



**COMMUNITY SATISFACTION SURVEY**  
SUMMARY REPORT

PREPARED FOR THE  
**CITY OF LAKE FOREST**



JANUARY 2025



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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 13 departments—City Clerk, City Manager, Communications and Marketing, Community Development, Community Services, Economic Development, Finance, Fire Services, Human Resources and Employment, Management Services, Police Services, Public Safety, 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 roughly 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 2024 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 (2023) to the current survey (2024)—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 2024.

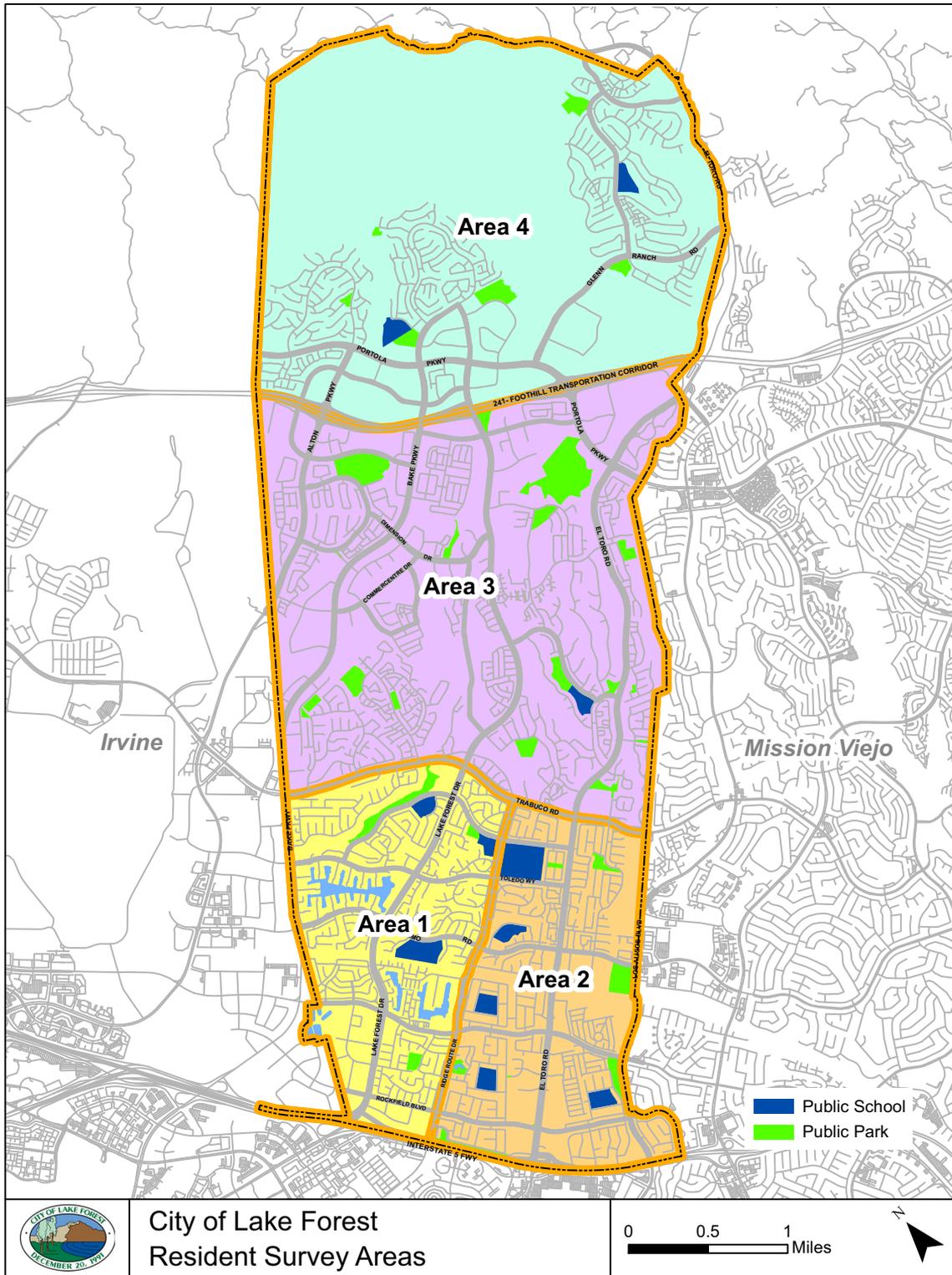
**OVERVIEW OF METHODOLOGY** A full description of the methodology used for this study is included later in this report (see *Methodology* on page 73). In brief, a total of 712 randomly selected Lake Forest residents who are registered to vote participated in the resident survey between December 5 and December 17, 2024. Survey participants were categorized into one of four geographic areas according to the location of their residence (see Figure 1 on the next page) as well as by Council District. The resident interviews averaged 22 minutes in length. The 18-minute survey of businesses was administered to a stratified random sample of 200 local business owners and managers between November 22 and December 18, 2024. 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



Path: Q:\Applications\GIS\Maps\Communications and Marketing\2023-03-14 Resident Survey Areas\City of Lake Forest - Res

**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 1,500 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 2024 study. For the reader's convenience, the findings are organized according to the section titles used in the body of this report. Thus, to learn more about a particular finding and how it may compare to findings from prior surveys, simply turn to the appropriate report section.

### GENERAL PERCEPTIONS OF CITY & LOCAL ISSUES

- The vast majority of residents shared favorable opinions of the quality of life in Lake Forest, with 29% reporting it is excellent and 60% stating it is good. Eleven percent (11%) of residents indicated that the quality of life in the City is fair, whereas 1% used poor or very poor to describe the quality of life in Lake Forest.
- *Lake Forest as a place to raise a family* received the most favorable rating among four aspects tested (80% excellent or good). Although still positive, residents provided somewhat softer ratings for Lake Forest as a place to retire (58%), shop and dine (57%), and work (53%).
- When businesses were asked to rate the business climate in Lake Forest compared with surrounding areas, 32% reported that it is excellent, 50% said it is good, and 17% offered that it is fair. Less than 1% 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, approximately one-in-five residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (13%) or desired no changes from the City (6%). Of the specific suggestions, the most common were attracting new restaurants and stores (14%), addressing homelessness/poverty issues (9%), improving parks and recreation (7%), and beautifying the City and its landscape (7%).
- When asked what the City could do to improve the business climate in Lake Forest, four-in-ten business managers surveyed indicated that they were unsure of a change that could be made (24%) or that no changes were needed (20%). Specific suggestions for improving the business climate included resolving homelessness/housing-related issues (10%), promoting/advertising local businesses (9%), increasing business networking opportunities (9%), providing more incentives to attract business (5%), and reducing restrictions/regulations (5%).
- Four-in-ten local businesses (40%) 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 (17%), support from the City to businesses (10%), the business friendly climate (7%), access to roads, freeways, and surrounding communities (6%), and access to other local businesses and services (5%) were cited most often.
- Seven-in-ten business managers surveyed (73%) said they could not think of any challenges associated with doing business in Lake Forest. The most common specific challenges cited were public safety/homeless concerns (4%), the number of regulations (4%), location and accessibility (3%), and advertising restrictions (3%).
- More than eight-in-ten residents (83%) and nine-in-ten local businesses (92%) 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 (93%) and preparing for emergencies (90%). Residents were most satisfied with the Department's efforts to provide crossing guards near schools (95% very or somewhat satisfied), prepare for emergencies (91%), provide child safety programs (87%), and provide animal control services (87%).
- Among the services provided by the **Development Services Department**, residents rated inspecting buildings as the most important service provided by the Department (62%), followed by issuing building permits (55%), enforcing zoning regulations (51%), and enforcing sign regulations (50%). Satisfaction ratings assigned to the four development services ranged from a low of 77% for enforcing zoning regulations to a high of 82% for issuing building permits.
- Of all residents surveyed, just 13% 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 (93%), maintaining parks and picnic areas (90%), and reducing traffic congestion (89%). Residents were most satisfied with the Department's efforts to provide garbage collection services (91%), prevent storm-water pollution (89%), and maintain parks and picnic areas (88%).
- Among the services provided by the **Community Services Department**, residents assigned the highest importance to addressing homelessness (92%), distantly followed by providing recreation programs for special needs children (70%), providing recreation and sports programs for teens (66%), and providing special events like concerts in the park and the Fourth of July Parade (65%). Residents expressed the highest levels of satisfaction with the Department's efforts to provide recreation and sports programs for elementary school-aged children (88%), provide special events like concerts in the park and the Fourth of July Parade (87%), and provide recreation programs for seniors (86%).

## 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 (96% extremely or very important), followed by investigating criminal activity (90%), and promoting economic development (73%). Satisfaction was high for all services tested, but greatest with respect to the City's efforts to provide building inspection services (95% very or somewhat satisfied), enforce traffic laws (94%), promote economic development (93%), and provide building permit services (93%).
- Among the **infrastructure-related and community services** provided by the City to local businesses, members of the business community rated addressing homelessness as most important (87%), followed by maintaining local streets and roads (85%) and reducing traffic congestion (73%). Satisfaction was greatest with respect to the City's efforts to landscape median strips and other areas of the City (94%), provide street sweeping services (94%), enforce zoning regulations (92%), and maintain local streets and roads (90%).

## NEIGHBORHOOD ISSUES

- The most commonly experienced neighborhood problem among those tested was too many vehicles associated with a single home (45% big or moderate problem), followed by illegally parked vehicles (41%).

## BRANDING

- When asked to think about Lake Forest's character and community, residents used the words safe (16%), peaceful/relaxing/calm/quiet (13%), family-oriented (12%), friendly (11%), nice/good place to live (10%), and clean (10%) most frequently. Approximately one-in-four residents (24%) could not think of how best to describe Lake Forest.
- Lake Forest's location/accessibility (13%) and natural resources (open space, landscape, lakes, 11%) were mentioned most frequently as to what makes it special, followed by the City's safety (7%), small-town feel (6%), sense of community (5%), parks/trails (5%), and quiet atmosphere (5%). Twenty-eight percent (28%) of residents were unsure, could not think of anything (24%), or indicated that Lake Forest was similar to other cities (5%).
- When asked to provide the location, landmark, or visual that they most associate with Lake Forest, the lakes (12%), Lake Forest Sports Park (10%), Saddleback Mountain (6%), El Toro Road (6%), and trees (5%) were the top mentions. Approximately one-in-four residents were unsure or could not think of a Lake Forest location, landmark, or visual (21%), or said that they did not associate any with the City (3%).

## BUSINESS ASSISTANCE PROGRAMS

- Managers were most in agreement that *Learning how to better market or advertise our business would make us more profitable* (75% strongly or somewhat agree), followed by *The pandemic hurt our business* (69%), and *Updating our business website would help us attract more customers* (68%). Approximately six-in-ten respondents agreed that *Improving the physical appearance of our store or offices would help us attract more customers* (61%) and that *The technology in our business needs to be updated* (58%). Fewer respondents agreed that *Our business could use assistance with attracting and retaining employees* (53%).
- When asked what the City could do to help their business be more successful, six-in-ten business managers (60%) were not sure or could not think of anything specific. Among the specifics mentioned, promoting businesses topped the list at 10%, followed by addressing homeless issues (6%), providing more resources and support (5%), providing tax incentives and lower taxes/fees (5%), and keeping the City well-maintained and clean (5%).

## COMMUNICATION

- Overall, 79% of residents indicated that they were either very (34%) or somewhat (45%) satisfied with the City's efforts to communicate with residents through newsletters, the Internet, social media, and other means.
- Among local businesses, 85% 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* (60%), distantly followed by social media (17%), *Leisure Times* (11%), electronic newsletters (9%), and one of the City's websites (general mention, 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 City's website in general (25%), *The Leaflet* (21%), social media sites (21%), the Internet in general (18%), electronic newsletters (16%), and general references to the City's newsletter (11%).
- Overall, 67% of residents and 41% 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 the City's website (89% very or somewhat effective), followed by email (88%), electronic newsletters (84%), and newsletters and direct mail to their office (78%).
- Sixty-three percent (63%) 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 (77%) 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 79% of residents indicating they were satisfied with the resources available on the sites.
- One-third (33%) of local businesses indicated that they had visited the City of Lake Forest's economic development website ([www.lakeforestbusiness.com](http://www.lakeforestbusiness.com)).
- The majority of business managers surveyed indicated that the City does an excellent (20%) or good (35%) job incentivizing residents to shop locally. Twenty-two percent (22%) rated the City's efforts in this area as fair, 10% said poor or very poor, and 14% 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, 29% mentioned the location/accessibility of Lake Forest, 20% indicated that it was close to the owner's home, and 11% cited the overall quality of the City.
- Local businesses were generally optimistic about the future, with 50% anticipating growth and 42% expecting that their business will remain about the same. Another 3% indicated that they expect their business to decrease in the coming year and 5% were unsure.
- Partitioning the 50% that anticipate growth, 10% of all businesses indicated that they would require additional space, whereas the remainder did not anticipate needing additional space (38%) or were unsure (3%).
- Seven percent (7%) of businesses surveyed anticipated relocating in the next year. Approximately 3% 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. More than eight-in-ten residents (83%) and local businesses (92%) indicated that they were satisfied with the City's overall performance in providing municipal services and offered positive ratings (excellent or good) for the quality of life in Lake Forest (88%) and local business climate (82%). These sentiments were also widespread, with overall satisfaction exceeding 75% across nearly *all* resident and business subgroups (see *Overall Performance Rating* on page 22).

The high level of satisfaction with the City's performance *in general* was also mirrored in assessments of the City's performance in providing most specific services. Among residents, the highest satisfaction scores were assigned to the City's efforts to provide crossing guards near schools, provide garbage collection services, prepare for emergencies, prevent storm-water pollution, provide recreation and sports programs for elementary school-aged children, and maintain parks and picnic areas (see *Specific Services: Resident Survey* on page 26). 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 83% of residents (see Figure 35 on page 42).

The results of the 2024 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 provide building inspection services, landscape median strips and other areas of the City, provide street sweeping services, and enforce traffic laws (see *Specific Services: Business Survey* on page 36). For 18 of the 19 services tested,

the City is meeting or exceeding the needs and expectations of at least 84% of local businesses—and for the majority of services the City is meeting the needs of at least 91% of businesses (see Figure 36 on page 43).

*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 18), the list of services and their respective priority status for future attention (see *Performance Needs & Priorities* on page 40), and the opinions of residents generally satisfied with the City’s performance versus those generally dissatisfied (see *Differentiators of Opinion: Resident Survey* on page 34), top priorities for residents include addressing homelessness, reducing traffic congestion, enforcing traffic laws, providing adult (including senior) recreation programs such as classes, concerts, and trips, enforcing zoning regulations, inspecting buildings, and attracting new restaurants and stores. For local businesses, top priorities include addressing homelessness, providing hiring or training services, reducing traffic congestion, and promoting and advertising local 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 economic development 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 2023 and 2024?*

The vast majority of assessments in 2024 remained consistent with the results of the most recent prior study (2023), including ratings of the overall quality of life in the City, the Lake Forest business climate, the City’s overall performance rating, as well as the satisfaction ratings for the vast majority of specific services.

Among specific services, statistically significant changes were found for the importance ratings assigned to 15 of the 34 services presented to residents, and among four of the services when assessing satisfaction. Importance ratings trended down, with the largest declines evidenced for street sweeping (-10%), providing summer-specific recreation programs such as camps (-8%), and enforcing zoning regulations (-8%). Turning to residents’ satisfaction with specific services, improvements were noted regarding the City’s efforts to prevent storm-water pollution (+7%) and provide neighborhood watch programs (+5%) and declines were recorded for inspecting buildings (-8%) and enforcing traffic laws (-6%).

Among businesses, there were four statistically significant changes in importance from 2023 to 2024: increases in the levels assigned to providing building inspection services (+14%), hiring or employee training services (+11%), business watch programs (+10%), and enforcing sign regulations (+10%). Regarding satisfaction, only one change was recorded for the 19 services: improved satisfaction with the City’s efforts to revitalize outdated areas in the City (+9%).

