



COMMUNITY SATISFACTION SURVEY
SUMMARY REPORT

PREPARED FOR THE
CITY OF LAKE FOREST



MARCH 2, 2023



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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 seven departments—City Attorney, City Manager, Development Services, Finance, Management Services, Police Services, and Public Works.

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 2023 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 (2021) to the current survey (2023)—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 2023.

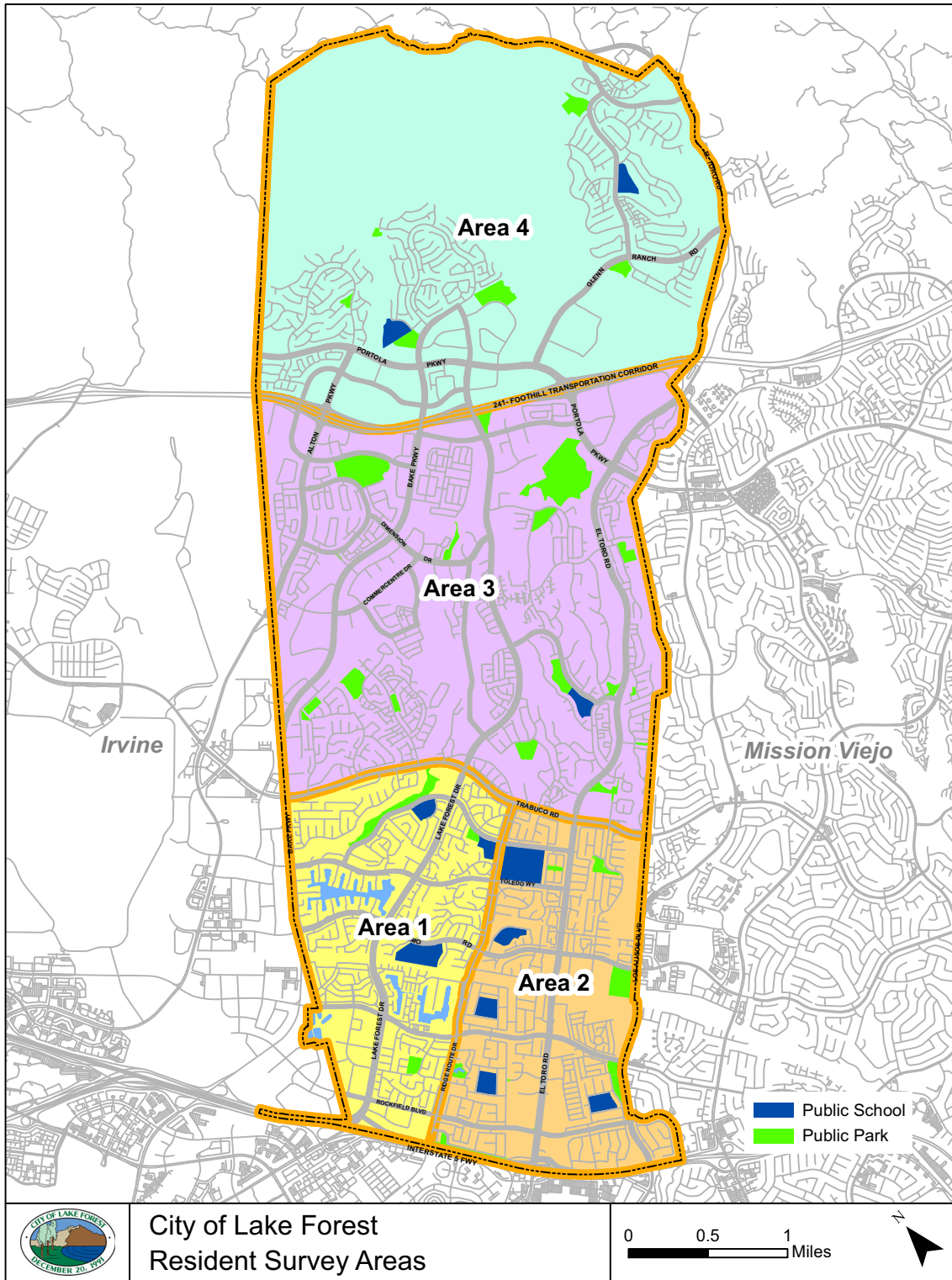
OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 82). In brief, a total of 885 randomly selected Lake Forest residents who are registered to vote participated in the resident survey between January 3 and January 12, 2023. 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 202 local business owners and managers between January 13 and February 14, 2023. Both studies employed a mixed-methodology approach that utilized multiple recruiting methods (email, text, 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 1,200 survey research studies for public agencies—including more than 500 studies for California municipalities and special districts.



JUST THE FACTS

The following is an outline of the main factual findings from the 2023 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 (88%) of residents shared favorable opinions of the quality of life in Lake Forest, with 31% reporting it is excellent and 57% stating it is good. Ten percent (10%) of residents indicated the quality of life in the City is fair, whereas 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 (83% excellent or good). Although still positive, residents provided somewhat softer ratings for Lake Forest as a place to retire (57%), work (55%), and shop and dine (53%). Close to 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, 37% reported that it is excellent, 47% 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, one-in-five residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (12%) or desired no changes from the City (8%). Of the specific suggestions, the most common were attracting new restaurants and stores (12%), addressing homelessness/poverty issues (12%), improving public safety (10%), and limiting growth and development (10%).
- When asked what the City could do to improve the business climate in Lake Forest, just over half of business managers surveyed indicated that no changes were needed (27%) or were unsure of a change that could be made (26%). Specific suggestions for improving the business climate included promoting/advertising local businesses (8%), resolving homelessness/housing-related issues (6%), making government more business friendly (5%), and reducing taxes/fees (5%).
- Approximately four-in-ten (41% 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 (18%), support from the City to businesses (8%), access to roads, freeways, and surrounding communities (7%), no business license requirement/ease of start-up (6%), and access to other local businesses and services (5%) were mentioned most often.
- Just over three-quarters (76%) 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 traffic and parking issues (4%), high expenses/rents/fees (4%), public safety/homelessness concerns (2%), and employees/laborer issues (2%).
- Eight-in-ten residents (82%) 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 (94% extremely or very important), followed by investigating criminal activity (94%) and preparing for emergencies (90%). Residents were most satisfied with the Department's efforts to provide crossing guards near schools (93% very or somewhat satisfied), prepare for emergencies (87%), provide animal control services (86%), and provide child safety programs (85%).
- Among the services provided by the **Development Services Department**, residents rated inspecting buildings as the most important service provided by the Department (67%), followed by issuing building permits (61%), enforcing zoning regulations (59%), and enforcing sign regulations (55%). Satisfaction ratings assigned to the four development services ranged from a low of 77% for enforcing zoning regulations to a high of 87% for inspecting buildings.
- Of all residents surveyed, just 10% had applied for a building permit, received a building inspection, requested code enforcement, or used any other service offered by the Development Services Department in the 12 months prior to the survey.
- Among the services provided by the **Public Works Department**, maintaining local streets and roads was viewed as the most important service (97%), followed by garbage collection services (95%), and maintaining parks and picnic areas (91%). Residents were most satisfied with the Department's efforts to provide garbage collection services (92%), maintain public landscapes (88%), and maintain trees (87%).
- Among the services provided by the **Community Services Department**, residents assigned the highest importance to addressing homelessness (90%), distantly followed by providing special events like concerts in the park and the Fourth of July Parade (69%), providing recreation programs for special needs children (68%), and providing recreation and sports programs for teens (68%). Residents expressed the highest levels of satisfaction with the Department's efforts to provide recreation and sports programs for elementary school-aged children (87%), provide recreation programs for pre-school children (86%), provide recreation and sports programs for teens (86%), and provide recreation programs for seniors (86%).
- Thirty-eight percent (38%) of respondents indicated that there was an additional park amenity or recreation facility that they would like to see added or improved within the City. Among those respondents, providing more pickleball courts was the most frequently cited park and recreation improvement at 11%, followed by providing more/improving maintenance of public restrooms (9%) and adding more bike/walking trails and paths (8%).

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 (95% extremely or very important), followed by investigating criminal activity (88%), revitalizing outdated areas in the City (66%), and promoting economic development (66%). Satisfaction was high for all services tested, but greatest with respect to the City's efforts to providing building inspection services (92% very or somewhat satisfied), followed by promoting economic development (91%), enforcing traffic laws (90%), and providing building permit services (90%).
- Among the **infrastructure-related and community services** provided by the City to local businesses, members of the business community rated maintaining local streets and roads and addressing homelessness as most important (each 84% extremely or very important), followed by reducing traffic congestion (73%). Regarding satisfaction, at the top of the list

was maintaining local streets and roads (93%), enforcing zoning regulations (93%), and providing street sweeping services (92%).

NEIGHBORHOOD ISSUES & ORGANICS RECYCLING

- The most commonly experienced neighborhood problem among those tested was too many vehicles associated with a single home (40% big or moderate problem), followed by illegally parked vehicles (34%) and too many people living in a single house (30%).
- Approximately six-in-ten respondents (61%) were aware of the new California requirement to place food scraps in the organics recycling bin along with green waste, whereas one-third (33%) were unaware of it, and 6% were unsure or preferred not to answer the question.
- At the ends of the spectrum, 43% percent of respondents indicated that they place 10% or less of their household's food waste in the organics recycling bin, whereas 14% put nearly all (76% to 100%) of their food waste in it. Responses were spread evenly across the three categories in between, varying from 8% to 10%. Additionally, 12% of respondents were unsure of the percentage they place in the organics recycling bin and 4% were unwilling to answer.
- The 70% of respondents who did not recycle at least a quarter of their food scraps were asked to reveal the primary barrier or challenge preventing them from recycling a larger percentage of their food waste. Close to one-fourth (24%) of respondents were unsure or indicated that there wasn't anything specific standing in their way while 16% provided a response related to a lack of awareness (Need information about recycling: 12%, Didn't know about it: 5%) and 12% said that recycling food waste is too much work/waste of time.
- More than six-in-ten respondents (62%) indicated they would be more likely to recycle their food waste if the City provided a small air-tight food waste bin that could be placed on the counter or under the counter.
- Overall, 68% of residents were aware that the City has a bulky item pickup program where residents can call in to receive free pickup of bulky trash items such as furniture.

BUSINESS ASSISTANCE PROGRAMS

- Managers were most in agreement that *The pandemic hurt our business* (76% strongly or somewhat agree), followed by *Learning how to better market or advertise our business would make us more profitable* (69%), *Updating our business website would help us attract more customers* (60%), and *Improving the physical appearance of our store or offices would help us attract more customers* (60%). Fewer than six-in-ten respondents agreed that *Our business could use assistance with attracting and retaining employees* (54%) and that *The technology in our business needs to be updated* (58%).
- When asked what the City could do to help their business be more successful, more than seven-in-ten business managers were not sure or could not think of anything specific (68%) or declined to answer (4%). Among the specifics mentioned, tax incentives and lower taxes/fees topped the list at 4%, followed by promoting businesses (3%), hosting more community events (2%), addressing homeless issues (2%), enforcing traffic laws (2%), making rents/utilities more affordable (2%), and providing more networking opportunities (2%).

COMMUNICATION

- Overall, 75% of residents indicated that they were either very (29%) or somewhat (46%) satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means.

- 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 was *The Leaflet* (54%), distantly followed by social media (18%), electronic newsletters (10%), one of the City's websites (general mention, 9%), text messages from the City (9%), and the Internet in general (not a city site, 8%).
- 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* (20%), the City's website in general (15%), electronic newsletters (15%), social media sites (13%), and the Internet in general (11%).
- Overall, 61% of residents and 36% 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 email (85% very or somewhat effective), followed by the City's website (81%), electronic newsletters (78%), and newsletters and direct mail to their office (73%).
- Sixty-two percent (62%) of residents indicated that they had visited at least one of the City's websites in the 12 months prior to the interview.
- Just over three-quarters (76%) of website users were able to find the information they were looking for on the City's website.
- Website visitors expressed high levels of satisfaction with the City's websites, with 81% of residents indicating they were satisfied with the resources available on the sites.
- Forty-two percent (42%) of local businesses indicated that they had visited the City of Lake Forest's economic development website (www.lakeforestbusiness.com).
- Close to six-in-ten business managers surveyed indicated that the City does an excellent (21%) or good (37%) job incentivizing residents to shop locally. Eighteen percent (18%) rated the City's efforts in this area as fair, 7% said poor or very poor, and 17% were unsure or declined to provide a rating.

BUSINESS BACKGROUND INFO

- When asked to identify the most important factor for why they chose to locate their business in the City of Lake Forest, 23% indicated that it was close to the owner's home, 23% mentioned the location/accessibility of Lake Forest, 14% cited the overall quality of the City, and 6% referenced competitive lease rates/rents (6%).
- Local businesses were generally optimistic about the future, with 41% anticipating growth and 45% expecting that their business will remain about the same. Another 9% indicated that they expect their business to decrease in the coming year and 5% were unsure.
- Partitioning the 41% of all businesses that anticipated growth, 8% indicated that they would require additional space, whereas the remaining 33% did not anticipate needing additional space (28%) or were unsure (5%).
- Six percent (6%) of businesses surveyed anticipated relocating in the next year. Approximately 2% expected to relocate to another community.



CONCLUSIONS

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

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

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

Lake Forest residents and businesses continue to be quite 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. Despite the pandemic and the many changes it has compelled for municipal operations since 2020, resident satisfaction with the City's overall performance in 2023 remained strikingly similar to the levels recorded in 2018 (pre-pandemic) and 2021 (during the pandemic)—with no statistically significant changes. Among business respondents, the percentage satisfied was virtually unchanged from 2021 to 2023, and was higher (although not statistically so) than 2018.

At least eight-in-ten residents (82%) and local businesses (91%) indicated that they were satisfied with the City's overall performance in providing municipal services in 2023 and offered positive ratings (excellent or good) for the quality of life in Lake Forest (88%) and local business climate (84%). This sentiment was also widespread, with overall satisfaction exceeding 75% across nearly *all* resident and business subgroups (see *Overall Performance Rating* on page 23).

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 public landscapes, prepare for emergencies, and maintain trees (see *Specific Services: Resident Survey* on page 27). For all but seven of the 34 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 40 on page 46).

The results of the 2023 business survey show a similar pattern of high satisfaction for the specific services tested. Businesses expressed the highest levels of satisfaction with the City’s efforts to maintain local streets and roads, enforce zoning regulations, provide building inspection services, provide street sweeping services, and promote economic development (see *Specific Services: Business Survey* on page 40). For 18 of the 19 services tested, the City is meeting or exceeding the needs and expectations of at least 82% of local businesses—and for the majority of services the City is meeting the needs of at least 89% of businesses (see Figure 41 on page 47).

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 ways to improve the business climate (see *Ways to Improve Lake Forest* on page 19), the list of services and their respective priority status for future attention (see *Performance Needs & Priorities* on page 44), and the opinions of residents generally satisfied with the City’s performance versus those generally dissatisfied (see *Differentiators of Opinion: Resident Survey* on page 38), top priorities for residents include addressing homelessness, reducing traffic congestion, enforcing zoning regulations, maintaining and improving public safety (including maintaining a low crime rate, providing neighborhood watch programs, and investigating criminal activity), providing adult recreation programs such as classes, concerts, and trips, and attracting new restaurants and stores. For local businesses, top priorities include addressing homelessness, revitalizing outdated areas in the City, reducing traffic congestion, maintaining a low crime rate, investigating criminal activity, and promoting and advertising businesses.

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 and businesses are simply not aware of the City’s ongoing infrastructure improvement efforts, or the limits of what a city can do to address homelessness. Choosing the appropriate balance of 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 satisfaction, the City should not oversteer. Indeed, the main takeaway from this study is that the City does many things very well, and emphasis should be on continuing to perform at that high level. The vast majority of residents and businesses are pleased with the City's efforts to provide services and programs, 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 2021 and 2023?

The vast majority of assessments in 2023 remained consistent with the results of the most recent prior study (2021), including ratings of the overall quality of life in the City, the Lake Forest business climate, the City's overall performance rating, satisfaction with the City's communication efforts, as well as the satisfaction ratings for the vast majority of specific services. There was, however, a statistically significant decline in the percentage of residents who rated Lake Forest as an excellent or good place to shop and dine from 2021 to 2023 (-7%).

Among specific services, statistically significant changes were found for the importance ratings assigned to eight of the 33 services presented to residents in both 2021 and 2023, and among five of the services when assessing satisfaction. Specifically, the importance assigned to providing animal control services increased the most (+8%), followed by issuing building permits (+7%), reducing traffic congestion (+6%), enforcing traffic laws (+6%), providing summer-specific recreation programs, such as camps (+6%), providing crossing guards near schools (+5%), providing child safety programs (+5%), and maintaining public landscapes (+4%).

Turning to residents' satisfaction with specific services, improvements were noted regarding the City's efforts to provide recreation programs for special needs children (+7%) and prepare for emergencies (+6%). Conversely, declines were recorded for the City's efforts to enforce traffic laws (-7%), reduce traffic congestion (-6%), and maintain parks and picnic areas (-5%).

Among businesses, there was only one statistically significant change in importance from 2021 to 2023: a 10% point increase in the importance assigned to investigating criminal activity. Regarding satisfaction, changes were recorded among four of the 18 services that were tested in both studies. Specifically, there were statistically significant declines in satisfaction with the City's efforts to revitalize outdated areas in the City (-9%), maintain a low crime rate (-7%), provide building permit services

(-7%), and landscape median strips and other areas of the City (-6%) among businesses from 2021 to 2023.

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

The importance of city communication with residents and local businesses cannot be over-stated. 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.

Keeping up with the challenge of communicating with residents and local businesses has been difficult for many public agencies in recent years. Against this backdrop of declining satisfaction with public agency communications *in general*, the survey results indicate the City of Lake Forest is doing an admirable job communicating with its residents and businesses. Overall, 75% of residents and 84% of businesses said they were satisfied with the City's efforts to communicate through newsletters, the Internet, social media, and other means in 2023, both of which were statistically consistent with 2021.

Although there was a statistically significant decline in visits to city websites among residents from 2021 to 2023 (-9%), the percentage recorded in 2023 is consistent with 2018. The higher than average use recorded in 2021 is likely attributed to city closures that forced many operations to an online format during the pandemic. Although the *overall* level of satisfaction with the resources and content available on the City's websites remained virtually identical from 2021 to 2023, a higher percentage of residents reporting being *very satisfied* than in 2021 (similar to the levels reported in 2016 and 2018). Additionally, more than three-quarters (76%) of resident website users indicated that they were able to find the information they were looking for on the City's website.

The Leaflet continues to be the most frequently cited source for Lake Forest news and information among both residents and businesses, and it enjoyed a statistically significant increase in mentions by residents (+11%), but a decline among businesses (-9%) this cycle. Residents also reported increases for electronic newsletters (+6%), *Leisure Times* (+3%), and the percentage who reported not receiving information about the City of Lake Forest (+3%). At the same time, there were statistically significant decreases in the percentage of residents who mentioned social media (-11%) and Nextdoor (-5%) as information sources for Lake Forest news, information, and programming.

In addition to declines in mentions of *The Leaflet* (-9%) among businesses from 2021 to 2023, other statistically significant changes included declines in general references to the City's newsletter (-6%) and mentions of text messages from the City/Nixle (-3%), as well as an increase in responses of not sure (+7%).

The 2023 survey results reversed the significant shift in reliance on social media and websites *not* maintained by the City among residents of Lake Forest recorded from 2018 to 2021. The 2021 survey result was likely an artifact of the pandemic, as the 2023 results are in line with 2018 (34% mentioned a non-city website or social media in 2023 compared with 55% in 2021 and 35% in 2018). As noted in the conclusions of the 2021 survey, an increased reliance on information sources that are not managed by the City poses many challenges for communicating with residents.

The 2023 survey results show that the majority of both residents and businesses rely on city sources to find out about City of Lake Forest news, information, and programming. Indeed, 61% of residents and 36% of businesses mentioned at least one of Lake Forest's newsletters as a source of city information, 25% of both residents and businesses cited one of the City's websites or apps, and 3% of residents and 2% of businesses mentioned City Council meetings or flyers. Taken together, and after accounting for respondents who mentioned multiple sources, 72% of residents and 51% of businesses relied on city sources for information in 2023. In True North's experience, a high level of satisfaction with a city's communication efforts is generally associated with and likely caused by a greater reliance among *city-sponsored* sources of information such as newsletters, websites, and related publications.

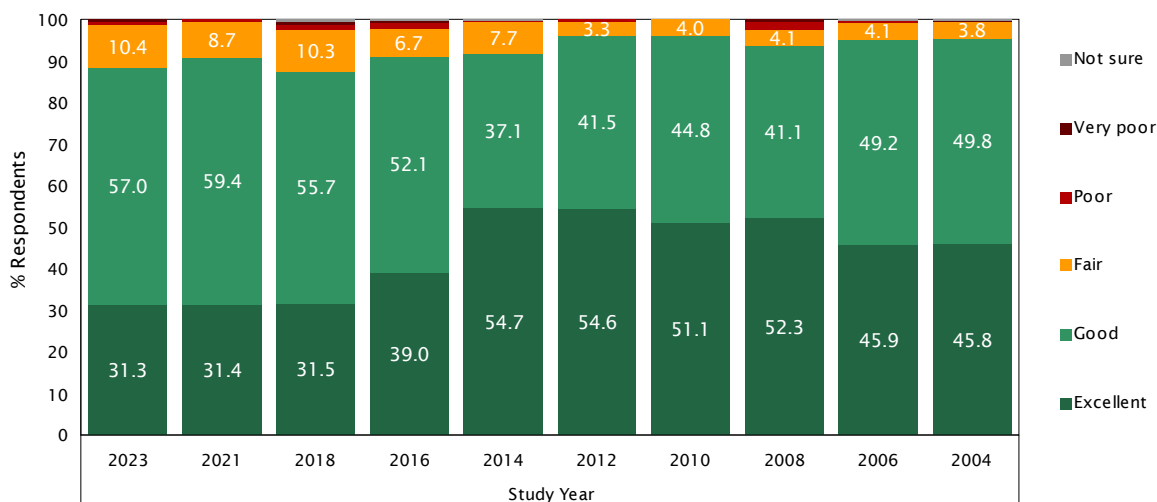
GENERAL PERCEPTION OF CITY & LOCAL ISSUES

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 (88%) of respondents shared favorable opinions of the quality of life in Lake Forest, with 31% reporting it is excellent and 57% stating it is good. Ten percent (10%) of residents indicated the quality of life in the City is fair, whereas 1% used poor or very poor to describe quality of life in the City. Quality of life ratings in 2023 were statistically consistent with those reported in 2021.

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 through 5 on the next page show how ratings of the quality of life in the City varied by years of residence in Lake Forest, household income, age of the respondent, area of the City, ethnicity, gender, presence of a child in the home, and home ownership status. Although there was some variation in opinion (e.g., residents at least 50 years of age were more likely than their younger counterparts to rate the quality of life as excellent), the most striking pattern in these figures is the relative consistency of opinion. Between 79% and 93% of respondents in every sub-group 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 & HOUSEHOLD INCOME

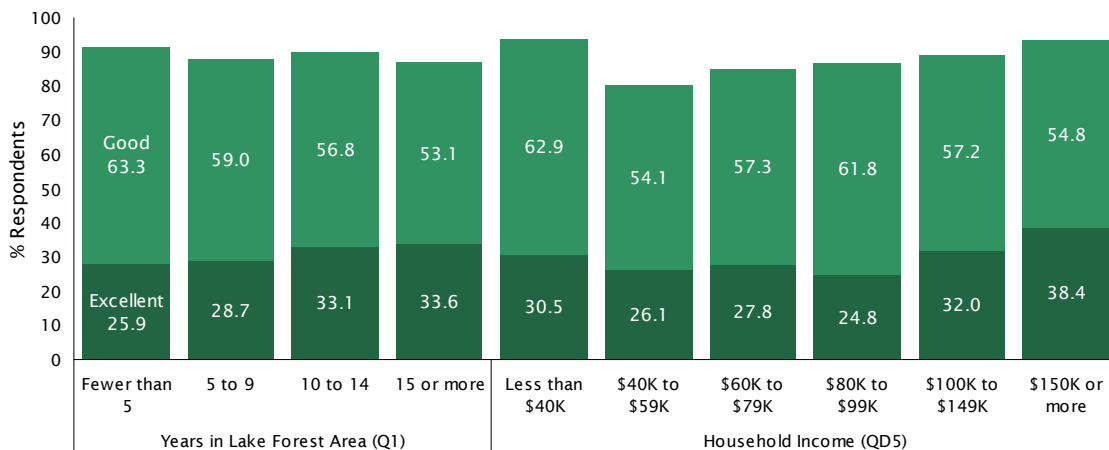


FIGURE 4 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY AGE & AREA OF CITY

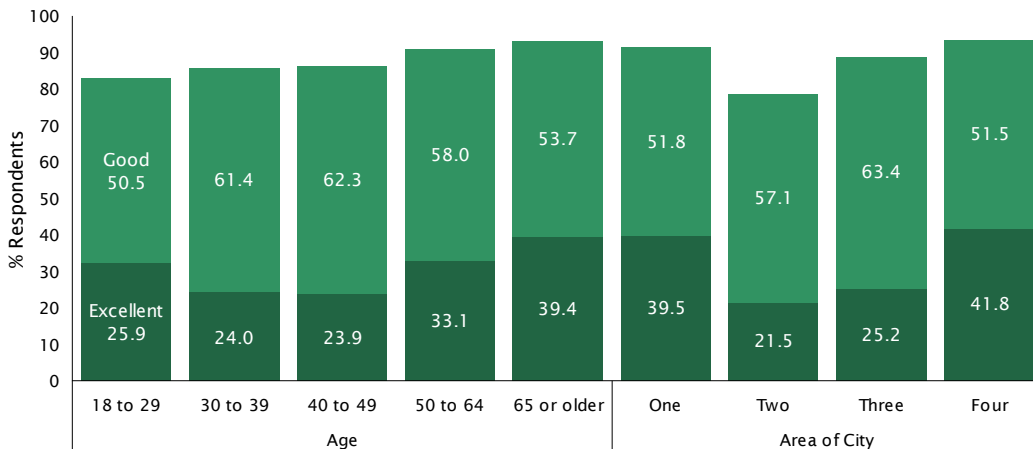
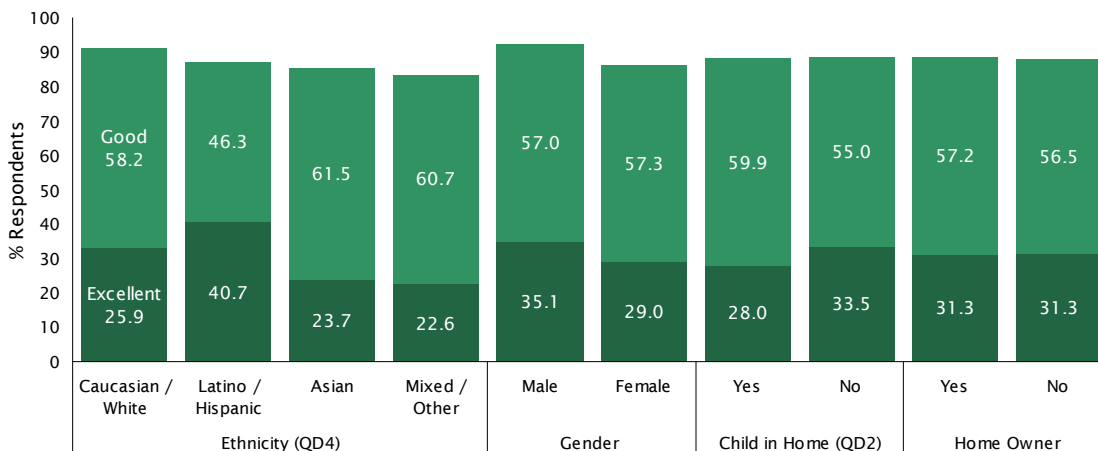


FIGURE 5 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY ETHNICITY, GENDER, CHILD IN HOME & HOME OWNER



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 6, residents generally shared favorable opinions of Lake Forest in 2023 on each aspect tested, with the most positive rating provided for Lake Forest as a place to raise a family (83% excellent or good). Although still positive, residents provided somewhat softer ratings for Lake Forest as a place to retire (57%), work (55%), and shop and dine (53%). Close to 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 2021, the percentage who rated Lake Forest as an excellent or good place to shop and dine declined significantly in 2023 (see Table 1).

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

FIGURE 6 RATING LAKE FOREST: RESIDENT SURVEY

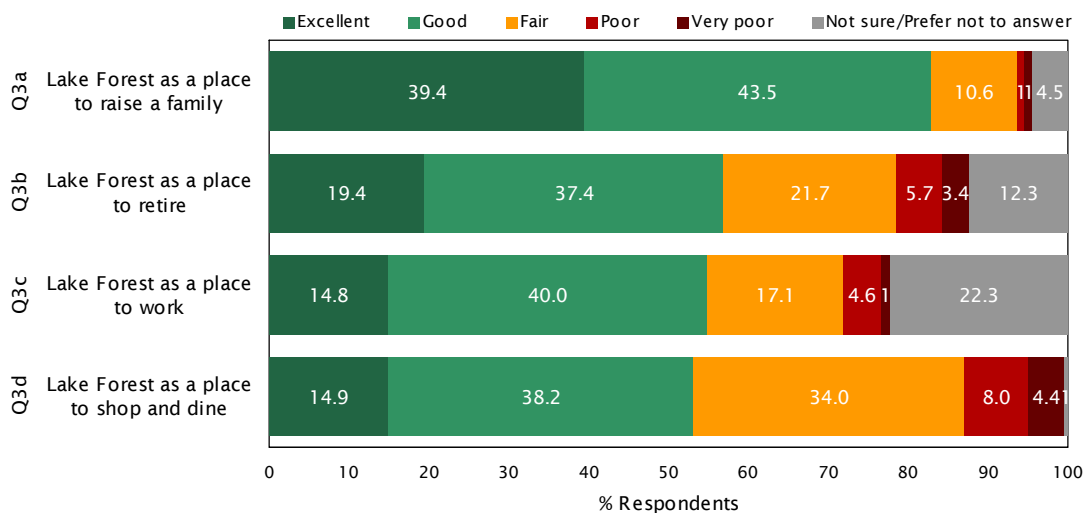


TABLE 1 RATING LAKE FOREST: RESIDENT SURVEY BY STUDY YEAR

	Study Year			Change in Excellent + Good 2021 to 2023
	2023	2021	2018	
Lake Forest as a place to retire	56.8	52.7	60.3	+4.1
Lake Forest as a place to work	54.8	52.4	54.3	+2.4
Lake Forest as a place to raise a family	82.9	84.3	85.7	-1.4
Lake Forest as a place to shop and dine	53.1	60.0	61.0	-6.9†

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

Tables 2 through 4 on the next page 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, household income, and ethnicity. With the exception of residents who identified their ethnicity as mixed or other, perceptions of Lake Forest as a place to raise a family were quite positive and consistent by years in Lake Forest, age, household income, and ethnicity (ranging from 77% to 87%). More variation in ratings was found for Lake Forest as a place to shop and

dine, with the widest gap found at the two ends of the household income spectrum (<\$40K: 67%, \$150K+: 46%). Examining ratings for Lake Forest as a place to work reveals higher than average ratings among respondents 18 to 29 years of age, those living in a household earning \$100,000 to \$149,000 a year, and Latino/Hispanics, with more than six-in-ten providing a rating of excellent or good.

It is noteworthy that ratings of Lake Forest as a place to retire were most positive among those who were at least 50 years of age (at or nearing retirement age and living in the City)—it was younger cohorts yet to near the point of retirement who were less positive or unsure. 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 found for Lake Forest as a place to raise a family (88% vs. 55%) and retire (63% vs. 25%).

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	76.6	81.1	84.2	86.5	82.8	77.2	82.0	87.3	82.8
Lake Forest as a place to retire	55.4	59.1	48.2	58.6	47.9	51.5	43.6	60.8	73.2
Lake Forest as a place to work	51.8	57.5	47.3	56.7	63.7	50.2	47.2	59.4	51.0
Lake Forest as a place to shop and dine	56.7	49.8	53.0	52.8	51.6	47.3	45.6	55.7	60.9

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

	Overall Satisfaction (Q5)		Household Income (QD5)					
	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	88.1	55.3	84.7	77.8	83.6	77.7	84.4	86.1
Lake Forest as a place to retire	62.6	25.3	75.5	59.6	56.8	56.1	60.5	51.9
Lake Forest as a place to work	58.5	30.7	56.9	57.9	45.7	54.6	62.8	56.6
Lake Forest as a place to shop and dine	57.7	32.0	66.9	58.8	55.8	58.7	60.0	45.8

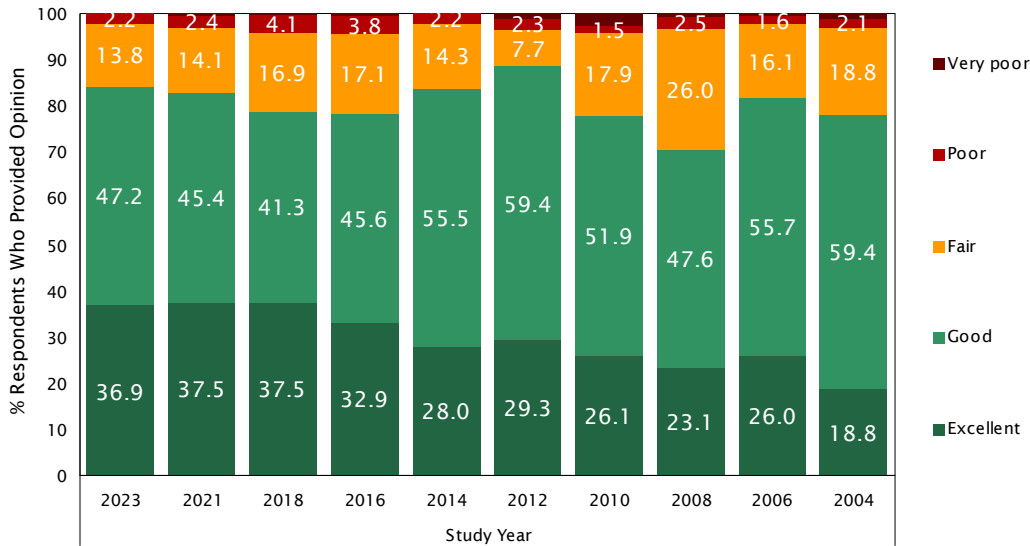
TABLE 4 RATING LAKE FOREST: RESIDENT SURVEY BY ETHNICITY (SHOWING % EXCELLENT OR GOOD)

	Ethnicity (QD4)			
	Caucasian / White	Latino / Hispanic	Asian	Mixed / Other
Lake Forest as a place to raise a family	85.9	84.9	81.4	65.9
Lake Forest as a place to retire	59.7	45.4	63.5	58.5
Lake Forest as a place to work	54.1	64.3	51.4	49.2
Lake Forest as a place to shop and dine	53.4	57.2	53.4	46.2

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 7 on the next page, most respondents shared a favorable opinion of Lake Forest’s business climate. Overall, 37% reported that it is excellent, 47% 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. Business climate ratings were statistically consistent from 2021 to 2023.

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 7 QUALITY OF BUSINESS CLIMATE BY STUDY YEAR: BUSINESS SURVEY



Figures 8 and 9 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. With the exception of respondents who anticipate their business to decrease over the next year, more than three-quarters of respondents in each of the other sub-groups rated the business climate as excellent or good.