Examining the extent to which various neighborhood issues were perceived as a problem by residents, six of the eight items were flagged as statistically significant. The largest increases were recorded for recreational vehicles parked on the street for more than 72 hours at a time (+9% big or moderate problem in their neighborhood), excessive noise (+8%), landscapes and buildings not being properly maintained (+8%), and illegally parked vehicles (+7%). Although ratings trended up from 2023 to 2024, the majority of residents did not perceive notable issues (big + moderate problem ratings ranged from a low of 24% to a high of 45% across the eight items).

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

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, 79% of residents and 85% of businesses said they were satisfied with the City's efforts to communicate through newsletters, the Internet, social media, and other means in 2024, both of which were up from 2023 (+4% and +1%, respectively). Although the upticks in overall satisfaction did not reach statistical significance, there was a significant shift in the intensity of satisfaction among residents, with an increase in the percentage very satisfied and a decline in the percentage somewhat dissatisfied.

*The Leaflet* continues to be the most frequently cited source for Lake Forest news and information among residents and a top-two source among businesses, and it enjoyed a statistically significant increase in mentions by residents this cycle (+7%). Residents also reported an increase for *Leisure Times* (+4%) while declines were recorded for the Lake Forest Patch (-4%), friends/other people (-3%), and Nextdoor (-3%) as sources for Lake Forest news, information, and programming.

The City's website was the most frequently utilized source of information among local businesses in 2024, up significantly from 2023 (+9%). Businesses also reported greater reliance on social media (+8%), the Internet in general (+7%), and general references to the City's newsletter (+5%). At the same time, there was a statistically significant decline in the percentage of businesses that were unsure of their sources (-7%).

The 2024 survey results continue to 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, 67% of residents and 41% of businesses mentioned at least one of Lake Forest's newsletters as a source of city information, 21% of residents and 33% of businesses cited one of the City's websites or apps, and 4% of both residents and businesses mentioned City Council meetings or flyers. Taken together, and after accounting for respondents who mentioned multiple sources, 74% of residents and 64% of businesses relied on city sources for information in 2024. 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.

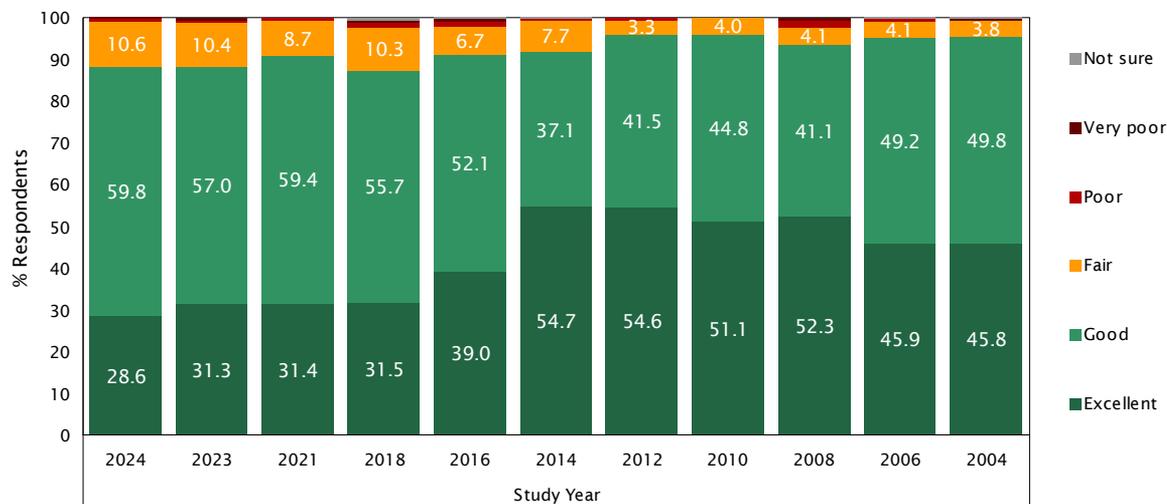
## GENERAL PERCEPTION OF CITY & LOCAL ISSUES

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 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 29% reporting it is excellent and 60% stating it is good. Eleven percent (11%) of residents indicated that the quality of life in the City is fair, whereas just 1% used poor or very poor to describe it. Quality of life ratings tracked very closely from 2023 to 2024, with no statistically significant changes.

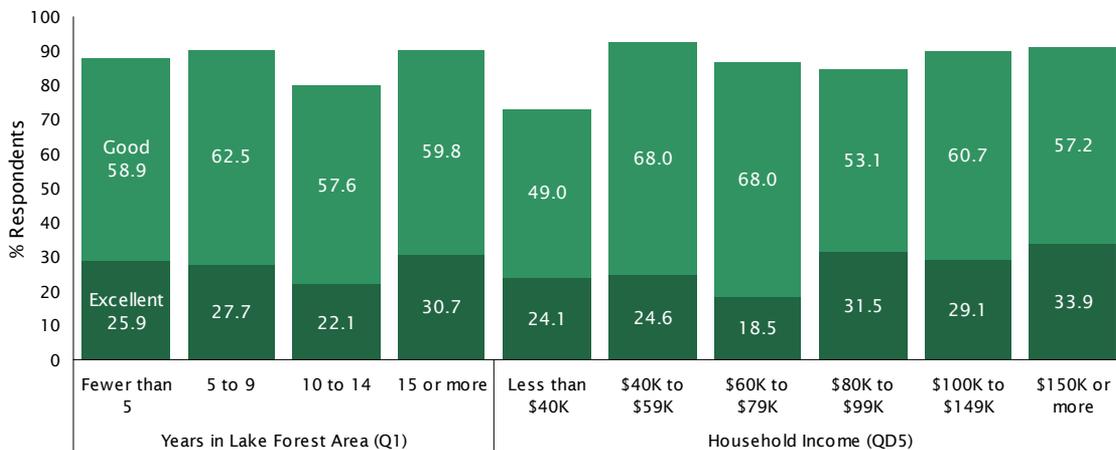
**Question 2: Resident Survey** *How would you rate the overall quality of life in Lake Forest? Would you say it is excellent, good, fair, poor, or very poor?*

**FIGURE 2 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY STUDY YEAR**

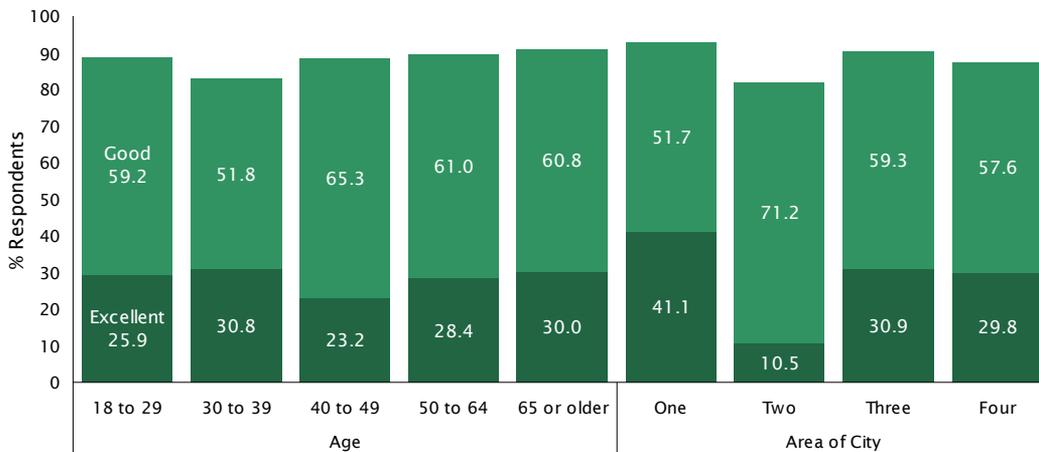


Figures 3 through 5 on the next page show how ratings of the quality of life in the City varied by years of residence in Lake Forest, household income, age of the respondent, area of the City, ethnicity, gender, presence of a child in the home, and home ownership status. Although there was some variation in opinion (e.g., residents of Area 1 were more likely than their counterparts in other areas to rate the quality of life as excellent), the most striking pattern in these figures is the relative consistency of opinion. With the exception of residents with a household income below \$40,000 per year (73% excellent or good), between 80% and 93% of respondents in every subgroup held a positive assessment of the quality of life in Lake Forest.

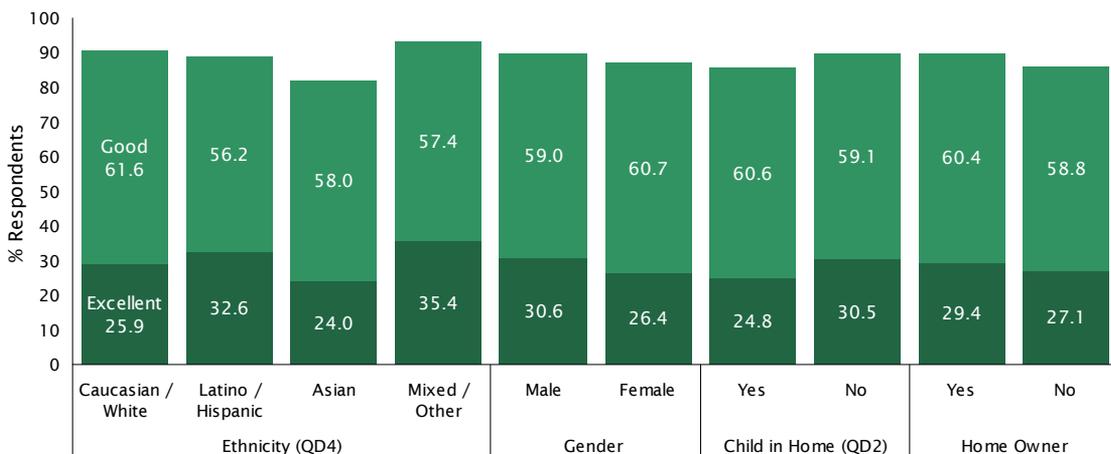
**FIGURE 3 OVERALL QUALITY OF LIFE: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME**



**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**

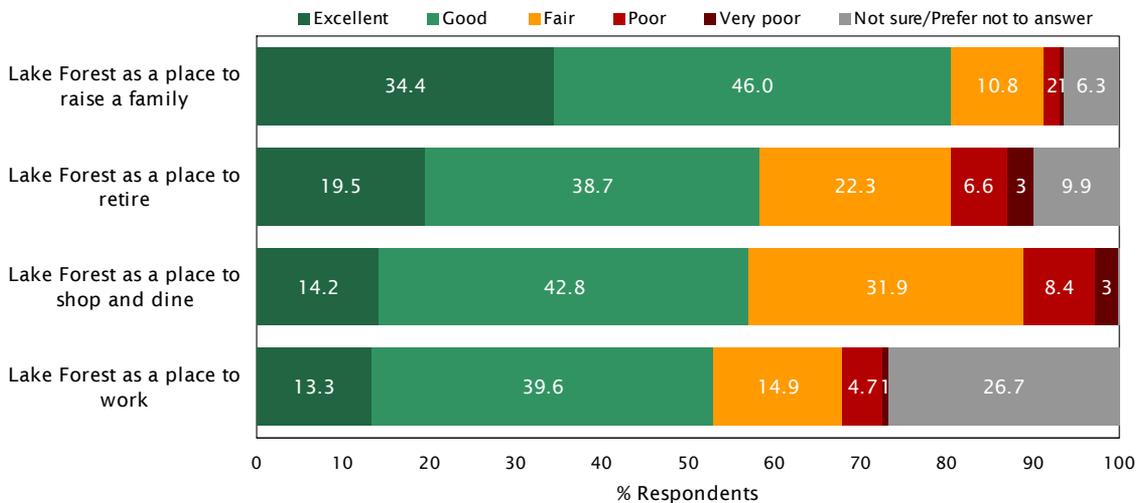


**RATING LAKE FOREST** Beginning in 2018, residents were also asked to rate the City of Lake Forest on a number of key dimensions related to quality of life—including Lake Forest as a place to raise a family and as a place to work—using the same five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 6, residents generally shared favorable opinions of Lake Forest on each aspect tested in 2024, with the most positive rating provided for Lake Forest as a place to raise a family (80% excellent or good). Although still positive, residents provided somewhat softer ratings for Lake Forest as a place to retire (58%), shop and dine (57%), and work (53%).

Although ratings for Lake Forest as a place to shop and dine ticked up slightly from 2023 to 2024 (+4%), the magnitude of the change was not statistically significant (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 2023 to 2024
	2024	2023	2021	2018	
Lake Forest as a place to shop and dine	57.0	53.1	60.0	61.0	+3.9
Lake Forest as a place to retire	58.2	56.8	52.7	60.3	+1.4
Lake Forest as a place to work	52.9	54.8	52.4	54.3	-1.9
Lake Forest as a place to raise a family	80.5	82.9	84.3	85.7	-2.5

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. Aside from residents in the 30 to 39 year age group or with an annual household income under \$40,000, 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 75% to 88%). Examining ratings for Lake Forest as a place to work reveals higher than average ratings among respondents who have lived in the City between 10 and 14 years, those living in a household earning \$60,000 to \$99,999 a year, and Latino/Hispanics, with

more than six-in-ten providing a rating of excellent or good. As a place to shop and dine, younger (<30 years) and older (65+ years) Lake Forest residents held more positive perceptions than those in other age groups.

It is noteworthy that ratings of Lake Forest as a place to retire were most positive among residents at least 65 years of age (at retirement age and living in the City)—it was younger cohorts yet to near the point of retirement who were less positive or unsure. Respondents with a household income between \$40,000 and \$59,999 and those with an ethnicity of mixed/other also provided much higher than average ratings for Lake Forest as a place to retire.

As expected, residents satisfied with the City’s overall performance provided much more favorable ratings for each statement when compared with dissatisfied residents.

**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	74.8	80.9	82.3	82.7	84.8	71.7	80.4	82.0	81.9
Lake Forest as a place to retire	60.5	54.8	58.6	58.5	50.6	51.4	49.7	54.2	79.1
Lake Forest as a place to work	55.3	46.3	62.2	51.5	52.5	54.2	57.6	54.3	47.6
Lake Forest as a place to shop and dine	58.6	59.9	66.0	52.9	62.5	50.4	54.9	54.1	62.2

**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	84.2	52.8	68.4	83.0	82.8	82.0	83.3	83.6
Lake Forest as a place to retire	61.5	31.6	57.2	76.6	55.1	61.6	58.0	54.0
Lake Forest as a place to work	56.6	42.3	44.4	47.8	69.4	62.7	53.6	54.1
Lake Forest as a place to shop and dine	61.2	30.5	65.3	73.1	53.7	54.9	64.8	51.5

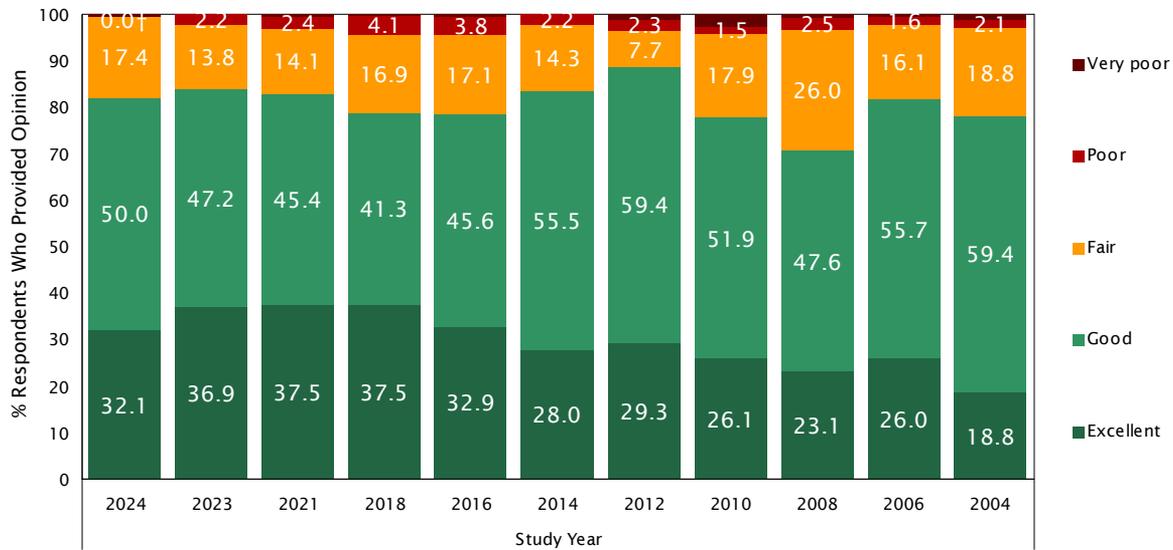
**TABLE 4 RATING LAKE FOREST: RESIDENT SURVEY BY ETHNICITY (SHOWING % EXCELLENT OR GOOD)**

	Ethnicity (QD4)			
	Caucasian / White	Latino / Hispanic	Asian	Mixed / Other
Lake Forest as a place to raise a family	81.7	87.8	74.9	78.0
Lake Forest as a place to retire	56.2	59.0	58.1	73.6
Lake Forest as a place to work	54.0	60.1	49.7	41.7
Lake Forest as a place to shop and dine	60.1	54.7	53.5	58.9

**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, 32% reported that it is excellent, 50% said it is good, and 17% offered that it is fair. Less than 1% of businesses indicated that, when compared with neighboring areas, the business climate in the City of Lake Forest is poor or very poor. Although overall positive and negative business climate ratings were consistent from 2023 to 2024, the percentage of businesses who rated the climate as poor experienced a statistically significant decline during this period (-2%).

**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?*

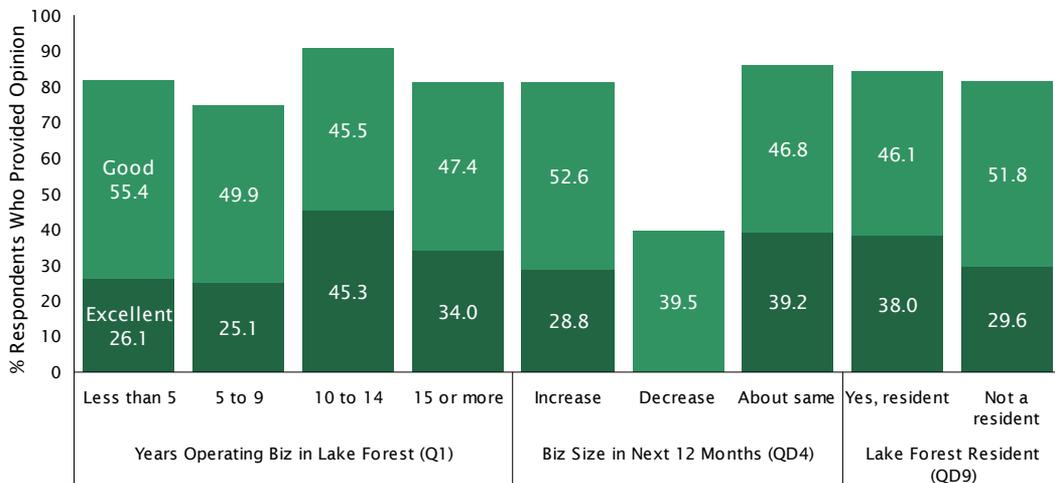
**FIGURE 7 QUALITY OF BUSINESS CLIMATE BY STUDY YEAR: BUSINESS SURVEY**



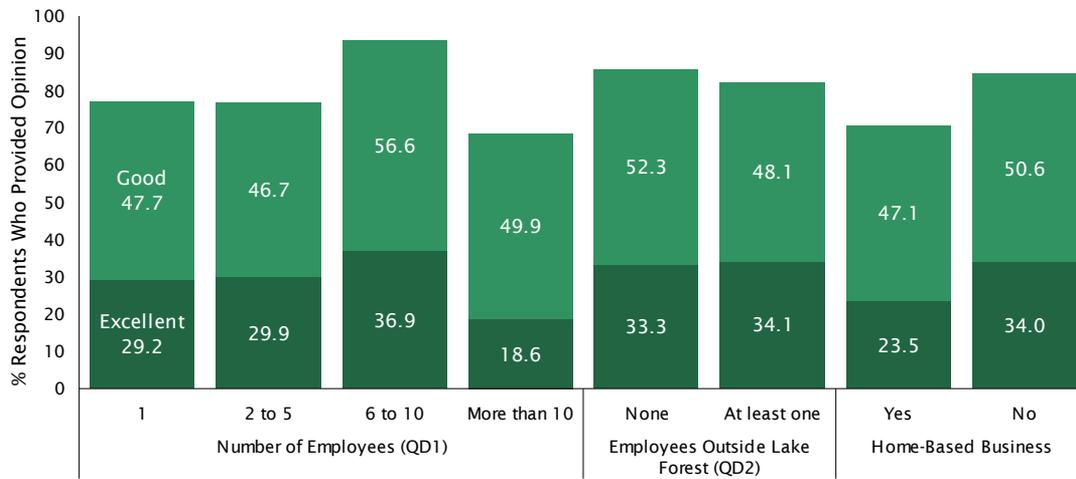
† Statistically significant difference ( $p < 0.05$ ) between the 2023 and 2024 studies.

Figures 8 and 9 show how respondents' ratings of the business climate in the City 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 two-thirds of respondents in each of the other subgroups rated the business climate in Lake Forest as excellent or good.

**FIGURE 8 QUALITY OF BUSINESS CLIMATE: BUSINESS SURVEY BY YEARS OPERATING BUSINESS 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**



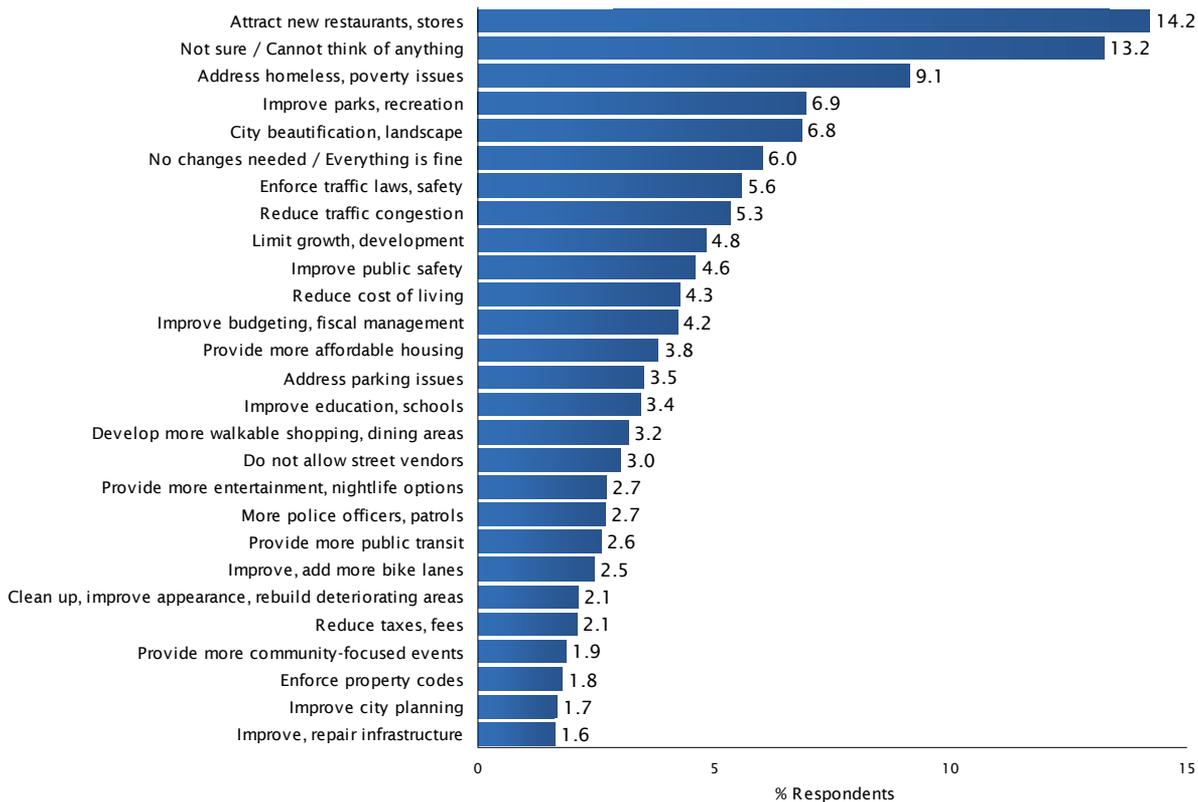
**WAYS TO IMPROVE LAKE FOREST** Residents and business managers were next asked to indicate the one thing city government could change to improve Lake Forest. For residents, the question focused on improving the City as a place to live, now and in the future. Business managers were asked more specifically 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 following pages.

As shown in Figure 10, approximately one-in-five residents surveyed indicated they were unsure of a change that would make Lake Forest a better place to live (13%) or desired no changes from the City (6%). Of the specific suggestions, the most common were attracting new restaurants and stores (14%), addressing homelessness/poverty issues (9%), improving parks and recreation (7%), and beautifying the City and its landscape (7%). No other single improvement was mentioned by more than 6% of respondents.

Although the order shifted somewhat from 2023 to 2024, the top three responses were consistent. When compared to 2023, residents placed more emphasis on improving parks and recreation and City beautification in 2024, while fewer mentioned public safety and limiting growth/development (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**

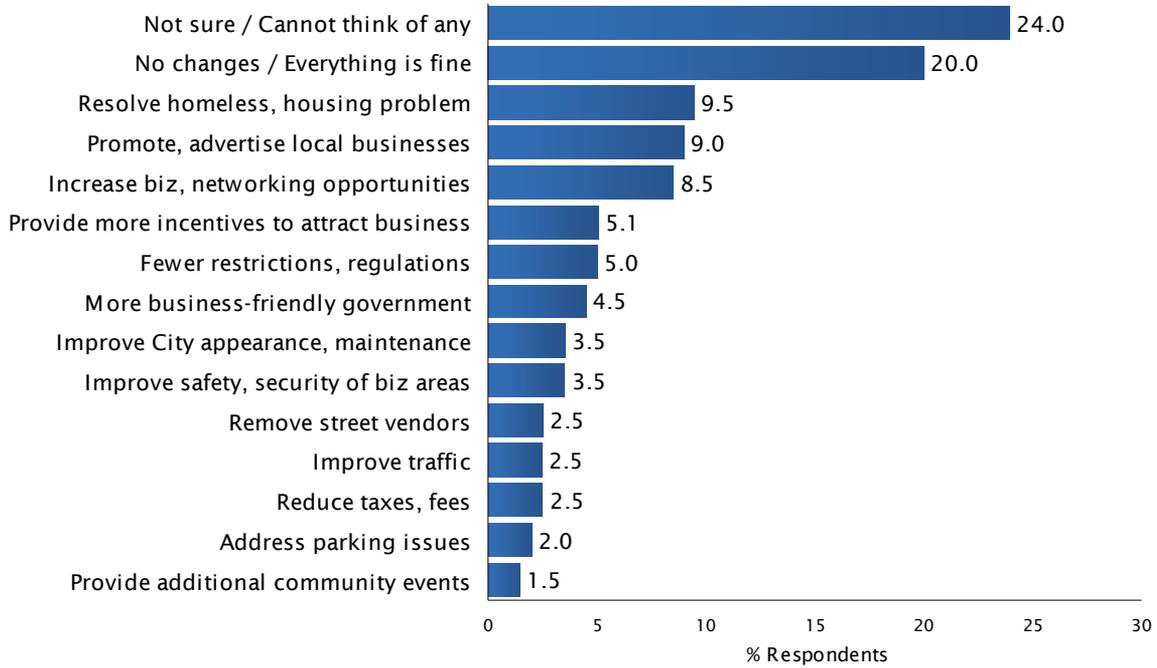
Study Year						
2024	2023	2021	2018	2016	2014	2012
Attract new restaurants, stores	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	Not sure / Cannot think of anything	No changes needed / Everything is fine
Not sure / Cannot think of anything	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	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 parks, recreation	Improve public safety	Limit growth, development	Reduce traffic congestion	Limit growth, development	Improve parks, recreation	Reduce traffic congestion
City beautification, landscape	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), four-in-ten business managers surveyed indicated that they were unsure of a change that could be made (24%) or that no changes were needed (20%). Specific suggestions for improving the business climate included resolving homelessness/housing-related issues (10%), promoting/advertising local businesses (9%), increasing business networking opportunities (9%),

providing more incentives to attract business (5%), and reducing restrictions/regulations (5%). No other improvement was mentioned by more than 5% 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 2023 to 2024. Making the top five for the first time since 2016 was the mention of increasing business networking opportunities.

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

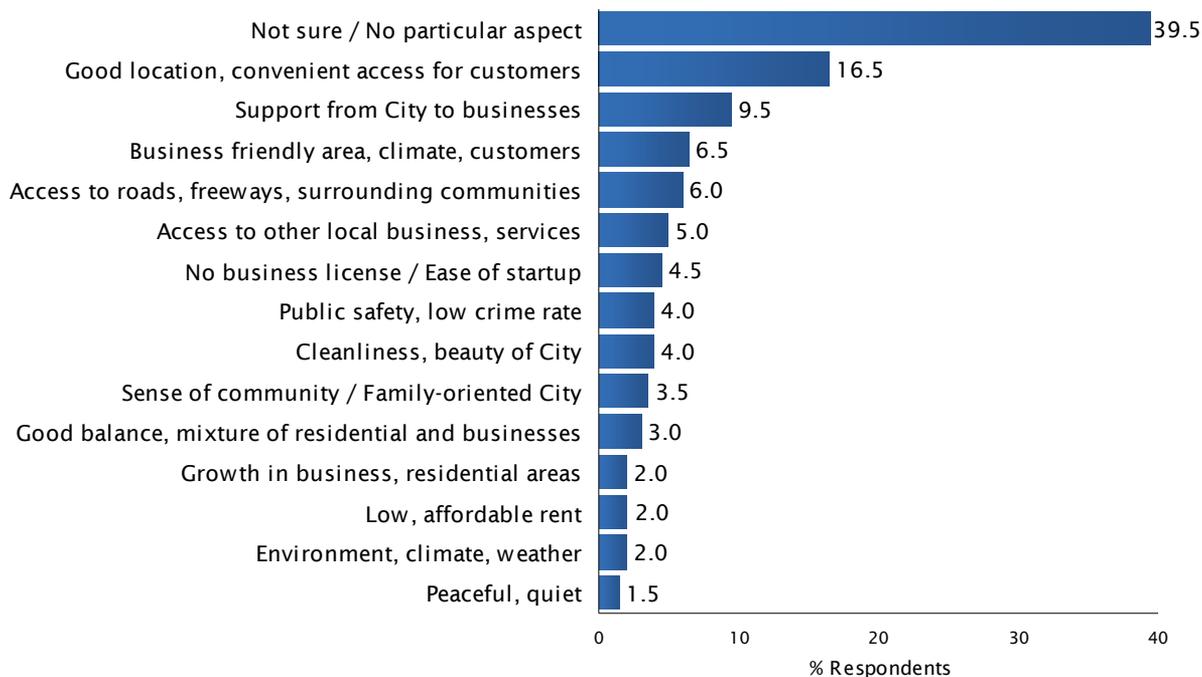
2024	2023	2021	Study Year 2018	2016	2014	2012
Not sure / Cannot think of any	No changes / Everything is fine	Not sure / Cannot think of any	No changes / Everything is fine	Not sure / Cannot think of any	Not sure / Cannot think of any	Not sure / Cannot think of any
No changes / Everything is fine	Not 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
Resolve homeless, housing problem	Promote, advertise local businesses	Promote, advertise local businesses	Promote, advertise local businesses	Increase biz, networking opportunities	Increase biz, networking opportunities	Increase biz, networking opportunities
Promote, advertise local businesses	Resolve homeless, housing problem	COVID-related concerns, help for businesses	Improve, add parking	Fewer restrictions/regulations	Improve, add parking	Reduce signage restrictions
Increase biz, networking opportunities	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.

Mentioned by four-in-ten business managers surveyed (40%), 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. Among specific aspects mentioned, having a convenient, easily-accessible location within the City (17%), support from the City to businesses (10%), the business friendly climate (7%), access to roads, freeways, and surrounding communities (6%), and access to other local businesses and services (5%) were mentioned most often.