FIGURE 8 QUALITY OF BUSINESS CLIMATE: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, BUSINESS SIZE IN NEXT 12 MONTHS & LAKE FOREST RESIDENT

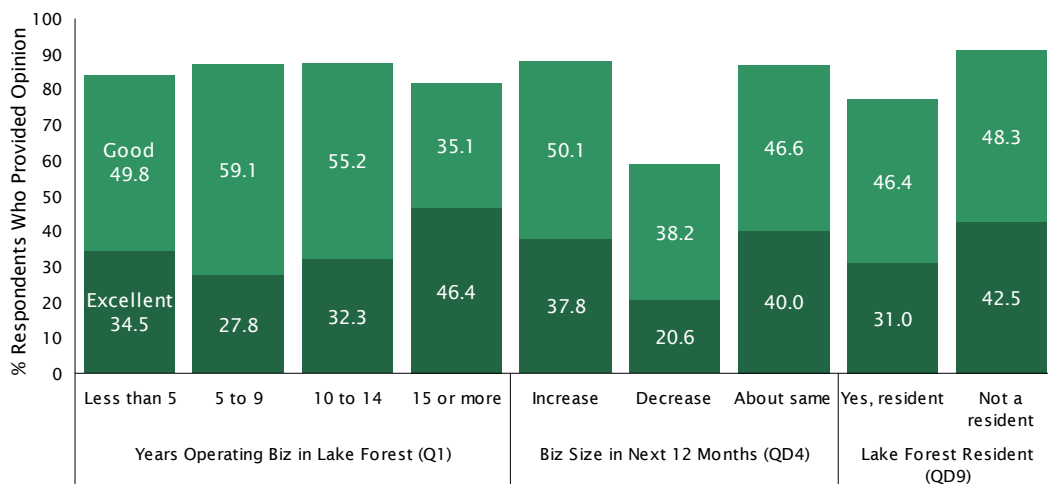
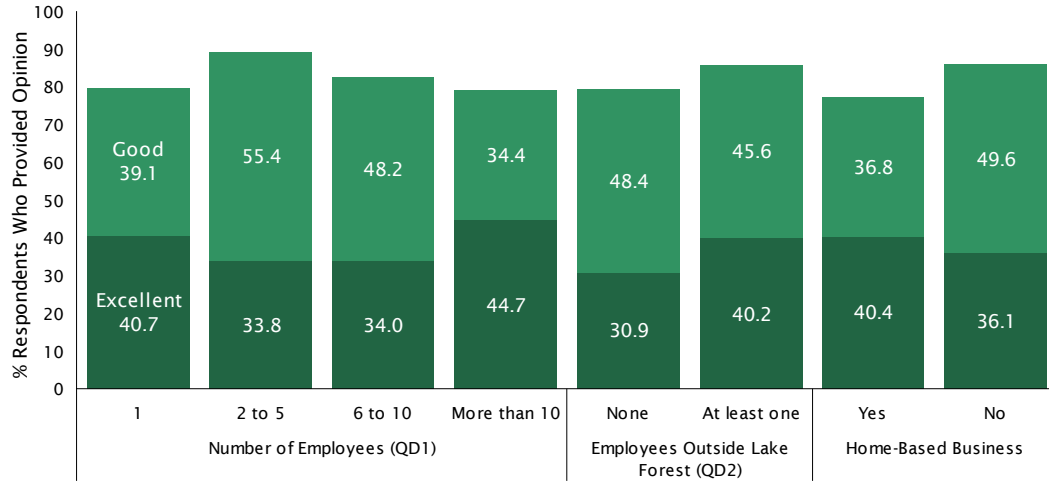


FIGURE 9 QUALITY OF BUSINESS CLIMATE: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST & HOME-BASED BUSINESS



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 10 and 11 on the next page.

As shown in Figure 10, one-in-five residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (12%) or desired no changes from the City (8%). Of the specific suggestions, the most common were attracting new restaurants and stores (12%), addressing homelessness/poverty issues (12%), improving public safety (10%), and limiting growth and development (10%). No other single improvement was mentioned by more than 6% of respondents.

With the exception of residents placing more emphasis on addressing homelessness/poverty issues in 2023, responses remained relatively consistent over the past two years (see Table 5 on next page).

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 10 CHANGES TO IMPROVE CITY: RESIDENT SURVEY

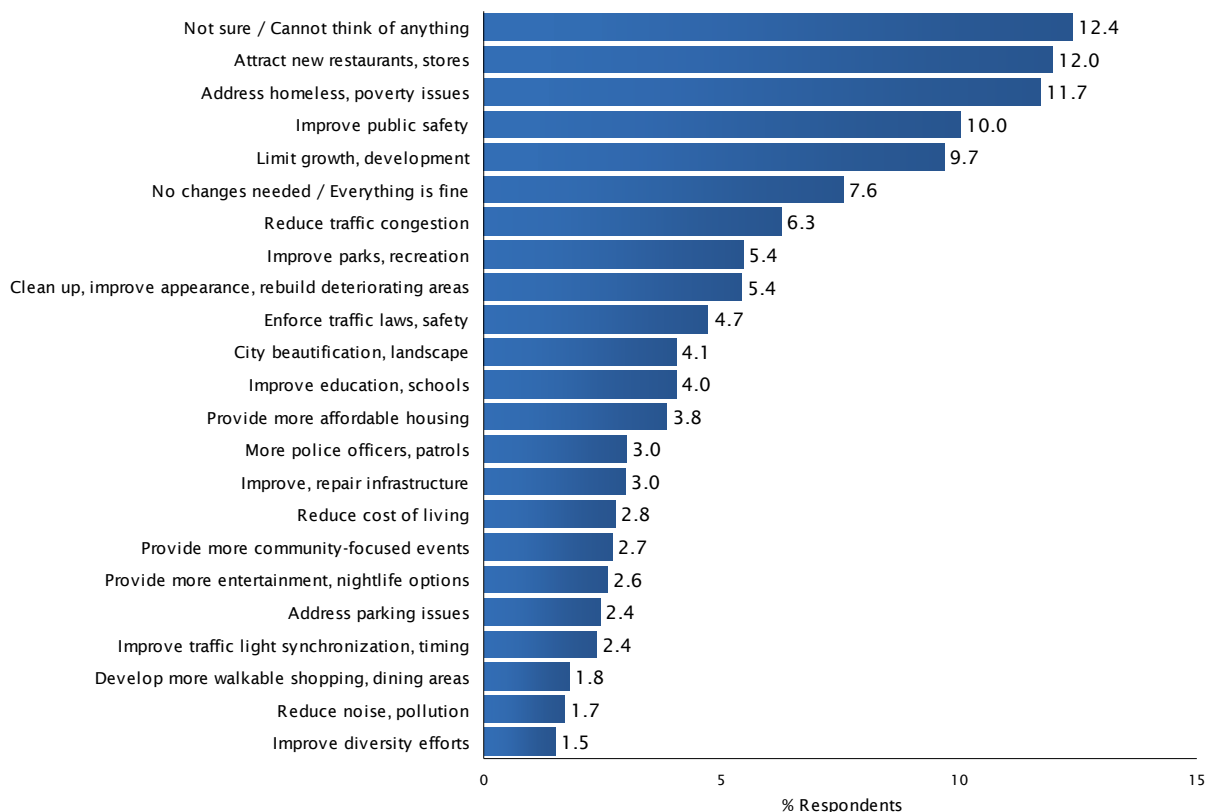


TABLE 5 CHANGES TO IMPROVE CITY: RESIDENT SURVEY BY STUDY YEAR

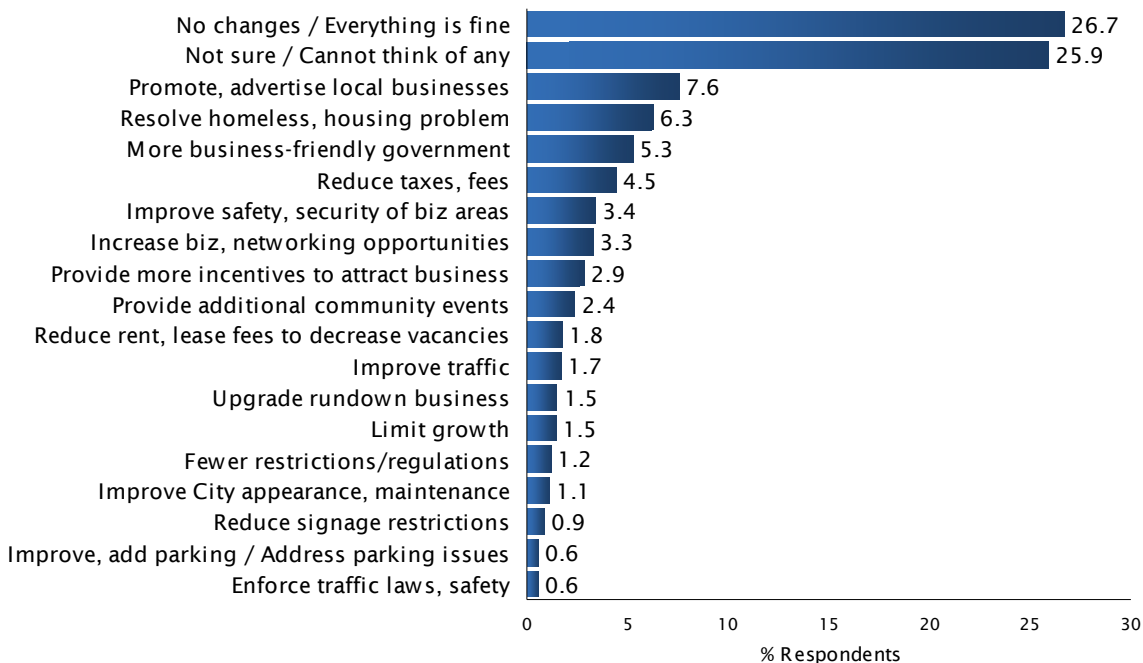
Study Year					
2023	2021	2018	2016	2014	2012
Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	No changes needed / Everything is fine
Attract new restaurants, stores	Attract new restaurants, stores	Limit growth, development	Reduce traffic congestion	No changes needed / Everything is fine	Improve parks, recreation
Address homeless, poverty issues	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
Improve public safety	Limit growth, development	Reduce traffic congestion	Limit growth, development	Improve parks, recreation	Reduce traffic congestion
Limit growth, development	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 11 on next page), just over half of business managers surveyed indicated that no changes were needed (27%) or were unsure of a change that could be made (26%). Specific suggestions for improving the business climate included promoting/advertising local businesses (8%), resolving homeless-

ness/housing-related issues (6%), making government more business friendly (5%), and reducing taxes/fees (5%). 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 11 CHANGES TO IMPROVE BUSINESS CLIMATE: BUSINESS SURVEY



As shown in Table 6, four of the top five mentions by business managers remained unchanged from 2021. New in 2023 was the mention of more business-friendly government and, not surprisingly, addressing COVID-related concerns dropped off the list.

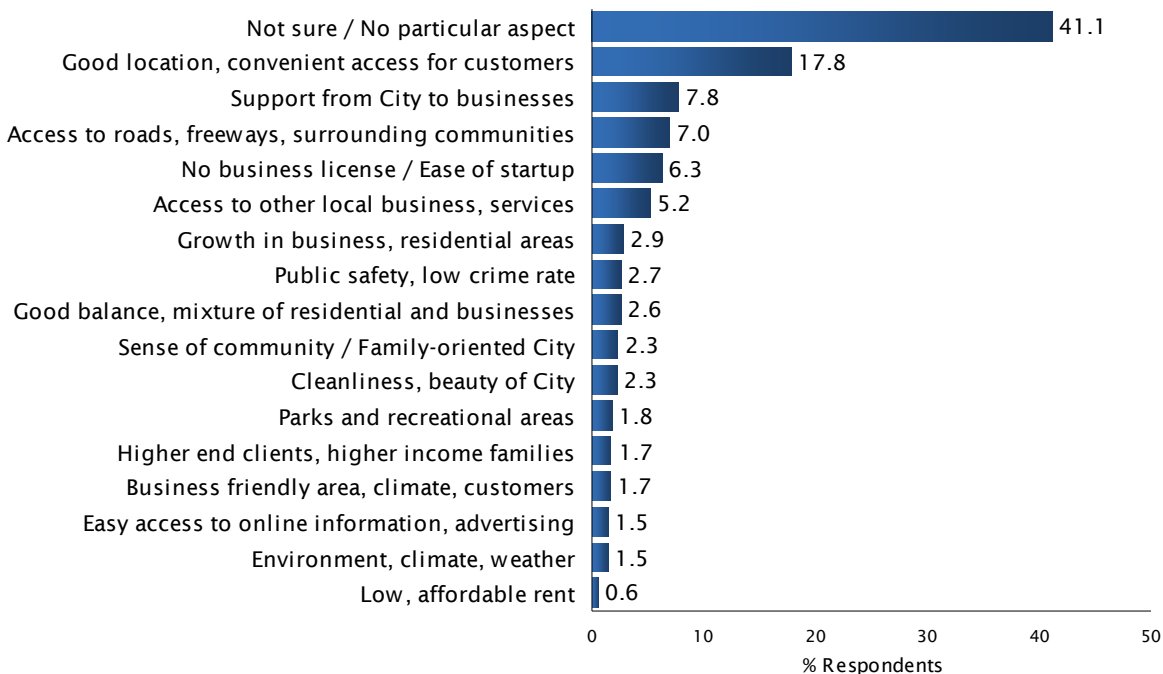
TABLE 6 CHANGES TO IMPROVE BUSINESS CLIMATE: BUSINESS SURVEY BY STUDY YEAR

Study Year					
2023	2021	2018	2016	2014	2012
No changes / Everything is fine	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
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	Promote, advertise local businesses	Increase biz, networking opportunities	Increase biz, networking opportunities	Increase biz, networking opportunities
Resolve homeless, housing problem	COVID-related concerns, help for businesses	Improve, add parking	Fewer restrictions/regulations	Improve, add parking	Reduce signage restrictions
More business-friendly government	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 12.

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

FIGURE 12 ASPECTS OF CITY MOST BENEFICIAL TO BUSINESS: BUSINESS SURVEY



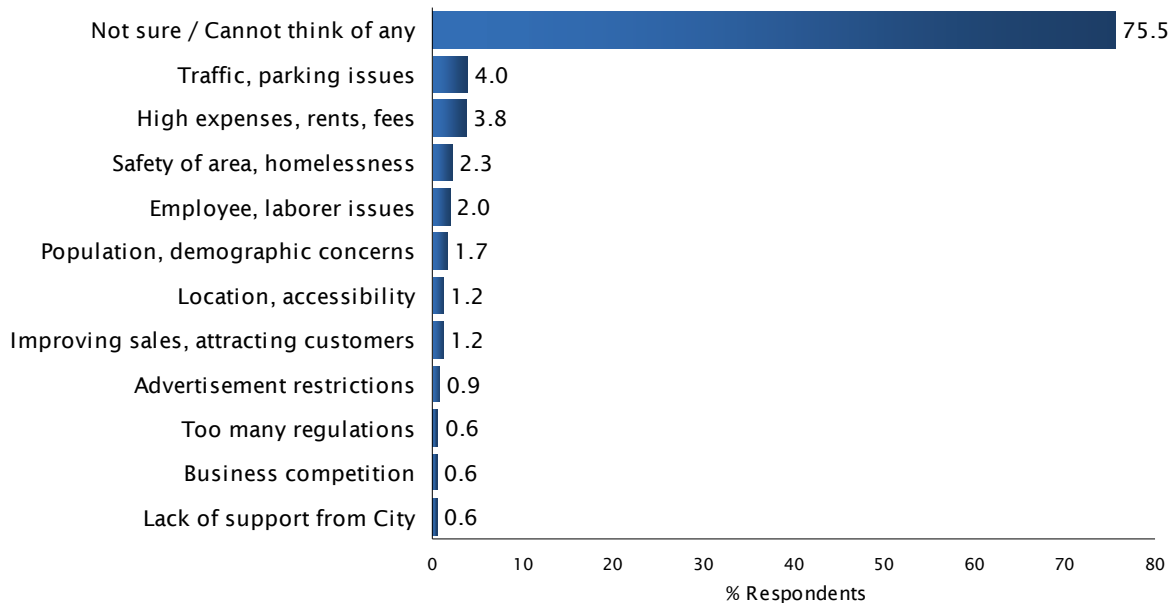
Mentioned by approximately four-in-ten business managers surveyed, the most common response was that there were no particular features of Lake Forest that benefit their business, or that they could not think of any at the time of the interview (41%). Among specific aspects mentioned, having a convenient, easily-accessible location within the City (18%), support from the City to businesses (8%), access to roads, freeways, and surrounding communities (7%), no business license requirement/ease of start-up (6%), and access to other local businesses and services (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 13 on the next page. Just over three-quarters (76%) 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 traffic and parking issues (4%), high expenses/rents/fees (4%), public safety/homelessness concerns (2%), and employees/laborer

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 13 CHALLENGES WITH DOING BUSINESS IN LAKE FOREST: BUSINESS SURVEY



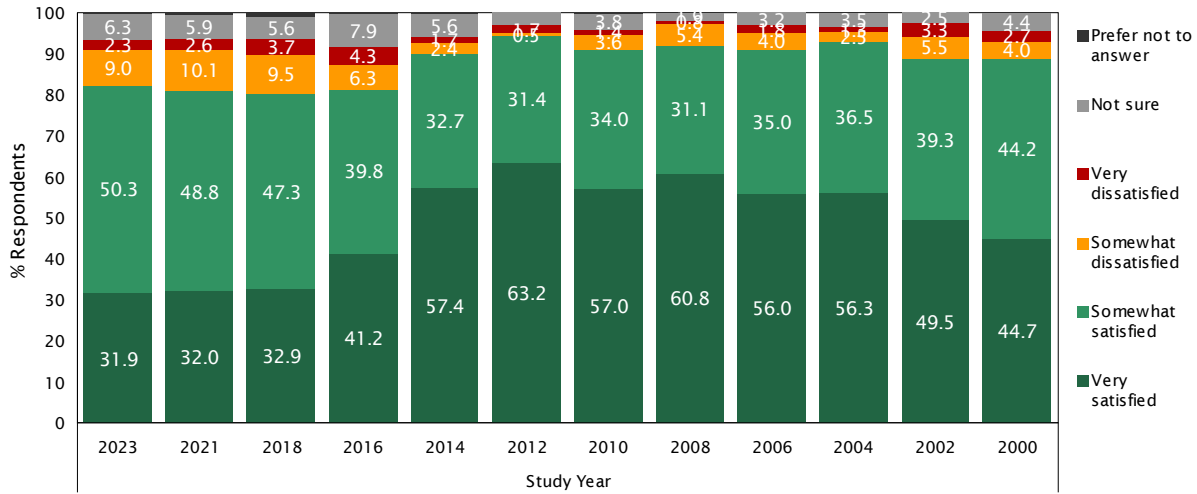
OVERALL PERFORMANCE RATING Both residents and businesses were asked to rate the job the City of Lake Forest is doing to provide municipal services. Because this question does not reference a specific program, facility, or service and requested that the respondent consider the City’s performance in general,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

Figure 14 on the next page presents the results of this question for the resident survey for 2023 and for prior surveys dating back to 2000, whereas Figure 18 on page 25 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, 82% of residents and 91% of local businesses indicated that they were satisfied in this respect in 2023.

Despite the pandemic and the many changes it has compelled for municipal operations since 2020, resident satisfaction with the City’s overall performance in 2023 remained strikingly similar to the levels recorded in 2018 and 2021—with no statistically significant changes. Among business respondents, the percentage satisfied was virtually unchanged from 2021 to 2023.

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 14 OVERALL SATISFACTION: RESIDENT SURVEY BY STUDY YEAR



Figures 15 through 17 display how overall satisfaction with the City’s performance in providing municipal services varied by key resident traits. Figures 19 and 20 on page 26 present similar information for the business community. Overall satisfaction was consistently high (75%+) across resident subgroups, with the exception of a dip among those 30 to 39 years of age. With the exception of respondents who anticipated their business to decrease over the next year (68%), overall satisfaction among Lake Forest businesses was consistently high across subgroups, ranging from a low of 87% to a high of 97%.

FIGURE 15 OVERALL SATISFACTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME

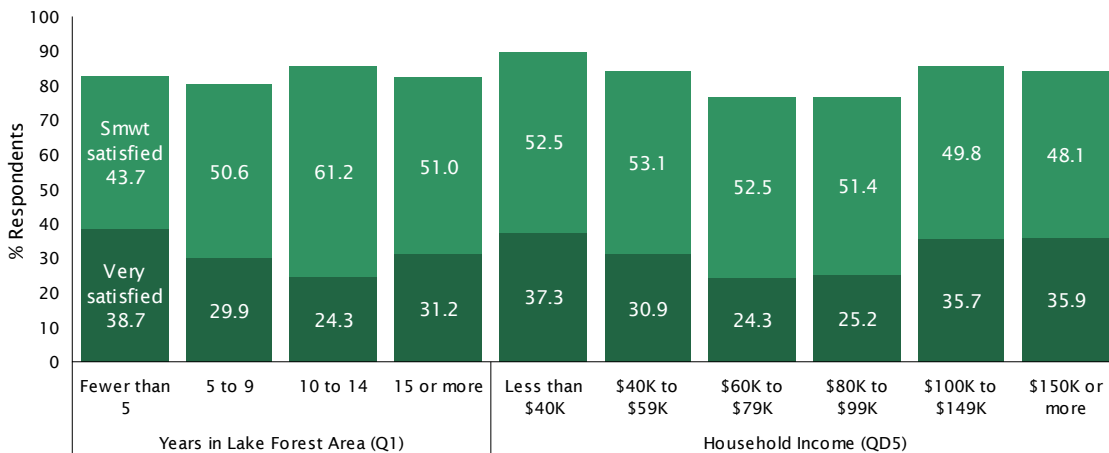


FIGURE 16 OVERALL SATISFACTION: RESIDENT SURVEY BY AGE & AREA OF CITY

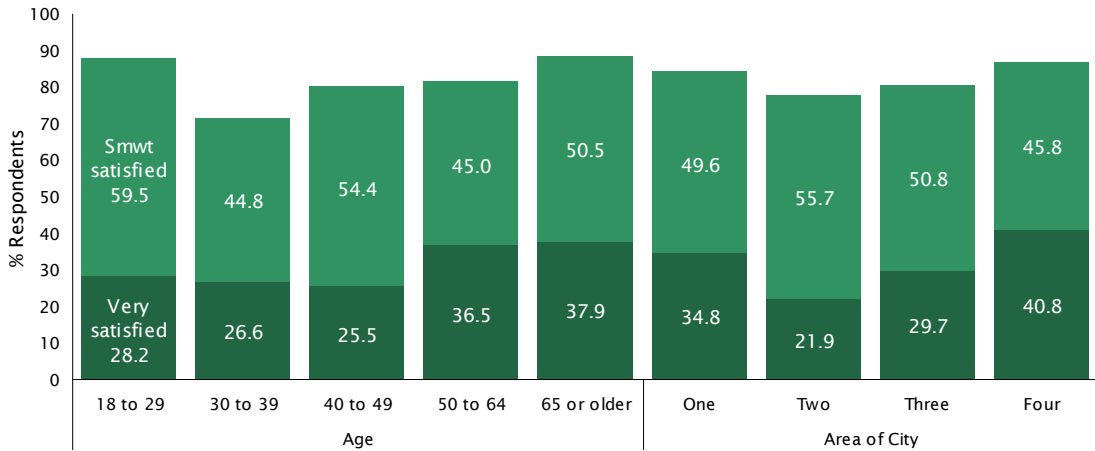
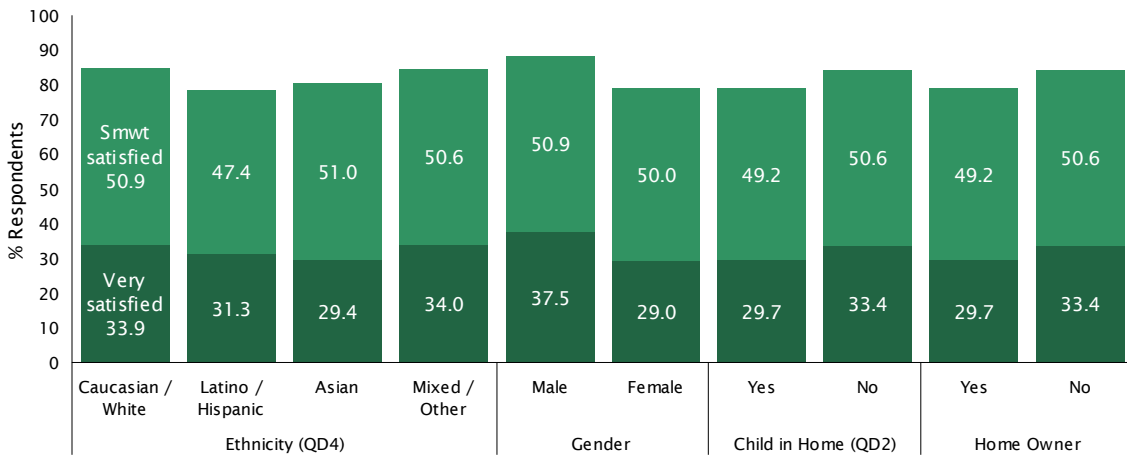


FIGURE 17 OVERALL SATISFACTION: RESIDENT SURVEY BY ETHNICITY, GENDER, CHILD IN HOME & HOME OWNER



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 18 OVERALL SATISFACTION: BUSINESS SURVEY BY STUDY YEAR

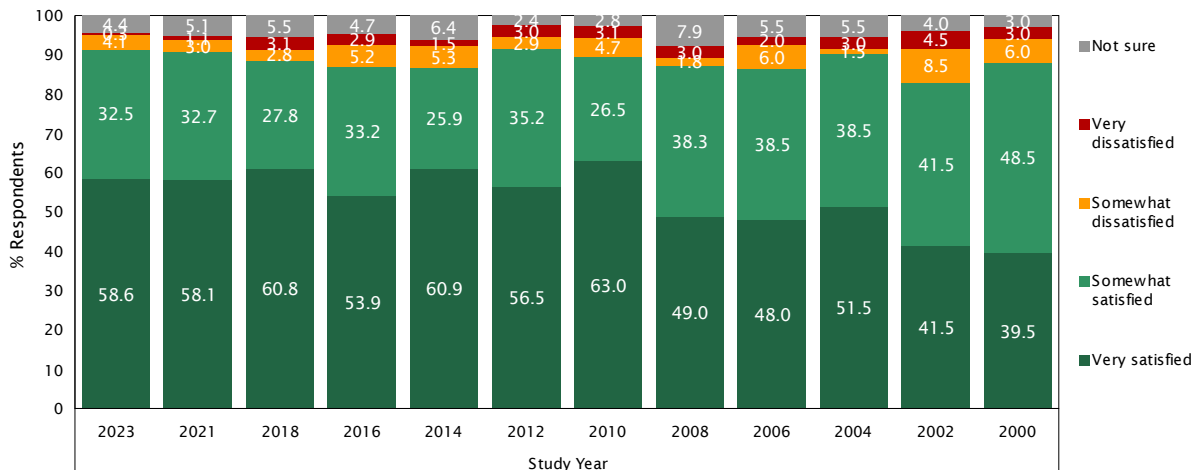


FIGURE 19 OVERALL SATISFACTION: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, BUSINESS SIZE IN THE NEXT 12 MONTHS & LAKE FOREST RESIDENT

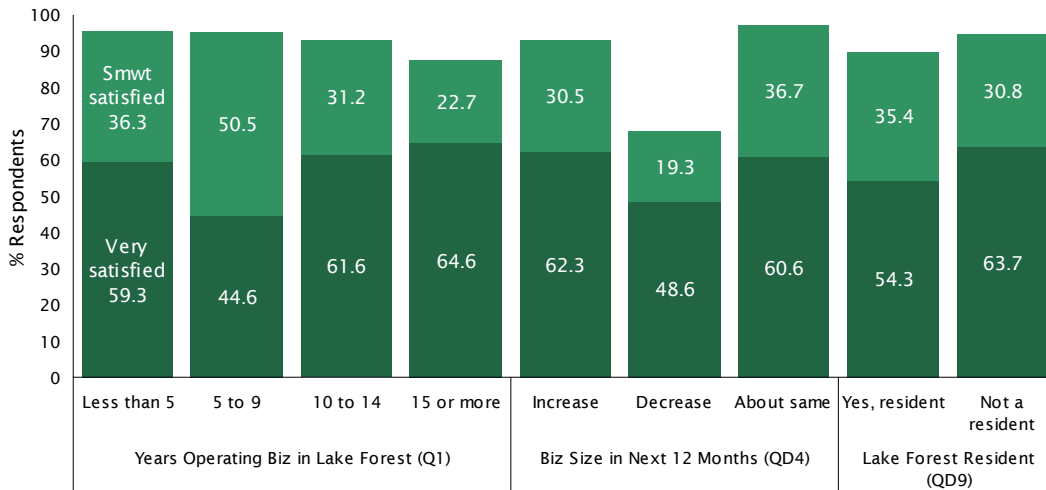
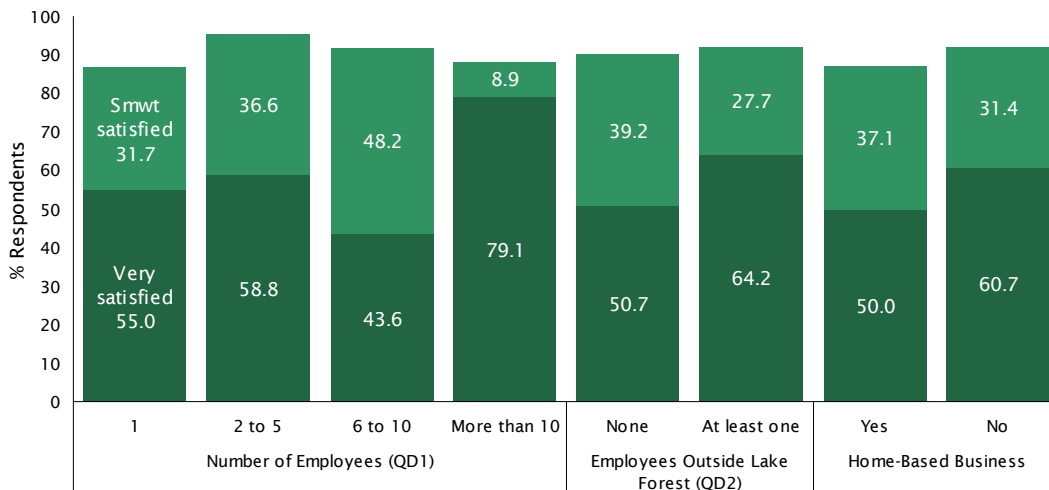


FIGURE 20 OVERALL SATISFACTION: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST & HOME-BASED BUSINESS



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 21 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 (94% extremely or very important), followed by investigating criminal activity (94%) and preparing for emergencies (90%). At the other end of the spectrum, providing animal control services (62%) was viewed as less important. Table 7 on the next page displays the percentage of respondents who viewed each service as extremely or very important from 2021 to 2023, as well as the difference between the two studies. There were statistically significant increases in the level of importance placed on half of the police services during this period, with the largest found for providing animal control services (+8%).

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 21 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY

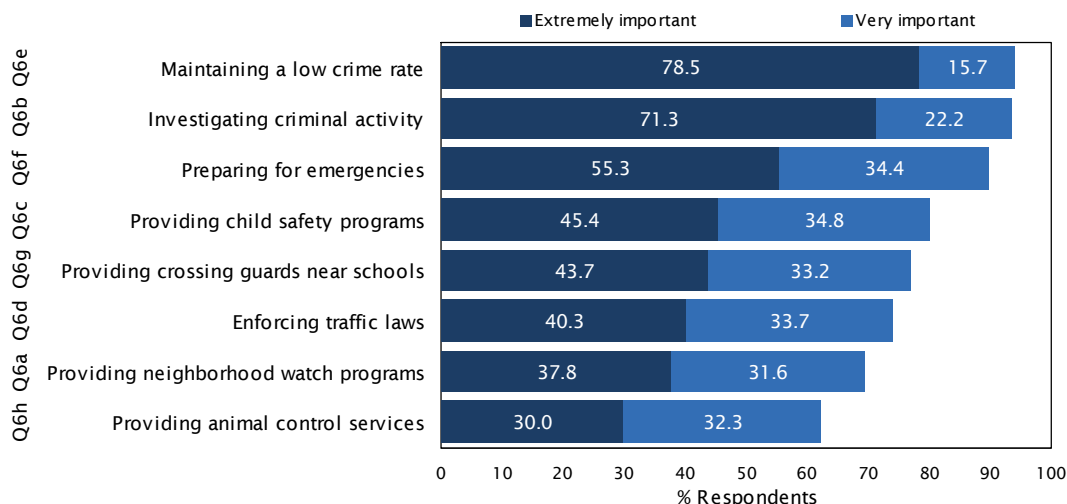


TABLE 7 IMPORTANCE OF POLICE SERVICES: RESIDENT SURVEY BY STUDY YEAR

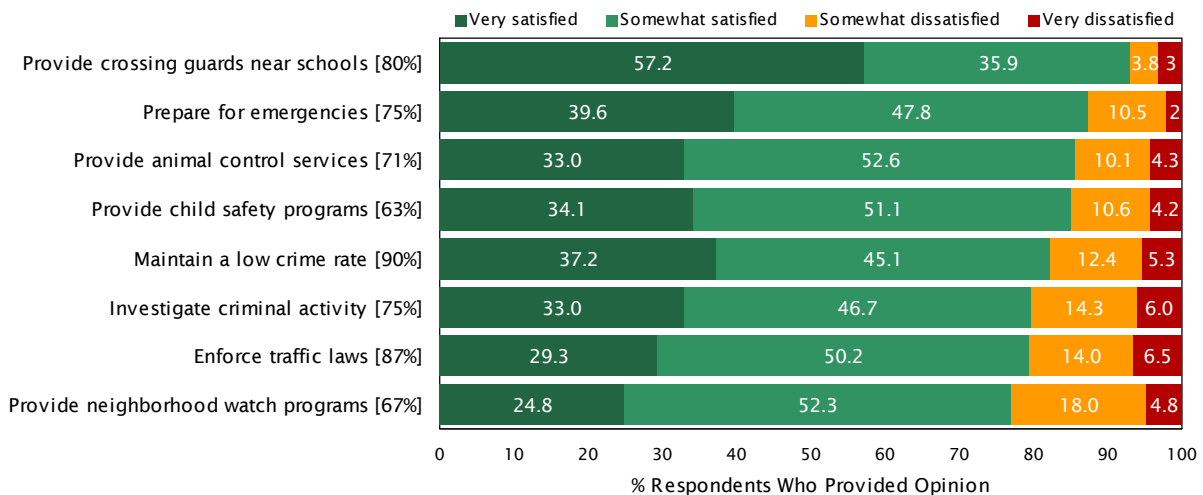
	Study Year			Change in Extremely + Very Important 2021 to 2023
	2023	2021	2018	
Providing animal control services	62.3	54.2	52.8	+8.1†
Enforcing traffic laws	73.9	67.9	72.3	+6.0†
Providing crossing guards near schools	76.9	71.8	73.1	+5.1†
Providing child safety programs	80.2	75.6	72.6	+4.6†
Providing neighborhood watch programs	69.3	68.0	64.4	+1.4
Preparing for emergencies	89.8	90.0	86.7	-0.2
Maintaining a low crime rate	94.2	94.6	95.9	-0.4
Investigating criminal activity	93.5	94.6	93.9	-1.0

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

Turning to the satisfaction component, Figure 22 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 22—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 80% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 57% were very satisfied and 36% 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 22 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 (93% very or somewhat satisfied), prepare for emergencies (87%), provide animal control services (86%), and provide child safety programs (85%). Table 8 on the next page shows how the 2023 results compare with the 2021 study and reveals there was a statistically significant increase in satisfaction with efforts to prepare for emergencies (+6%) and a decline in satisfaction with enforcing traffic laws (-7%).