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

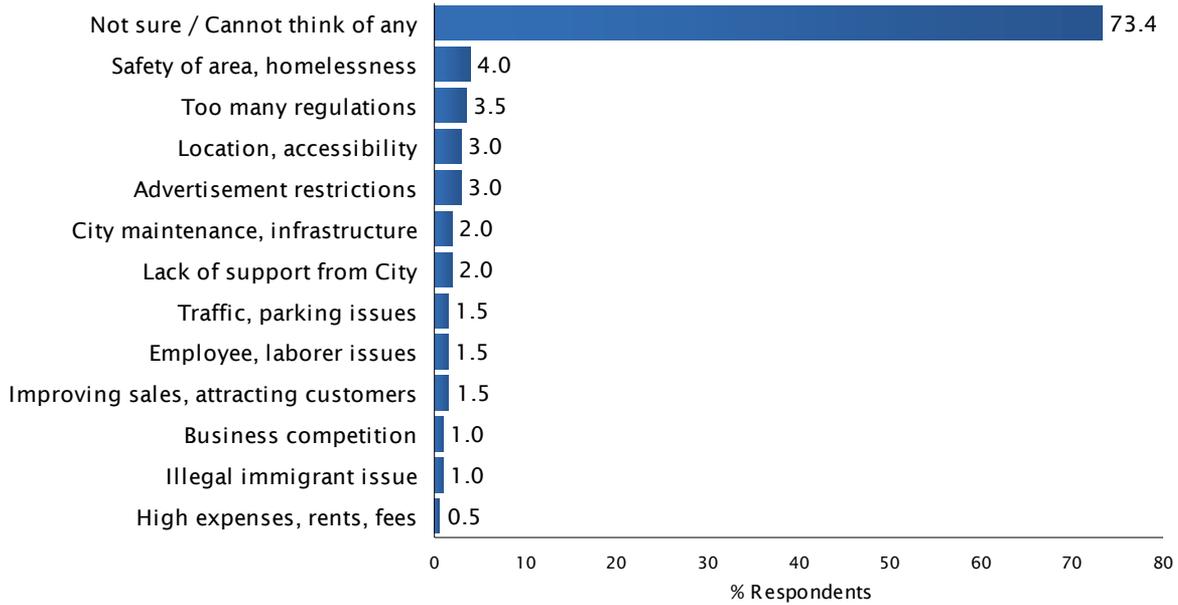
**FIGURE 12 ASPECTS OF CITY MOST BENEFICIAL TO BUSINESS: BUSINESS SURVEY**



**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. Seven-in-ten business managers surveyed (73%) said they could not think of any challenges associated with doing business in Lake Forest. The most common specific challenges cited were public safety/homeless concerns (4%), the number of regulations (4%), location and accessibility (3%), and advertising restrictions (3%). No other specific challenge was mentioned by more than 3% 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**

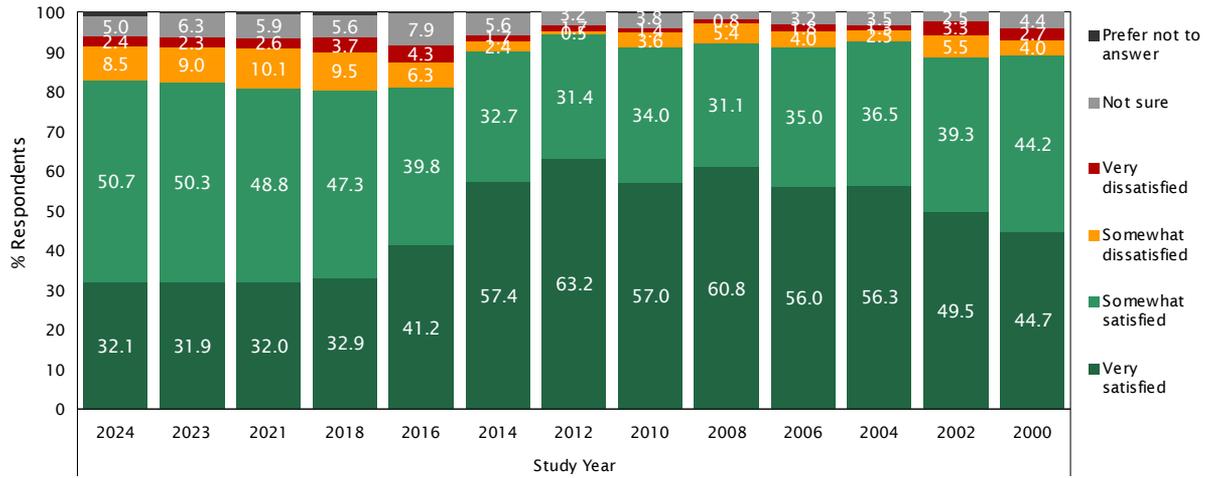


**OVERALL PERFORMANCE RATING** Both residents and businesses were asked to rate the job the City of Lake Forest is doing to provide municipal services. Because this question does not reference a specific program, facility, or service and requested that the respondent consider the City’s performance in 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 2024 and for prior surveys dating back to 2000, whereas Figure 18 on page 24 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, 83% of residents and 92% of local businesses indicated that they were satisfied in this respect in 2024. Moreover, satisfaction with the City’s overall performance in 2024 remained strikingly similar to the levels recorded in 2023 for both residents and businesses.

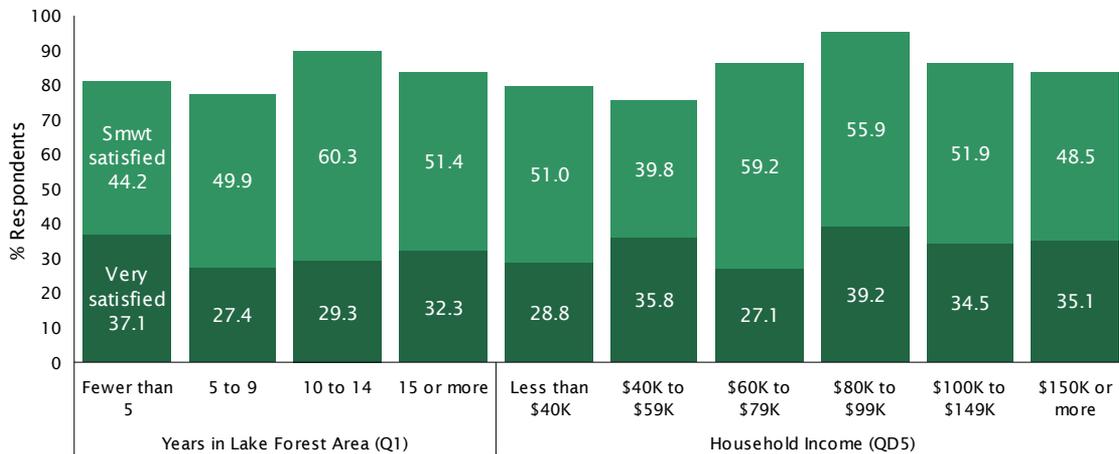
**Question 5: Resident Survey** *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

**FIGURE 14 OVERALL SATISFACTION: RESIDENT SURVEY BY STUDY YEAR**

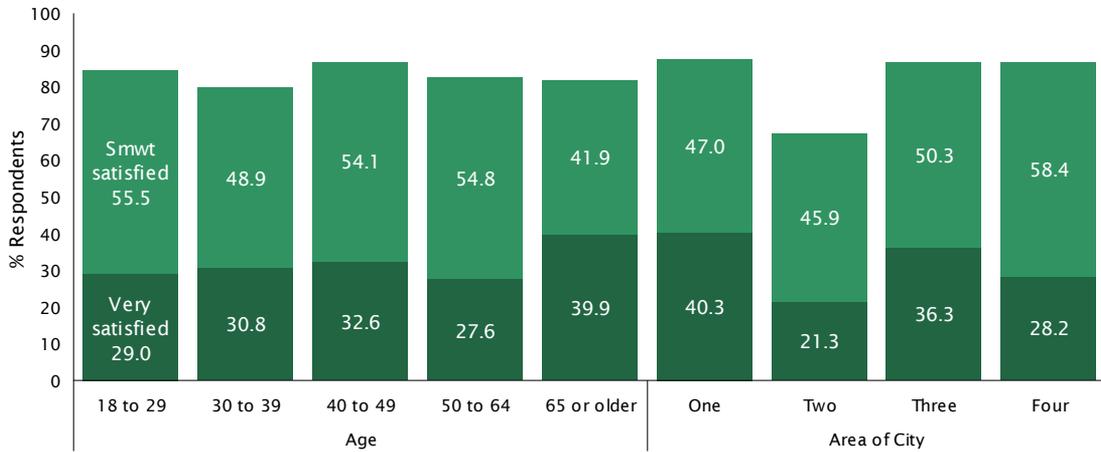


Figures 15 through 17 display how overall satisfaction with the City’s performance in providing municipal services varied by key resident traits. Figures 19 and 20 on page 25 present similar information for the business community. Overall satisfaction was consistently high (75%+) across resident subgroups, with the exception of a dip among Area 2 residents (67%). Aside from respondents who anticipated their business to decrease over the next year (50%), overall satisfaction among Lake Forest businesses was also consistently high across subgroups, ranging from a low of 79% to a high of 96%.

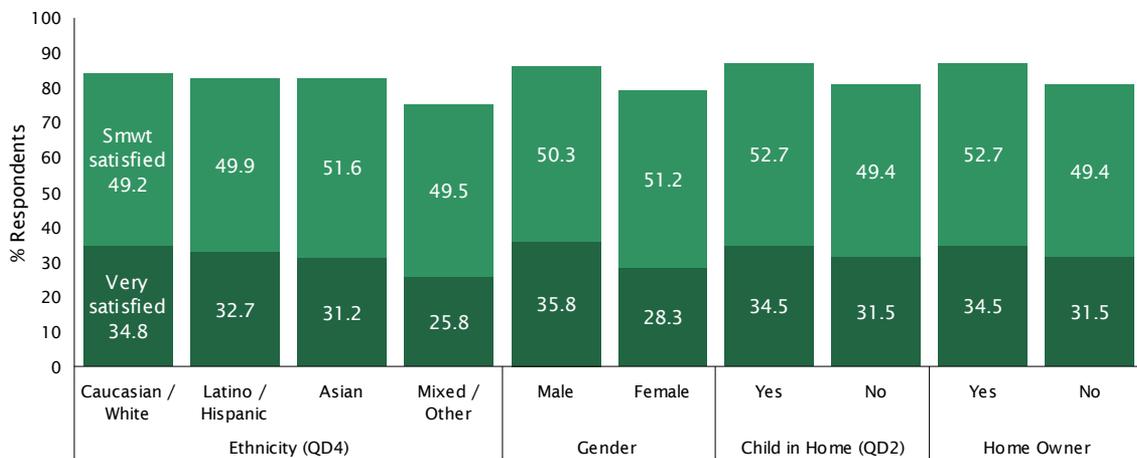
**FIGURE 15 OVERALL SATISFACTION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & HOUSEHOLD INCOME**



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

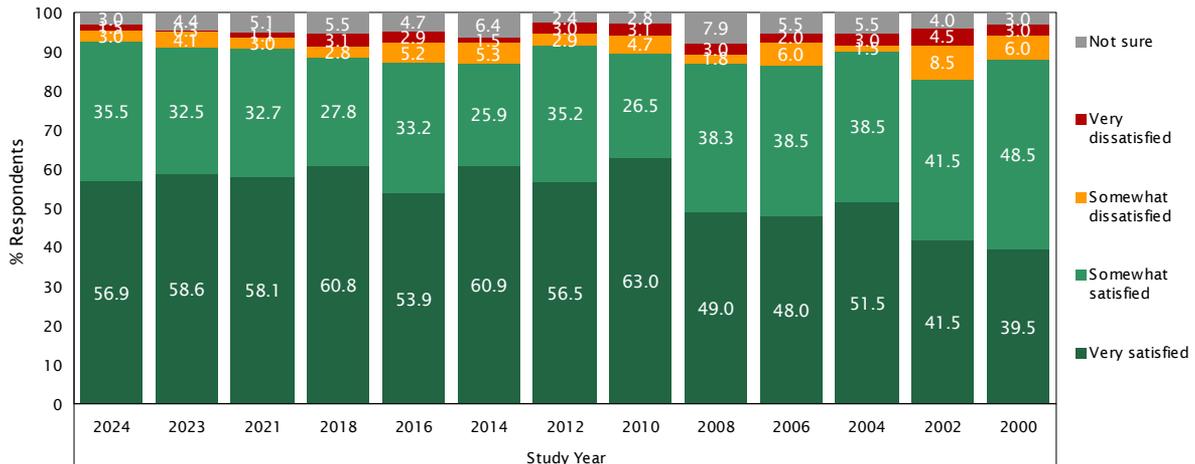


**FIGURE 17 OVERALL SATISFACTION: RESIDENT SURVEY BY ETHNICITY, GENDER, CHILD IN HOME & HOME OWNER**

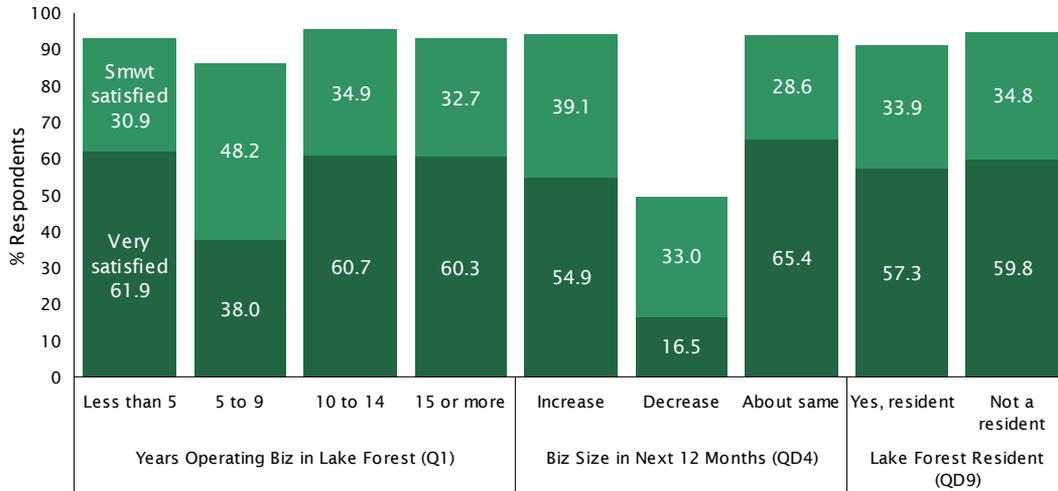


**Question 6: Business Survey** *Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services?*

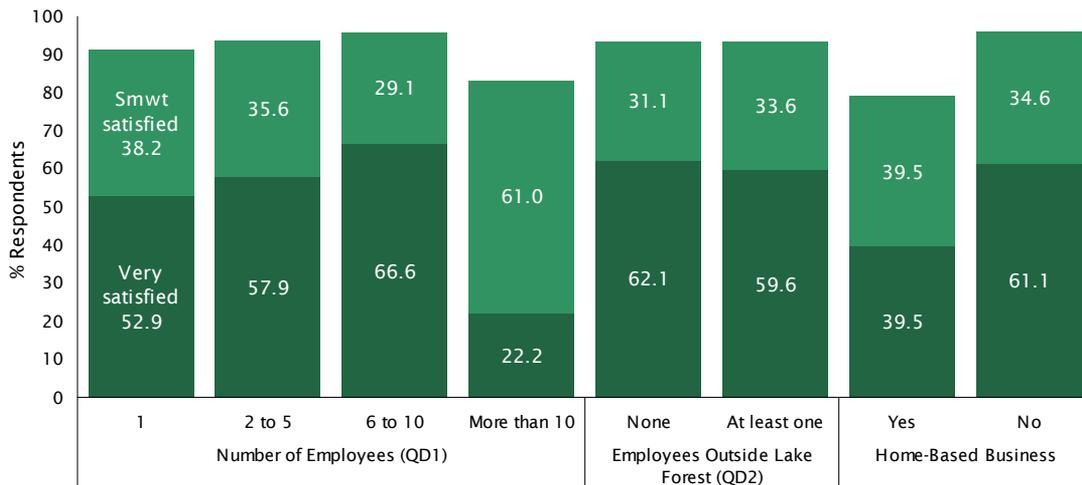
**FIGURE 18 OVERALL SATISFACTION: BUSINESS SURVEY BY STUDY YEAR**



**FIGURE 19 OVERALL SATISFACTION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS 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**