TABLE 8 SATISFACTION WITH POLICE SERVICES: RESIDENT SURVEY BY STUDY YEAR

	Study Year			Change in Satisfaction 2021 to 2023
	2023	2021	2018	
Prepare for emergencies	87.4	81.3	84.3	+6.1†
Investigate criminal activity	79.7	77.2	85.5	+2.5
Provide neighborhood watch programs	77.1	75.3	81.6	+1.8
Maintain a low crime rate	82.3	82.1	86.7	+0.2
Provide animal control services	85.6	86.0	87.0	-0.4
Provide crossing guards near schools	93.1	96.1	94.6	-3.0
Provide child safety programs	85.2	88.5	91.4	-3.3
Enforce traffic laws	79.5	86.5	82.9	-7.0†

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

DEVELOPMENT SERVICES DEPARTMENT Figure 23 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 (67%), followed by issuing building permits (61%), enforcing zoning regulations (59%), and enforcing sign regulations (55%). When compared with 2021, there was a statistically significant increase in the perceived importance of issuing building permits (+7%, see Table 9).

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 23 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY

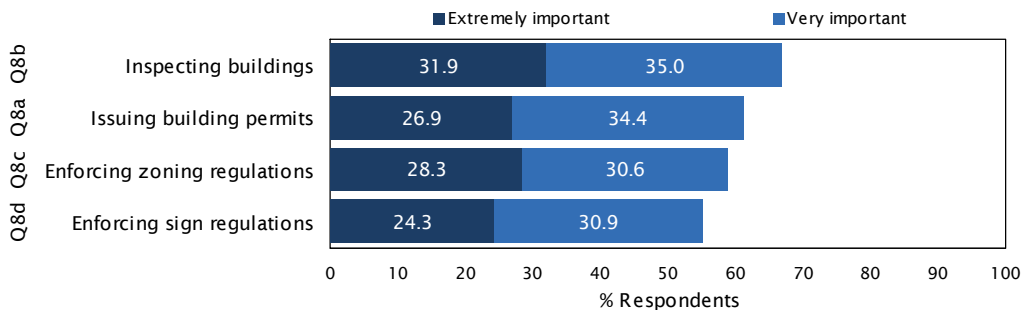


TABLE 9 IMPORTANCE OF DEVELOPMENT SERVICES: RESIDENT SURVEY BY STUDY YEAR

	Study Year			Change in Extremely + Very Important 2021 to 2023
	2023	2021	2018	
Issuing building permits	61.3	54.7	57.9	+6.6†
Inspecting buildings	66.9	62.5	67.2	+4.4
Enforcing sign regulations	55.2	51.3	50.4	+3.9
Enforcing zoning regulations	58.9	58.8	59.3	+0.2

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

Figure 24 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 77% for enforcing zoning regulations to a high of 87% for inspecting buildings. There were no statistically significant changes between the 2021 and 2023 studies (see Table 10). Table 11 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 24 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY

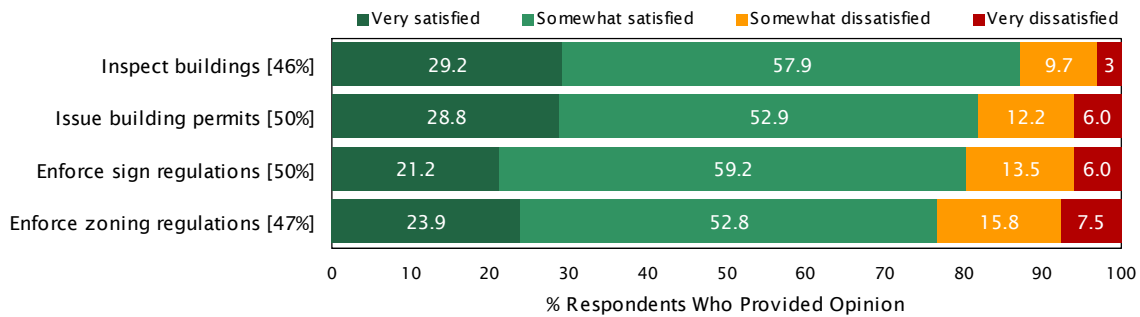


TABLE 10 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY BY STUDY YEAR

	Study Year			Change in Satisfaction 2021 to 2023
	2023	2021	2018	
Inspect buildings	87.1	86.1	86.6	+1.0
Issue building permits	81.8	81.2	76.0	+0.6
Enforce zoning regulations	76.6	79.1	73.9	-2.5
Enforce sign regulations	80.4	83.6	85.6	-3.1

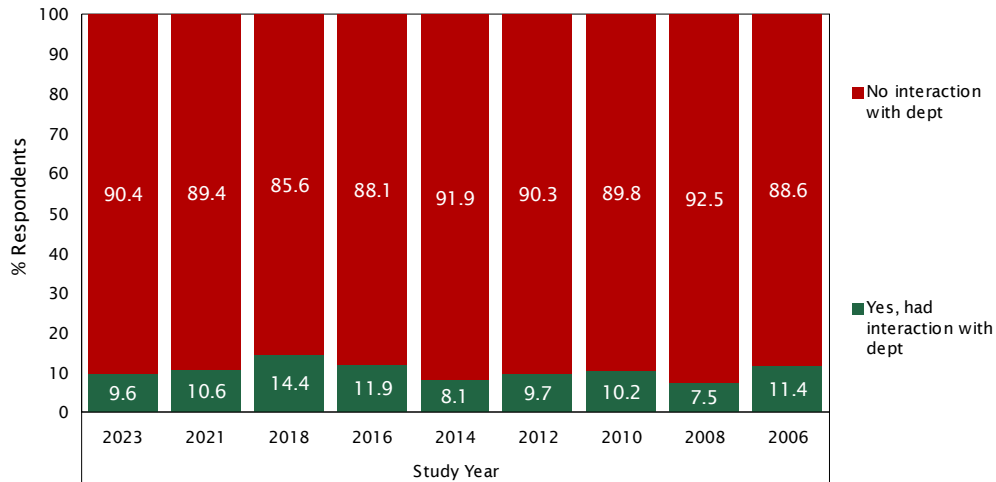
TABLE 11 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY BY INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR

	Interacted With Development		Difference in Satisfaction
	Yes	No	
Issue building permits	83.3	82.4	+0.8
Inspect buildings	88.8	88.0	+0.8
Enforce sign regulations	76.1	78.3	-2.2
Enforce zoning regulations	73.3	82.5	-9.3

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 25 on the next page, just 10% of residents surveyed indicated that they had interacted with the Department during the 12 months prior to the survey in 2023, which is statistically comparable to the finding from 2021.

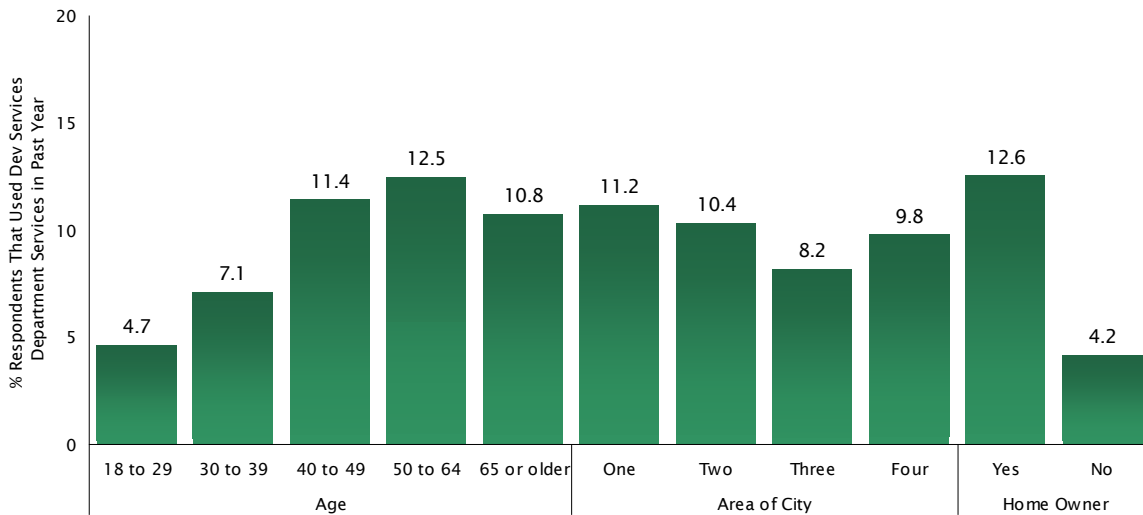
Question 10: Resident Survey *In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?*

FIGURE 25 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 over the past year was most frequently reported by residents at least 40 years of age and home owners (see Figure 26).

FIGURE 26 INTERACTED WITH DEVELOPMENT SERVICES IN PAST YEAR: RESIDENT SURVEY BY AGE, AREA OF CITY & HOME OWNER



PUBLIC WORKS DEPARTMENT Figure 27 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, maintaining local streets and roads was viewed as the most important service (97%), followed by garbage collection services (95%), and maintaining parks and picnic areas (91%). When compared with 2021, there were statistically significant increases in the perceived

importance of two services: reducing traffic congestion (+6%) and maintaining public landscapes (+4%) (see Table 12).

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 27 IMPORTANCE OF PUBLIC WORKS SERVICES: RESIDENT SURVEY

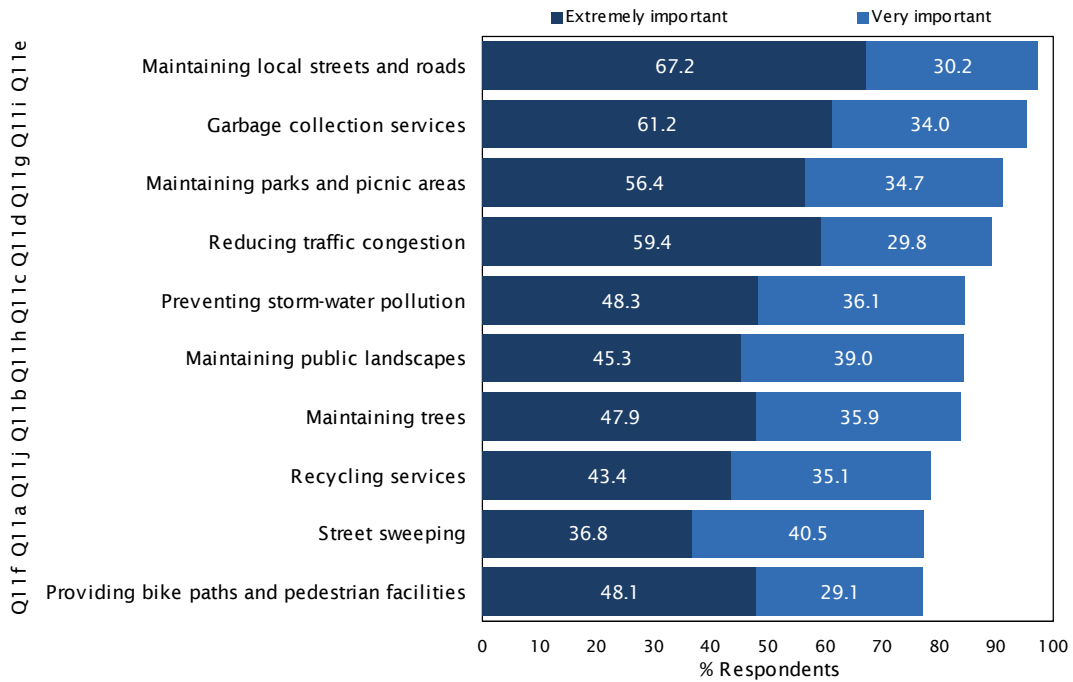


TABLE 12 IMPORTANCE OF PUBLIC WOKS SERVICES: RESIDENT SURVEY BY STUDY YEAR

	Study Year			Change in Extremely + Very Important 2021 to 2023
	2023	2021	2018	
Reducing traffic congestion	89.2	82.8	86.5	+6.4†
Maintaining public landscapes	84.3	80.1	75.6	+4.3†
Street sweeping	77.3	73.5	68.5	+3.8
Maintaining local streets and roads	97.3	93.9	95.2	+3.4
Maintaining parks and picnic areas	91.1	88.8	85.9	+2.3
Maintaining trees	83.8	82.7	79.6	+1.0
Providing garbage collection services	95.2	94.7	93.1	+0.5
Preventing storm-water pollution	84.4	84.4	81.9	+0.1
Providing recycling services	78.6	81.4	74.2	-2.8
Providing bike paths and pedestrian facilities	77.2	80.3	72.5	-3.2

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

Figure 28 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 (92%), maintain public landscapes (88%), and maintain trees (87%). Table 13 on the next page shows how the measured satisfaction with Public Works services differed between the 2021 and 2023 surveys, with two statistically significant declines (reduce traffic congestion: -6% and maintain parks and picnic areas: -5%) 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 28 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY

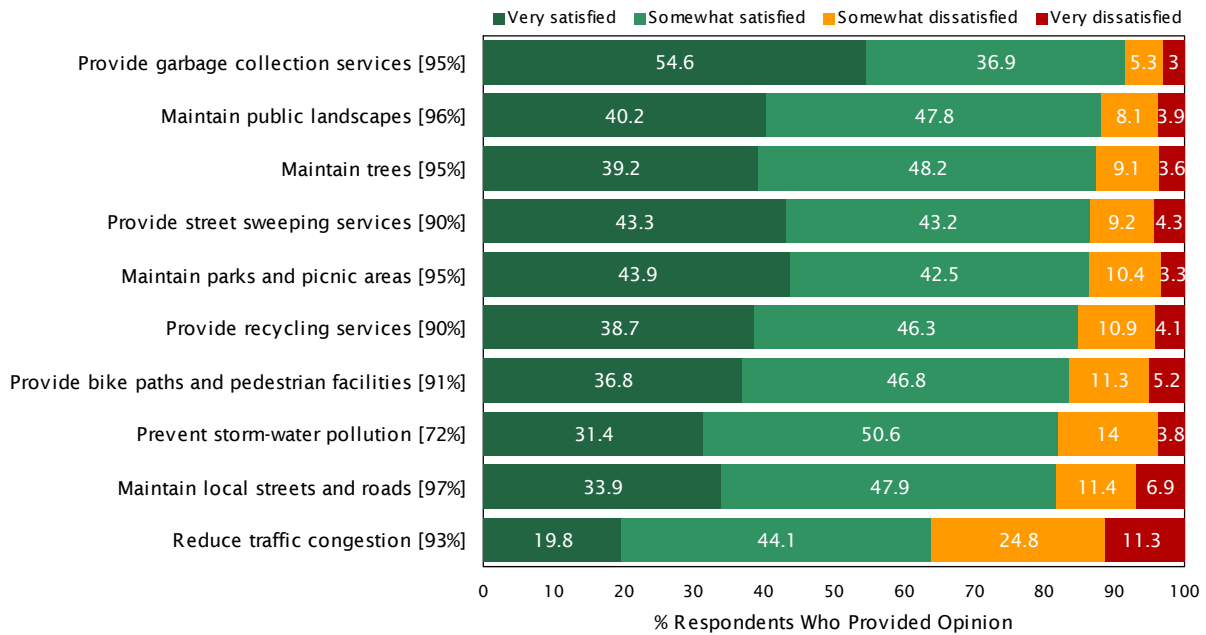


TABLE 13 SATISFACTION WITH PUBLIC WORKS SERVICES: RESIDENT SURVEY BY STUDY YEAR

	Study Year			Change in Satisfaction 2021 to 2023
	2023	2021	2018	
Provide street sweeping services	86.5	83.4	86.4	+3.1
Provide recycling services	84.9	83.2	89.0	+1.7
Maintain trees	87.4	87.9	88.0	-0.6
Maintain local streets and roads	81.8	83.5	83.7	-1.7
Provide garbage collection services	91.6	93.4	96.8	-1.9
Maintain public landscapes	88.1	91.0	88.4	-2.9
Provide bike paths and pedestrian facilities	83.6	87.0	84.6	-3.5
Prevent storm-water pollution	82.0	86.0	88.2	-4.0
Maintain parks and picnic areas	86.3	91.2	89.5	-4.8†
Reduce traffic congestion	63.9	70.2	57.2	-6.3†

† Statistically significant difference (p < 0.05) between the 2021 and 2023 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 29 on the next page presents each of the services tested, sorted by order of importance.

Residents assigned the highest importance to addressing homelessness (90%), distantly followed by providing special events like concerts in the park and the Fourth of July Parade (69%), providing recreation programs for special needs children (68%), and providing recreation and sports programs for teens (68%). Comparatively, providing adult sports programs (48%) was viewed as less important. There was one statistically significant change from 2021 to 2023 among the 12 community services, a 6 percentage point increase in the importance of providing summer-specific recreation programs, such as camps (see Table 14 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 29 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY

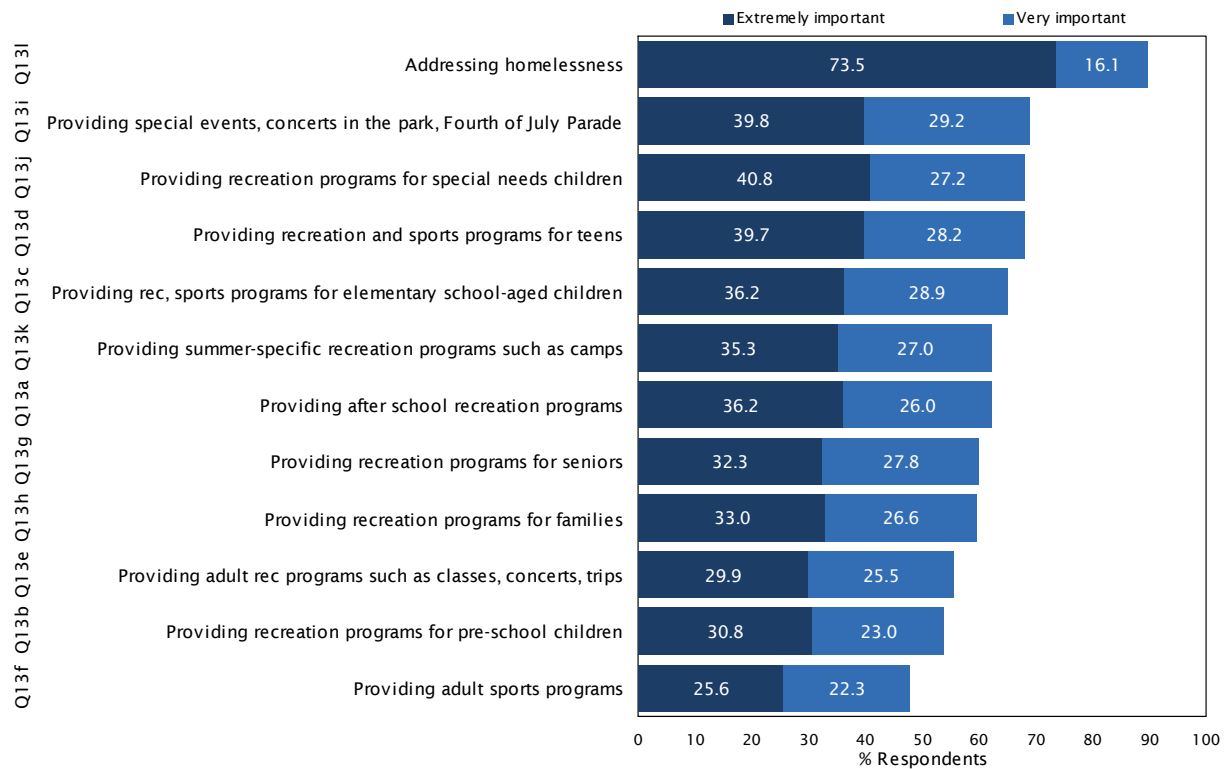


TABLE 14 IMPORTANCE OF COMMUNITY SERVICES: RESIDENT SURVEY BY STUDY YEAR

	Study Year			Change in Extremely + Very Important 2021 to 2023
	2023	2021	2018	
Providing summer-specific rec programs	62.3	56.6	54.8	+5.7†
Providing adult rec programs	55.4	50.6	46.2	+4.8
Providing special events like concerts in the park	68.9	65.2	62.9	+3.7
Providing adult sports programs	47.8	45.1	37.4	+2.8
Providing recreation programs for families	59.6	57.2	55.0	+2.4
Providing after school recreation programs	62.2	60.3	60.0	+1.9
Providing rec, sports for elementary children	65.1	63.9	64.3	+1.3
Providing rec, sports for teens	67.9	66.8	68.2	+1.1
Providing recreation programs for preschoolers	53.7	52.6	49.6	+1.1
Providing recreation programs for seniors	60.1	60.3	59.1	-0.2
Providing rec programs for special needs children	68.1	70.7	70.6	-2.7
Addressing homelessness	89.6	N/A	N/A	N/A

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

When asked about their satisfaction with the same list of services (Figure 30 on the next page), at least three-quarters of residents who held an opinion indicated that they were satisfied with 11 of the 12 services tested. Residents expressed the highest levels of satisfaction with the Department's efforts to provide recreation and sports programs for elementary school-aged children (87%), provide recreation programs for pre-school children (86%), provide recreation and sports programs for teens (86%), and provide recreation programs for seniors (86%). Residents

were notably less satisfied with the Department’s efforts to address homelessness (52%). When compared with the 2021 results, there was a statistically significant increase in satisfaction with the City’s efforts to provide recreation programs for special needs children (+7%, see Table 15).

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 30 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY

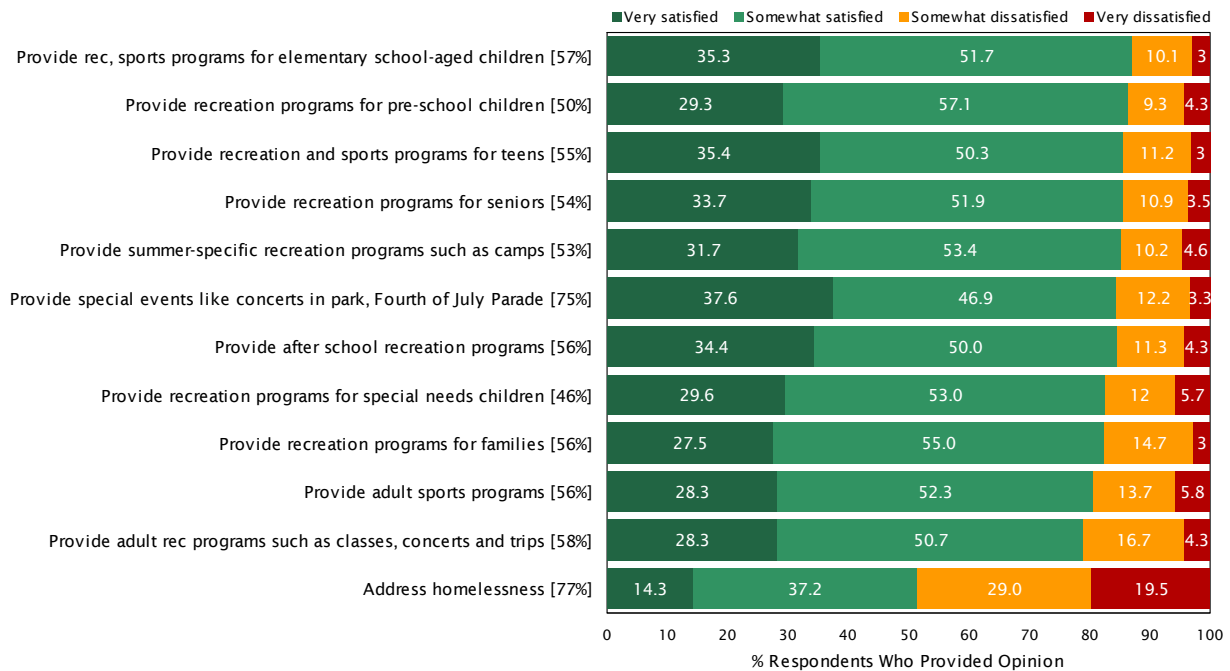


TABLE 15 SATISFACTION WITH COMMUNITY SERVICES: RESIDENT SURVEY BY STUDY YEAR

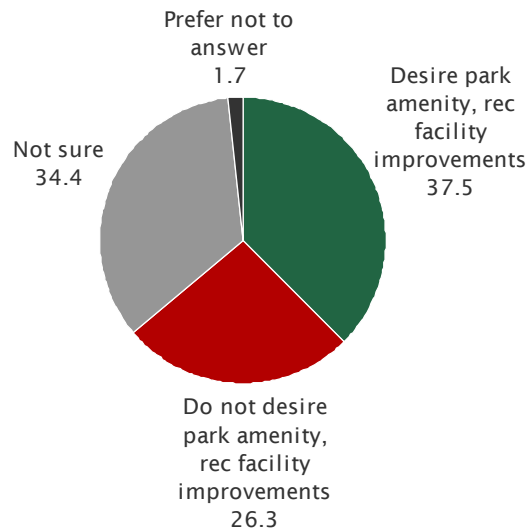
	Study Year			Change in Satisfaction 2021 to 2023
	2023	2021	2018	
Provide rec programs for special needs children	82.6	75.2	85.0	+7.4†
Provide adult sports programs	80.5	76.5	75.6	+4.1
Provide recreation programs for seniors	85.6	81.9	84.2	+3.7
Provide recreation programs for preschoolers	86.4	82.9	88.0	+3.5
Provide rec, sports for teens	85.6	82.3	82.1	+3.3
Provide summer-specific rec programs	85.2	83.6	86.1	+1.5
Provide after school recreation programs	84.4	83.4	85.0	+1.0
Provide rec, sports for elementary children	87.0	86.1	89.0	+0.9
Providing special events like concerts in the park	84.5	83.7	88.4	+0.8
Provide recreation programs for families	82.5	81.8	80.9	+0.8
Provide adult rec programs	79.0	80.5	76.5	-1.5
Address homelessness	51.5	N/A	N/A	N/A

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

New to the 2023 survey, respondents were asked whether there were any park amenities or recreation facilities that they would like to see added or improved within the City. As shown in Figure 31 on the next page, 38% of respondents answered Question 15 in the affirmative, whereas 26% did not desire any additions or improvements, 34% were unsure, and 2% preferred not to answer.

Question 15: Resident Survey *Is there a park amenity or recreation facility you would like to see added or improved in the City of Lake Forest?*

FIGURE 31 DESIRE PARK, AMENITY, REC FACILITY IMPROVEMENTS



Compared with their subgroup counterparts, residents with a household income of \$60,000 to \$79,999 or \$100,000 or more, those 30 to 39 years of age, residents of Area 2, those who described their ethnic background as mixed/other, and respondents with a child in the home were more likely to indicate a desire for a park amenity or recreation facility improvement (figures 32-34).

FIGURE 32 DESIRE PARK, AMENITY, REC FACILITY IMPROVEMENTS BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME

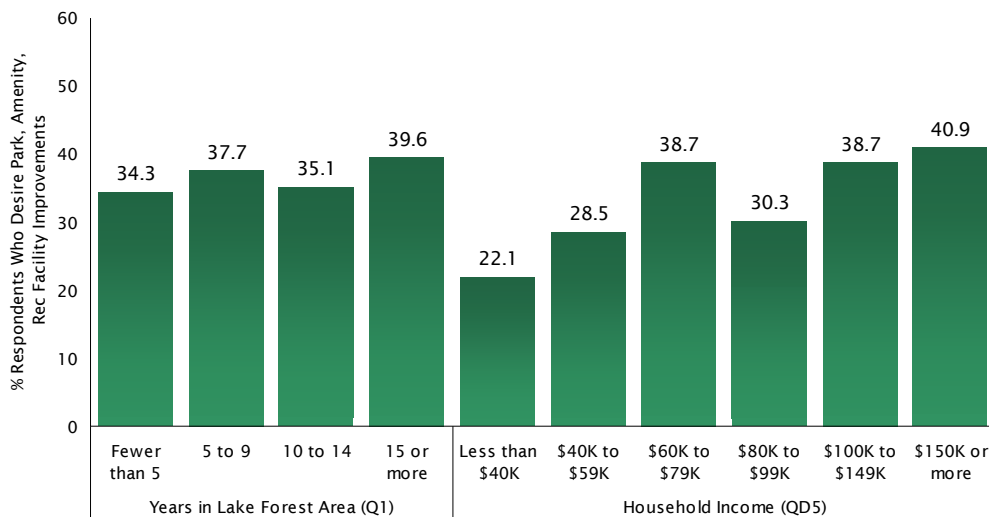


FIGURE 33 DESIRE PARK, AMENITY, REC FACILITY IMPROVEMENTS BY AGE & AREA OF CITY

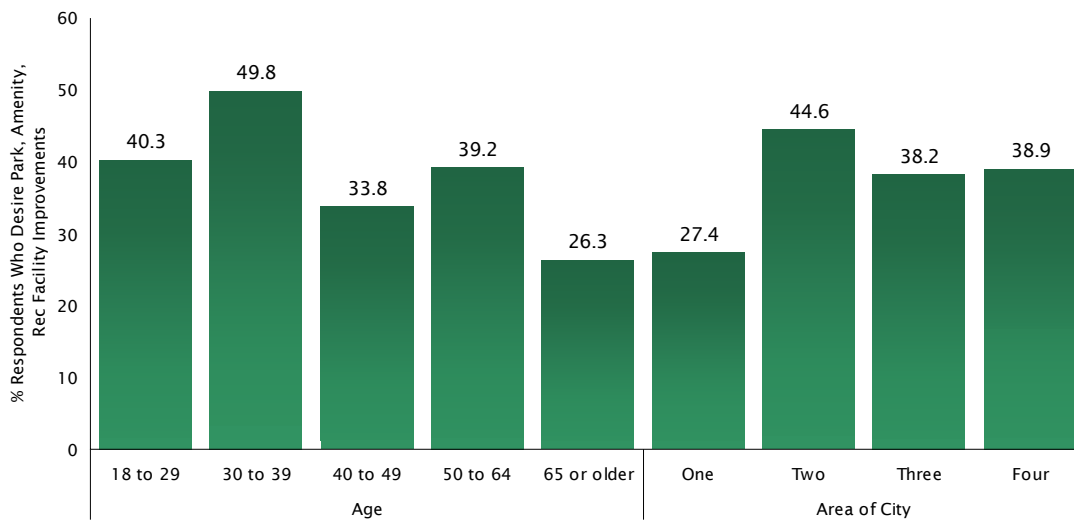
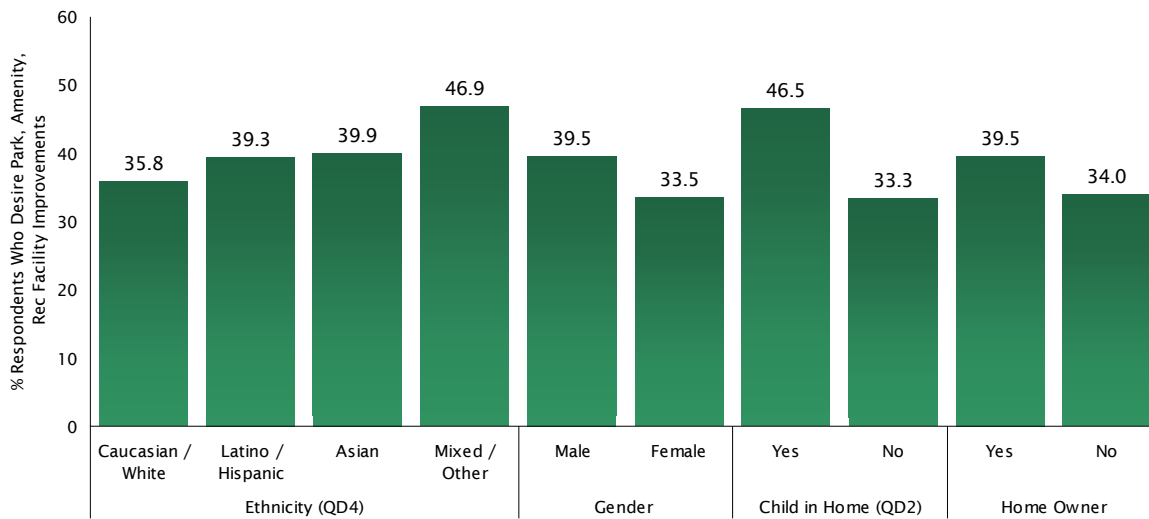


FIGURE 34 DESIRE PARK, AMENITY, REC FACILITY IMPROVEMENTS BY ETHNICITY, GENDER, CHILD IN HOME & HOME OWNER

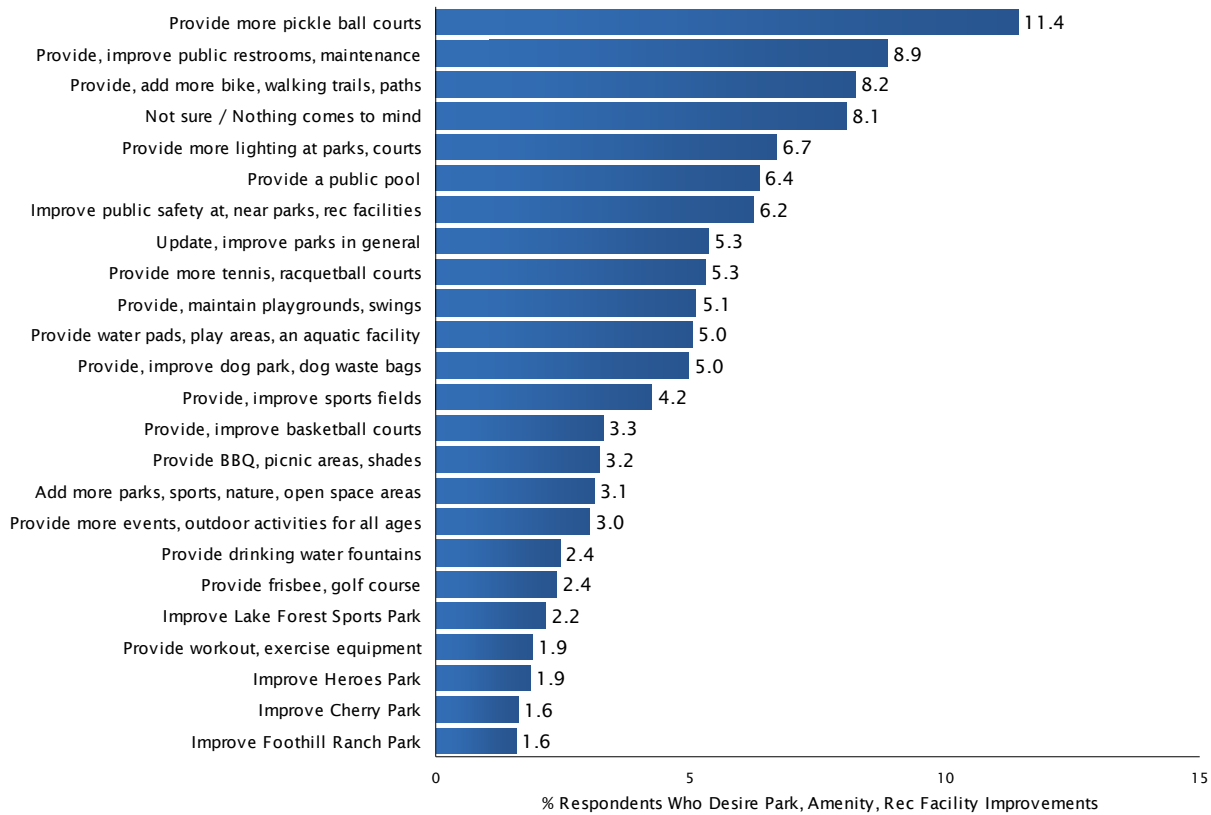


Respondents who indicated that they had an interest in an additional park amenity or recreation facility in Question 16 were next asked to briefly describe it. This question was posed in an open-ended manner, allowing respondents to mention any item without being prompted by, or limited to, a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 35 on the next page.

Among the *specific* responses, providing more pickleball courts was the most frequently cited park and recreation improvement at 11%, followed by providing more/improving maintenance of public restrooms (9%), adding more bike/walking trails and paths (8%), additional lighting at parks/courts (7%), providing a public pool (6%), and improving public safety at/near parks and recreation facilities (6%). Eight percent (8%) of the respondents who indicated a desire for a park and recreation improvement could not provide any specific suggestions when asked.

Question 16: Resident Survey Please briefly describe the one park amenity or recreation facility you would most like to see added or improved in the City of Lake Forest.

FIGURE 35 PARK, AMENITY OR REC FACILITY IMPROVEMENTS DESIRED



DIFFERENTIATORS OF OPINION: RESIDENT SURVEY For the interested reader, Table 16 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 23). 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 indicated 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 maintain a low crime rate, provide neighborhood watch programs, investigate criminal activity, and provide animal control services.

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 to provide crossing guards near schools, recycling services, and bike paths and pedestrian facilities.

TABLE 16 SATISFACTION WITH SERVICES BY OVERALL SATISFACTION WITH CITY: RESIDENT SURVEY

	Satisfaction With		Difference Between Groups For Each Service	
	Very or somewhat satisfied	Very or somewhat dissatisfied		
% Respondents Satisfied With Each Service	Maintain a low crime rate	88.4	36.4	52.0
	Provide neighborhood watch programs	83.7	32.0	51.7
	Investigate criminal activity	86.2	39.0	47.2
	Provide animal control services	91.6	49.5	42.0
	Inspect buildings	91.8	51.6	40.2
	Maintain local streets and roads	86.6	46.5	40.1
	Enforce sign regulations	86.1	46.1	40.0
	Address homelessness	56.7	17.8	38.9
	Enforce zoning regulations	82.1	43.3	38.8
	Reduce traffic congestion	69.0	30.8	38.2
	Provide recreation programs for special needs children	87.8	50.3	37.5
	Prepare for emergencies	92.1	54.7	37.4
	Provide summer-specific recreation programs such as camps	89.2	54.2	35.0
	Enforce traffic laws	84.1	49.5	34.6
	Prevent storm-water pollution	86.8	52.2	34.5
	Provide child safety programs	89.2	54.7	34.4
	Provide recreation programs for seniors	90.5	56.9	33.6
	Provide adult rec programs such as classes, concerts, trips	84.0	50.5	33.5
	Provide street sweeping services	90.7	57.9	32.8
	Provide adult sports programs	84.8	52.6	32.2
	Provide after school recreation programs	88.6	57.0	31.6
	Issue building permits	84.9	55.0	30.0
	Provide recreation programs for families	86.9	57.7	29.2
	Provide recreation and sports programs for teens	89.5	60.4	29.1
	Maintain public landscapes	91.9	62.9	29.1
	Provide rec, sports programs for elementary children	90.8	62.5	28.3
	Maintain trees	90.8	62.5	28.3
	Maintain parks and picnic areas	90.4	62.7	27.6
	Provide special events like concerts in park	87.6	63.4	24.2
	Provide recreation programs for pre-school children	89.4	67.6	21.8
Provide garbage collection services	94.7	73.8	20.9	
Provide bike paths and pedestrian facilities	86.3	68.1	18.3	
Provide recycling services	87.5	70.7	16.8	
Provide crossing guards near schools	95.5	79.2	16.3	

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 36 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 (95% extremely or very important), followed by investigating criminal activity (88%), revitalizing outdated areas in the City (66%), and promoting economic development (66%). At the other end of the spectrum, respondents generally viewed the City providing employee hiring or training services (28%) as much less important. Table 17 on the next page presents the change in importance assigned to each item tested in 2021 and 2023. During this period, there was only one statistically significant change: a 10% point increase in the importance assigned to investigating criminal activity.

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 36 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY

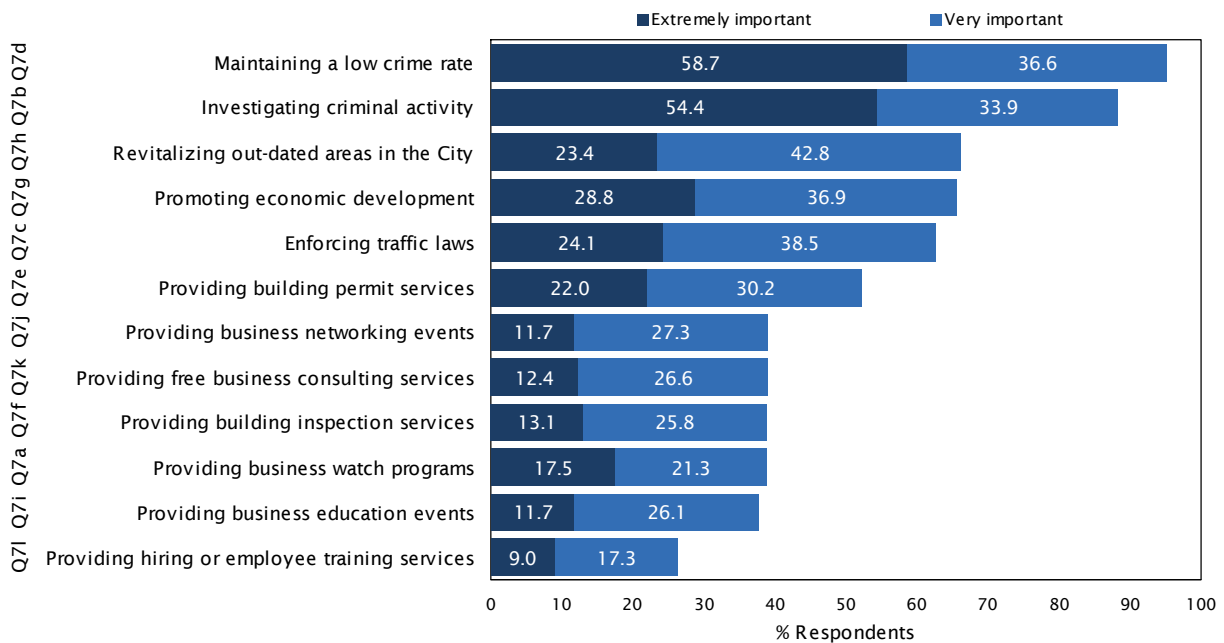


TABLE 17 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY BY STUDY YEAR

	Study Year			Change in Extremely + Very Important 2021 to 2023
	2023	2021	2018	
Investigating criminal activity	88.3	78.4	85.2	+9.9†
Revitalizing outdated areas in the City	66.2	61.7	71.8	+4.6
Providing building permit services	52.2	48.6	60.7	+3.6
Enforcing traffic laws	62.6	59.2	65.1	+3.4
Maintaining a low crime rate	95.2	92.1	92.9	+3.1
Providing business education events	37.7	35.8	45.4	+1.9
Providing building inspection services	38.9	40.8	55.6	-2.0
Providing hiring or employee training services	26.4	31.7	31.9	-5.3
Providing free business consulting services	38.9	44.5	43.0	-5.6
Promoting economic development	65.7	71.6	75.9	-5.8
Providing business watch programs	38.8	45.0	49.8	-6.2
Providing business networking events	39.0	46.4	47.0	-7.4

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

When asked about satisfaction with the same list of services, the business community was largely satisfied with every service tested (see Figure 37). At the top of the list was providing building inspection services (92% very or somewhat satisfied), followed by promoting economic development (91%), enforcing traffic laws (90%), and providing building permit services (90%). Among the 12 services tested, there were statistically significant declines in satisfaction with the City’s efforts to revitalize outdated areas in the City (-9%), maintain a low crime rate (-7%), and provide building permit services (-7%) from 2021 to 2023 (see Table 18 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 37 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY

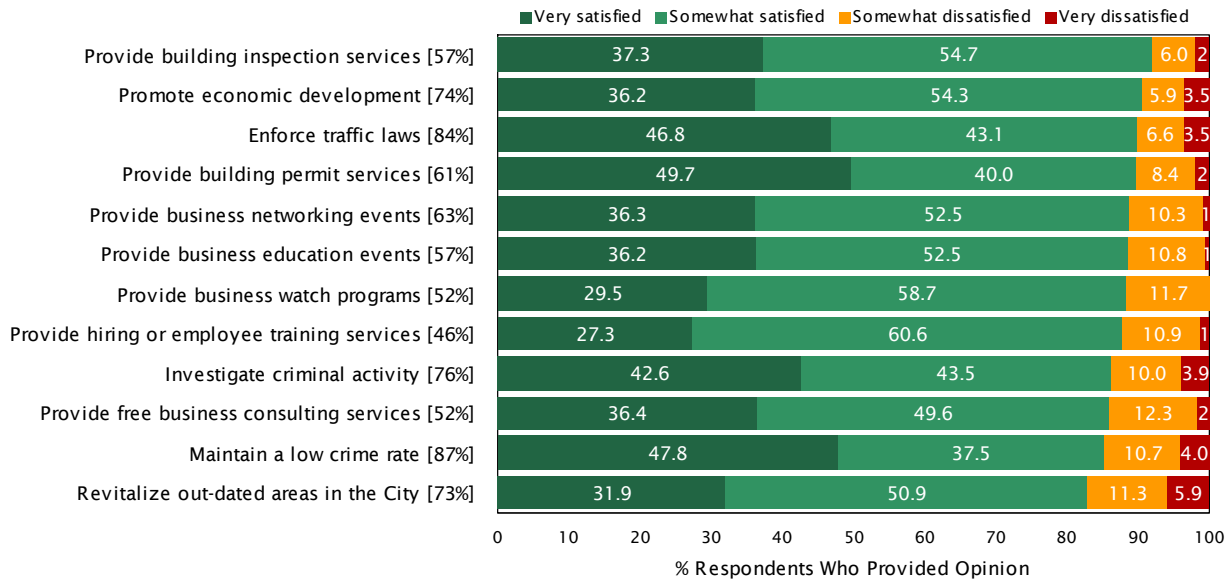


TABLE 18 SATISFACTION WITH SELECT SERVICES I: BUSINESS SERVICES BY STUDY YEAR

	Study Year			Change in Satisfaction 2021 to 2023
	2023	2021	2018	
Provide business networking events	88.8	87.3	87.8	+1.5
Provide hiring or employee training services	87.8	86.4	90.9	+1.4
Provide building inspection services	92.0	91.3	96.4	+0.7
Provide business watch programs	88.3	87.7	94.5	+0.6
Promote economic development	90.5	90.8	89.5	-0.2
Enforce traffic laws	89.9	92.2	92.2	-2.3
Investigate criminal activity	86.1	89.3	93.1	-3.2
Provide free business consulting services	86.0	89.5	90.4	-3.5
Provide business education events	88.7	93.3	93.8	-4.6
Provide building permit services	89.7	96.2	95.1	-6.5†
Maintain a low crime rate	85.3	92.0	91.1	-6.7†
Revitalize outdated areas in the City	82.8	91.5	84.8	-8.8†

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

The second list of services presented to business managers, shown in Figure 38, 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 and addressing homelessness as most important (each 84% extremely or very important), followed by reducing traffic congestion (73%). As shown in Table 19 on the next page, there were no statistically significant changes in the perceived importance of the services between 2021 and 2023.

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 38 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY

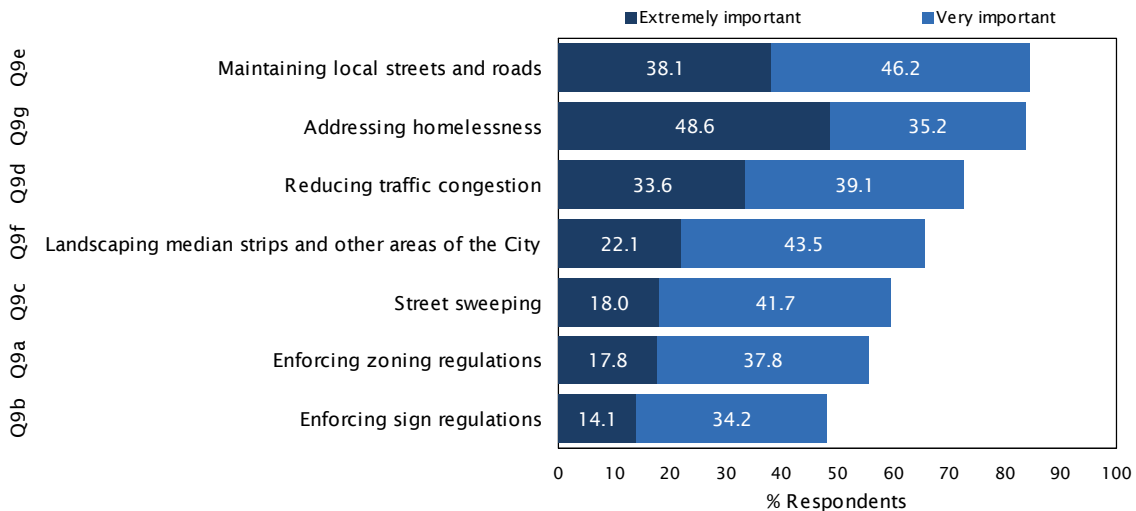


TABLE 19 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY BY STUDY YEAR

	Study Year			Change in Extremely + Very Important 2021 to 2023
	2023	2021	2018	
Reducing traffic congestion	72.7	68.1	74.3	+4.6
Enforcing zoning regulations	55.6	53.4	56.5	+2.2
Enforcing sign regulations	48.3	46.8	51.8	+1.5
Maintaining local streets and roads	84.4	83.3	83.7	+1.1
Landscaping median strips and other areas of the City	65.6	65.7	56.1	-0.1
Street sweeping	59.7	64.2	59.8	-4.5
Addressing homelessness	83.8	N/A	N/A	N/A

Figure 39 presents the overall levels of satisfaction for the same list of infrastructure and community services tested in the previous question. Satisfaction was greatest with respect to the City’s efforts to maintain local streets and roads (93%), enforce zoning regulations (93%), and provide street sweeping services (92%). Although still positive, the business community was less satisfied with efforts to address homelessness (69%). As shown in Table 20, there was a statistically significant decline in satisfaction with the City’s efforts to landscape median strips and other areas of the City between 2021 and 2023.

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 39 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY

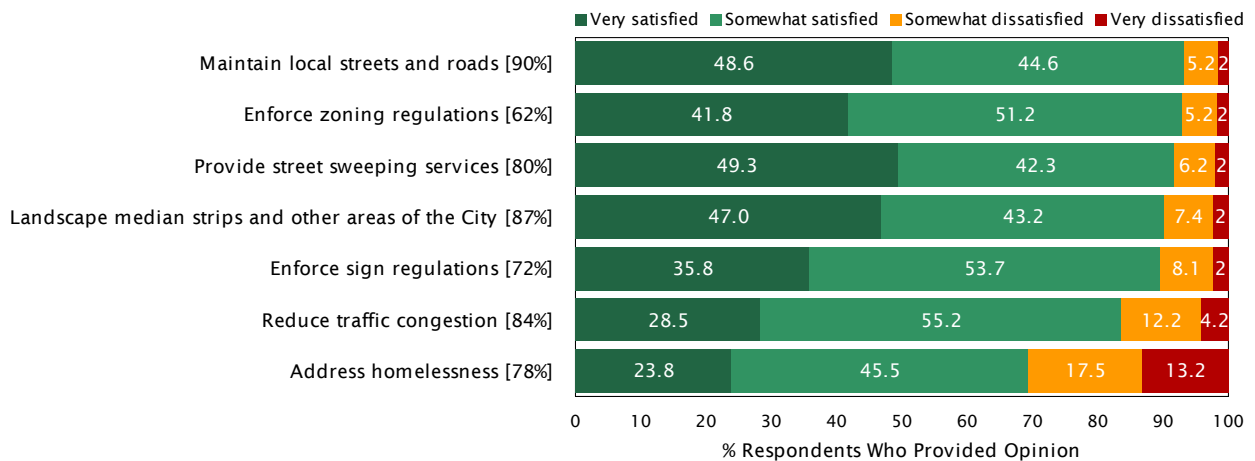


TABLE 20 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY BY STUDY YEAR

	Study Year			Change in Satisfaction 2021 to 2023
	2023	2021	2018	
Reduce traffic congestion	83.6	83.5	80.7	+0.1
Enforce zoning regulations	92.9	93.0	89.1	-0.1
Provide street sweeping services	91.6	93.1	94.6	-1.5
Maintain local streets and roads	93.2	95.7	95.7	-2.5
Enforce sign regulations	89.5	92.6	90.9	-3.1
Landscape median strips and other areas of the City	90.2	95.9	96.4	-5.7†
Address homelessness	69.3	N/A	N/A	N/A

† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.



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 21 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 21 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 40 on the following page presents each of the 34 services tested among residents, along with the percentage of respondents who were grouped into each of the six possible categories. Figure 41 on page 47 provides the same information for the 19 services tested among the business community. For ease of interpretation, the color-coding in both figures is consistent with that presented in Table 21 above. Thus, for example, in the service area of addressing homelessness, the City is exceeding the needs of 1% of residents, moderately meeting the needs of 17% of residents, marginally meeting the needs of 33% of residents, marginally not meeting the needs of 2% of residents, moderately not meeting the needs of 5% of residents, and severely not meeting the needs of 41% of residents.

For the majority of services tested, the City is meeting the needs of at least 84% of residents and 89% 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 40 and 41. Addressing homelessness is the top priority for improvement among residents, followed by reducing traffic congestion, enforcing zoning regulations, providing neighborhood watch programs, and providing adult recreation programs such as classes, concerts, and trips. Among businesses, addressing homelessness, revitalizing outdated areas in the City, reducing traffic congestion, maintaining a low crime rate, and investigating criminal activity topped the list.

FIGURE 40 SERVICE NEEDS: RESIDENT SURVEY

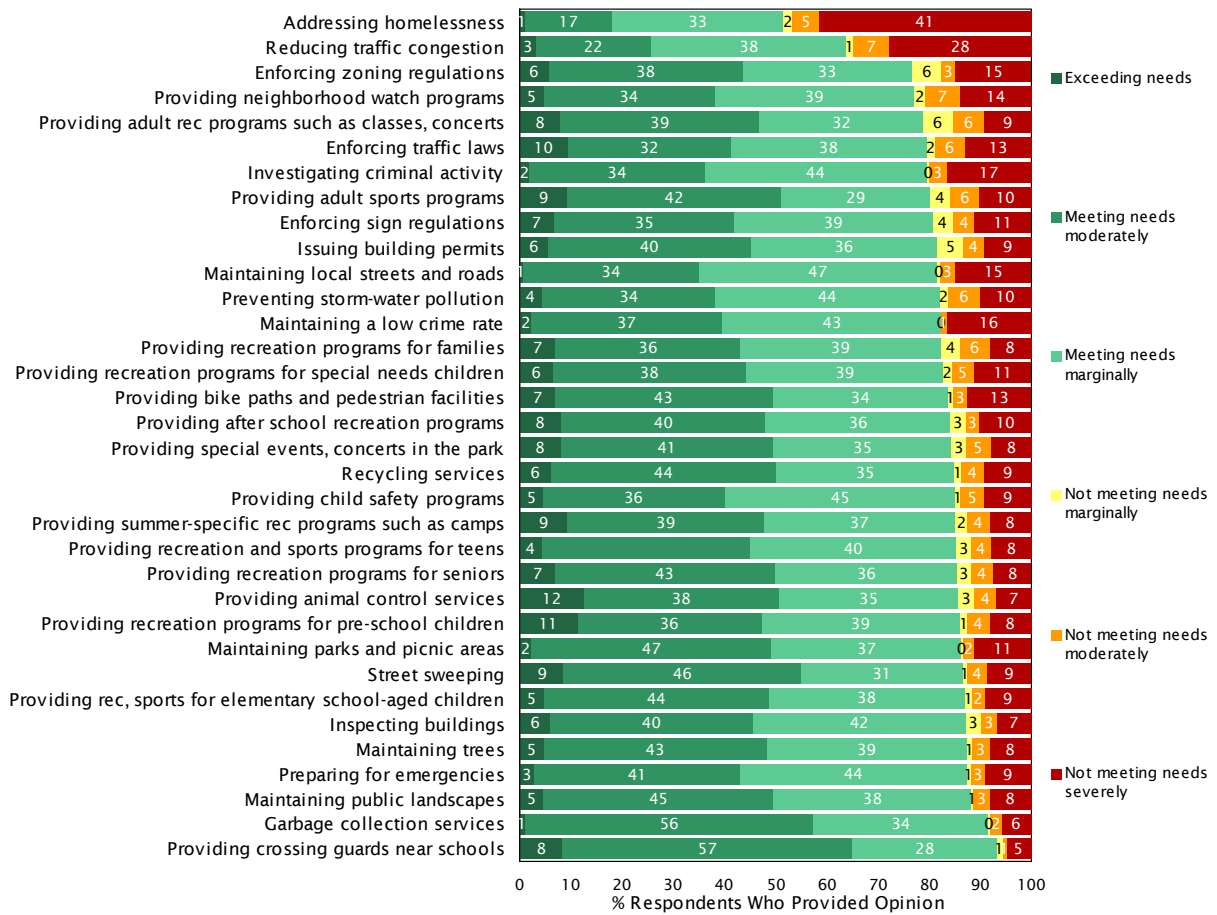
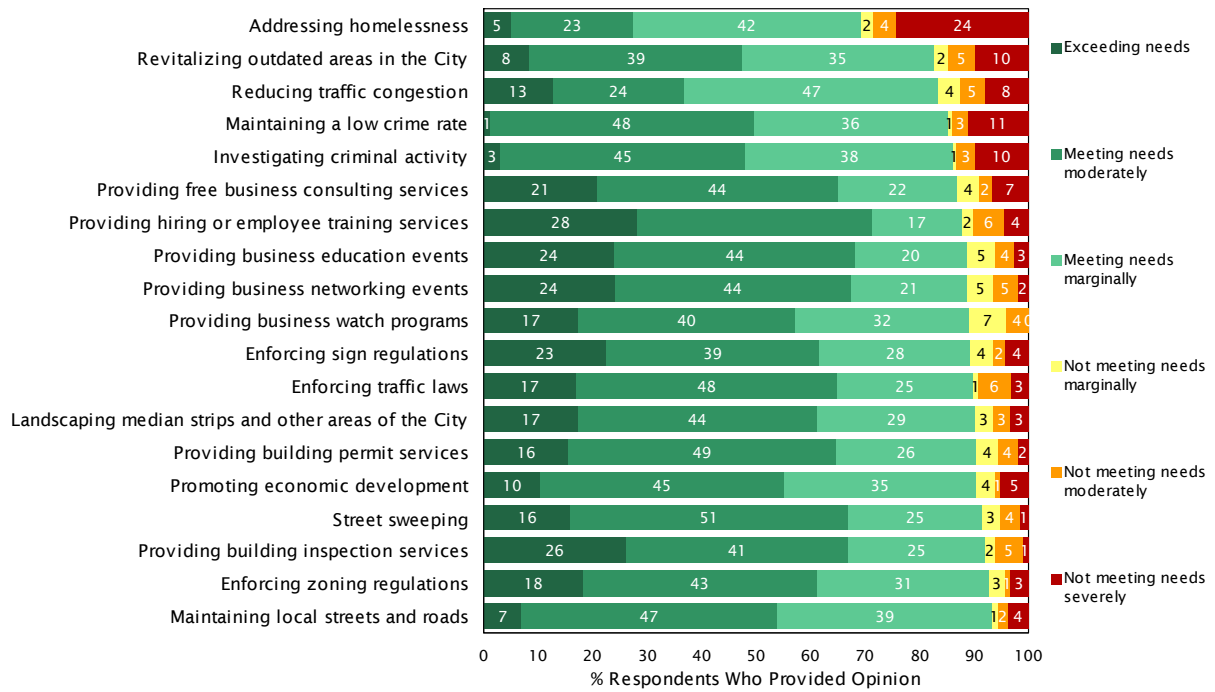


FIGURE 41 SERVICE NEEDS: BUSINESS SURVEY



NEIGHBORHOOD ISSUES & ORGANICS RECYCLING

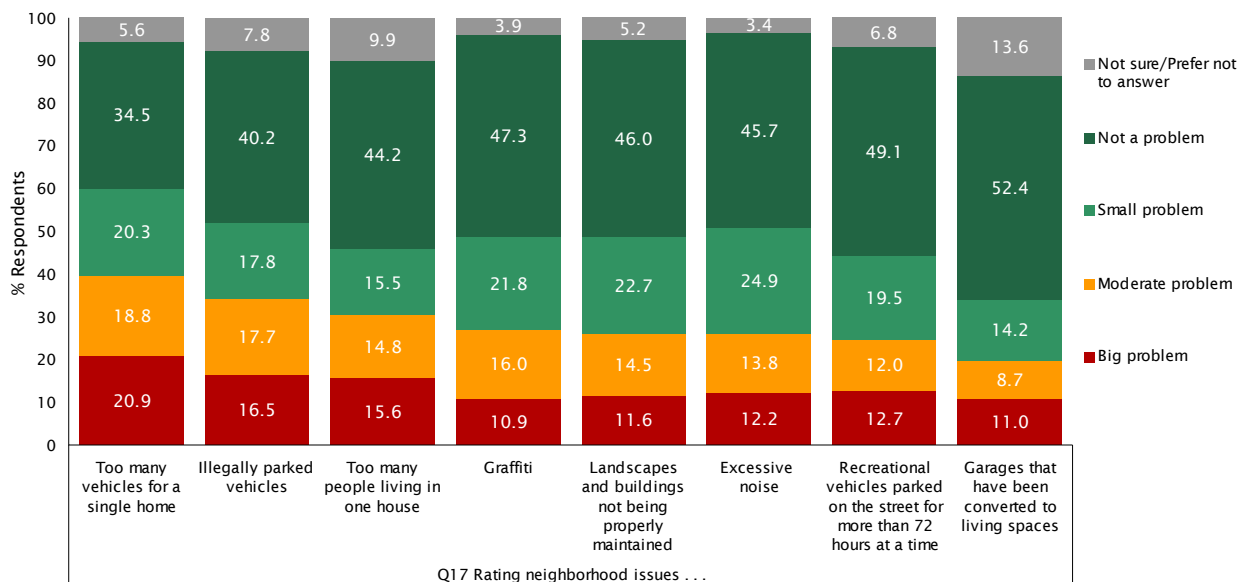
To allow the City to track its performance over time, most of the questions included in the 2021 survey were continued from prior surveys. To keep the survey dynamic, however, each cycle the surveys are also modified to include questions on salient topics and/or to help inform particular policy or planning issues of interest at the time. For the 2023 survey of residents, these new questions addressed recycling food scraps in the organics recycling bin.

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 2023 survey presented residents with each of the issues shown 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 (40% big or moderate problem) was the most commonly perceived neighborhood problem, followed by illegally parked vehicles (34%) and too many people living in a single house (30%). Among the eight issues tested, garages that have been converted to living spaces was seen as less of a problem (20%), but also had the highest percentage of not sure responses (14%).

Question 17: 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



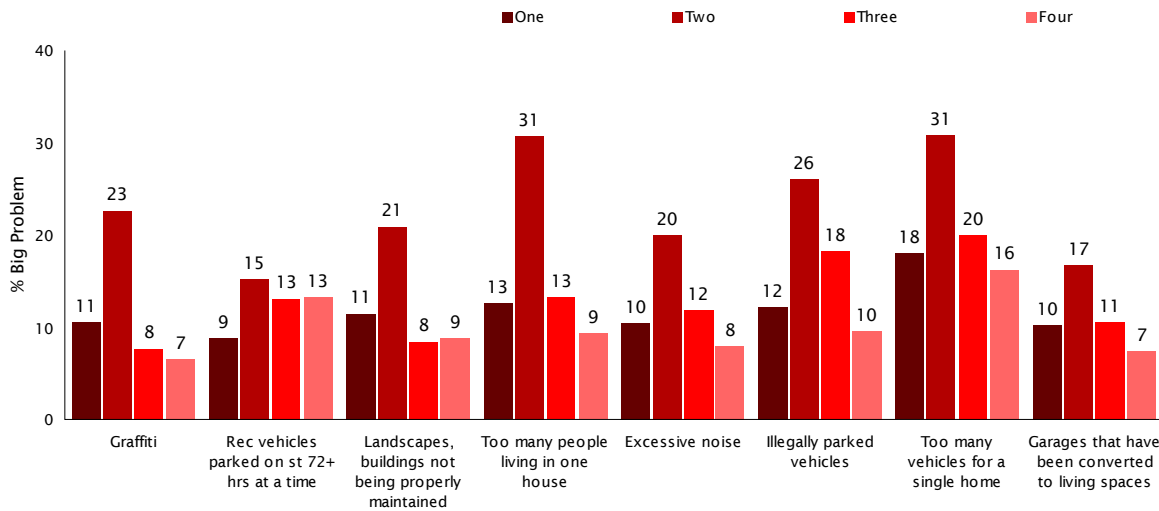
When compared with the 2021 survey findings, there were no statistically significant changes (Table 22).

TABLE 22 RATING NEIGHBORHOOD ISSUES BY STUDY YEAR (SHOWING % BIG OR MODERATE PROBLEM): RESIDENT SURVEY

	Study Year				Change in Big + Moderate 2021 to 2023
	2023	2021	2008	2006	
Landscapes and buildings not being properly maintained	26.1	22.6	18.1	15.2	+3.5
Too many people living in one house	30.4	27.9	28.6	N/A	+2.5
Illegally parked vehicles	34.2	31.9	28.9	N/A	+2.3
Graffiti	27.0	26.4	19.3	14.3	+0.5
Excessive noise	26.0	26.5	21.3	25.1	-0.5
Too many vehicles for a single home	39.7	40.9	42.2	N/A	-1.2
Recreational vehicles parked on the street for more than 72 hours at a time	24.7	26.0	17.9	25.5	-1.4
Garages that have been converted to living spaces	19.7	21.9	18.4	15.5	-2.2

Figure 43 demonstrates that although each of the issues tested in Question 17 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 too many people living in one house, too many vehicles for a single home, illegally parked vehicles, and graffiti.

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



ORGANICS RECYCLING New to the 2023 survey, residents were informed that new California state regulations require organic waste to be diverted from landfills and recycled as compost and other renewable energy products to help limit greenhouse gases and combat climate change. As shown in Figure 44 on the next page, approximately six-in-ten respondents (61%) were aware of the new requirement to place food scraps in the organics recycling bin along with green waste, whereas one-third (33%) were unaware of it, and 6% were unsure or preferred not to answer the question.

Figures 45-47 show how awareness of the new food scrap recycling requirement varied by key demographic subgroups. In general, the highest levels of awareness were reported by residents who have lived in the city for 10 to 14 years, those with a household income under \$40,000 a

year, residents 65 years and older, and female respondents. Conversely, respondents with a household income between \$40,000 and \$79,999, those 18 to 29 years of age, Area 2 residents, and Asian respondents reported much lower than average awareness.

Question 18: Resident Survey *Organic waste such as green waste and food scraps creates greenhouse gas as it decomposes in the landfill. To help combat climate change, new California state regulations require organic waste to be diverted from the landfill and recycled as compost and other renewable energy products. The City provides an organics recycling bin to residents to discard food and yard waste. Prior to taking this survey, were you aware of the new requirement to place food scraps in the organics recycling bin?*

FIGURE 44 AWARE OF REQUIREMENTS TO PLACE FOOD SCRAPS IN ORGANIC RECYCLING BIN

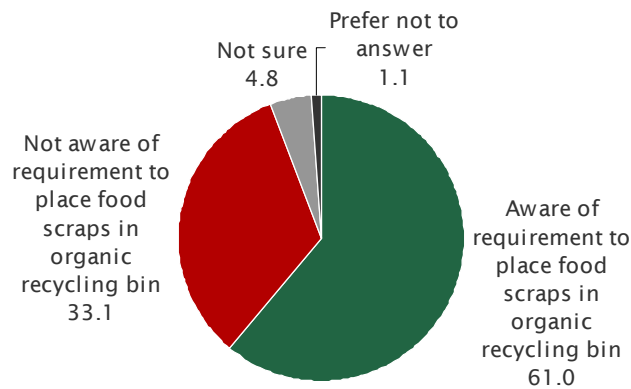


FIGURE 45 AWARE OF REQUIREMENTS TO PLACE FOOD SCRAPS IN ORGANIC RECYCLING BIN BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME

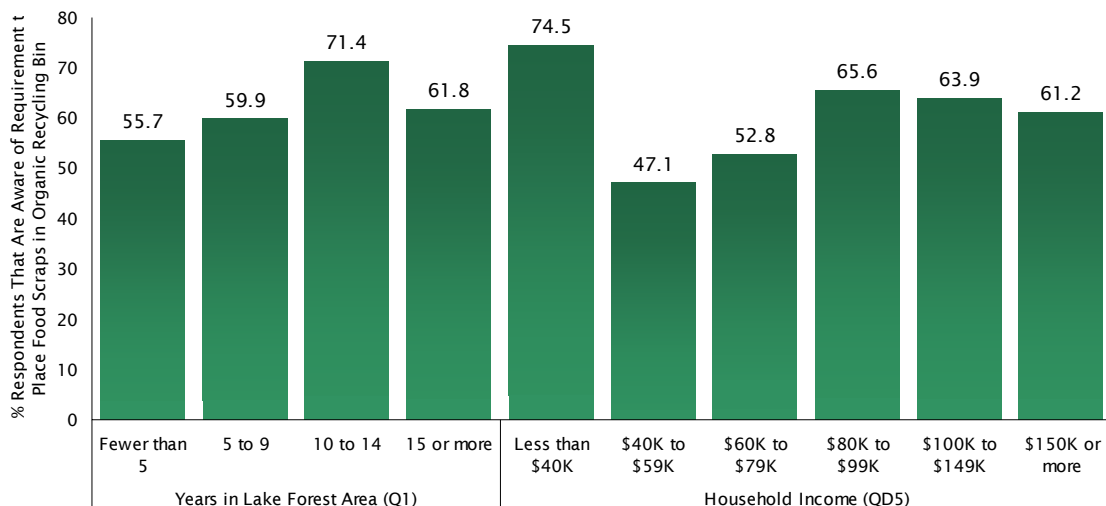


FIGURE 46 AWARE OF REQUIREMENTS TO PLACE FOOD SCRAPS IN ORGANIC RECYCLING BIN BY AGE & AREA OF CITY

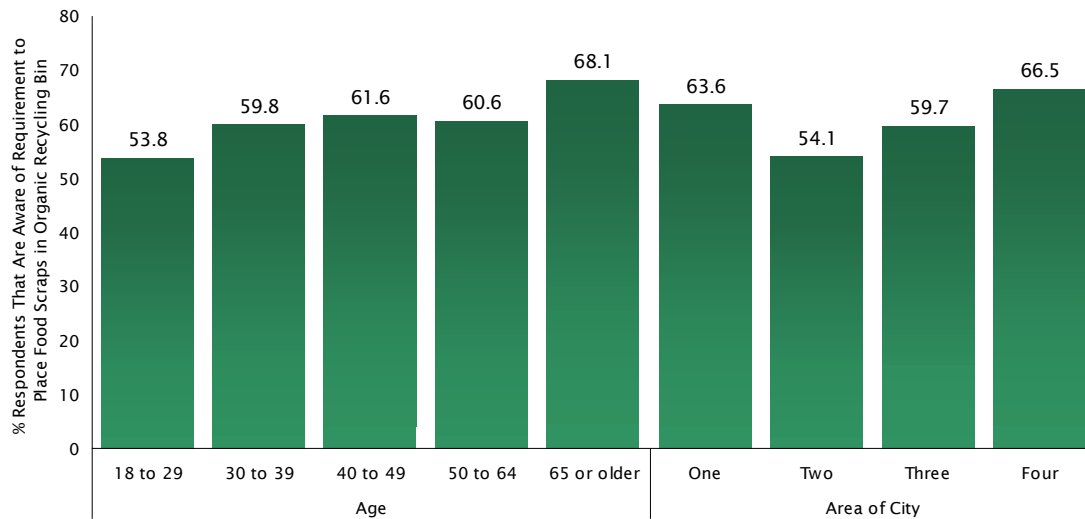
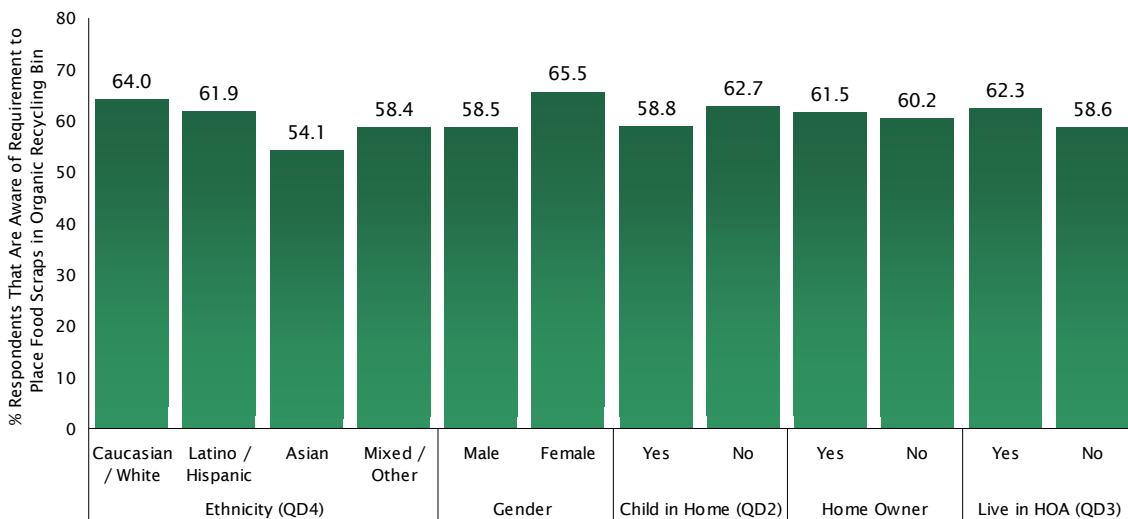


FIGURE 47 AWARE OF REQUIREMENTS TO PLACE FOOD SCRAPS IN ORGANIC RECYCLING BIN BY ETHNICITY, GENDER, CHILD IN HOME & LIVE IN HOA



All respondents were next asked to approximate the percentage of their household's total food waste that they place in the organics recycling bin. At the two extremes, 43% percent of respondents indicated that they place 10% or less of their household's food waste in the organics recycling bin, whereas 14% put nearly all (76% to 100%) of their food waste in it. Responses were spread evenly across the three categories in between, varying from 8% to 10%. Additionally, 12% of respondents were unsure of the percentage they place in the organics recycling bin and 4% were unwilling to answer. In total, 30% of respondents recycled more than a quarter of their food scraps (Figure 48 on next page).