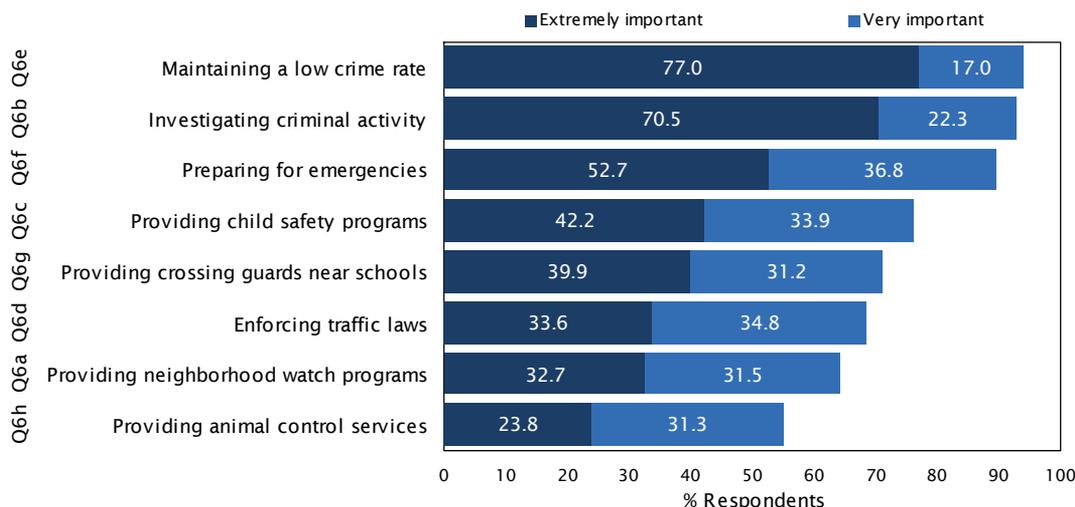
# SPECIFIC SERVICES: RESIDENT SURVEY

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 (93%) and preparing for emergencies (90%). At the other end of the spectrum, providing animal control services (55%) 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 2023 to 2024, as well as the difference between the two studies. There were statistically significant declines in the level of importance placed on five of the eight police services during this period, with the largest found for providing animal control services (-7%).

**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**

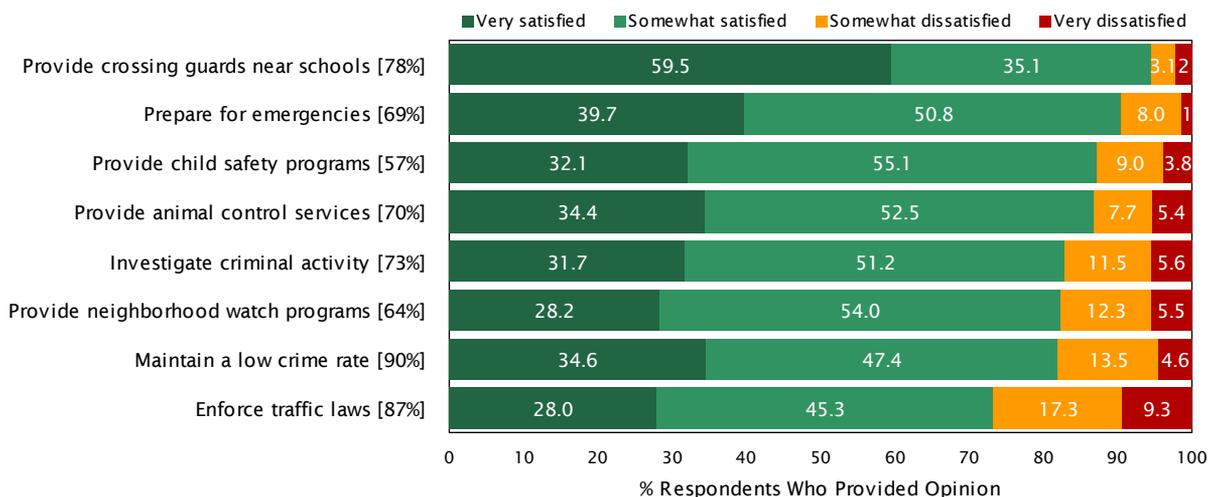
	Study Year				Change in Extremely + Very Important 2023 to 2024
	2024	2023	2021	2018	
Preparing for emergencies	89.5	89.8	90.0	86.7	-0.3
Maintaining a low crime rate	93.9	94.2	94.6	95.9	-0.3
Investigating criminal activity	92.8	93.5	94.6	93.9	-0.7
Providing child safety programs	76.1	80.2	75.6	72.6	-4.1†
Providing neighborhood watch programs	64.2	69.3	68.0	64.4	-5.2†
Enforcing traffic laws	68.4	73.9	67.9	72.3	-5.6†
Providing crossing guards near schools	71.1	76.9	71.8	73.1	-5.8†
Providing animal control services	55.0	62.3	54.2	52.8	-7.2†

† Statistically significant difference (p < 0.05) between the 2023 and 2024 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 78% of respondents who expressed an opinion about the Department’s efforts to provide crossing guards near schools, 60% were very satisfied and 35% 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 (95% very or somewhat satisfied), prepare for emergencies (91%), provide child safety programs (87%), and provide animal control services (87%).

Table 8 shows how the 2024 results compare with the 2023 study and reveals there was a statistically significant increase in satisfaction with efforts to provide neighborhood watch programs (+5%) and a decline in satisfaction with enforcing traffic laws (-6%).

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

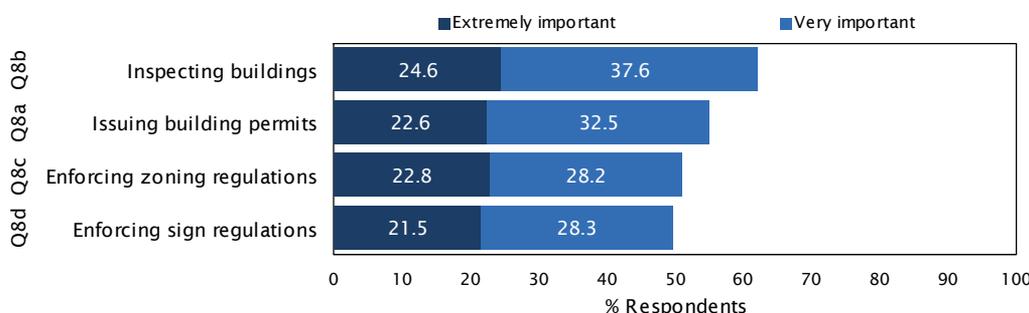
	Study Year				Change in Satisfaction 2023 to 2024
	2024	2023	2021	2018	
Provide neighborhood watch programs	82.2	77.1	75.3	81.6	+5.1†
Investigate criminal activity	82.9	79.7	77.2	85.5	+3.2
Prepare for emergencies	90.5	87.4	81.3	84.3	+3.1
Provide child safety programs	87.2	85.2	88.5	91.4	+2.0
Provide crossing guards near schools	94.6	93.1	96.1	94.6	+1.5
Provide animal control services	86.8	85.6	86.0	87.0	+1.2
Maintain a low crime rate	81.9	82.3	82.1	86.7	-0.4
Enforce traffic laws	73.3	79.5	86.5	82.9	-6.2†

† Statistically significant difference (p < 0.05) between the 2023 and 2024 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 (62%), followed by issuing building permits (55%), enforcing zoning regulations (51%), and enforcing sign regulations (50%). When compared with 2023, there were statistically significant declines in the perceived importance of each of the four development services tested, with the largest recorded for enforcing zoning regulations (-8%, 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**

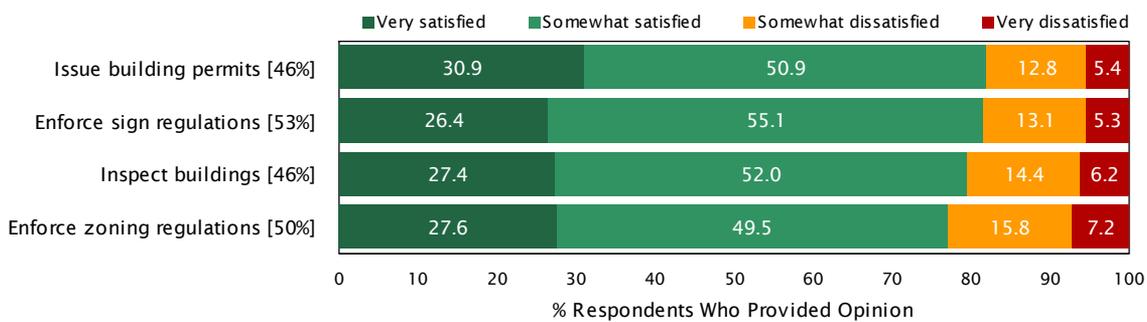
	Study Year				Change in Extremely + Very Important 2023 to 2024
	2024	2023	2021	2018	
Inspecting buildings	62.2	66.9	62.5	67.2	-4.8†
Enforcing sign regulations	49.7	55.2	51.3	50.4	-5.5†
Issuing building permits	55.1	61.3	54.7	57.9	-6.2†
Enforcing zoning regulations	51.0	58.9	58.8	59.3	-8.0†

† Statistically significant difference (p < 0.05) between the 2023 and 2024 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 82% for issuing building permits. From 2023 to 2024, there was a statistically significant decline in satisfaction among residents for enforcing zoning regulations (-8%, 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 inspecting buildings 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 2023 to 2024
	2024	2023	2021	2018	
Enforce sign regulations	81.5	80.4	83.6	85.6	+1.1
Enforce zoning regulations	77.1	76.6	79.1	73.9	+0.5
Issue building permits	81.8	81.8	81.2	76.0	+0.0
Inspect buildings	79.4	87.1	86.1	86.6	-7.7†

† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

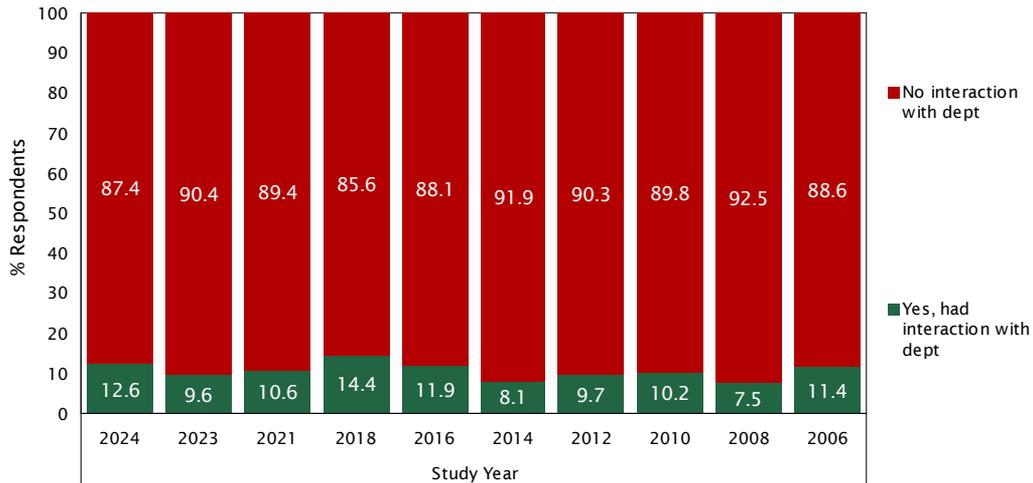
**TABLE 11 SATISFACTION WITH DEVELOPMENT SERVICES: RESIDENT SURVEY BY INTERACTED WITH DEVELOPMENT SERVICES DEPARTMENT IN PAST YEAR**

	Interacted With Development		Difference in Satisfaction
	Yes	No	
Issue building permits	79.7	82.7	-3.0
Enforce sign regulations	78.8	82.2	-3.4
Enforce zoning regulations	70.7	77.9	-7.2
Inspect buildings	71.3	81.5	-10.2

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 13% of residents surveyed indicated that they had interacted with the Department during the 12 months prior to the survey in 2024, which is statistically comparable to the finding from 2023.

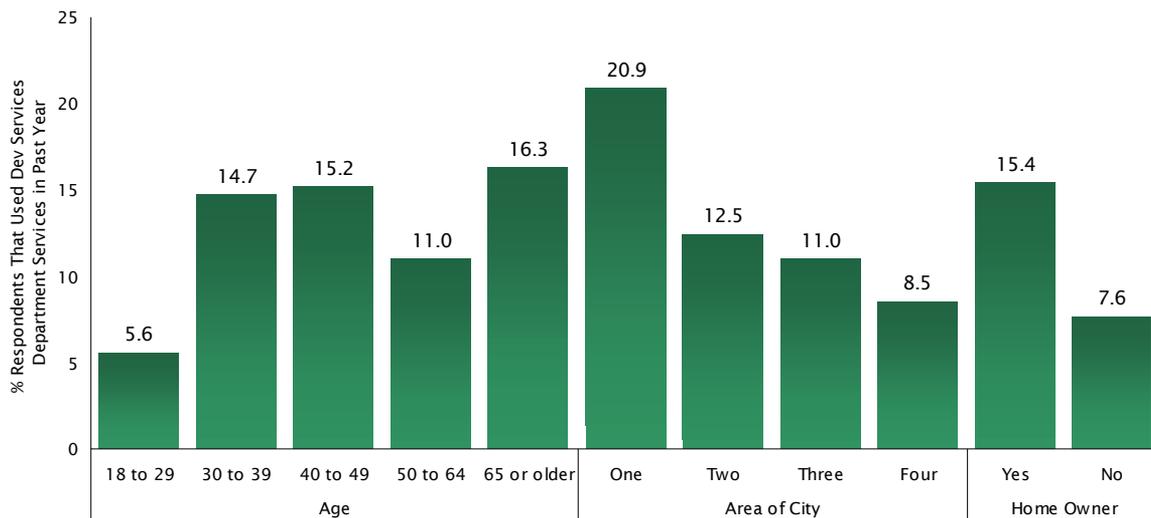
**Question 10: Resident Survey** *In the past year, have you applied for a building permit, received a building inspection, requested code enforcement, or used any of the other services offered by Lake Forest's Development Services Department?*

**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 30 years of age, Area 1 residents, and home owners (see Figure 26).