Among those who provided an opinion, respondents with a household income less than \$40,000, those 18 to 29 years of age or 65 years and older, Area 1 and Area 4 residents, and those without a child in the home were the most likely to report placing nearly all (76% or more) of their food scraps in the organics recycling bin (figures 49-51).

Question 19: Resident Survey *Approximately what percentage of your household's total food waste do you currently place in the organics recycling bin? If unsure, estimate.*

FIGURE 48 PERCENTAGE OF HSLD FOOD WASTE PLACED IN ORGANIC RECYCLING BIN

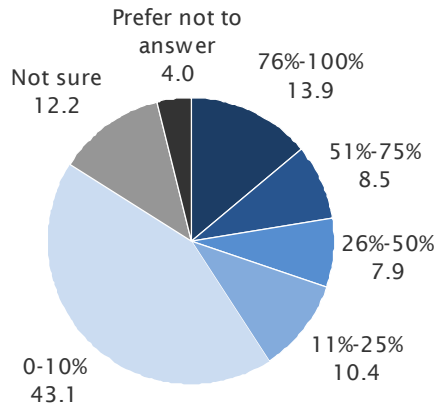


FIGURE 49 PERCENTAGE OF HSLD FOOD WASTE PLACED IN ORGANIC RECYCLING BIN BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME

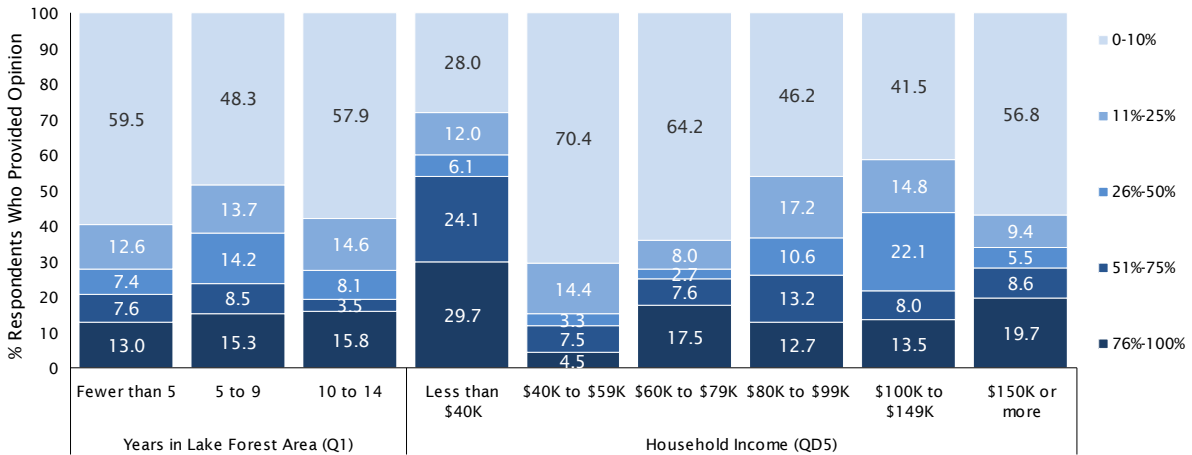


FIGURE 50 PERCENTAGE OF HSLD FOOD WASTE PLACED IN ORGANIC RECYCLING BIN BY AGE & AREA OF CITY

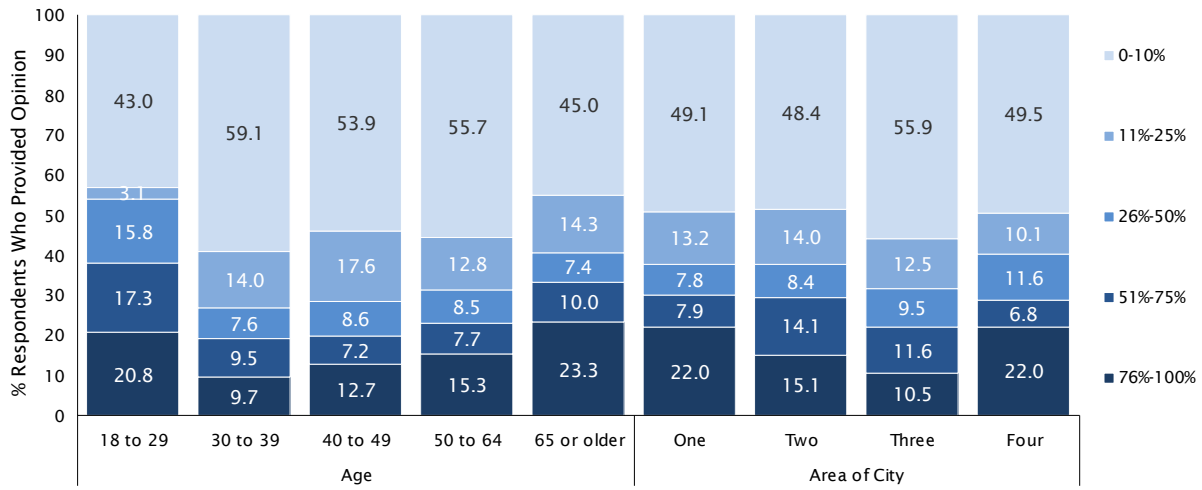
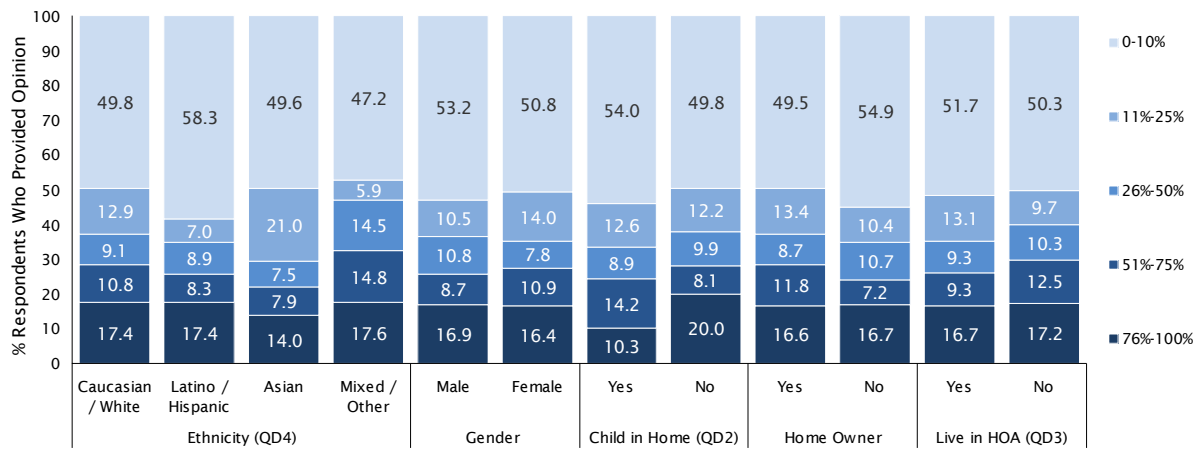


FIGURE 51 PERCENTAGE OF HSLD FOOD WASTE PLACED IN ORGANIC RECYCLING BIN BY ETHNICITY, GENDER, CHILD IN HOME, HOME OWNER & LIVE IN HOA

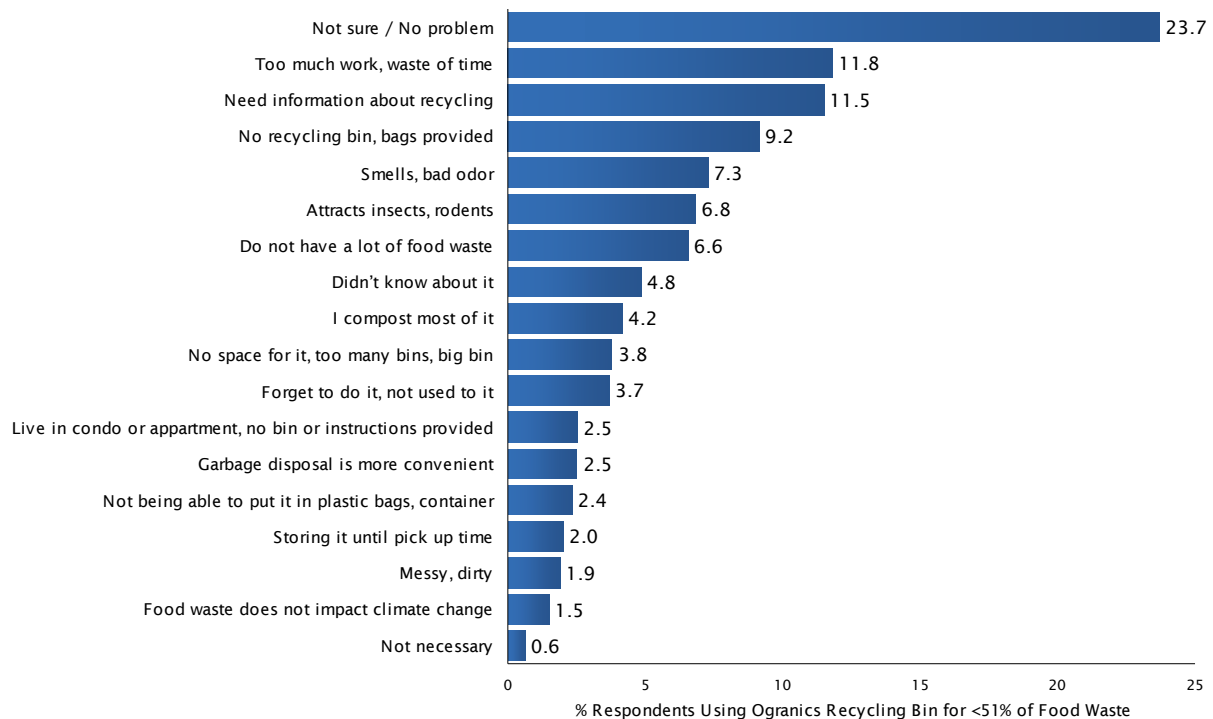


The 70% of respondents who did not recycle at least a quarter of their food scraps were asked to reveal the primary barrier or challenge preventing them from recycling a larger percentage of their food waste. Close to one-fourth (24%) of respondents were unsure or indicated that there wasn't anything specific standing in their way, while 16% provided a response related to a lack of awareness (Need information about recycling: 12%, Didn't know about it: 5%) and 12% said that recycling food waste is too much work/waste of time (Figure 52 on the next page).

Other responses cited by at least 5% of respondents included recycling bins or bags not provided (9%), that food waste smells bad (7%), it attracts insects or rodents (7%), and that their household does not have a lot of food waste to recycle (7%).

Question 20: Resident Survey *What is the primary barrier or challenge to recycling a larger percentage of your food waste?*

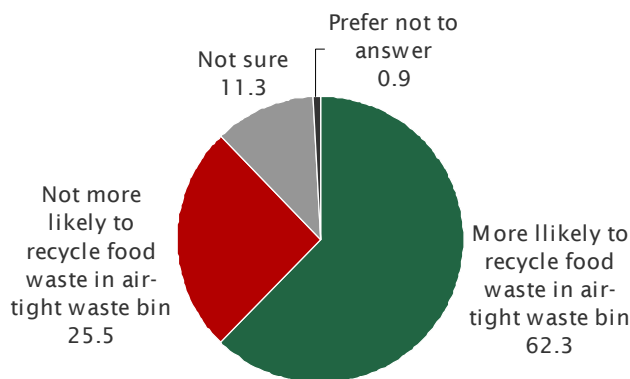
FIGURE 52 BARRIER OR CHALLENGE TO RECYCLING FOOD WASTE



All respondents were next asked whether they would be more likely to recycle their food waste if the City provided a small air-tight food waste bin that could be placed on the counter or under the counter.

Question 21: Resident Survey *If the City provided a small air-tight food waste bin that could be placed on the counter or under the counter, would you be more likely to recycle your food waste?*

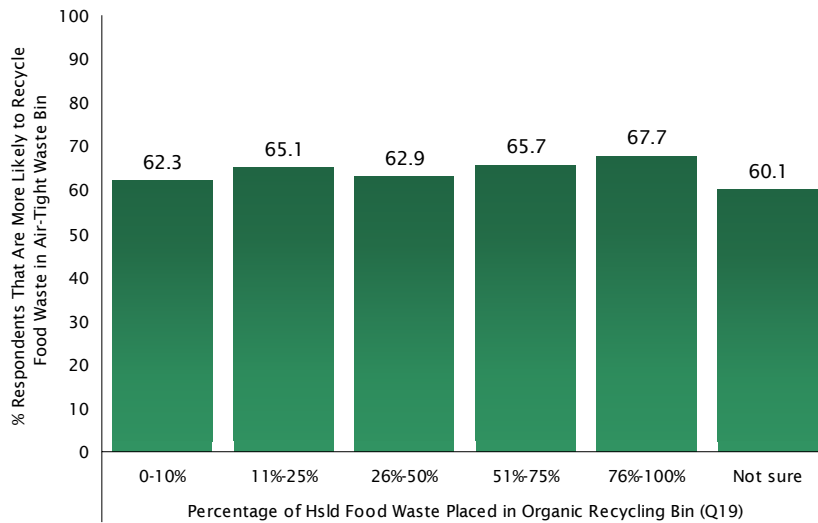
FIGURE 53 LIKELY TO RECYCLE FOOD WASTE IN AIR-TIGHT WASTE BIN



More than six-in-ten respondents (62%) answered Question 21 in the affirmative and indicated they would be more likely to recycle food waste if provided with a small air-tight bin. The remainder of respondents indicated that a city-provided air tight bin would not impact their behavior (26%), were unsure (11%), or declined to state (1%).

Figure 54 shows respondents' likelihood of recycling food waste if provided with a small air-tight food waste bin broken down by the percentage of food waste that their household currently places with the organics. As shown in the figure, responses were quite consistent across those who provided a response, ranging from 62% among those who recycle 10% or less of their food waste to 68% among those who already recycle nearly all of it. Those unsure of how much food waste their household currently recycles were more in line with the lower end of the range, with 60% indicating they would be inclined to recycle more if provided with a small air-tight bin by the City.

FIGURE 54 LIKELY TO RECYCLE FOOD WASTE IN AIR-TIGHT WASTE BIN BY PERCENTAGE OF HSLD FOOD WASTE PLACED IN ORGANIC RECYCLING BIN



Figures 55 to 57 on the next page show increased likelihood of recycling food waste if provided with a small airtight bin that could be placed on the counter or under the counter by demographic subgroups of respondents. Of particular note is the strong, inverse relationship between age and likelihood of recycling, such that those 18 to 29 years of age were the most likely and those 65 years and older the least likely to recycle food waste if provided with a small air-tight bin for the counter. Latino/Hispanic and Asian respondents also indicated much higher than average likelihood of recycling if provided a bin than respondents in other ethnic groups.

FIGURE 55 LIKELY TO RECYCLE FOOD WASTE IN AIR-TIGHT WASTE BIN BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME

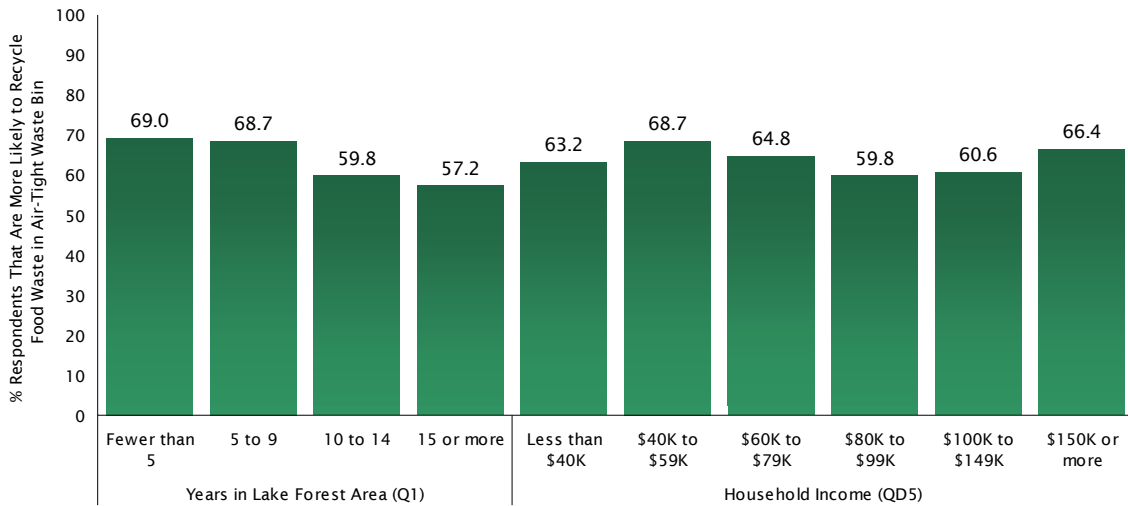


FIGURE 56 LIKELY TO RECYCLE FOOD WASTE IN AIR-TIGHT WASTE BIN BY AGE & AREA OF CITY

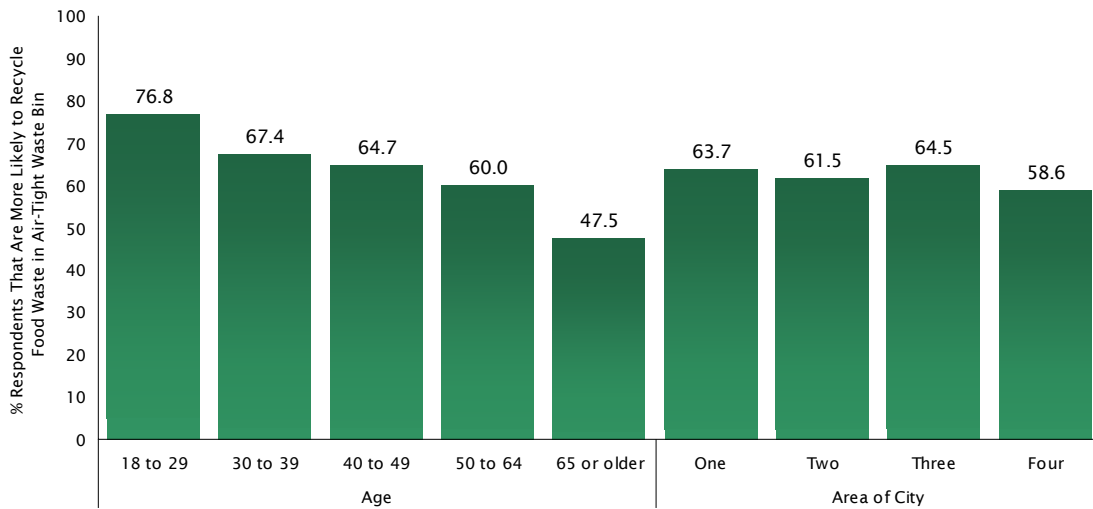
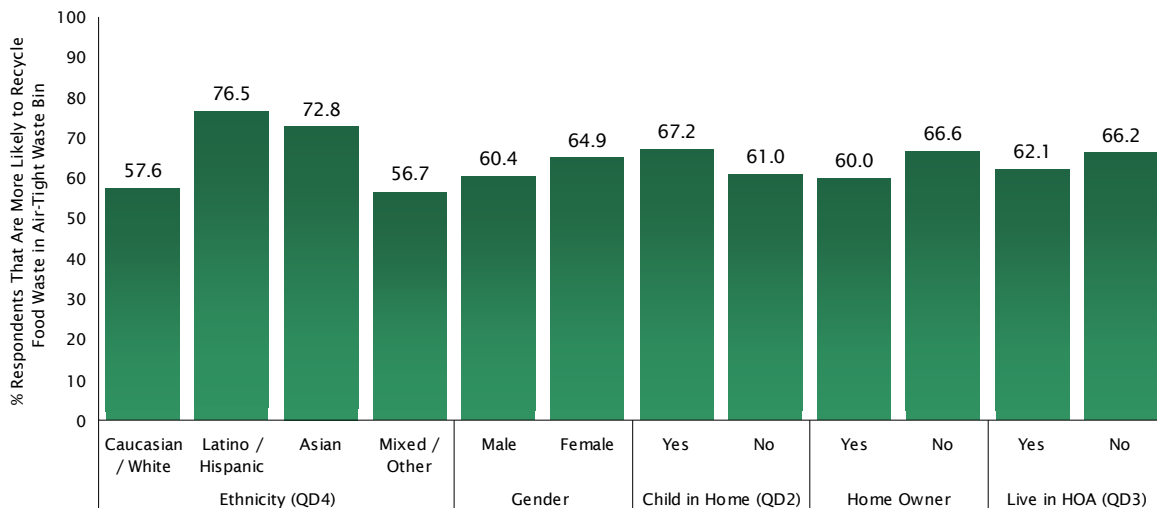


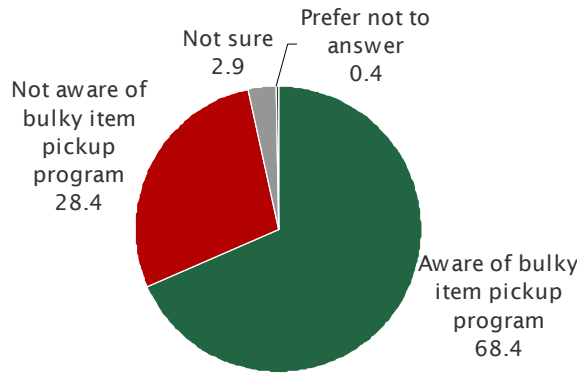
FIGURE 57 LIKELY TO RECYCLE FOOD WASTE IN AIR-TIGHT WASTE BIN BY ETHNICITY, GENDER, CHILD IN HOME, HOME OWNER & LIVE IN HOA



BULKY ITEM PICKUP The final question in this section of the resident survey asked respondents if, prior to taking the survey, they were aware that the City has a bulky item pickup program where residents can call in to receive free pickup of bulky trash items such as furniture. Overall, 68% of residents were aware of the bulky item pickup program, whereas 28% were not, and 3% were unsure or declined to state (Figure 58).

Question 22: Resident Survey *Prior to taking this survey, were you aware that the City has a bulky item pickup program, where residents can call in to receive free pickup of bulky trash items such as furniture.*

FIGURE 58 AWARENESS OF BULKY ITEM PICKUP PROGRAM



Examining awareness by subgroups reveals that newer residents (less than 5 years), households with an income less than \$40,000, residents 18 to 29 years of age, and those with a mixed/other or Asian ethnicity were the least likely to indicate awareness of the bulky item pickup program (figures 59-61).

FIGURE 59 AWARENESS OF BULKY ITEM PICKUP PROGRAM BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME

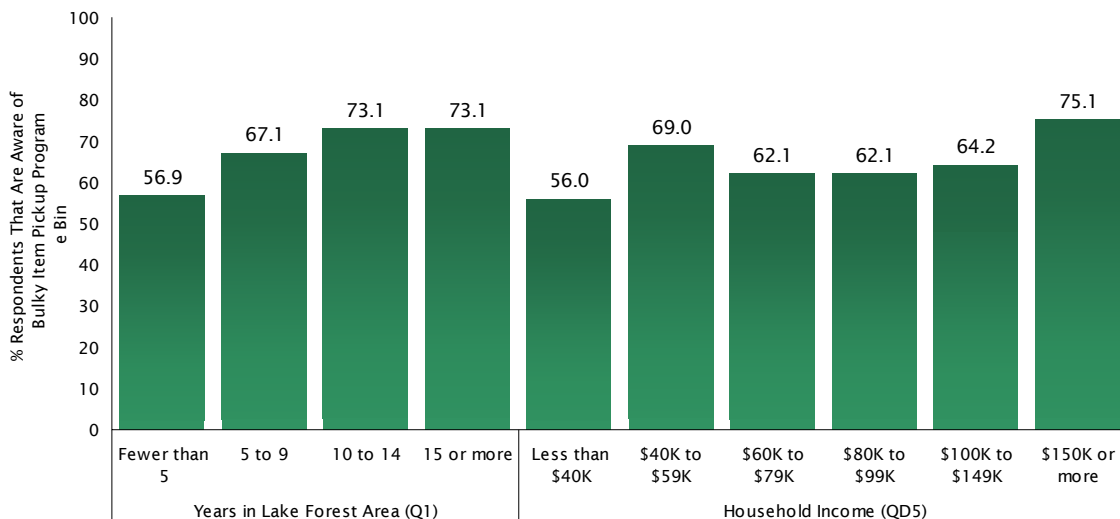


FIGURE 60 AWARENESS OF BULKY ITEM PICKUP PROGRAM BY AGE & AREA OF CITY

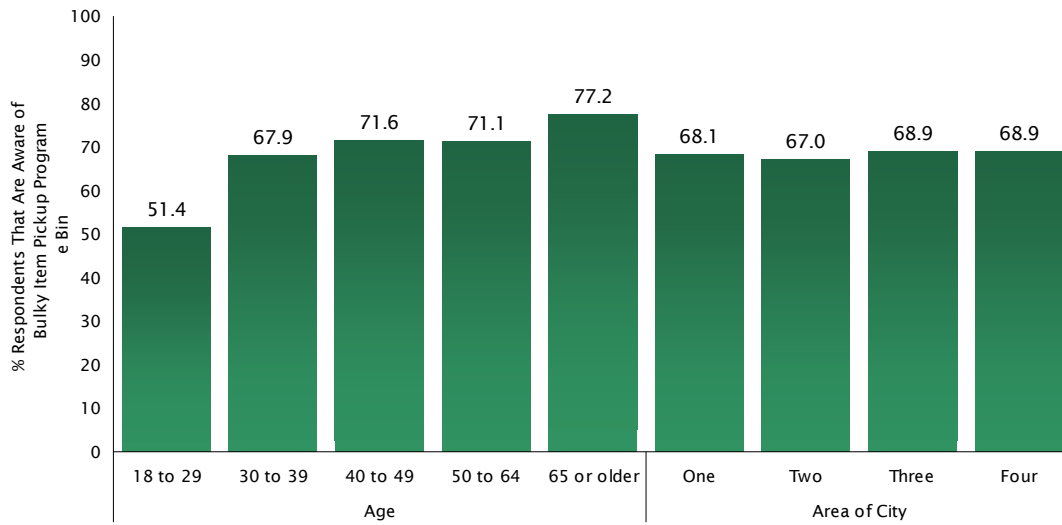
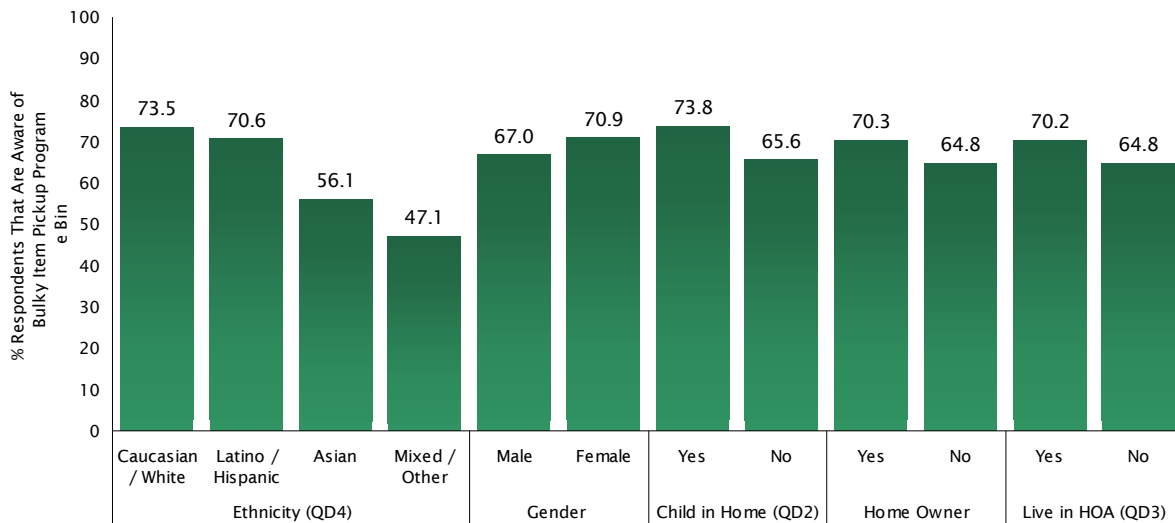


FIGURE 61 AWARENESS OF BULKY ITEM PICKUP PROGRAM BY ETHNICITY, GENDER, CHILD IN HOME, HOME OWNER & LIVE IN HOA



BUSINESS ASSISTANCE PROGRAMS

The City of Lake Forest received a limited amount of federal funds to help local businesses recover from the impacts of the pandemic. New to the 2023 survey, business managers were asked to detail their level of agreement with a variety of statements to help the City understand what improvements and programs businesses think would help them be more successful.

As shown in Figure 62, managers were most in agreement that *The pandemic hurt our business* (76% strongly or somewhat agree), followed by *Learning how to better market or advertise our business would make us more profitable* (69%), *Updating our business website would help us attract more customers* (60%), and *Improving the physical appearance of our store or offices would help us attract more customers* (60%). Fewer than six-in-ten respondents agreed that *Our business could use assistance with attracting and retaining employees* (54%) and that *The technology in our business needs to be updated* (58%).

Question 11: Business Survey *The City of Lake Forest received a limited amount of federal funds to help local businesses recover from the impacts of the pandemic. The City wants to understand what improvements or programs businesses think would help them be more successful. As I read the following statements, please tell me whether you agree or disagree with the statement.*

FIGURE 62 AGREEMENT WITH STATEMENTS: BUSINESS SURVEY



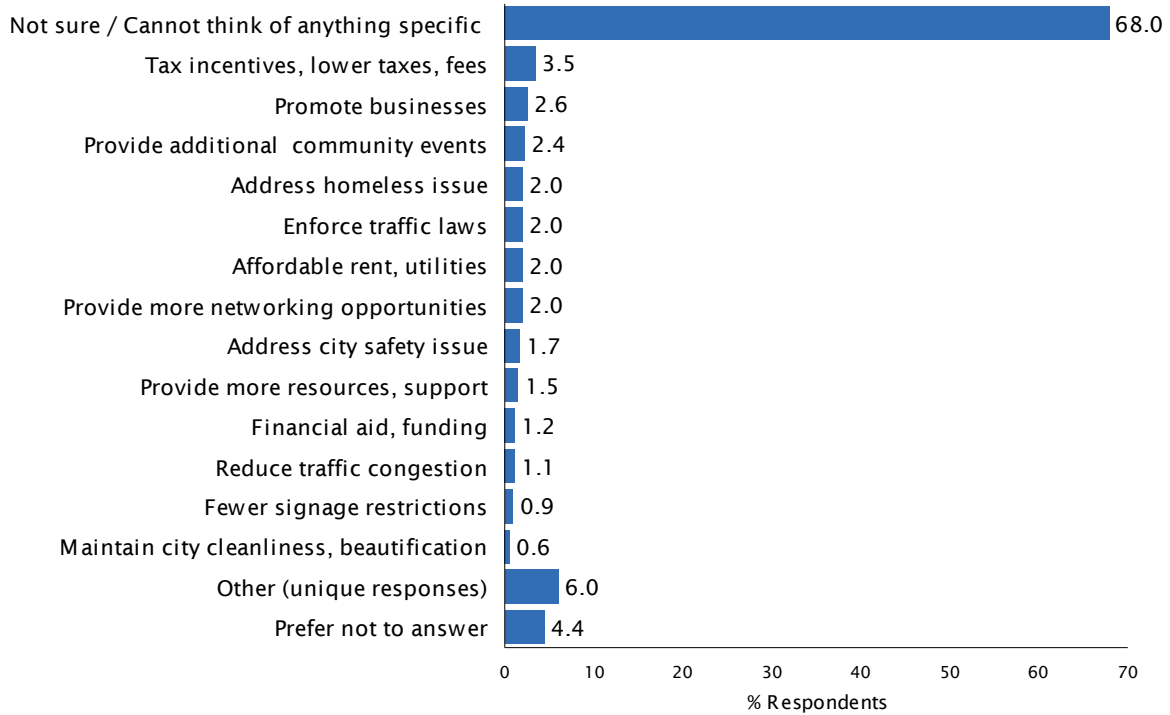
As a follow-up, all business managers were next asked what the City could do to help their business be more successful. This question was posed in an open-ended manner, allowing respondents to mention any aspect without being prompted by, or limited to, a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 63 on the next page.

More than seven-in-ten business managers were not sure or could not think of anything specific (68%) or declined to answer (4%) when asked what the City could do to help their business be more successful. Among the specifics mentioned, tax incentives and lower taxes/fees topped the list at 4%, followed by promoting businesses (3%), hosting more community events (2%),

addressing homeless issues (2%), enforcing traffic laws (2%), making rents/utilities more affordable (2%), and providing more networking opportunities (2%).