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

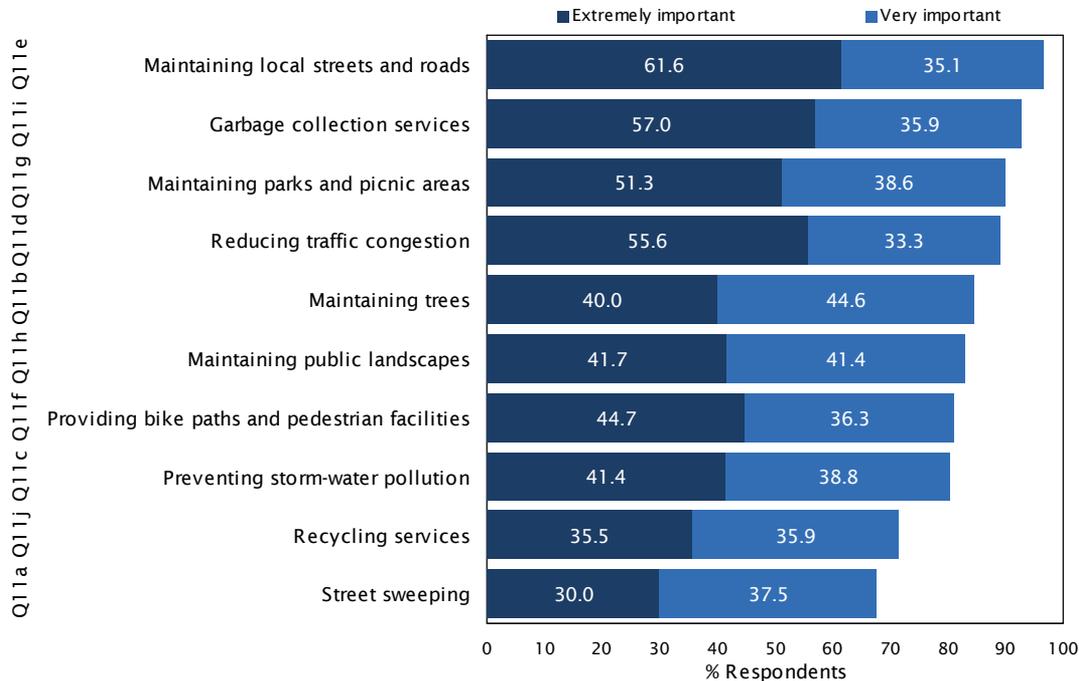


**PUBLIC WORKS DEPARTMENT** Figure 27 on the next page presents the importance that residents assigned to ten services provided by the Public Works Department, sorted in order of importance. Overall, maintaining local streets and roads was viewed as the most important service (97%), followed by garbage collection services (93%), maintaining parks and picnic areas (90%), and reducing traffic congestion (89%). When compared with 2023, there were statistically

significant declines in the perceived importance of three services: street sweeping (-10%), providing recycling services (-7%), and preventing storm-water pollution (-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**

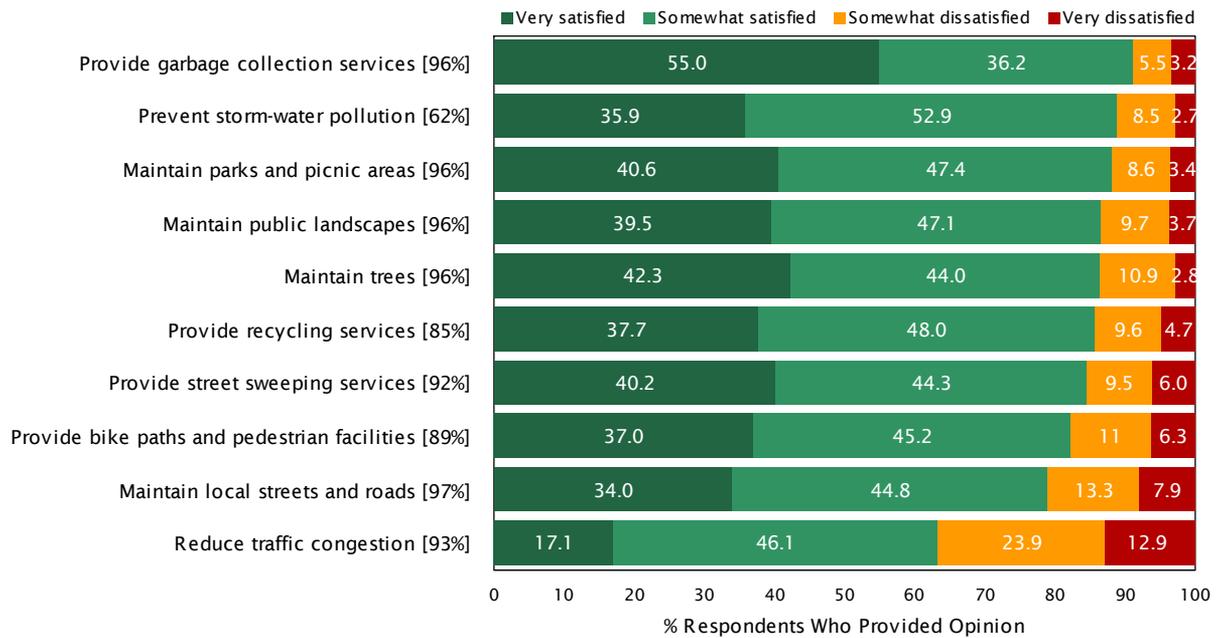
	Study Year				Change in Extremely + Very Important 2023 to 2024
	2024	2023	2021	2018	
Providing bike paths and pedestrian facilities	81.1	77.2	80.3	72.5	+3.9
Maintaining trees	84.6	83.8	82.7	79.6	+0.9
Reducing traffic congestion	89.0	89.2	82.8	86.5	-0.3
Maintaining local streets and roads	96.7	97.3	93.9	95.2	-0.7
Maintaining parks and picnic areas	89.9	91.1	88.8	85.9	-1.2
Maintaining public landscapes	83.1	84.3	80.1	75.6	-1.3
Providing garbage collection services	92.9	95.2	94.7	93.1	-2.3
Preventing storm-water pollution	80.3	84.4	84.4	81.9	-4.2†
Providing recycling services	71.4	78.6	81.4	74.2	-7.2†
Street sweeping	67.5	77.3	73.5	68.5	-9.8†

† Statistically significant difference (p < 0.05) between the 2023 and 2024 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 (91%), prevent storm-water pollution (89%), and maintain parks and picnic areas (88%). Table 13 on the next page shows how the measured satisfaction with Public Works services differed between the 2023 and 2024 surveys, with one statistically significant improvement during this period (preventing storm-water pollution: +7%).

**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 2023 to 2024
	2024	2023	2021	2018	
Prevent storm-water pollution	88.8	82.0	86.0	88.2	+6.8†
Maintain parks and picnic areas	88.0	86.3	91.2	89.5	+1.6
Provide recycling services	85.7	84.9	83.2	89.0	+0.8
Provide garbage collection services	91.2	91.6	93.4	96.8	-0.3
Reduce traffic congestion	63.2	63.9	70.2	57.2	-0.7
Maintain trees	86.3	87.4	87.9	88.0	-1.0
Provide bike paths and pedestrian facilities	82.3	83.6	87.0	84.6	-1.3
Maintain public landscapes	86.7	88.1	91.0	88.4	-1.4
Provide street sweeping services	84.5	86.5	83.4	86.4	-2.0
Maintain local streets and roads	78.8	81.8	83.5	83.7	-3.0

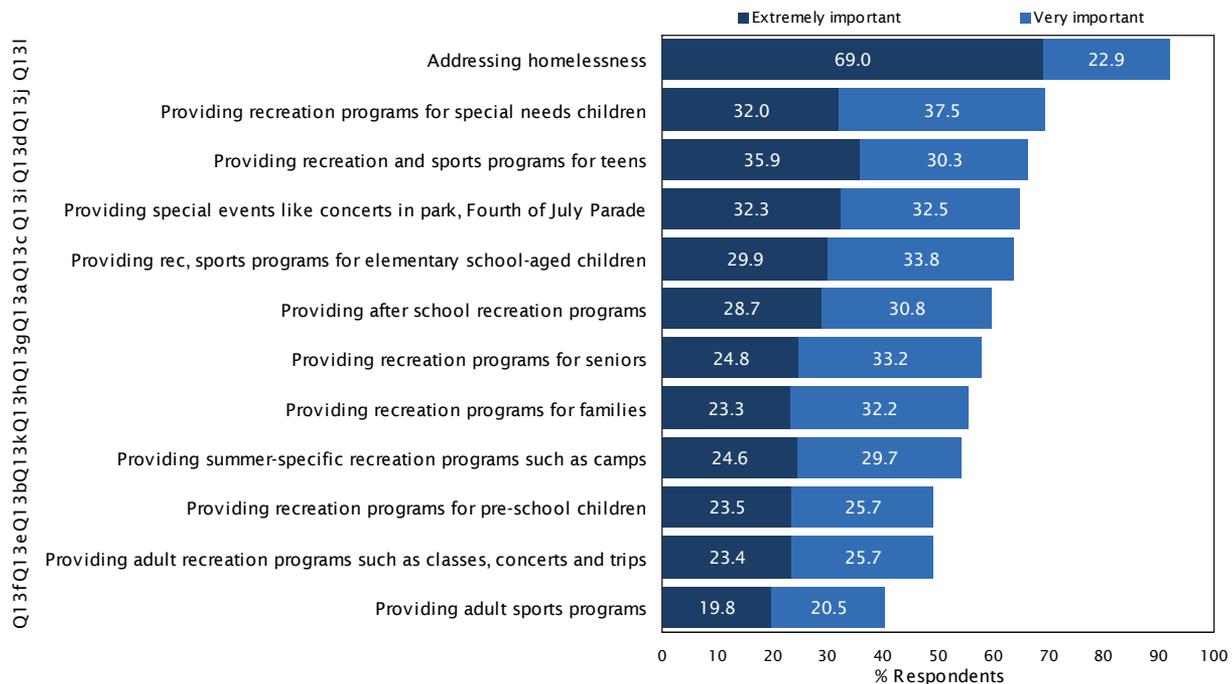
† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

**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 (92%), distantly followed by providing recreation programs for special needs children (70%), providing recreation and sports programs for teens (66%), and providing special events like concerts in the park and the Fourth of July Parade (65%). Comparatively, providing adult sports programs (40%) was viewed as less important. There were statistically significant declines in the importance of 3 of the 12 community services from 2023 to 2024: providing summer-specific recreation programs (-8%), adult sports programs (-8%), and adult recreation programs (-6%, 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**

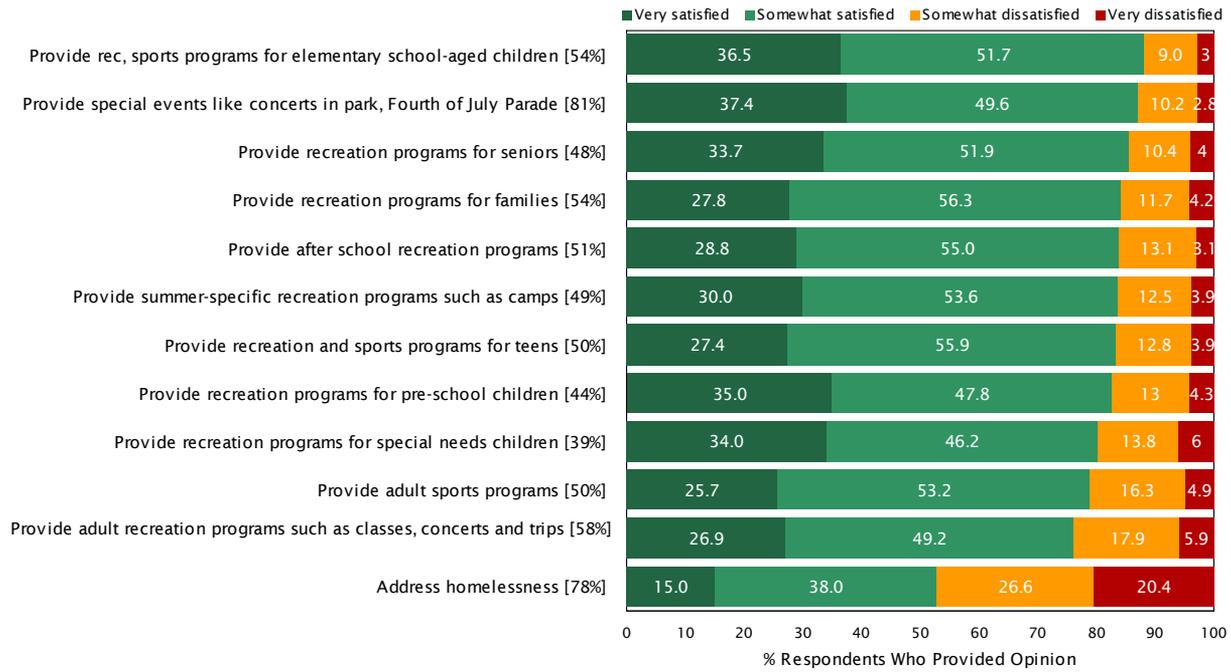
	Study Year				Change in Extremely + Very Important 2023 to 2024
	2024	2023	2021	2018	
Addressing homelessness	91.9	89.6	N/A	N/A	+2.3
Providing rec programs for special needs children	69.5	68.1	70.7	70.6	+1.5
Providing rec, sports for elementary children	63.8	65.1	63.9	64.3	-1.4
Providing rec, sports for teens	66.2	67.9	66.8	68.2	-1.8
Providing recreation programs for seniors	58.0	60.1	60.3	59.1	-2.1
Providing after school recreation programs	59.6	62.2	60.3	60.0	-2.6
Providing recreation programs for families	55.5	59.6	57.2	55.0	-4.1
Providing special events like concerts in the park	64.8	68.9	65.2	62.9	-4.2
Providing recreation programs for preschoolers	49.2	53.7	52.6	49.6	-4.6
Providing adult rec programs	49.2	55.4	50.6	46.2	-6.2†
Providing adult sports programs	40.4	47.8	45.1	37.4	-7.5†
Providing summer-specific rec programs	54.3	62.3	56.6	54.8	-8.0†

† Statistically significant difference (p < 0.05) between the 2023 and 2024 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 (88%), provide special events like concerts in the park and the Fourth of July Parade (87%), and provide recreation programs for seniors (86%). Residents were notably less satisfied with the Department's efforts to address homelessness (53%). Satisfaction with each community service was consistent from 2023 to 2024, with no statistically significant changes (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 2023 to 2024
	2024	2023	2021	2018	
Providing special events like concerts in the park	87.0	84.5	83.7	88.4	+2.5
Provide recreation programs for families	84.1	82.5	81.8	80.9	+1.6
Address homelessness	52.9	51.5	N/A	N/A	+1.5
Provide rec, sports for elementary children	88.2	87.0	86.1	89.0	+1.2
Provide recreation programs for seniors	85.6	85.6	81.9	84.2	+0.0
Provide after school recreation programs	83.8	84.4	83.4	85.0	-0.6
Provide summer-specific rec programs	83.6	85.2	83.6	86.1	-1.6
Provide adult sports programs	78.8	80.5	76.5	75.6	-1.7
Provide rec, sports for teens	83.3	85.6	82.3	82.1	-2.3
Provide rec programs for special needs children	80.1	82.6	75.2	85.0	-2.5
Provide adult rec programs	76.2	79.0	80.5	76.5	-2.8
Provide recreation programs for preschoolers	82.8	86.4	82.9	88.0	-3.6

**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 22). The table divides residents who were satisfied with the City's overall performance into one group and those dissatisfied into a second group. Also displayed is the difference between the two groups in terms of the percentage who 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 inspect buildings, provide recreation programs for seniors, maintain a low crime rate, and enforce sign regulations.

At the other end of the spectrum, there was much less difference between the two resident groups regarding their satisfaction with the City’s efforts to provide crossing guards near schools, maintain parks and picnic areas, and provide special events like concerts in the park and the Fourth of July Parade.

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

		Satisfaction With City's Overall Performance (Q5)		Difference Between Groups For Each Service
		Very or somewhat satisfied	Very or somewhat dissatisfied	
% Respondents Satisfied With Each Service	Inspect buildings	86.9	42.4	44.5
	Provide recreation programs for seniors	91.5	47.6	44.0
	Maintain a low crime rate	86.3	47.5	38.8
	Enforce sign regulations	86.8	48.5	38.3
	Provide recreation programs for pre-school children	87.3	50.3	37.1
	Provide after school recreation programs	88.2	51.2	37.0
	Provide neighborhood watch programs	86.4	50.5	35.9
	Provide summer-specific recreation programs such as camps	88.1	53.2	34.9
	Enforce zoning regulations	83.4	48.8	34.6
	Provide adult sports programs	83.4	49.0	34.3
	Provide adult rec programs such as classes, concerts, trips	81.5	48.4	33.1
	Maintain local streets and roads	82.6	49.7	33.0
	Investigate criminal activity	86.7	56.1	30.6
	Enforce traffic laws	78.8	49.2	29.6
	Provide rec, sports programs for elementary children	91.6	62.8	28.8
	Address homelessness	56.2	28.5	27.7
	Prepare for emergencies	93.8	66.2	27.6
	Provide recreation programs for special needs children	83.3	55.8	27.5
	Provide recreation and sports programs for teens	87.3	61.6	25.7
	Provide recreation programs for families	87.6	62.3	25.3
	Provide street sweeping services	87.7	63.4	24.2
	Maintain public landscapes	90.1	67.9	22.2
	Provide bike paths and pedestrian facilities	84.8	63.8	21.0
	Reduce traffic congestion	66.2	45.9	20.2
	Provide recycling services	88.7	68.5	20.2
	Issue building permits	83.6	66.3	17.3
	Provide animal control services	88.8	71.6	17.2
	Provide child safety programs	89.5	72.5	16.9
	Maintain trees	89.5	73.1	16.5
	Prevent storm-water pollution	90.5	74.5	16.0
	Provide garbage collection services	93.4	78.3	15.1
	Provide special events like concerts in park	88.7	75.8	12.9
	Maintain parks and picnic areas	89.2	79.7	9.5
Provide crossing guards near schools	95.1	88.3	6.9	

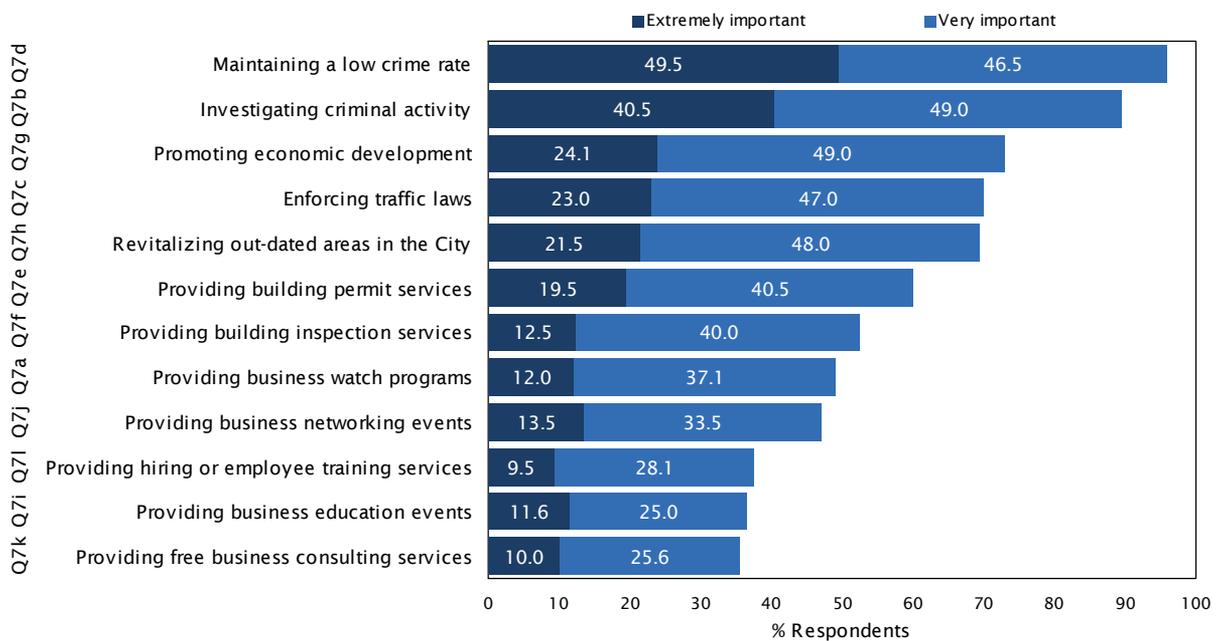
## SPECIFIC SERVICES: BUSINESS SURVEY

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 31 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 (96% extremely or very important), followed by investigating criminal activity (90%), and promoting economic development (73%). At the other end of the spectrum, business respondents generally viewed the City providing free business consulting services (36%), business education events (37%), and hiring or employee training services (38%) as much less important. Table 17 on the next page presents the change in importance assigned to each item tested in 2023 and 2024. During this period, there were three statistically significant increases: providing building inspection services (+14%), hiring or employee training services (+11%), and business watch programs (+10%).

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

**FIGURE 31 IMPORTANCE OF SELECT SERVICES I: BUSINESS SURVEY**



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

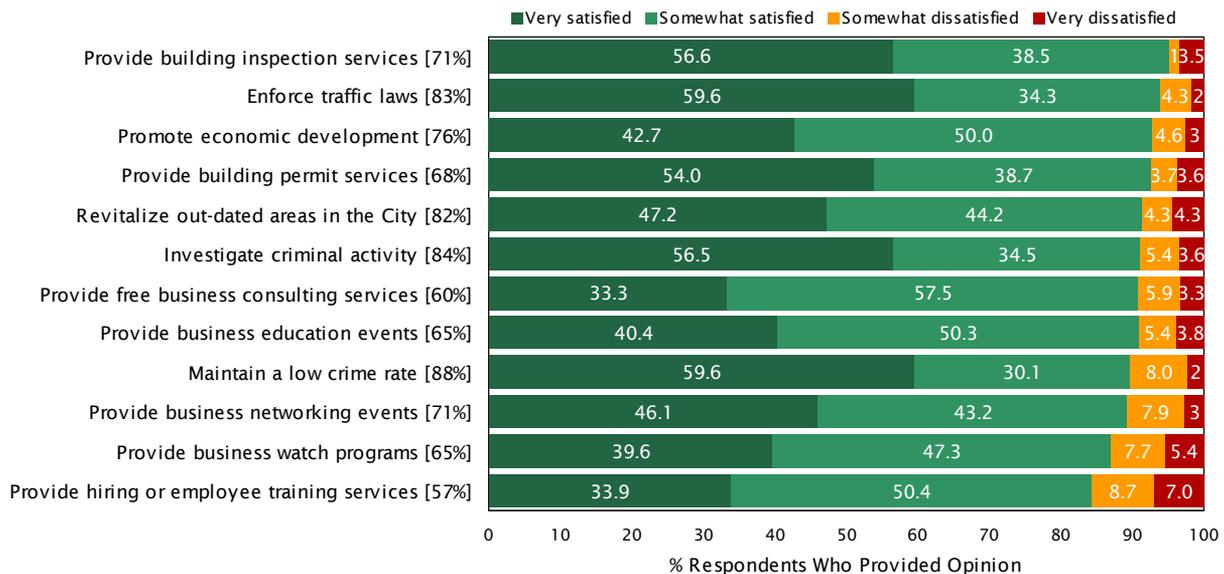
	Study Year				Change in Extremely + Very Important 2023 to 2024
	2024	2023	2021	2018	
Providing building inspection services	52.5	38.9	40.8	55.6	+13.6†
Providing hiring or employee training services	37.6	26.4	31.7	31.9	+11.2†
Providing business watch programs	49.1	38.8	45.0	49.8	+10.3†
Providing business networking events	47.1	39.0	46.4	47.0	+8.0
Providing building permit services	60.1	52.2	48.6	60.7	+7.8
Enforcing traffic laws	70.0	62.6	59.2	65.1	+7.4
Promoting economic development	73.0	65.7	71.6	75.9	+7.3
Revitalizing outdated areas in the City	69.5	66.2	61.7	71.8	+3.3
Investigating criminal activity	89.5	88.3	78.4	85.2	+1.2
Maintaining a low crime rate	96.0	95.2	92.1	92.9	+0.8
Providing business education events	36.6	37.7	35.8	45.4	-1.1
Providing free business consulting services	35.6	38.9	44.5	43.0	-3.3

† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

When asked about satisfaction with the same list of services, the business community was largely satisfied with every service tested (Figure 32). At the top of the list was providing building inspection services (95% very or somewhat satisfied), followed by enforcing traffic laws (94%), promoting economic development (93%), and providing building permit services (93%). Among the 12 services tested, there was a statistically significant increase in satisfaction with the City’s efforts to revitalize outdated areas in the City (+9%) from 2023 to 2024 (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 32 SATISFACTION WITH SELECT SERVICES I: BUSINESS SURVEY**



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

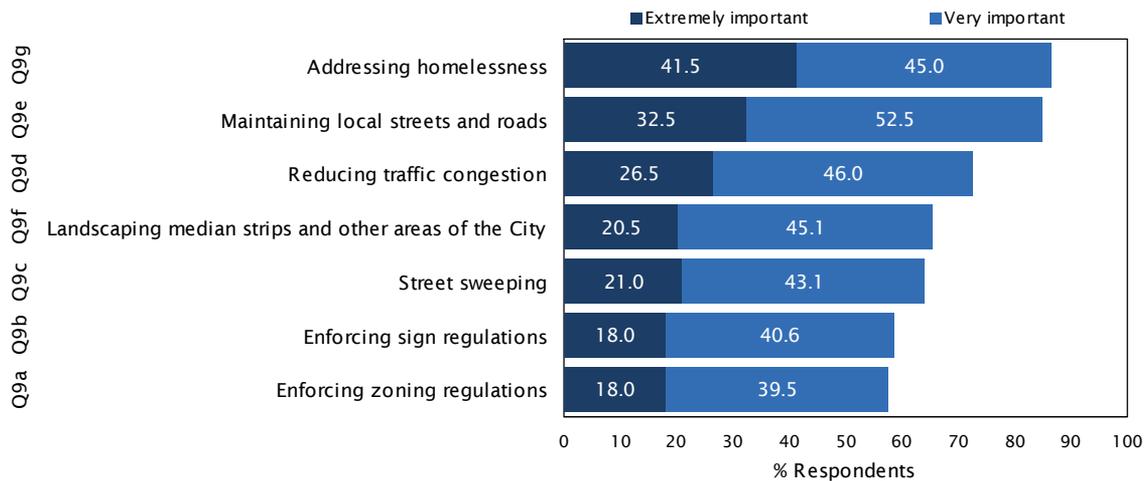
	Study Year				Change in Satisfaction 2023 to 2024
	2024	2023	2021	2018	
Revitalize outdated areas in the City	91.4	82.8	91.5	84.8	+8.6†
Investigate criminal activity	91.0	86.1	89.3	93.1	+4.9
Provide free business consulting services	90.8	86.0	89.5	90.4	+4.8
Maintain a low crime rate	89.7	85.3	92.0	91.1	+4.4
Enforce traffic laws	93.9	89.9	92.2	92.2	+4.0
Provide building inspection services	95.1	92.0	91.3	96.4	+3.1
Provide building permit services	92.7	89.7	96.2	95.1	+3.0
Promote economic development	92.7	90.5	90.8	89.5	+2.2
Provide business education events	90.8	88.7	93.3	93.8	+2.1
Provide business networking events	89.3	88.8	87.3	87.8	+0.5
Provide business watch programs	87.0	88.3	87.7	94.5	-1.3
Provide hiring or employee training services	84.3	87.8	86.4	90.9	-3.5

† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

The second list of services presented to business managers, shown in Figure 33, 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 addressing homelessness as most important (87% extremely or very important), followed by maintaining local streets and roads (85%) and reducing traffic congestion (73%). As shown in Table 19 on the next page, there was a statistically significant increase in the perceived importance of enforcing sign regulations from 2023 to 2024 (+10%).

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

**FIGURE 33 IMPORTANCE OF SELECT SERVICES II: BUSINESS SURVEY**



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

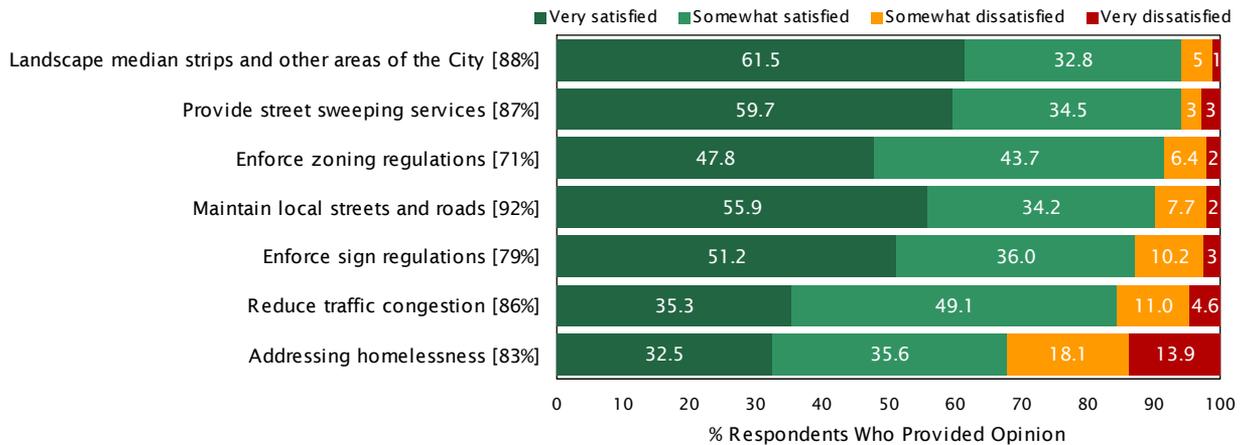
	Study Year				Change in Extremely + Very Important 2023 to 2024
	2024	2023	2021	2018	
Enforcing sign regulations	58.6	48.3	46.8	51.8	+10.3†
Street sweeping	64.1	59.7	64.2	59.8	+4.3
Addressing homelessness	86.5	83.8	N/A	N/A	+2.8
Enforcing zoning regulations	57.5	55.6	53.4	56.5	+1.9
Maintaining local streets and roads	85.0	84.4	83.3	83.7	+0.6
Landscaping median strips and other areas of the City	65.5	65.6	65.7	56.1	-0.1
Reducing traffic congestion	72.5	72.7	68.1	74.3	-0.1

† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

Figure 34 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 landscape median strips and other areas of the City (94% very or somewhat satisfied), provide street sweeping services (94%), enforce zoning regulations (92%), and maintain local streets and roads (90%). Although still positive, the business community was less satisfied with efforts to address homelessness (68%). As shown in Table 20, there were no statistically significant changes in satisfaction with the City’s efforts to provide each of the seven infrastructure and community services between 2023 and 2024.

**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 34 SATISFACTION WITH SELECT SERVICES II: BUSINESS SURVEY**



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

	Study Year				Change in Satisfaction 2023 to 2024
	2024	2023	2021	2018	
Landscape median strips and other areas of the City	94.3	90.2	95.9	96.4	+4.1
Provide street sweeping services	94.2	91.6	93.1	94.6	+2.6
Reduce traffic congestion	84.4	83.6	83.5	80.7	+0.7
Address homelessness	68.0	69.3	N/A	N/A	-1.3
Enforce zoning regulations	91.5	92.9	93.0	89.1	-1.5
Enforce sign regulations	87.2	89.5	92.6	90.9	-2.2
Maintain local streets and roads	90.2	93.2	95.7	95.7	-3.0



## 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.<sup>1</sup> 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.

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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

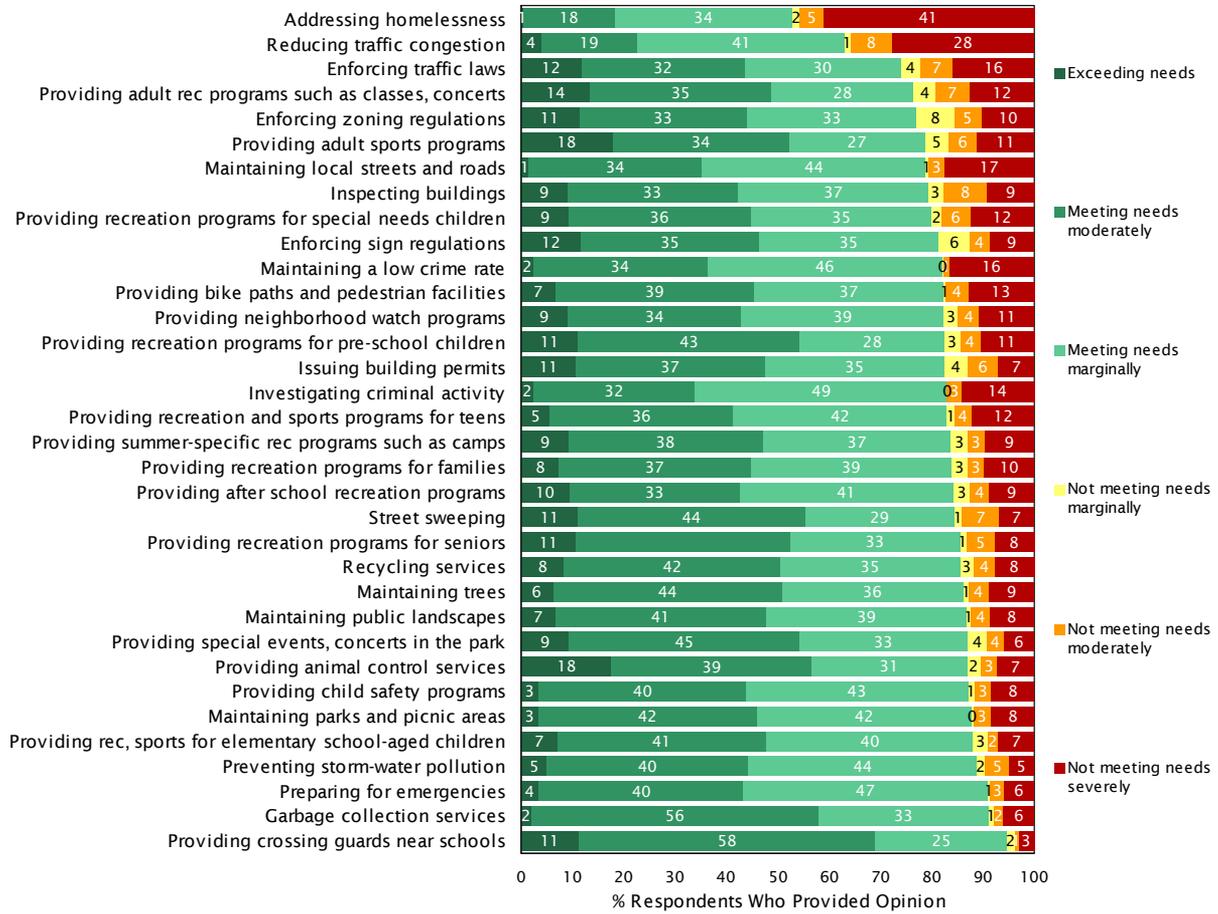
		Importance			
		Not too important	Somewhat important	Very important	Extremely important
Satisfaction	Very satisfied	Exceeding needs	Exceeding needs	Meeting needs, moderately	Meeting needs, moderately
	Somewhat satisfied	Exceeding needs	Meeting needs, moderately	Meeting needs, marginally	Meeting needs, 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 addressing homelessness 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., reducing traffic congestion—if they were somewhat dissatisfied with the City’s efforts to provide the service, but the service was viewed as only somewhat important.