Question 12: Business Survey *Is there anything the City could do to help your business be more successful?*

FIGURE 63 WAYS TO HELP BUSINESSES: BUSINESS SURVEY



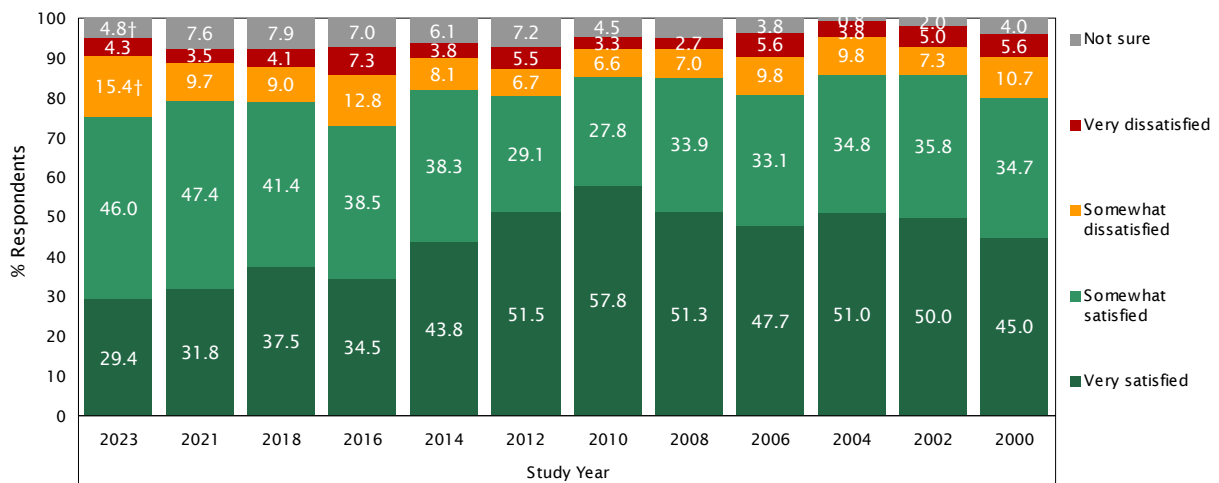
COMMUNICATION

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, 75% of residents indicated that they were either very (29%) or somewhat (46%) satisfied with the City’s communication efforts. Although there was a statistically significant increase in the percentage somewhat dissatisfied and a decrease in unsure responses from 2021 to 2023, the overall percentage of those satisfied with the City’s communication efforts remained statistically consistent (see Figure 64).

Question 23: 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 64 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

With the exception of one subgroup, at least six-in-ten residents in each demographic segment were satisfied with the City’s communication efforts (see figures 65 through 67 on the following pages). As might be expected, residents dissatisfied with the City’s overall performance also tended to be much less satisfied with the City’s communication efforts when compared with those generally satisfied with the City (82% vs. 49%).

FIGURE 65 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AREA OF CITY & OVERALL SATISFACTION

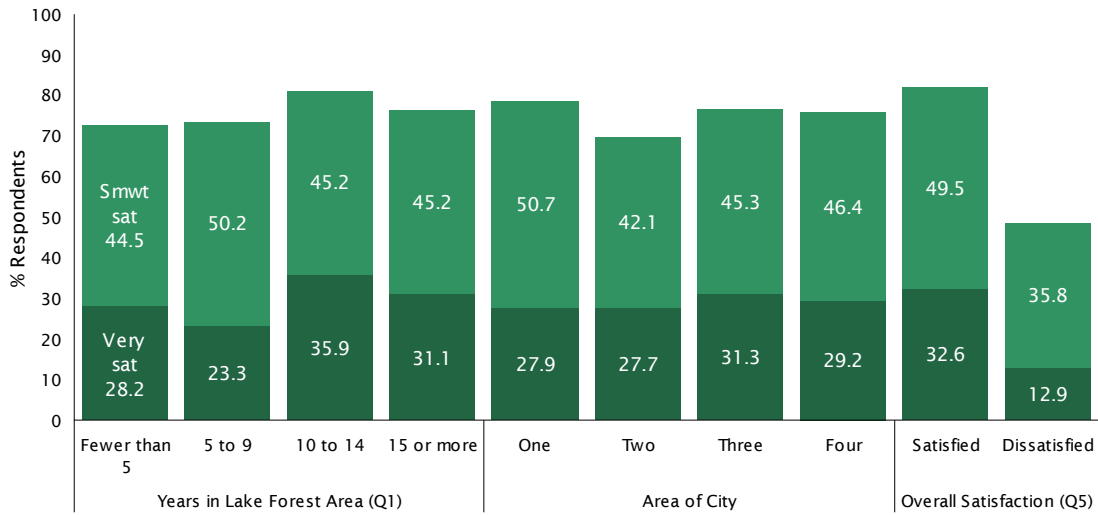


FIGURE 66 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY GENDER, HOME OWNER, AGE & CHILD IN HOME

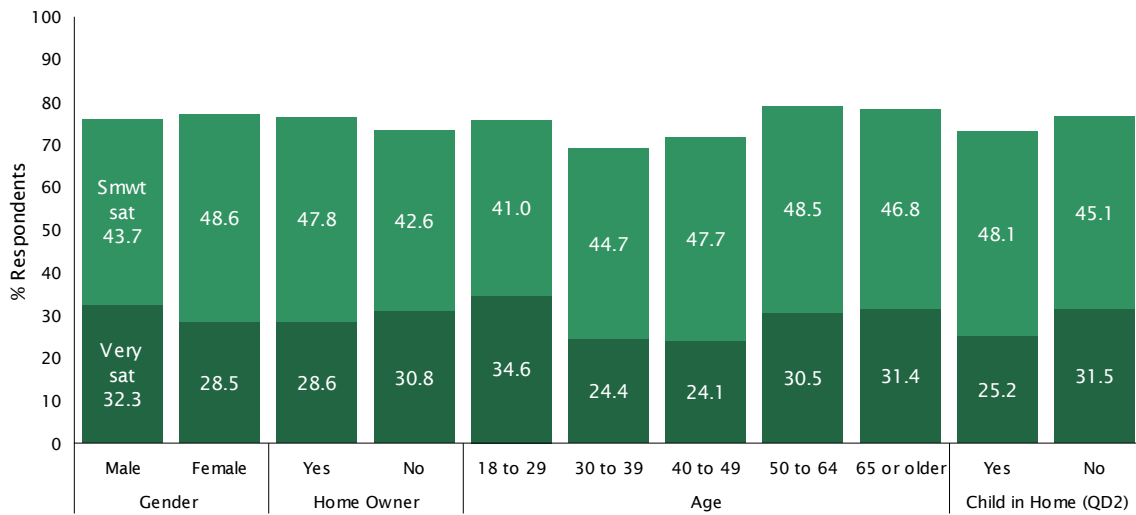
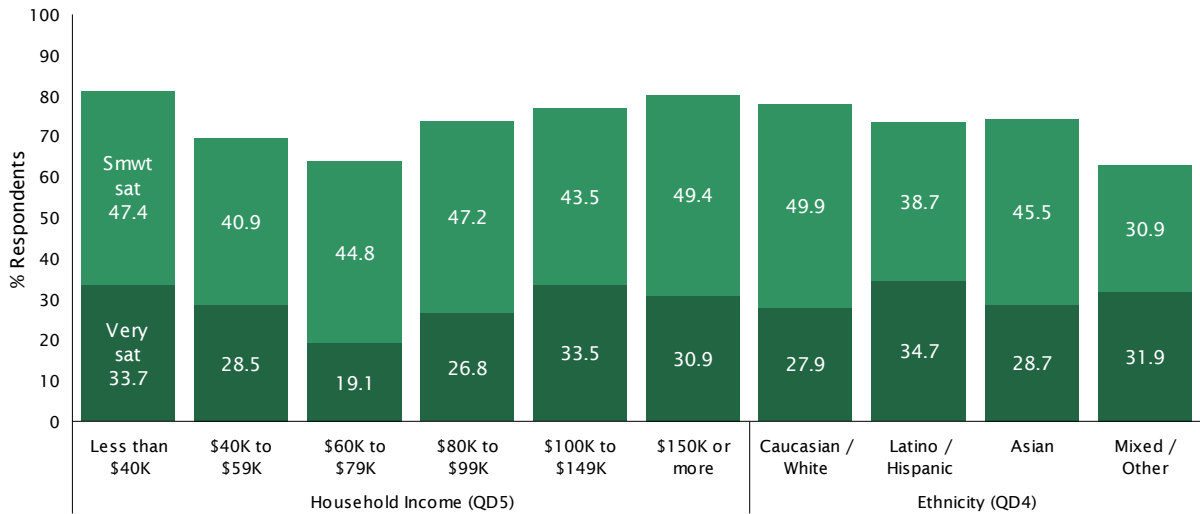


FIGURE 67 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY HOUSEHOLD INCOME & ETHNICITY



Among local businesses, 84% of business managers surveyed in 2023 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, 9% said they were dissatisfied, and 8% were unsure (see Figure 68). Satisfaction with the City's communication efforts among business managers in 2023 was statistically consistent with 2021. For the interested reader, figures 69 and 70 on the next page show how satisfaction varied across several business subgroups.

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 68 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY STUDY YEAR

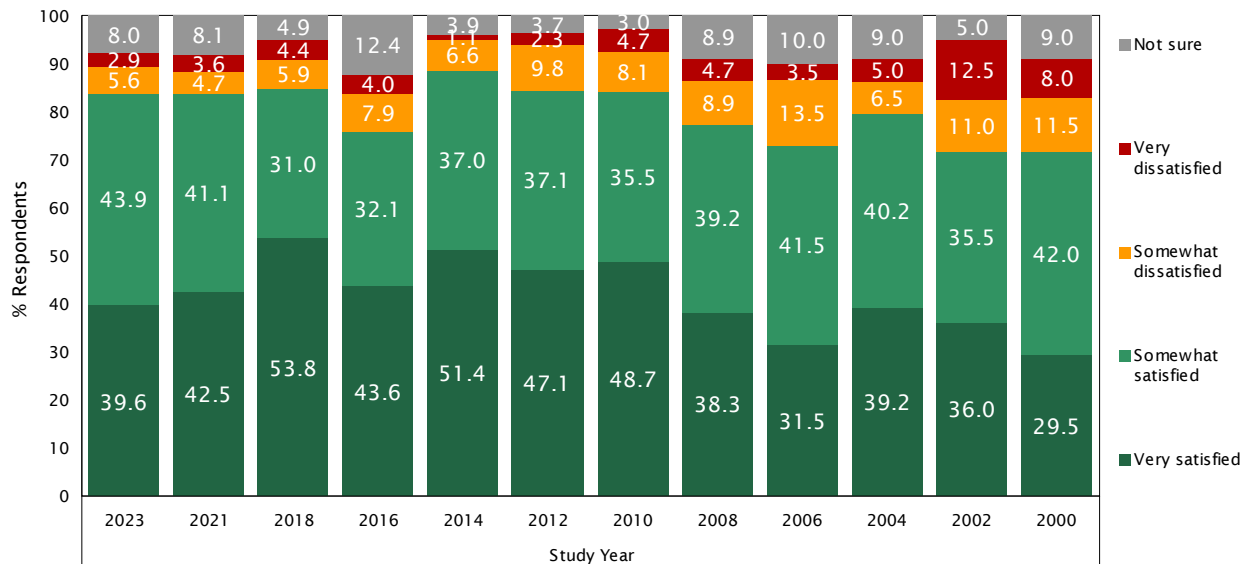


FIGURE 69 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, BUSINESS SIZE IN NEXT 12 MONTHS & LAKE FOREST RESIDENT

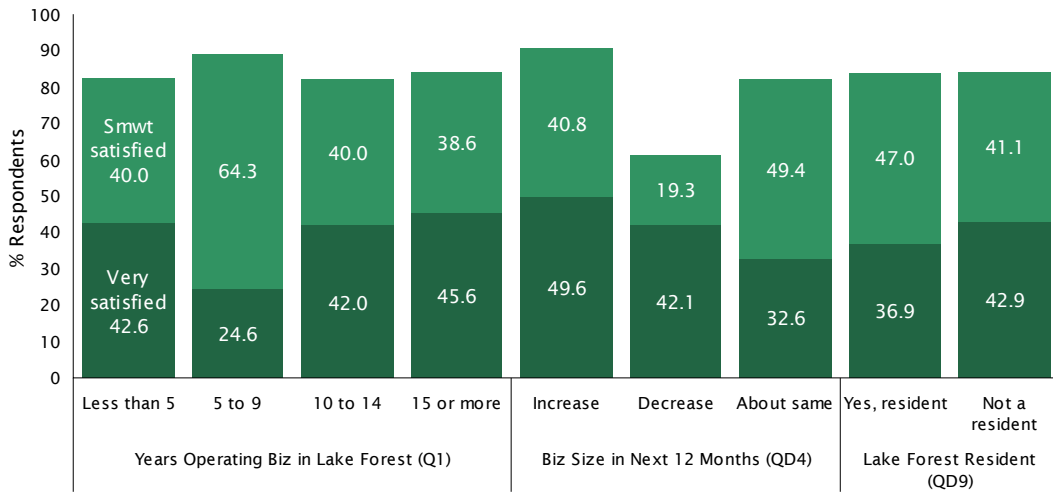
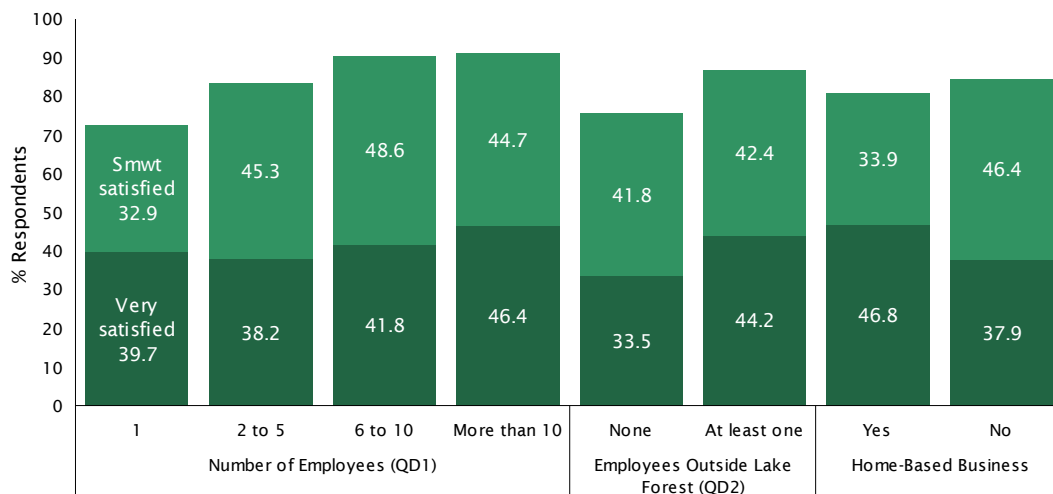


FIGURE 70 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST & HOME-BASED BUSINESS



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. Many 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.*

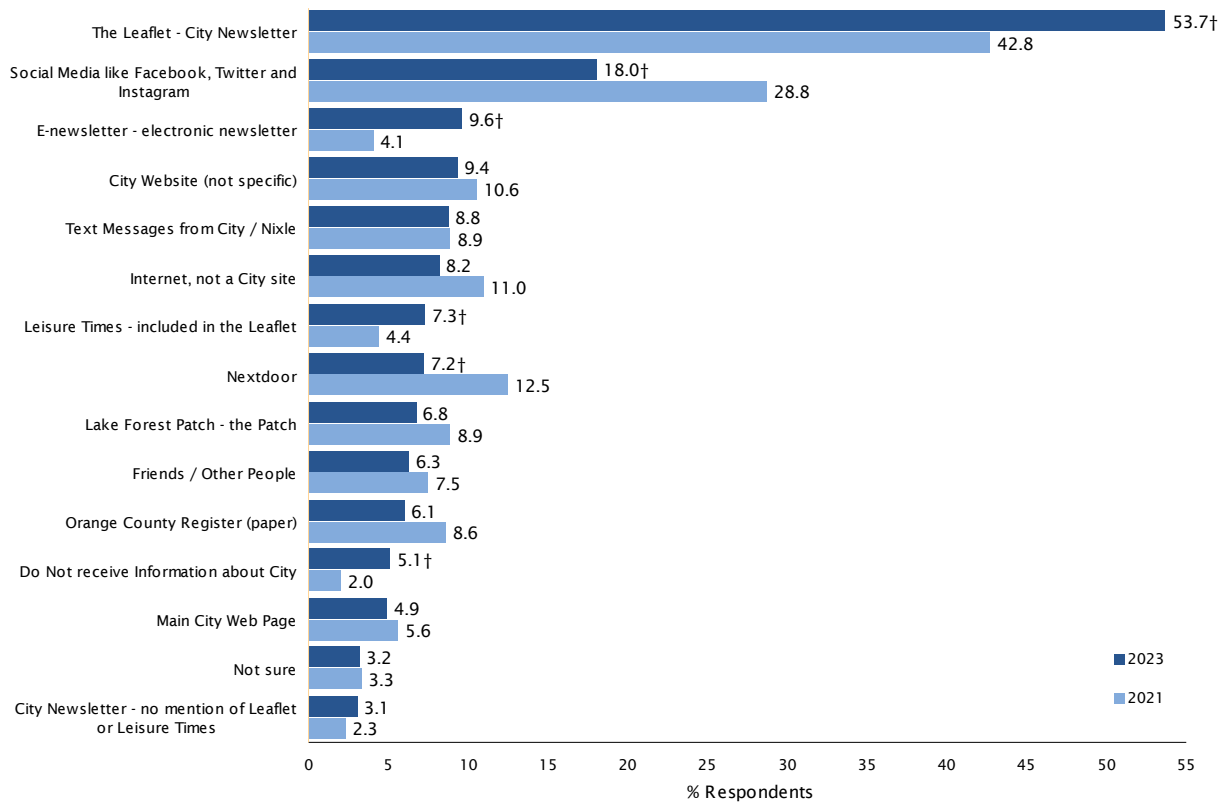
- Every time I try to sell my product my services it was always something.
- Feel it is not so impactful.
- I don't get any communication from the city like a newsletter.
- I don't receive any newsletters or emails.

- I don't think that I see that much coming from the city in regard to business resources.
- I have never been communicated with, so no one or anyone has ever reached out to me.
- I haven't gotten many notifications or communications from them.
- It is hard to deal with or navigate the Lake Forest website.
- There are two things. It is the government website. There are no resources. This applies for a business permit. The second one is COVID. You can't find anything in the government website, and it doesn't provide any resources.
- They are not helping on social media.
- Unfamiliar with some services listed in this survey.
- Way too much incessant emails!

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.

Question 24: Resident Survey *What information sources do you use to find out about City of Lake Forest news, information, and programming?*

FIGURE 71 SPECIFIC INFORMATION SOURCES: RESIDENT SURVEY BY STUDY YEAR

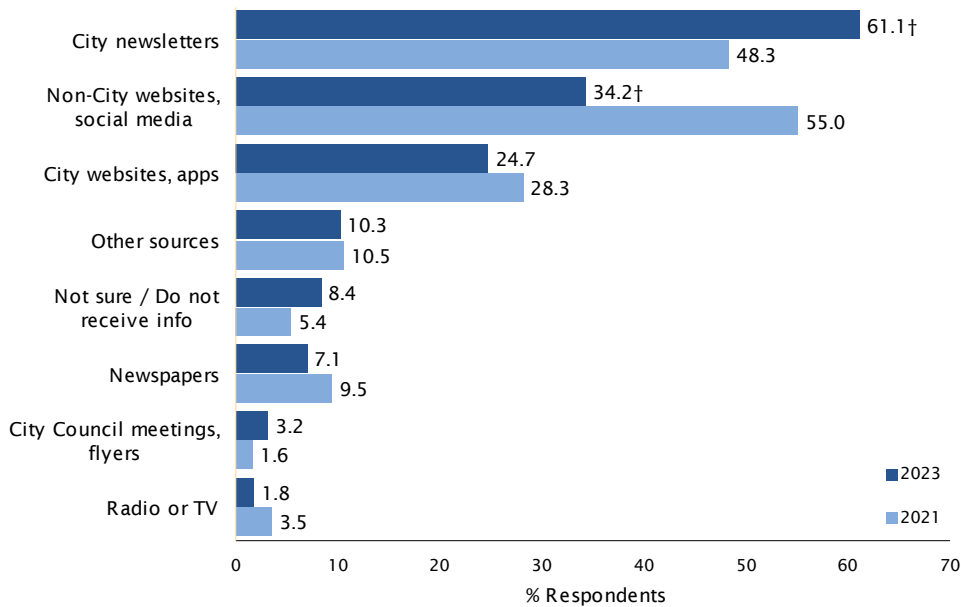


† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

As presented in Figure 71 on the prior page, the single most frequently cited source of city information among residents in 2023 was *The Leaflet* (54%), distantly followed by social media (18%), electronic newsletters (10%), one of the City’s websites (general mention, 9%), text messages from the City (9%), and the Internet in general (not a city site, 8%). From 2021 to 2023, there were statistically significant increases in *The Leaflet* (+11%), electronic newsletters (+6%), *Leisure Times* (+3%), and the percentage who reported not receiving information about the City of Lake Forest (+3%). At the same time, there were statistically significant decreases in the percentage of respondents who mentioned social media (-11%) and Nextdoor (-5%) as information sources for Lake Forest news, information, and programming.

To summarize the wide variety of information sources mentioned and more easily compare the results between years and demographic subgroups, Figure 72 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, 61% of residents surveyed in 2023 mentioned at least one of Lake Forest’s newsletters as a source of city information, 34% mentioned a non-city website or social media, and 25% cited one of the City’s websites or apps. Compared with 2021, statistically significant changes in use were apparent for city newsletters (up 13%) and non-city websites or social media (down 21%).

FIGURE 72 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

Figures 73 through 75 on the following pages present the information source categories by age, home ownership status, presence of a child in the home, satisfaction with the City’s communication efforts, and ethnicity. 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, those currently satisfied with the City’s communication efforts, and respondents identifying as either Caucasian or Latino/Hispanic were more likely to rely on city newsletters when compared with their respective counterparts.

FIGURE 73 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY AGE

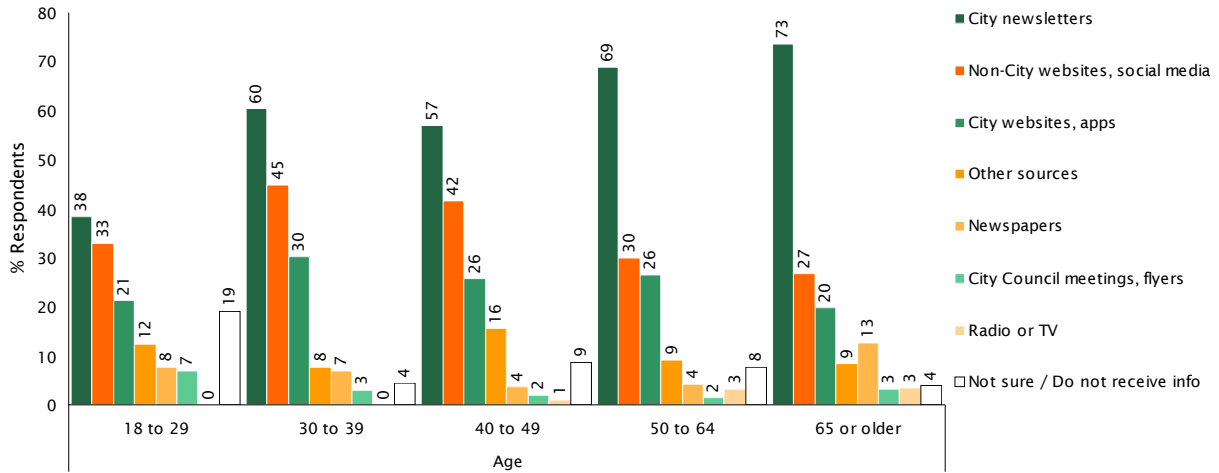


FIGURE 74 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY HOME OWNER, CHILD IN HOME & SATISFACTION WITH COMMUNICATION

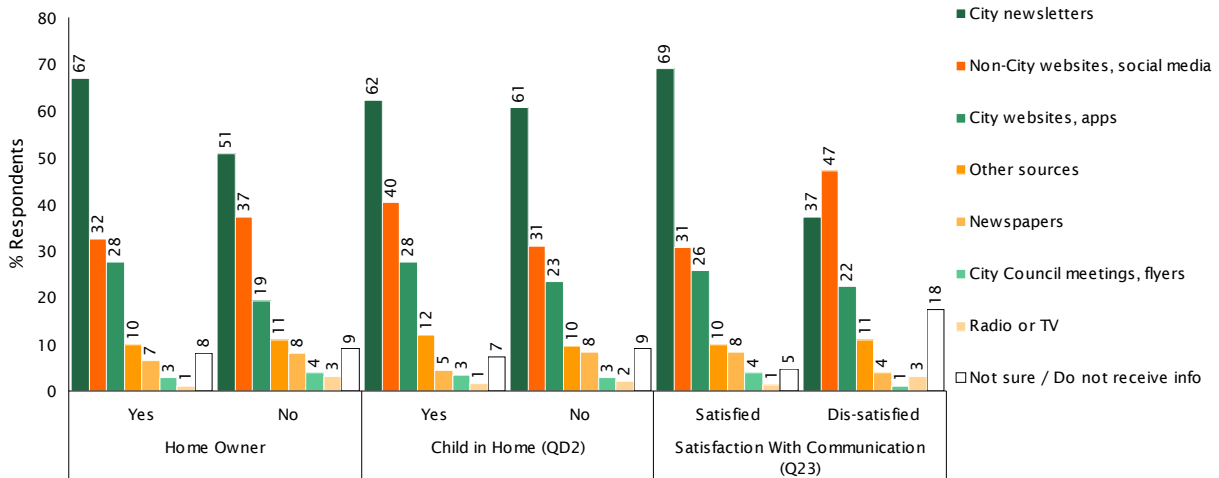
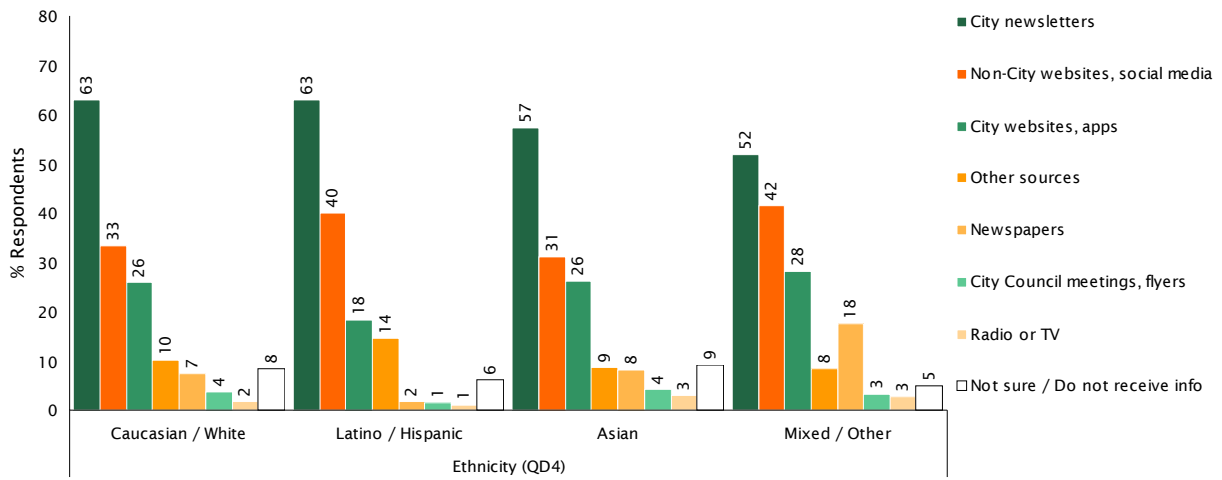


FIGURE 75 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY ETHNICITY

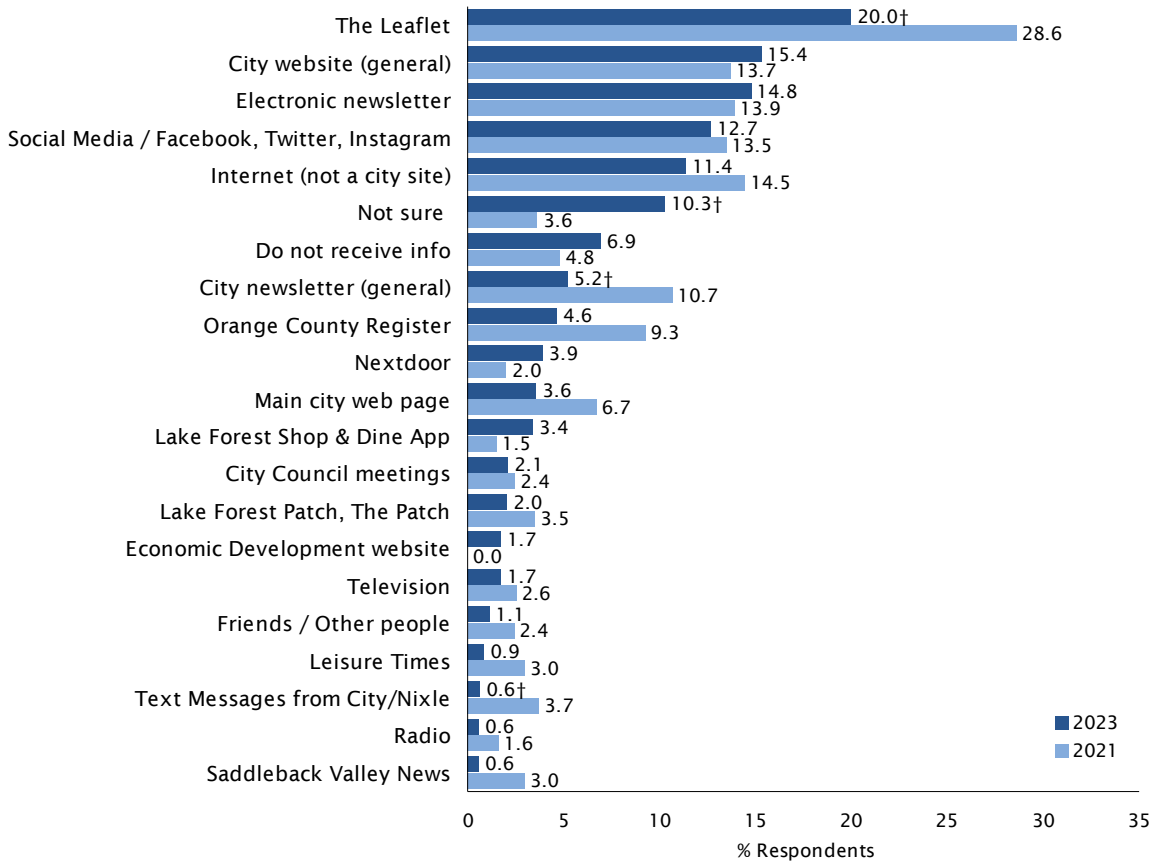


As shown in Figure 76 on the next page, when asked what information sources they rely on for Lake Forest news, information, and programming, members of the business community were most likely to mention *The Leaflet* (20%), the City’s website in general (15%), electronic newsletters (15%), social media sites (13%), and the Internet in general (11%). Statistically significant changes from the 2021 study included declines in mentions of *The Leaflet* (-9%), general references to the City’s newsletter (-6%), and text messages from the City/Nixle (-3%), as well as an increase in responses of not sure (+7%).

In the same manner described for the resident survey, Figure 77 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, 36% of businesses surveyed in 2023 mentioned at least one of Lake Forest’s newsletters as a source of information, significantly lower than the finding from 2021 (-14%). Twenty-seven percent (27%) of business managers mentioned a non-city website or social media, and 25% cited one of the City’s websites or apps. There was also a statistically significant increase in the percentage of respondents who were unsure of their information sources or who indicated that they do not receive information about Lake Forest from 2021 to 2023 (+9%) and a decline in the percentage who mentioned newspapers, radio, and television as sources (-10%).

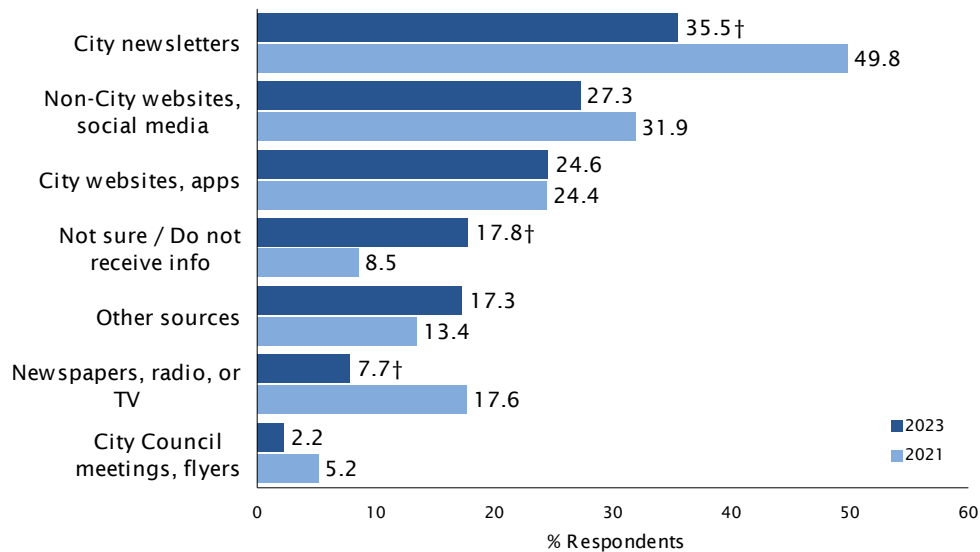
Question 15: Business Survey *What information sources do you use to find out about City of Lake Forest news, information, and programming?*

FIGURE 76 INFORMATION SOURCES: BUSINESS SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

FIGURE 77 INFORMATION SOURCE CATEGORIES: BUSINESS SURVEY BY STUDY YEAR

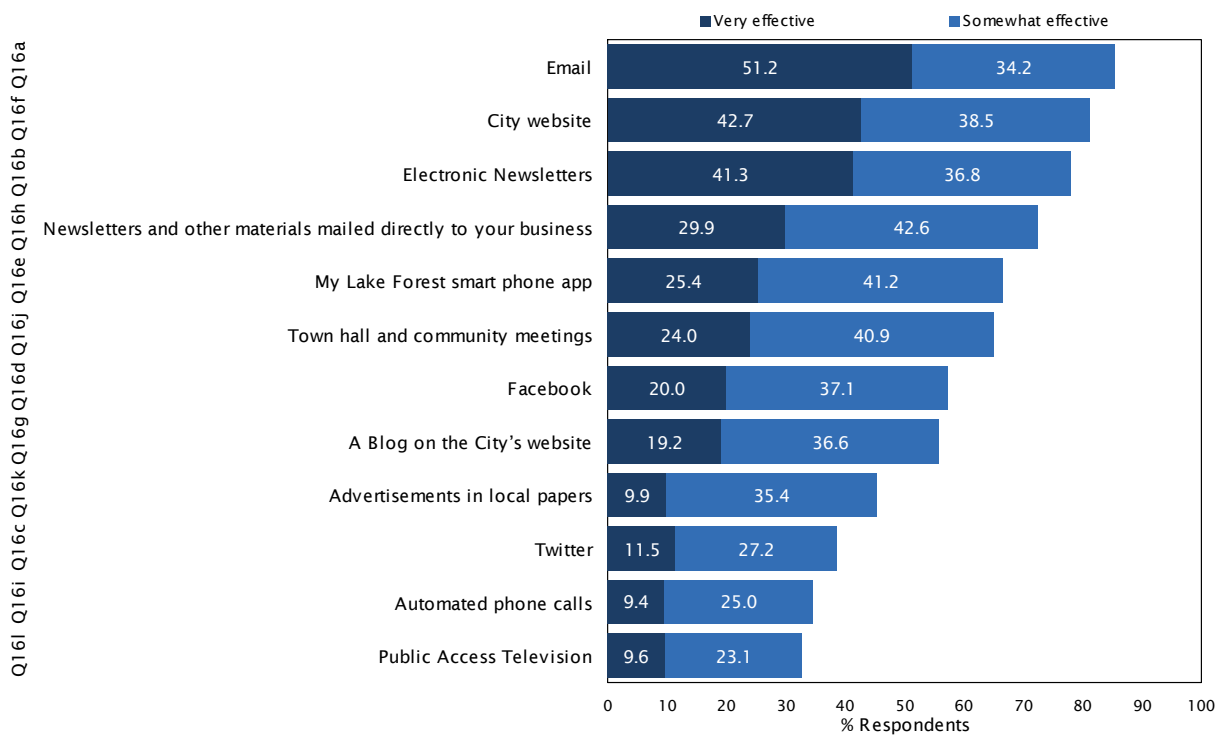


† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS The next communication-related question presented local businesses with each of the methods shown on the left of Figure 78 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 email (85% very or somewhat effective), followed by the City’s website (81%), electronic newsletters (78%), and newsletters and direct mail to their office (73%). Comparatively, Public Access Television (33%), automated phone calls (34%), and Twitter (39%) 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 78 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS: BUSINESS SURVEY



For the interested reader, Table 23 on the next page 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.

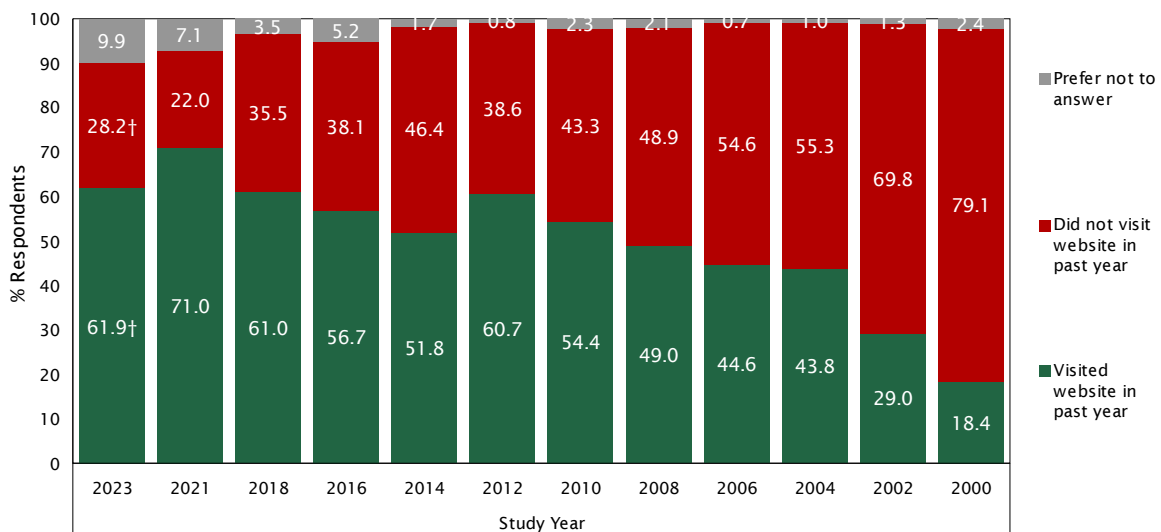
TABLE 23 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS: BUSINESS SURVEY BY HOME-BASED BUSINESS, SATISFACTION WITH COMMUNICATION & BUSINESS SIZE IN NEXT 12 MONTHS (SHOWING % VERY EFFECTIVE)

	Home-Based Business		Satisfaction With Communication (Q13)		Biz Size in Next 12 Months (QD4)		
	Yes	No	Satisfied	Dissatisfied	Increase	Decrease	About same
Email	53.2	50.7	53.3	68.4	55.4	57.9	50.5
City website	41.9	42.9	45.1	38.4	44.9	55.0	41.8
Electronic Newsletters	32.3	43.6	46.0	30.8	44.4	45.0	41.2
Newsletters and other materials mailed directly to your business	35.5	28.6	31.6	41.4	31.9	25.7	30.2
My Lake Forest smart phone app	24.2	25.7	26.2	37.6	34.6	19.3	20.5
Town hall and community meetings	25.8	23.6	25.2	27.8	31.8	12.9	20.7
Facebook	25.8	18.6	18.7	51.9	27.7	19.3	14.8
A Blog on the City's website	30.6	16.4	20.9	21.1	21.9	29.3	15.6
Twitter	14.5	10.7	12.4	13.5	11.6	25.7	9.8
Advertisements in local papers	9.7	10.0	10.8	10.5	13.6	6.4	8.4
Public Access Television	8.1	10.0	11.1	3.8	12.8	6.4	7.2
Automated phone calls	12.9	8.6	9.8	14.3	15.2	0.0	6.5

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 79 shows that the percentage of residents who visited one of the City’s websites has grown substantially since the 18% recorded in 2000, with 62% indicating they visited one or more of the City’s websites in 2023. Although there was a statistically significant decline in visits to city websites from 2021 to 2023 (-9%), the percentage recorded in 2023 is consistent with 2018. The higher than average use recorded in 2021 is likely attributed to city closures that forced many operations to an online format during the coronavirus pandemic. Figures 80 to 82 show how use of the City’s websites in the past year varied by key resident subgroups.

Question 25: Resident Survey *In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?*

FIGURE 79 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY STUDY YEAR



† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

FIGURE 80 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & EMPLOYMENT STATUS

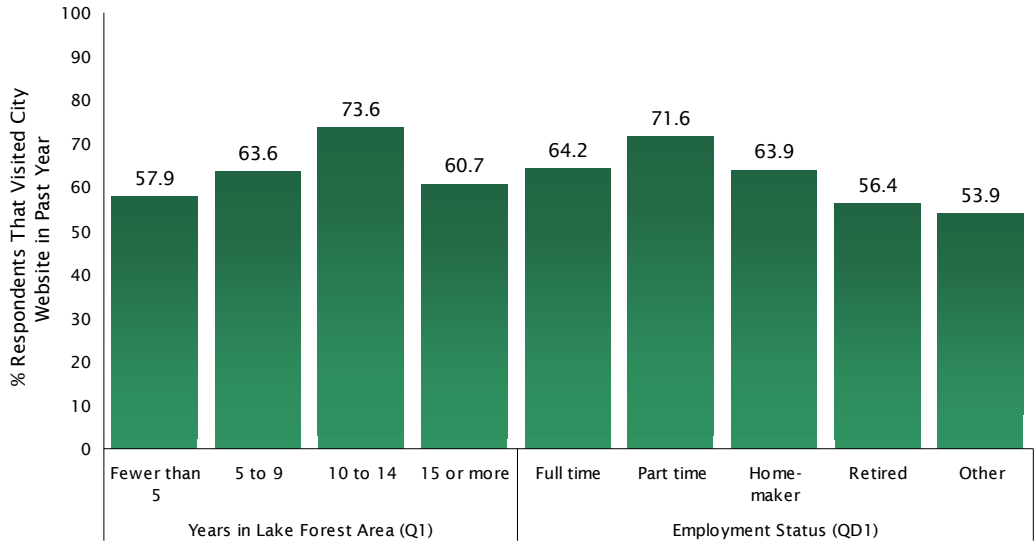


FIGURE 81 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY AGE & AREA OF CITY

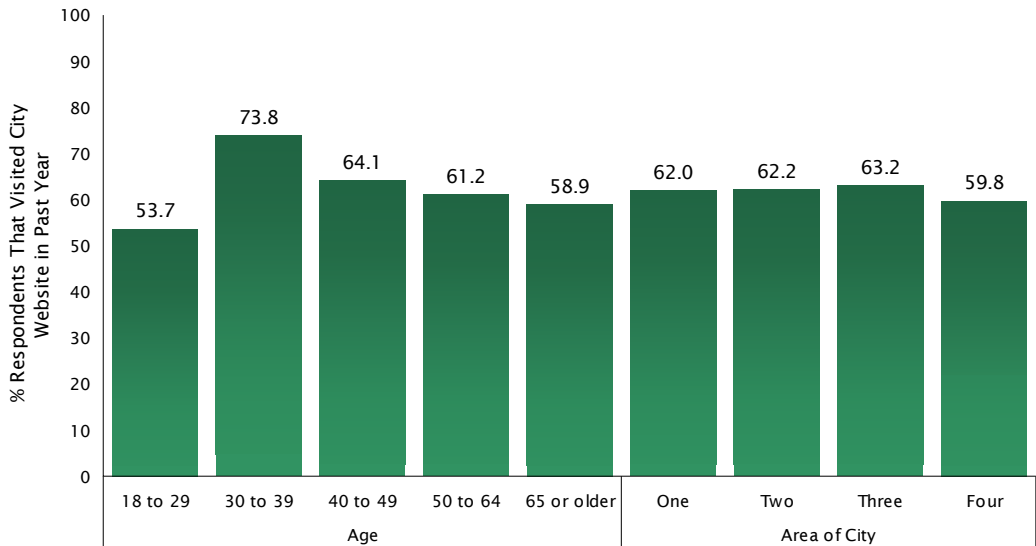
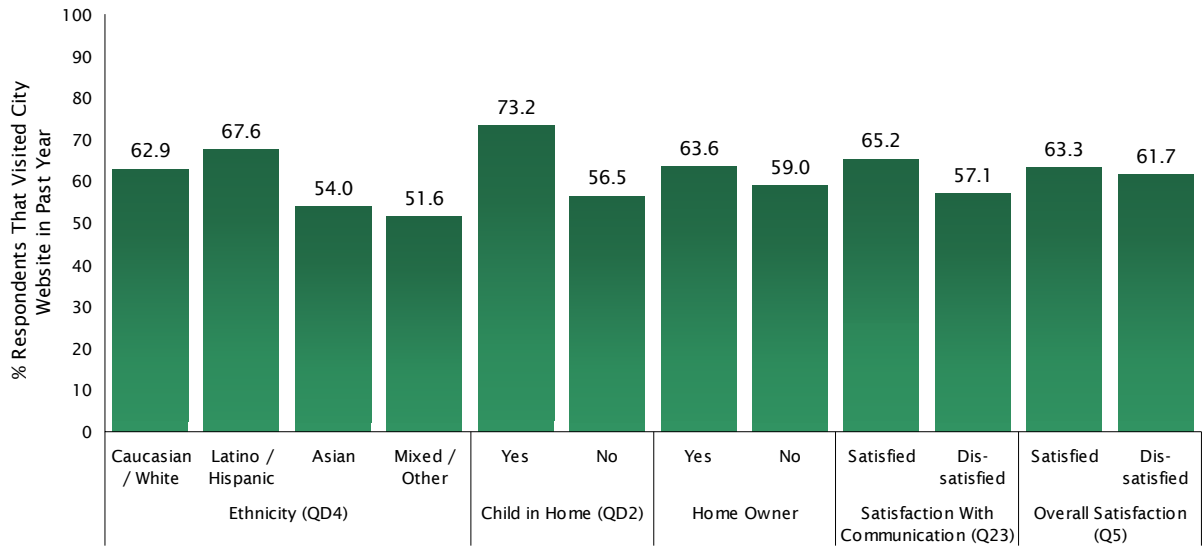


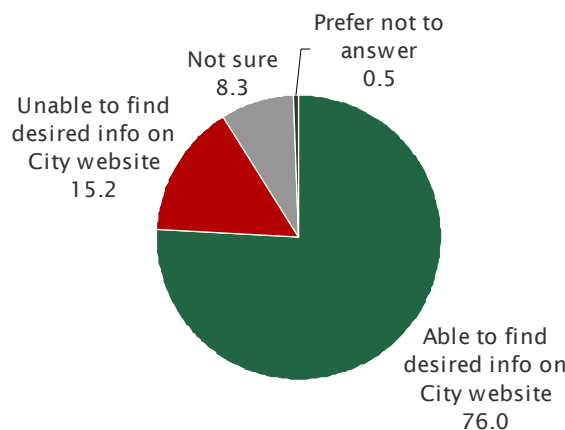
FIGURE 82 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY ETHNICITY, CHILD IN HOME, SATISFACTION WITH COMMUNICATION & OVERALL SATISFACTION



WEBSITE CONTENT New to the 2023 resident survey, respondents who had visited a city website in the past year were asked whether they were able to find the information they were looking for on the site. Just over three-quarters (76%) of website users answered Question 26 in the affirmative, whereas 15% indicated that they were unable to find the desired information on a city website and 9% were unsure or declined to state (Figure 83).

Question 26: Resident Survey *Were you able to find the information you were looking for on the City's website?*

FIGURE 83 ABLE TO FIND INFORMATION ON CITY'S WEBSITE

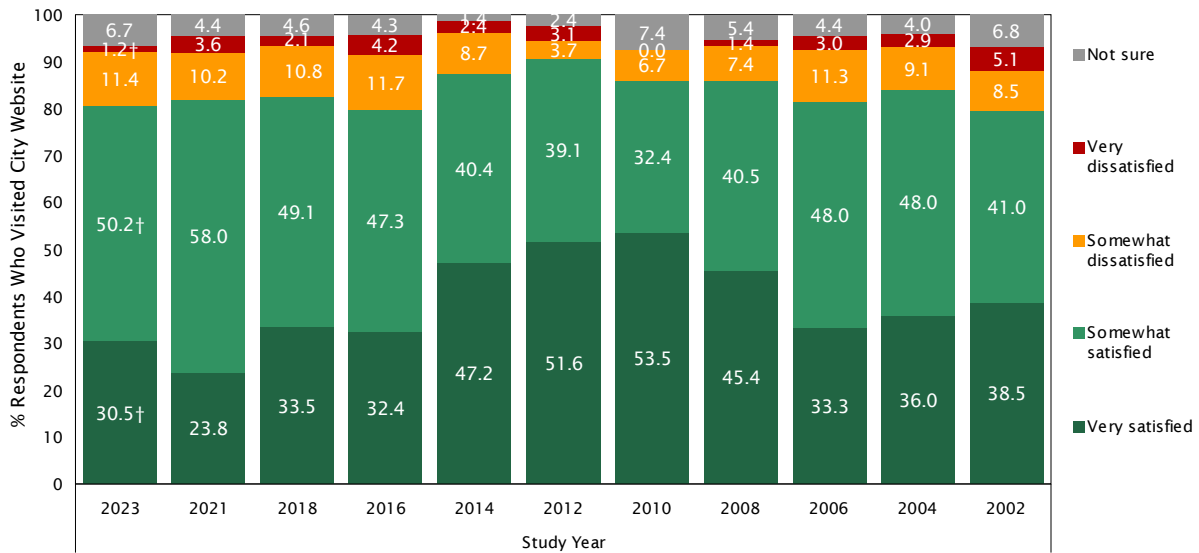


Visitors to the City's websites were next asked to rate their level of satisfaction with the resources and content available on the sites—the results of which are shown in Figure 84 on the next page. Overall, visitors expressed high levels of satisfaction with the City's websites, with 81% of residents indicating they were satisfied with the resources available on the sites.

Although the overall level of satisfaction remained virtually identical from 2021 to 2023, respondents reported a stronger degree of satisfaction in 2023, with a higher percentage of respondents reporting being very satisfied than in 2021 (similar to the levels reported in 2016 and 2018).

Question 27: Resident Survey *Are you satisfied or dissatisfied with the resources and content available on the City's web sites?*

FIGURE 84 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY BY STUDY YEAR

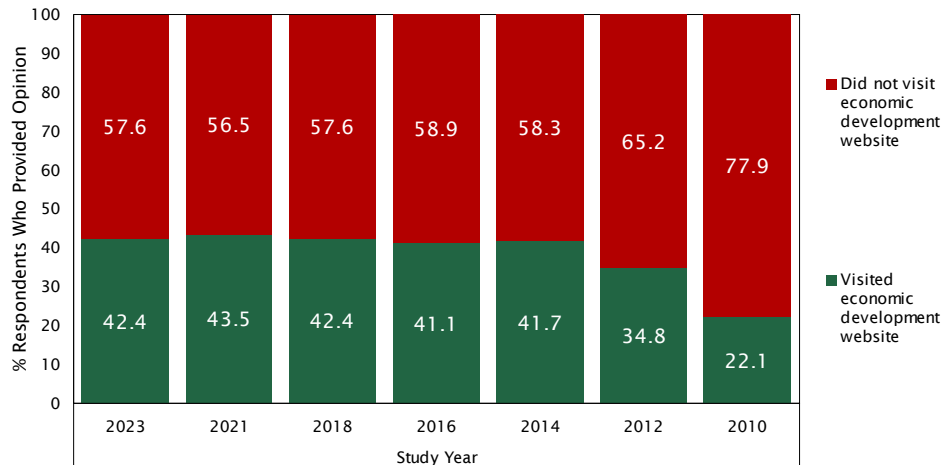


† Statistically significant difference ($p < 0.05$) between the 2021 and 2023 studies.

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.

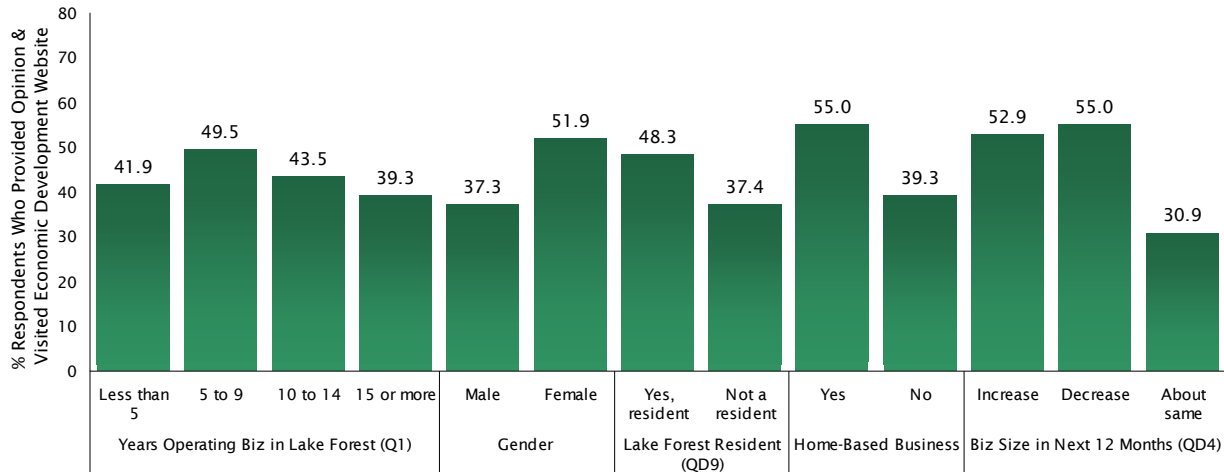
Question 17: Business Survey *Have you ever visited the City's economic development website at www.lakeforestbusiness.com?*

FIGURE 85 VISITED ECONOMIC DEVELOPMENT WEBSITE: BUSINESS SURVEY BY STUDY YEAR



As shown in Figure 85 on the previous page, 42% of local businesses in 2023 indicated that they had visited the site, which is comparable to the values recorded since 2016. Figure 86 presents the findings of this question by select business subgroups.

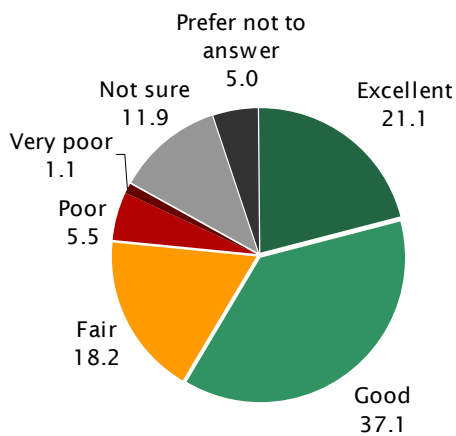
FIGURE 86 VISITED ECONOMIC DEVELOPMENT WEBSITE: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, GENDER, LAKE FOREST RESIDENT, HOME-BASED BUSINESS & BUSINESS SIZE IN NEXT 12 MONTHS



INCENTIVES TO SHOP LOCAL New to the 2023 study, participants in the business survey were next asked whether they thought the City of Lake Forest does an excellent, good, fair, poor, or very poor job of incentivizing residents to shop locally.

Question 18: Business Survey *Would you say the City of Lake Forest does an excellent, good, fair, poor, or very poor job of incentivizing residents to shop locally?*

FIGURE 87 OPINION OF CITY’S JOB INCENTIVIZING RESIDENTS TO SHOP LOCALLY: BUSINESS SURVEY



Close to six-in-ten business managers surveyed indicated that the City does an excellent (21%) or good (37%) job incentivizing residents to shop locally. Eighteen percent (18%) rated the City’s efforts in this area as fair, 7% said poor or very poor, and 17% were unsure or declined to provide a rating (Figure 87).

Compared with their counterparts, businesses with more than ten employees, those operating in the City between 10 and 14 years, and business managers who were satisfied with the City’s overall performance were much more likely (among those who provided an opinion) to rate the City as excellent or good in incentivizing residents to shop locally (figures 88-89 on next page).

FIGURE 88 OPINION OF CITY’S JOB INCENTIVIZING RESIDENTS TO SHOP LOCALLY: BUSINESS SURVEY BY YEARS OPERATING BIZ IN LAKE FOREST, BUSINESS SIZE IN NEXT 12 MONTHS & LAKE FOREST RESIDENT

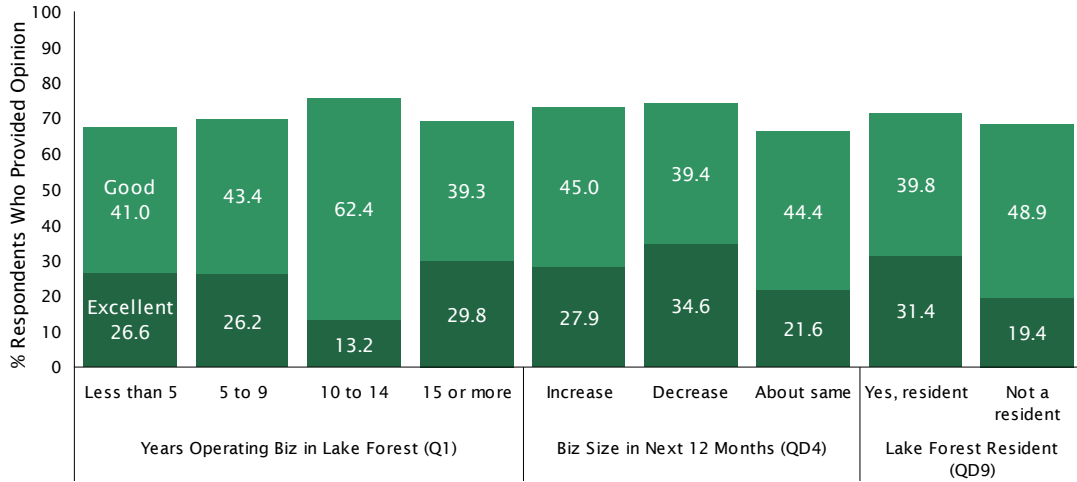
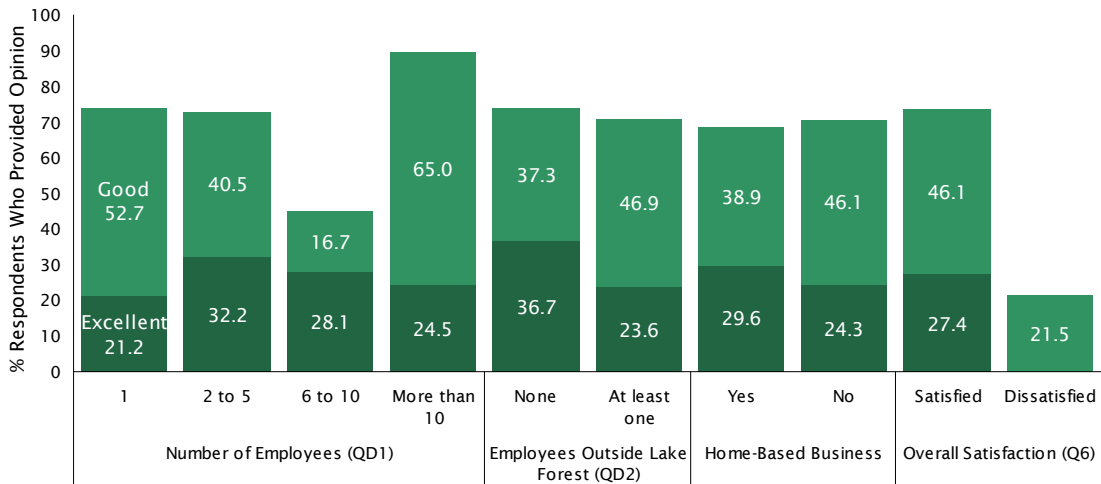


FIGURE 89 OPINION OF CITY’S JOB INCENTIVIZING RESIDENTS TO SHOP LOCALLY: BUSINESS SURVEY NUMBER OF EMPLOYEES, EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST, HOME-BASED BUSINESS & OVERALL SATISFACTION



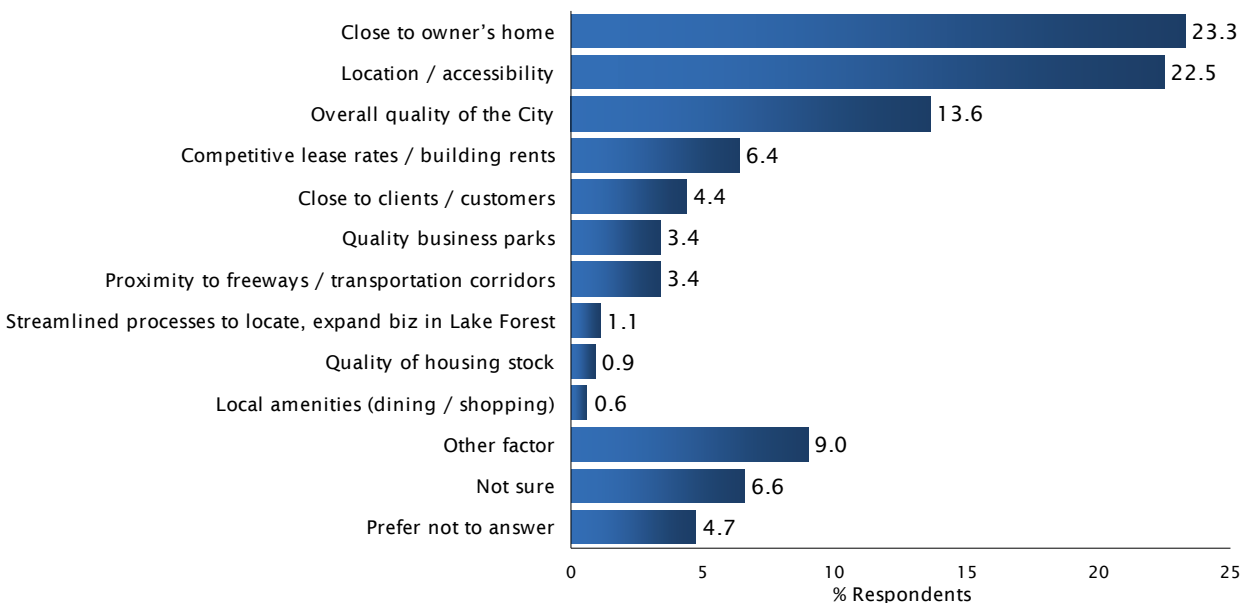
BUSINESS BACKGROUND INFO

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, 23% indicated that it was close to the owner’s home, and an additional 23% mentioned the location/accessibility of Lake Forest. The overall quality of the City (14%) and competitive lease rates/rents (6%) 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?*

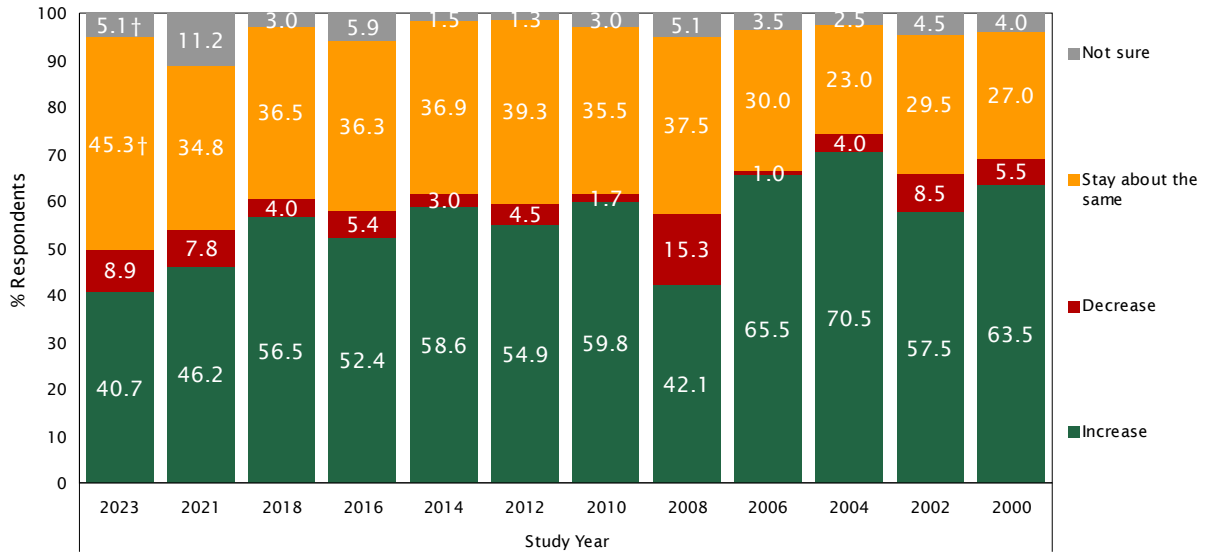
FIGURE 90 PRIMARY REASON FOR LOCATING BUSINESS IN LAKE FOREST: BUSINESS SURVEY



GROWTH The next question in this series asked local businesses whether—in the next 12 months—they anticipate that their business will increase, decrease, or stay about the same. The results to this question for 2023 and prior studies are shown in Figure 91 on the next page. Local businesses were generally optimistic about the future, with 41% anticipating growth and 45% expecting that their business will remain about the same. Another 9% indicated that they expect their business to decrease in the coming year and 5% were unsure. Compared with 2021, business managers were more likely to indicate stability, with a statistically significant increase in the percentage who felt business would stay the same (+11%) and a decrease in the percentage who were unsure (-6%).

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

FIGURE 91 BUSINESS SIZE IN NEXT 12 MONTHS: BUSINESS SURVEY BY STUDY YEAR

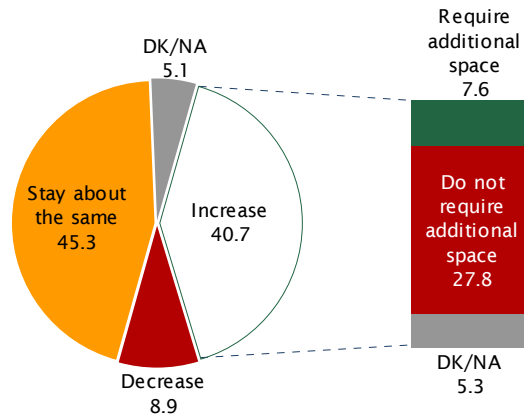


† Statistically significant difference (p < 0.05) between the 2021 and 2023 studies.

Partitioning the 41% of all businesses that anticipated growth (see Figure 92), 8% indicated that they would require additional space, whereas the remaining 33% did not anticipate needing additional space (28%) or were unsure (5%).

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

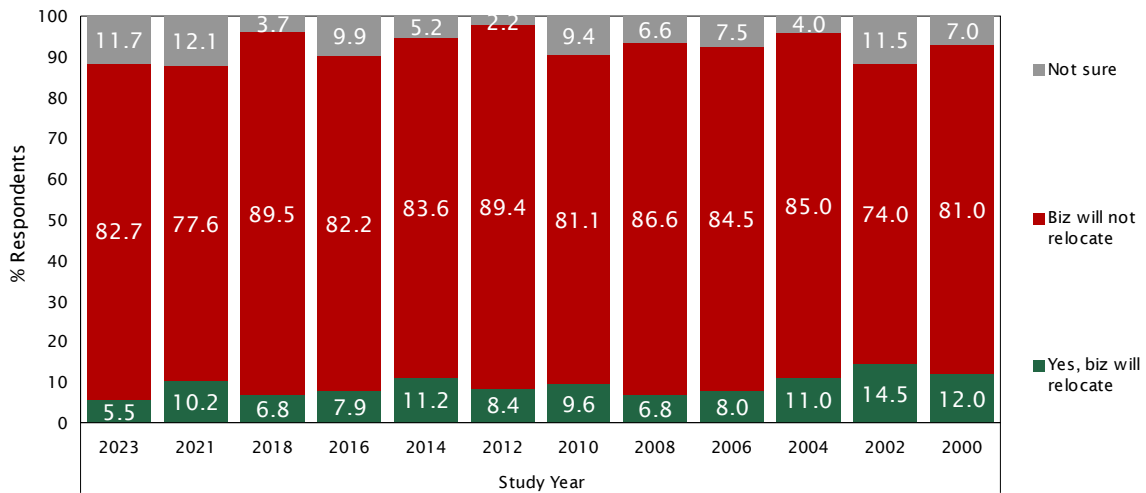
FIGURE 92 BUSINESS SIZE AND SQUARE FOOTAGE REQUIREMENTS IN NEXT 12 MONTHS: BUSINESS SURVEY



RELOCATION The final substantive questions in the business survey asked respondents whether they anticipate relocating their business in the next year and, if yes, whether they are planning to relocate within Lake Forest or to another community. Figure 93 shows that the percentage of businesses that anticipate relocating was 6% in the 2023 survey (statistically consistent with 2021). The 6% of businesses that anticipated relocating in the next year breaks down to 2% expecting to relocate within Lake Forest, 2% to another community, and 2% unsure (see Figure 94).

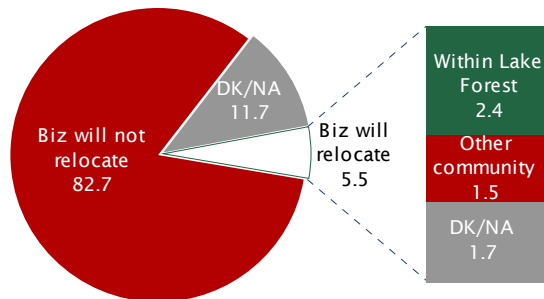
Question D6: Business Survey *In the next 12 months, do you think your business will relocate?*

FIGURE 93 BUSINESS RELOCATION IN NEXT 12 MONTHS: BUSINESS SURVEY BY STUDY YEAR



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

FIGURE 94 BUSINESS RELOCATION AND AREA IN NEXT 12 MONTHS: BUSINESS SURVEY



BACKGROUND & DEMOGRAPHIC INFO

Table 24 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 24 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY BY STUDY YEAR

Study Year	2023	2021	2018	2016	2014	2012	2010	2008	2006	2004	2002
Total Respondents	885	612	478	704	400	400	400	400	400	400	400
QD1 Employment status											
Employed full-time	62.1	54.5	57.8	50.8	49.7	56.5	51.2	54.6	58.5	N/A	N/A
Employed part-time	6.1	9.4	7.5	11.1	9.4	10.6	9.1	13.7	11.0	N/A	N/A
Student	3.4	3.4	5.9	5.1	4.0	5.5	3.6	2.6	3.7	N/A	N/A
Homemaker	2.6	5.0	5.2	4.6	9.0	3.2	5.0	8.4	7.9	N/A	N/A
Retired	21.2	19.4	18.8	23.4	20.0	18.1	19.2	13.6	16.0	N/A	N/A
In-between jobs	1.2	4.9	2.2	2.5	4.3	4.7	9.0	6.0	1.9	N/A	N/A
Prefer not to answer	3.2	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	32.1	34.1	36.4	37.7	36.0	38.7	43.9	41.3	43.4	44.5	44.8
No	66.1	62.6	61.6	61.0	60.3	59.8	54.0	58.5	56.4	55.0	54.3
Prefer not to answer	1.8	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	76.9	72.9	73.9	70.4	68.8	73.8	75.6	74.8	73.3	72.8	73.3
No	21.3	23.8	24.7	28.0	26.9	24.5	22.2	24.4	25.6	26.0	25.3
Prefer not to answer	1.8	3.4	1.4	1.6	4.3	1.7	2.2	0.8	1.1	1.3	1.5
Ethnicity (QD4)											
Caucasian / White	54.1	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Latino / Hispanic	18.0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Asian	16.2	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Mixed / Other	6.9	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Prefer not to answer	4.9	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
QD5 Household income											
Under \$40K	5.3	6.5	7.9	8.8	9.6	10.7	10.6	8.1	7.0	9.5	11.5
\$40K to \$59K	8.6	11.9	10.1	10.7	12.0	13.7	11.8	10.1	10.3	14.8	15.3
\$60K to \$79K	9.2	9.6	13.4	11.4	10.2	10.1	13.4	13.9	16.8	21.0	12.8
\$80K to \$99K	13.0	10.8	16.1	11.8	11.9	12.7	15.8	15.9	10.7	13.3	17.0
\$100K or more	54.0	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	10.0	12.0	10.8	14.0	20.8	12.9	12.5	15.4	12.9	10.3	14.3
QD8 Gender											
Male	48.9	48.4	51.6	46.8	46.1	47.7	47.7	47.7	47.5	49.8	49.3
Female	45.7	47.5	46.5	52.0	53.9	52.3	52.3	52.3	52.5	50.3	50.8
Prefer not to answer	5.4	4.2	1.9	1.2	N/A	N/A	N/A	N/A	N/A	N/A	N/A
S1 Party											
Democrat	37.2	33.1	30.5	32.4	30.3	28.0	26.7	26.9	25.5	28.3	26.5
Republican	35.1	37.8	37.1	41.9	38.8	44.8	49.6	50.2	52.5	50.3	54.8
Other	5.3	6.5	6.0	4.8	3.9	3.5	4.9	4.4	5.1	4.3	4.8
DTS	22.4	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	18.3	17.6	16.3	16.3	14.8	15.3	11.1	13.4	13.4	14.5	14.8
30 to 39	17.0	16.8	15.9	13.7	13.9	15.2	15.3	17.2	16.9	20.8	22.8
40 to 49	15.9	15.6	15.8	15.5	19.6	21.1	23.9	25.9	26.9	28.8	26.5
50 to 64	26.9	28.0	31.3	31.3	32.5	31.5	32.2	28.6	29.9	23.8	23.5
65 and older	21.9	22.0	20.7	23.2	19.1	16.9	17.5	14.9	13.0	12.3	12.3
S6 Home Owner											
Yes	64.5	63.8	65.1	68.4	70.3	69.5	79.9	72.0	75.3	66.5	N/A
No	35.5	36.2	34.9	31.6	29.7	30.5	20.1	28.0	24.7	33.5	N/A

Table 25 provides information that was collected from local businesses during the 2023 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 25 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY BY STUDY YEAR

Study Year	2023	2021	2018	2016	2014	2012	2010	2008	2006	2004	2002	2000
Total Respondents	202	200	200	200	200	200	200	200	200	200	200	200
Number of employees (QD1)												
1	22.5	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	32.0	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	18.0	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	19.2	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	8.3	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 who live outside Lake Forest (QD2)												
None	26.6	26.6	21.1	24.3	28.6	15.1	27.2	N/A	N/A	N/A	N/A	N/A
1	9.9	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	31.0	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	9.8	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	14.1	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	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	46.5	43.3	49.8	53.3	44.7	34.2	47.2	34.5	30.5	23.5	42.5	N/A
No	52.3	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	1.2	1.9	0.5	0.0	1.2	0.0	0.0	2.0	1.0	0.0	2.5	N/A
Gender (S1)												
Male	61.0	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	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	5.0	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 (S2)												
Yes	19.8	25.8	26.0	28.4	29.0	15.0	27.3	15.0	12.5	12.5	13.0	N/A
No	80.2	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 85) 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, 202 business owners or managers completed the interview, representing a total of approximately 5,150 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 62 interviews were collected among home-based businesses, with the remaining 140 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 (email, text, and phone) 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 and text 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 3 and January 12, 2023, a total of 885 residents completed the survey.

In a manner similar to that described above, the business survey also employed multiple recruiting (email, text, and phone) and data collection methods (phone and online). The 18-minute survey of businesses was administered to a stratified random sample of 202 local business owners and managers between January 13 and February 14, 2023.

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 885 voters for a particular question and what would have been found if all 53,053 voters in Lake Forest had been surveyed.

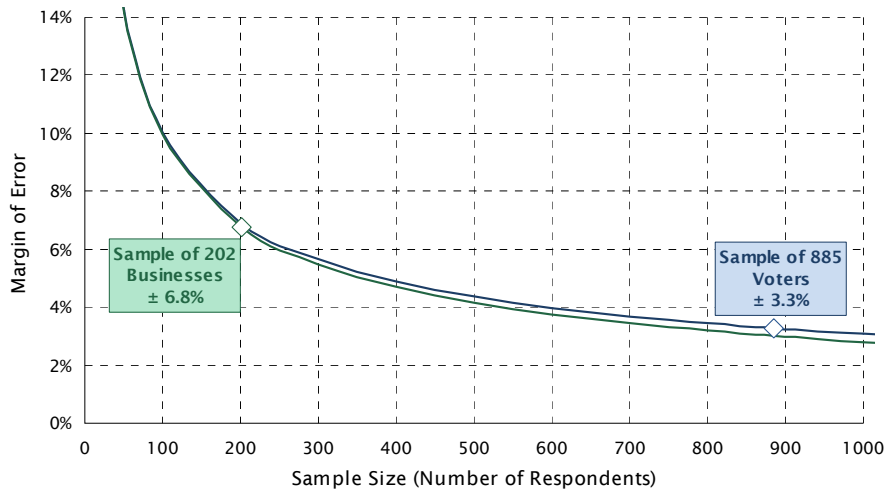
For example, in estimating the percentage of registered voters who have visited one or more of the City of Lake Forest’s websites in the past year (Question 25 of the resident survey), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence 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 (0.62 for 62% in this example), N is the population size of all registered voters (53,053), n is the sample size that received the question (885), 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 $\pm 3.2\%$. This means that with 62% 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 59% and 65%.

Figure 95 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 885 registered voters is $\pm 3.3\%$, and the maximum margin of error for questions answered by all 202 business managers is $\pm 6.8\%$.

FIGURE 95 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 95 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 2021 and 2023 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 tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question. Due to rounding, some figures and narrative include numbers that add to more than or less than 100%.

QUESTIONNAIRES & TOPLINES

RESIDENT SURVEY



City of Lake Forest
Voter Survey
Final Toplines (n=885)
January 2023

Section 1: Introduction to Study

Hello, may I please speak to _____. Hi, my name is _____ and I'm calling from TNR on behalf of the City of Lake Forest. The City is conducting a survey of residents about important 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: Your answers will be confidential. The City will be provided with a summary of all survey responses, not individual responses.

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?

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	22%
2	5 years to less than 10 years	20%
3	10 years to less than 15 years	11%
4	15 or more years	47%
99	Not sure/Prefer not to answer	0%
Q2	How would you rate the overall quality of life in Lake Forest? Would you say it is excellent, good, fair, poor or very poor?	
1	Excellent	31%
2	Good	57%
3	Fair	10%
4	Poor	1%
5	Very poor	1%
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	39%	44%	11%	1%	1%	3%	1%
B	Lake Forest as a place to retire	19%	37%	22%	6%	3%	11%	1%
C	Lake Forest as a place to work	15%	40%	17%	5%	1%	19%	3%
D	Lake Forest as a place to shop and dine	15%	38%	34%	8%	4%	0%	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.						
	Attract new restaurants, stores						12%	
	Address homeless, poverty issues						12%	
	Not sure / Cannot think of anything						12%	
	Improve public safety						10%	
	Limit growth, development						10%	
	No changes needed / Everything is fine						8%	
	Reduce traffic congestion						6%	
	Clean up, improve appearance, rebuild deteriorating areas						5%	
	Improve parks, recreation						5%	
	Enforce traffic laws, safety						5%	
	Improve education, schools						4%	
	Provide more affordable housing						4%	
	City beautification, landscape						4%	
	Improve, repair infrastructure						3%	
	Provide more community-focused events						3%	
	Provide more entertainment, nightlife options						3%	
	Reduce cost of living						3%	
	More police officers, patrols						3%	
	Address parking issues						2%	
	Improve traffic light synchronization, timing						2%	
	Improve diversity efforts						2%	
	Develop more walkable shopping, dining areas						2%	
	Reduce noise, pollution						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	50%
	3	Somewhat dissatisfied	9%
	4	Very dissatisfied	2%
	98	Not sure	6%
	99	Prefer not to answer	0%

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	38%	32%	23%	5%	2%	1%
B	Investigating criminal activity	71%	22%	4%	1%	1%	1%
C	Providing child safety programs	45%	35%	11%	4%	4%	1%
D	Enforcing traffic laws	40%	34%	19%	5%	1%	1%
E	Maintaining a low crime rate	78%	16%	3%	1%	1%	1%
F	Preparing for emergencies	55%	34%	8%	0%	1%	1%
G	Providing crossing guards near schools	44%	33%	15%	5%	2%	1%
H	Providing animal control services	30%	32%	29%	6%	1%	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	17%	35%	12%	3%	32%	1%
B	Investigate criminal activity	25%	35%	11%	5%	24%	1%

C	Provide child safety programs	22%	32%	7%	3%	34%	2%
D	Enforce traffic laws	25%	44%	12%	6%	12%	1%
E	Maintain a low crime rate	33%	40%	11%	5%	9%	1%
F	Prepare for emergencies	30%	36%	8%	2%	24%	1%
G	Provide crossing guards near schools	46%	29%	3%	2%	19%	2%
H	Provide animal control services	23%	37%	7%	3%	28%	1%

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	27%	34%	20%	8%	10%	1%
B	Inspecting buildings	32%	35%	19%	5%	9%	1%
C	Enforcing zoning regulations	28%	31%	23%	7%	10%	1%
D	Enforcing sign regulations	24%	31%	25%	10%	9%	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%	27%	6%	3%	48%	2%
B	Inspect buildings	13%	27%	4%	1%	52%	2%
C	Enforce zoning regulations	11%	25%	7%	4%	51%	2%
D	Enforce sign regulations	11%	30%	7%	3%	48%	2%

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	10%
2	No	86%
98	Not sure	1%
99	Prefer not to answer	3%

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	37%	40%	18%	4%	0%	0%
B	Maintaining trees	48%	36%	15%	0%	0%	0%
C	Preventing storm-water pollution	48%	36%	12%	2%	1%	0%
D	Reducing traffic congestion	59%	30%	9%	2%	0%	0%
E	Maintaining local streets and roads	67%	30%	3%	0%	0%	0%
F	Providing bike paths and pedestrian facilities	48%	29%	20%	3%	0%	0%
G	Maintaining parks and picnic areas	56%	35%	9%	0%	0%	0%
H	Maintaining public landscapes	45%	39%	14%	1%	0%	0%
I	Garbage collection services	61%	34%	4%	0%	0%	0%
J	Recycling services	43%	35%	17%	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	Prefer not to answer
A	Provide street sweeping services	39%	39%	8%	4%	10%	0%
B	Maintain trees	37%	46%	9%	3%	4%	0%
C	Prevent storm-water pollution	23%	37%	10%	3%	27%	0%
D	Reduce traffic congestion	18%	41%	23%	11%	6%	0%
E	Maintain local streets and roads	33%	47%	11%	7%	3%	0%
F	Provide bike paths and pedestrian facilities	33%	42%	10%	5%	9%	0%
G	Maintain parks and picnic areas	42%	40%	10%	3%	5%	0%
H	Maintain public landscapes	39%	46%	8%	4%	4%	0%
I	Provide garbage collection services	52%	35%	5%	3%	4%	0%
J	Provide recycling services	35%	42%	10%	4%	10%	0%

Section 6: Community Services Department							
Q13		Next I'd like to ask you about a number of services provided by the City of Lake Forest's Community Services Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.					
		Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?					
<i>Read in Order</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Providing after school recreation programs	36%	26%	21%	8%	7%	2%
B	Providing recreation programs for pre-school children	31%	23%	22%	14%	9%	2%
C	Providing recreation and sports programs for elementary school-aged children	36%	29%	18%	7%	8%	2%
D	Providing recreation and sports programs for teens	40%	28%	16%	7%	7%	2%
E	Providing adult recreation programs such as classes, concerts and trips	30%	26%	29%	9%	4%	1%
F	Providing adult sports programs	26%	22%	32%	14%	5%	1%
G	Providing recreation programs for seniors	32%	28%	25%	8%	5%	2%
H	Providing recreation programs for families	33%	27%	25%	9%	5%	2%
I	Providing special events like concerts in the park and the Fourth of July Parade	40%	29%	19%	7%	3%	1%
J	Providing recreation programs for special needs children	41%	27%	18%	8%	4%	2%
K	Providing summer-specific recreation programs such as camps	35%	27%	21%	10%	5%	2%
L	Addressing homelessness	74%	16%	6%	3%	1%	0%
Q14		Now I'd like to know how satisfied you are with the job the City of Lake Forest is doing to provide each of the services. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? <i>Get answer. If 'satisfied' or 'dissatisfied', then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide after school recreation programs	19%	28%	6%	2%	41%	3%
B	Provide recreation programs for pre-school children	15%	29%	5%	2%	47%	3%
C	Provide recreation and sports programs for elementary school-aged children	20%	30%	6%	2%	40%	3%
D	Provide recreation and sports programs for teens	19%	28%	6%	2%	42%	3%

E	Provide adult recreation programs such as classes, concerts and trips	16%	29%	10%	2%	40%	2%
F	Provide adult sports programs	16%	29%	8%	3%	41%	3%
G	Provide recreation programs for seniors	18%	28%	6%	2%	44%	2%
H	Provide recreation programs for families	15%	31%	8%	2%	41%	3%
I	Provide special events like concerts in the park and the Fourth of July Parade	28%	35%	9%	2%	23%	2%
J	Provide recreation programs for special needs children	13%	24%	5%	3%	51%	3%
K	Provide summer-specific recreation programs such as camps	17%	28%	5%	2%	44%	3%
L	Address homelessness	11%	29%	22%	15%	21%	2%
Q15	Is there a park amenity or recreation facility you would like to see added or improved in the City of Lake Forest?						
	1	Yes	38%		Ask Q16		
	2	No	26%		Skip to Q17		
	98	Not sure	34%		Skip to Q17		
	99	Prefer not to answer	2%		Skip to Q17		
Q16	Please briefly describe the one park amenity or recreation facility you would <i>most</i> like to see added or improved in the City of Lake Forest. Verbatim responses recorded and later grouped into categories shown below.						
	Provide more pickle ball courts		11%				
	Provide, improve restrooms, maintenance		9%				
	Provide, add more bike, walking trails, paths		8%				
	Not sure / Nothing comes to mind		8%				
	Provide more lighting at parks, courts		7%				
	Provide a public pool		6%				
	Improve public safety at, near parks, rec facilities		6%				
	Provide, improve dog park, dog waste bags		5%				
	Provide more tennis, racquetball courts		5%				
	Provide water pads, play areas, an aquatic facility		5%				
	Provide, maintain playgrounds, swings		5%				
	Update, improve parks in general		5%				
	Provide, improve sports fields		4%				
	Provide, improve basketball courts		3%				
	Provide BBQ, picnic areas, shades		3%				
	Add more parks, sports, nature, open space areas		3%				
	Provide more events, outdoor activities for all ages		3%				

Improve Heroes Park	2%
Improve Cherry Park	2%
Provide drinking water fountains	2%
Provide workout, exercise equipment	2%
Improve Lake Forest Sports Park	2%
Improve Foothill Ranch Park	2%
Provide frisbee golf course	2%

Section 7: Neighborhood Issues & Organic Recycling

Q17	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.						
	<i>Randomize</i>	Big Problem	Moderate Problem	Small Problem	Not a Problem	Not Sure	Prefer not to answer
A	Graffiti	11%	16%	22%	47%	4%	0%
B	Recreational vehicles parked on the street for more than 72 hours at a time	13%	12%	20%	49%	6%	0%
C	Landscapes and buildings <u>not</u> being properly maintained	12%	14%	23%	46%	5%	0%
D	Too many people living in one house	16%	15%	16%	44%	9%	1%
E	Excessive noise	12%	14%	25%	46%	3%	0%
F	Illegally parked vehicles	17%	18%	18%	40%	7%	0%
G	Too many vehicles for a single home	21%	19%	20%	34%	5%	0%
H	Garages that have been converted to living spaces	11%	9%	14%	52%	13%	1%
Q18	Organic waste such as green waste and food scraps creates greenhouse gas as it decomposes in the landfill. To help combat climate change, new California state regulations require organic waste to be diverted from the landfill and recycled as compost and other renewable energy products. The City provides an organics recycling bin to residents to discard food and yard waste. Prior to taking this survey, were you aware of the new requirement to place food scraps in the organics recycling bin?						
	1	Yes					61%
	2	No					33%
	98	Not sure					5%
	99	Prefer not to answer					1%

Q19	Approximately what percentage of your household's total food waste do you currently place in the organics recycling bin? <i>If unsure, ask them to estimate.</i>			
	1	0-10%	43%	Ask Q20
	2	11%-25%	10%	Ask Q20
	3	26%-50%	8%	Ask Q20
	4	51%-75%	9%	Skip to Q21
	5	76%-100%	14%	Skip to Q21
	98	Not sure	12%	Skip to Q21
	99	Prefer not to answer	4%	Skip to Q21
Q20	What is the primary barrier or challenge to recycling a larger percentage of your food waste? <i>Verbatim responses recorded and later grouped into categories shown below.</i>			
	Not sure / No problem		24%	
	Too much work, waste of time		12%	
	Need information about recycling		12%	
	No recycling bin, bags provided		9%	
	Smells, bad odor		7%	
	Attracts insects, rodents		7%	
	Do not have a lot of food waste		7%	
	Didn't know about it		5%	
	No space for it, too many bins, big bin		4%	
	Forget to do it, not used to it		4%	
	I compost most of it		4%	
	Garbage disposal is more convenient		3%	
	Live in condo or apartment, no bin or instructions provided		3%	
	Messy, dirty		2%	
	Storing it until pick up time		2%	
	Not being able to put it in plastic bags, container		2%	
	Not necessary		1%	
	Food waste does not impact climate change		1%	
Q21	If the City provided a small air-tight food waste bin that could be placed on the counter or under the counter, would you be more likely to recycle your food waste?			
	1	Yes	62%	
	2	No	25%	
	98	Not sure	11%	
	99	Prefer not to answer	1%	

Q22	Prior to taking this survey, were you aware that the City has a bulky item pickup program, where residents can call in to receive free pickup of bulky trash items such as furniture.		
	1	Yes	68%
	2	No	28%
	98	Not sure	3%
	99	Prefer not to answer	0%

Section 8: City-Resident Communication

Q23	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: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>		
	1	Very satisfied	29%
	2	Somewhat satisfied	46%
	3	Somewhat dissatisfied	15%
	4	Very dissatisfied	4%
	98	Not sure	5%
	99	Prefer not to answer	0%
Q24	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. 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	54%
	2	Leisure Times - included in the Leaflet	7%
	3	City Newsletter - no mention of Leaflet or Leisure Times	3%
	4	E-newsletter - electronic newsletter	10%
	5	City Council Meetings	2%
	6	Lake Forest Shop & Dine App	2%
	7	My Lake Forest Smartphone App	2%
	8	Text Messages from City/Nixle	9%
	9	City of Lake Forest Alexa Skill	0%
	10	City Website (not specific)	9%
	11	Skatepark site (Etnies)	0%
	12	Main City Web Page	5%
	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)	6%	
	17	Los Angeles Times (paper)	1%	
	18	Radio	1%	
	19	Television	1%	
Internet & Social Media				
	20	Internet, not a City site	8%	
	21	Social Media like Facebook, Twitter and Instagram	18%	
	22	Lake Forest Patch - the Patch	7%	
	23	Nextdoor	7%	
	24	Friends / Other People	6%	
	25	Other	4%	
	26	Do Not Receive Information about City	5%	
	98	Not sure	3%	
	99	Prefer not to answer	1%	
Q25	In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?			
	1	Yes	62%	Ask Q26
	2	No	28%	Skip to D1
	98	Not sure/No opinion	9%	Skip to D1
	99	Prefer not to answer	1%	Skip to D1
Q26	Were you able to find the information you were looking for on the City's website?			
	1	Yes	76%	
	2	No	15%	
	98	Not sure/No opinion	8%	
	99	Prefer not to answer	0%	

Q27	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	31%
2	Somewhat satisfied	50%
3	Somewhat dissatisfied	11%
4	Very dissatisfied	1%
98	Not sure	6%
99	Prefer not to answer	0%

Section 9: 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	62%
2	Employed part-time	6%
3	Student	3%
4	Homemaker	3%
5	Retired	21%
6	In-between jobs	1%
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	32%
2	No	66%
99	Prefer not to answer	2%
D3	Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association?	
1	Yes	77%
2	No	21%
99	Prefer not to answer	2%

D4		
What ethnic group do you consider yourself a part of or feel closest to? <i>Read list if respondent hesitates</i>		
1	Caucasian/White	54%
2	Latino/Hispanic	18%
3	African-American/Black	2%
4	American Indian or Alaskan Native	0%
5	Asian -- Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian	16%
6	Pacific Islander	0%
7	Mixed Heritage	4%
98	Other	1%
99	Prefer not to answer	5%
D5		
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	5%
2	\$40,000 to \$59,999	9%
3	\$60,000 to \$79,999	9%
4	\$80,000 to \$99,999	13%
5	\$100,000 to \$149,999	20%
6	\$150,000 or more	34%
98	Not sure	1%
99	Prefer not to answer	9%

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

Section 10: Post-Interview & Sample Items

D6		
Gender		
1	Male	49%
2	Female	46%
3	Prefer not to answer	5%

S1	Party	
	1	Democrat 37%
	2	Republican 35%
	3	Other 5%
	4	DTS 22%
S2	Age	
	1	18 to 29 18%
	2	30 to 39 17%
	3	40 to 49 16%
	4	50 to 64 27%
	5	65 or older 22%
S3	Home Owner	
	Yes	64%
	No	36%
S4	Area of City	
	1	One 20%
	2	Two 20%
	3	Three 36%
	4	Four 24%
S5	Council District	
	1	One 23%
	2	Two 17%
	3	Three 20%
	4	Four 21%
	5	Five 18%



City of Lake Forest
Business Survey
Final Toplines (n=202)
February 2023

Section 1: Introduction to Study

Hello, may I please speak to _____. Hi, my name is _____ and I'm calling from TNR on behalf of the City of Lake Forest. The City is 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>>.

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
	2	5 years to less than 10 years
	3	10 years to less than 15 years
	4	15 or more years
	99	Not sure/Prefer not to answer
		27%
		18%
		16%
		37%
		2%
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
	2	Good
	3	Fair
	4	Poor
	5	Very poor
	98	Not sure
	99	Prefer not to answer
		35%
		45%
		13%
		2%
		0%
		4%
		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.	
	No changes needed / Everything is fine	
	Not sure / Cannot think any	
	Promote, advertise local businesses	
	Resolve homeless, housing problem	
	More business-friendly government	
	Reduce taxes, fees	
	Increase biz, networking opportunities	
		27%
		26%
		8%
		6%
		5%
		4%
		3%

	Improve safety, security of biz areas	3%
	Provide more incentives to attract business	3%
	Reduce rent, lease fees to decrease vacancies	2%
	Provide additional community events	2%
	Improve traffic	2%
	Improve, add parking / Address parking issues	1%
	Reduce signage restrictions	1%
	Upgrade rundown business	1%
	Fewer restrictions/regulations	1%
	Improve City appearance, maintenance	1%
	Limit growth	1%
	Enforce traffic laws, safety	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	41%
	Good location, convenient access for customers	18%
	Support from City to businesses	8%
	Access to roads, freeways, surrounding communities	7%
	No business license / Ease of startup	6%
	Access to other local business, services	5%
	Public safety, low crime rate	3%
	Growth in business, residential areas	3%
	Good balance, mixture of residential and businesses	3%
	Sense of community / Family-oriented City	2%
	Cleanliness, beauty of City	2%
	Parks and recreational areas	2%
	Higher end clients, higher income families	2%
	Business friendly area, climate, customers	2%
	Easy access to online information, advertising	1%
	Environment, climate, weather	1%
	Low, affordable rent	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	76%
	High expenses, rents, fees	4%
	Traffic, parking issues	4%
	Population, demographic concerns	2%
	Employee, laborer issues	2%
	Safety of area, homelessness	2%
	Too many regulations	1%
	Location, accessibility	1%
	Advertisement restrictions	1%
	Business competition	1%
	Improving sales, attracting customers	1%
	Lack of support from City	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	59%
	2 Somewhat satisfied	33%
	3 Somewhat dissatisfied	4%
	4 Very dissatisfied	0%
	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	17% 21% 33% 20% 6% 2%
B	Investigating criminal activity	54% 34% 8% 2% 1% 1%
C	Enforcing traffic laws	24% 38% 27% 10% 0% 1%
D	Maintaining a low crime rate	59% 37% 3% 1% 0% 1%

E	Providing building permit services	22%	30%	27%	17%	2%	1%
F	Providing building inspection services	13%	26%	31%	25%	4%	1%
G	Promoting economic development	29%	37%	23%	10%	1%	1%
H	Revitalizing out-dated areas in the City	23%	43%	23%	8%	0%	2%
I	Providing business education events	12%	26%	36%	25%	0%	1%
J	Providing business networking events	12%	27%	33%	27%	0%	1%
K	Providing free business consulting services	12%	27%	32%	27%	1%	1%
L	Providing hiring or employee training services	9%	17%	29%	41%	2%	1%
Q8	<p>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.</p> <p>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)?</p>						
	<i>Randomize</i>	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide business watch programs	15%	31%	6%	0%	46%	2%
B	Investigate criminal activity	32%	33%	8%	3%	23%	1%
C	Enforce traffic laws	39%	36%	6%	3%	14%	2%
D	Maintain a low crime rate	42%	33%	9%	4%	11%	1%
E	Provide building permit services	30%	24%	5%	1%	37%	2%
F	Provide building inspection services	21%	31%	3%	1%	41%	2%
G	Promote economic development	27%	40%	4%	3%	23%	3%
H	Revitalize out-dated areas in the City	23%	37%	8%	4%	24%	2%
I	Provide business education events	21%	30%	6%	0%	41%	2%
J	Provide business networking events	23%	33%	6%	1%	36%	1%
K	Provide free business consulting services	19%	26%	6%	1%	45%	2%
L	Provide hiring or employee training services	12%	28%	5%	1%	53%	2%
Q9	<p>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.</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>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Enforcing zoning regulations	18%	38%	25%	14%	4%	1%

B	Enforcing sign regulations	14%	34%	31%	18%	3%	1%	
C	Street sweeping	18%	42%	31%	7%	1%	1%	
D	Reducing traffic congestion	34%	39%	18%	8%	1%	1%	
E	Maintaining local streets and roads	38%	46%	10%	4%	1%	1%	
F	Landscaping median strips and other areas of the City	22%	44%	25%	8%	1%	1%	
G	Addressing homelessness	49%	35%	9%	6%	1%	1%	
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	26%	32%	3%	1%	37%	1%	
B	Enforce sign regulations	26%	39%	6%	2%	27%	1%	
C	Provide street sweeping services	39%	34%	5%	2%	19%	1%	
D	Reduce traffic congestion	24%	47%	10%	4%	15%	1%	
E	Maintain local streets and roads	44%	40%	5%	1%	10%	1%	
F	Landscape median strips and other areas of the City	41%	38%	6%	2%	13%	1%	
G	Addressing homelessness	19%	36%	14%	10%	21%	1%	

Section 4: Business Assistance Programs

Q11	The City of Lake Forest received a limited amount of federal funds to help local businesses recover from the impacts of the pandemic. The City wants to understand what improvements or programs businesses think would help them be more successful. As I read the following statements, please tell me whether you agree or disagree with the statement. Here is the (first/next) one: _____. Do you agree or disagree? <i>Get answer, then ask:</i> Would that be strongly (agree/disagree) or somewhat (agree/disagree)?							
	<i>Read item A first, then randomize B-F</i>		Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	Not Sure	Prefer not to answer
A	The pandemic hurt our business	46%	30%	13%	6%	2%	3%	
B	Updating our business website would help us attract more customers	27%	33%	15%	15%	5%	5%	
C	Learning how to better market or advertise our business would make us more profitable	29%	39%	13%	12%	4%	3%	
D	The technology in our business needs to be	19%	39%	16%	15%	6%	5%	

	updated						
E	Improving the physical appearance of our store or offices would help us attract more customers	29%	31%	13%	15%	6%	5%
F	Our business could use assistance with attracting and retaining employees	27%	27%	17%	16%	9%	5%
Q12	Is there anything the City could do to help your business be more successful? <i>If yes, ask: Please describe the most important thing the City could do to help your business. Verbatim responses recorded and later grouped into categories shown below.</i>						
	Not sure / Cannot think of anything specific	68%					
	Tax incentives, lower taxes, fees	4%					
	Promote businesses	3%					
	Address homeless issue	2%					
	Address city safety issue	2%					
	Enforce traffic laws	2%					
	Affordable rent, utilities	2%					
	Provide additional community events	2%					
	Provide more networking opportunities	2%					
	Maintain city cleanliness, beautification	1%					
	Fewer signage restrictions	1%					
	Provide more resources, support	1%					
	Financial aid, funding	1%					
	Reduce traffic congestion	1%					
	Other (unique responses)	6%					

Section 5: City- Business Communication

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: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>			
	1	Very satisfied	40%	Skip to Q15
	2	Somewhat satisfied	44%	Skip to Q15
	3	Somewhat dissatisfied	6%	Ask Q14
	4	Very dissatisfied	3%	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? Please be specific. <i>Substantive verbatim responses provided below.</i>			
	<i>Every time I try to sell my product my services it was always something say.</i>			
	<i>Feel it is not so impactful.</i>			

	<i>I don't get any communication from the city like a newsletter.</i>	
	<i>I don't receive any newsletters or emails.</i>	
	<i>I don't think that I see that much coming from the city in regard to business resources.</i>	
	<i>I have never been communicated with, so no one or anyone has ever reached out to me.</i>	
	<i>I haven't gotten many notifications or communications from them.</i>	
	<i>It is hard to deal with or navigate the Lake Forest website.</i>	
	<i>There are two things. It is the government website. There are no resources. This applies for a business permit. The second one is COVID. You can't find anything in the government website, and it doesn't provide any resources.</i>	
	<i>They are not helping on social media.</i>	
	<i>Unfamiliar with some services listed in this survey.</i>	
	<i>Way too much incessant emails!</i>	
Q15	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 20%
	2	Leisure Times – included in the Leaflet 1%
	3	City Newsletter – no mention of Leaflet or Leisure Times 5%
	4	E-newsletter – electronic newsletter 15%
	5	City Council Meetings 2%
	6	Lake Forest Shop & Dine App 3%
	7	My Lake Forest Smartphone App 0%
	8	Text Messages from City/Nixle 1%
	9	City of Lake Forest Alexa Skill 0%
	10	City Website (not specific) 15%
	11	Skatepark site (Etnies) 0%
	12	Main City Web Page 4%
	13	Economic Development Website 2%
	14	Flyers at City Facilities 0%
	Newspaper, Radio, & TV	
	15	Saddleback Valley News (paper) 1%
	16	Orange County Register (paper) 5%
	17	Los Angeles Times (paper) 0%
	18	Radio 1%
	19	Television 2%
	Internet & Social Media	

	20	Internet, not a City site	11%			
	21	Social Media like Facebook, Twitter and Instagram	13%			
	22	Lake Forest Patch - the Patch	2%			
	23	Nextdoor	4%			
	24	Friends / Other People	1%			
	25	Other	12%			
	26	Do Not Receive Information about City	7%			
	98	Not sure	10%			
	99	Prefer not to answer	3%			
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		51%	34%	10%	5%
B	Electronic Newsletters		41%	37%	17%	5%
C	Twitter		11%	27%	52%	10%
D	Facebook		20%	37%	34%	9%
E	The <i>My Lake Forest</i> smart phone application that allows you to communicate with the City, report issues, and receive updates		25%	41%	22%	12%
F	City website		43%	39%	13%	6%
G	A Blog on the City's website		19%	37%	36%	8%
H	Newsletters and other materials mailed directly to your business		30%	43%	22%	6%
I	Automated phone calls		9%	25%	58%	8%
J	Town hall and community meetings		24%	41%	28%	7%
K	Advertisements in local papers		10%	35%	47%	8%
L	Public Access Television		10%	23%	56%	11%
Q17	Have you ever visited the City's economic development website at www.lakeforestbusiness.com ?					
	1	Yes	41%			
	2	No	56%			
	99	Prefer not to answer	4%			

Q18	Would you say the City of Lake Forest does an excellent, good, fair, poor, or very poor job of incentivizing residents to shop locally?		
	1	Excellent	21%
	2	Good	37%
	3	Fair	18%
	4	Poor	6%
	5	Very poor	1%
	98	Not sure	12%
	99	Prefer not to answer	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	22%	
	2 to 5	32%	
	6 to 10	18%	
	More than 10	19%	
	Prefer not to answer	8%	
D2	Approximately how many of these employees live outside of Lake Forest?		
	None	27%	
	1	10%	
	2 to 5	31%	
	6 to 10	10%	
	More than 10	14%	
	Prefer not to answer	9%	
D3	What would you say is the most important factor for why you chose to locate your business in the City of Lake Forest? <i>Do not read list - record first response</i>		
	1	Competitive lease rates/building rents	6%
	2	Quality business parks	3%
	3	Proximity to freeways/transportation corridors	3%
	4	Quality of housing stock	1%
	5	Overall quality of the City	14%

6	Local amenities (dining/shopping)	1%	
7	Close to clients/customers	4%	
8	Close to owner's home	23%	
9	Streamlined processes to locate or expand a business in Lake Forest	1%	
10	Location/accessibility	23%	
12	Other	9%	
98	Not sure	7%	
99	Prefer not to answer	5%	
D4	In the next 12 months, do you think your business will increase, decrease or stay about the same?		
1	Increase	41%	Ask D5
2	Decrease	9%	Skip to D6
3	Stay about the same	45%	Skip to D6
98	Not sure	2%	Skip to D6
99	Prefer not to answer	4%	Skip to D6
D5	To accommodate the growth in your business, will you require additional square footage or a larger building?		
1	Yes	19%	
2	No	68%	
98	Not sure	13%	
99	Prefer not to answer	0%	
D6	In the next 12 months, do you think your business will relocate?		
1	Yes	6%	Ask D7
2	No	83%	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	43%	Skip to D9
2	Another community	26%	Ask D8
98	Not sure	31%	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 on file for 3 respondents	

D9	Last question for you. Are you a resident of Lake Forest?		
	1	Yes	46%
	2	No	52%
	99	Prefer not to answer	1%
Thank you for participating! This survey was conducted for the City of Lake Forest.			

Section 7: Post- Interview & Sample Items			
D10	Gender		
	1	Male	61%
	2	Female	34%
	99	Prefer not to answer	5%
S2	Home-Based Business		
	1	Yes	20%
	2	No	80%