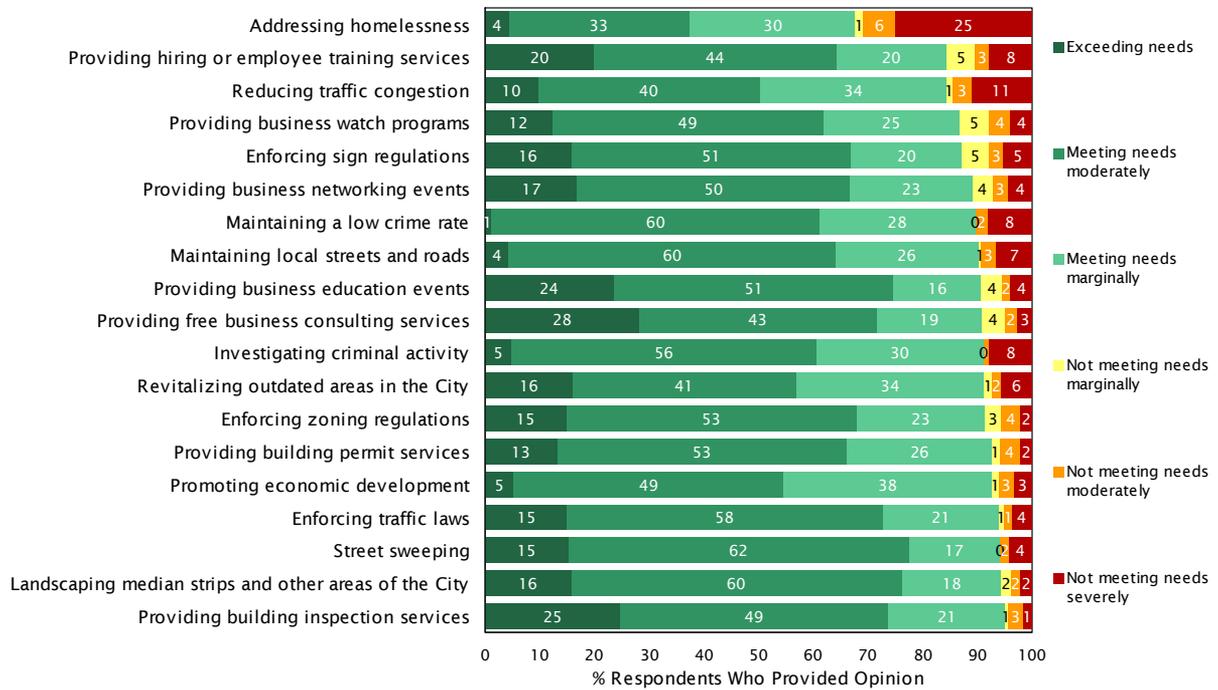
Figure 35 on the following page presents each of the 34 services tested among residents, along with the percentage of respondents who were grouped into each of the six possible categories. Figure 36 on page 43 provides the same information for the 19 services tested among the business community. For 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 18% of residents, marginally meeting the needs of 34% 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 83% of residents and 90% 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 35 and 36. Addressing homelessness is the top priority for improvement among residents, followed by reducing traffic congestion, enforcing traffic laws, providing adult recreation programs such as classes, concerts, and trips, and enforcing zoning regulations. Among businesses, addressing homelessness, providing hiring or training services, and reducing traffic congestion topped the list.

FIGURE 35 SERVICE NEEDS: RESIDENT SURVEY



**FIGURE 36 SERVICE NEEDS: BUSINESS SURVEY**



## NEIGHBORHOOD ISSUES

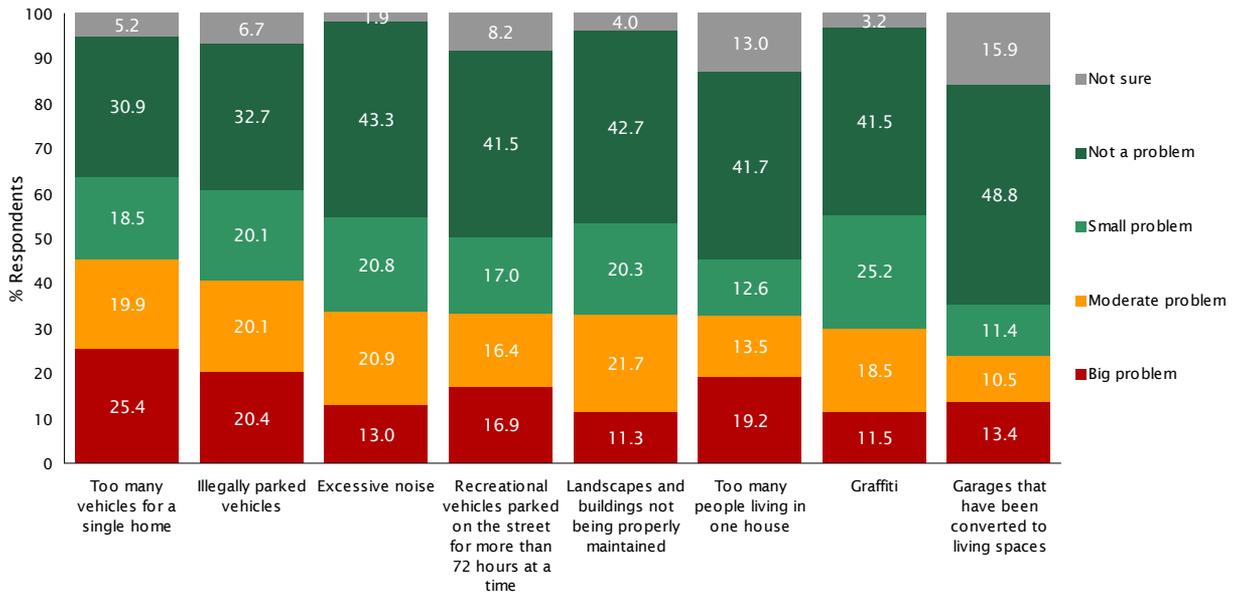
Research has shown that fear of crime and perceptions of safety can be influenced by factors that—although they are not directly related to crime—when present in a community are suggestive of an unsafe environment. Graffiti and excessive noise, for example, are problems that can lead a resident to feel 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 survey presented residents with each of the issues shown along the bottom of Figure 37 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 (45% big or moderate problem) was the most commonly perceived neighborhood problem, followed by illegally parked vehicles (41%). Among the eight issues tested, garages that have been converted to living spaces was seen as less of a problem (24%), but also had the highest percentage of not sure responses (16%).

When compared with the 2023 survey findings, each neighborhood issue was seen as more of a problem in 2024. Six of the eight items were flagged as statistically significant, and the largest increase was recorded for recreational vehicles parked on the street for more than 72 hours at a time (+9%, Table 22 on next page).

**Question 15: 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 37 RATING NEIGHBORHOOD ISSUES: RESIDENT SURVEY**



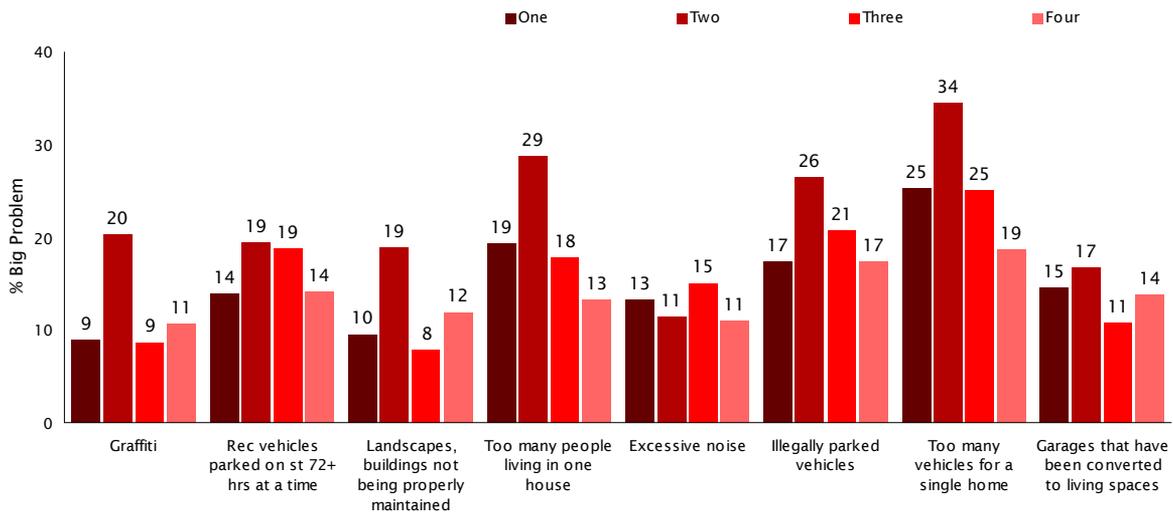
**TABLE 22 RATING NEIGHBORHOOD ISSUES BY STUDY YEAR (SHOWING % BIG OR MODERATE PROBLEM): RESIDENT SURVEY**

	Study Year					Change in Big + Moderate 2023 to 2024
	2024	2023	2021	2008	2006	
Recreational vehicles parked on the street for more than 72 hours at a time	33.3	24.7	26.0	17.9	25.5	+8.6†
Excessive noise	33.9	26.0	26.5	21.3	25.1	+7.9†
Landscapes and buildings not being properly maintained	33.0	26.1	22.6	18.1	15.2	+7.0†
Illegally parked vehicles	40.5	34.2	31.9	28.9	N/A	+6.4†
Too many vehicles for a single home	45.4	39.7	40.9	42.2	N/A	+5.7†
Garages that have been converted to living spaces	23.9	19.7	21.9	18.4	15.5	+4.2†
Graffiti	30.0	27.0	26.4	19.3	14.3	+3.1
Too many people living in one house	32.7	30.4	27.9	28.6	N/A	+2.3

† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

Figure 38 demonstrates that although each of the issues tested in Question 15 was 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 vehicles for a single home, too many people living in one house, illegally parked vehicles, and graffiti.

**FIGURE 38 RATING NEIGHBORHOOD ISSUES: RESIDENT SURVEY BY AREA OF CITY (SHOWING % BIG PROBLEM)**



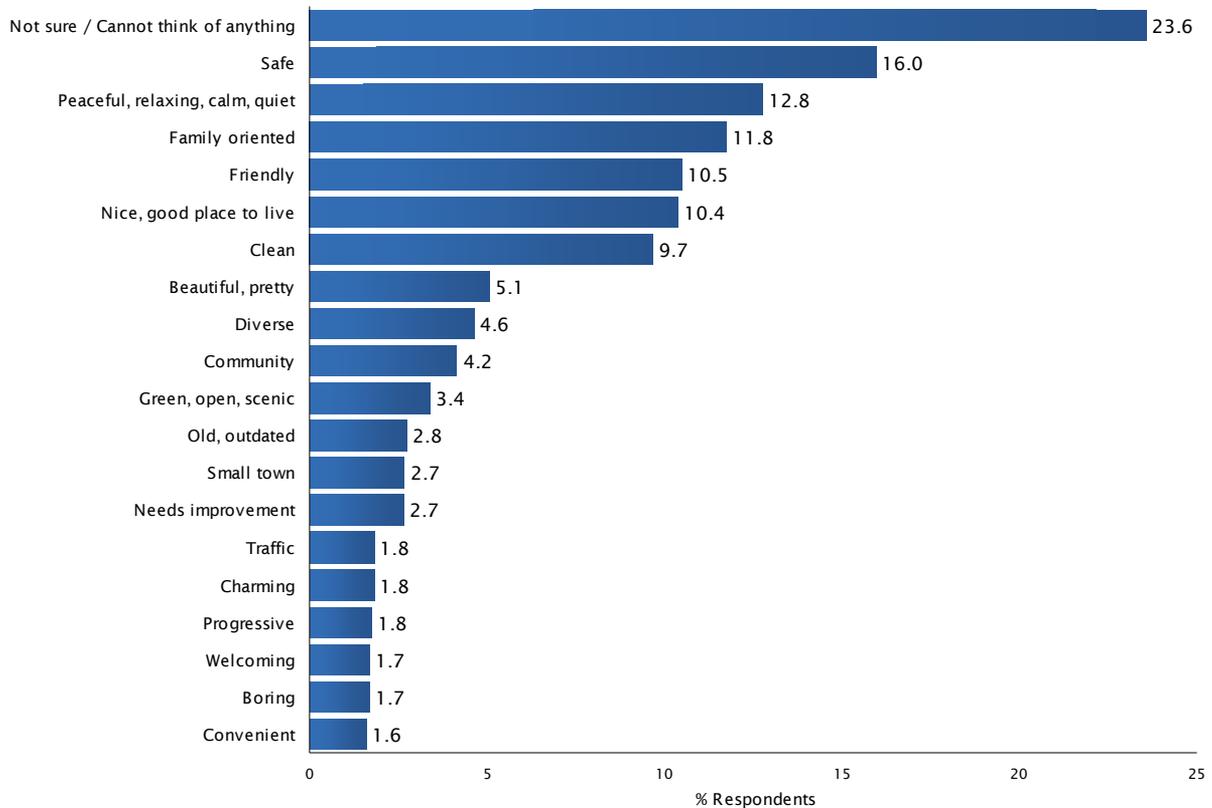
# BRANDING

To allow the City to track its performance over time, most of the questions included in the 2024 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 2024 survey of residents, these new questions were designed to inform the City’s branding efforts. Each question in this section was asked in an open-ended manner to gather top-of-mind responses without prompting or constraint. True North later reviewed the verbatim responses and grouped them into the categories shown in the figures on the following pages.

**CHARACTER & COMMUNITY** The first question in this series asked residents to think about Lake Forest’s character and community and provide the three words that best describe it. As shown in Figure 39, safe (16%), peaceful/relaxing/calm/quiet (13%), family-oriented (12%), friendly (11%), nice/good place to live (10%), and clean (10%) were the words and phrases cited most frequently. Approximately one-in-four residents (24%) were unsure which words to use or could not think of how best to describe Lake Forest.

**Question 16: Resident Survey** *What three words would you use to describe Lake Forest's character and community?*

**FIGURE 39 WORDS TO DESCRIBE LAKE FOREST’S CHARACTER & COMMUNITY**

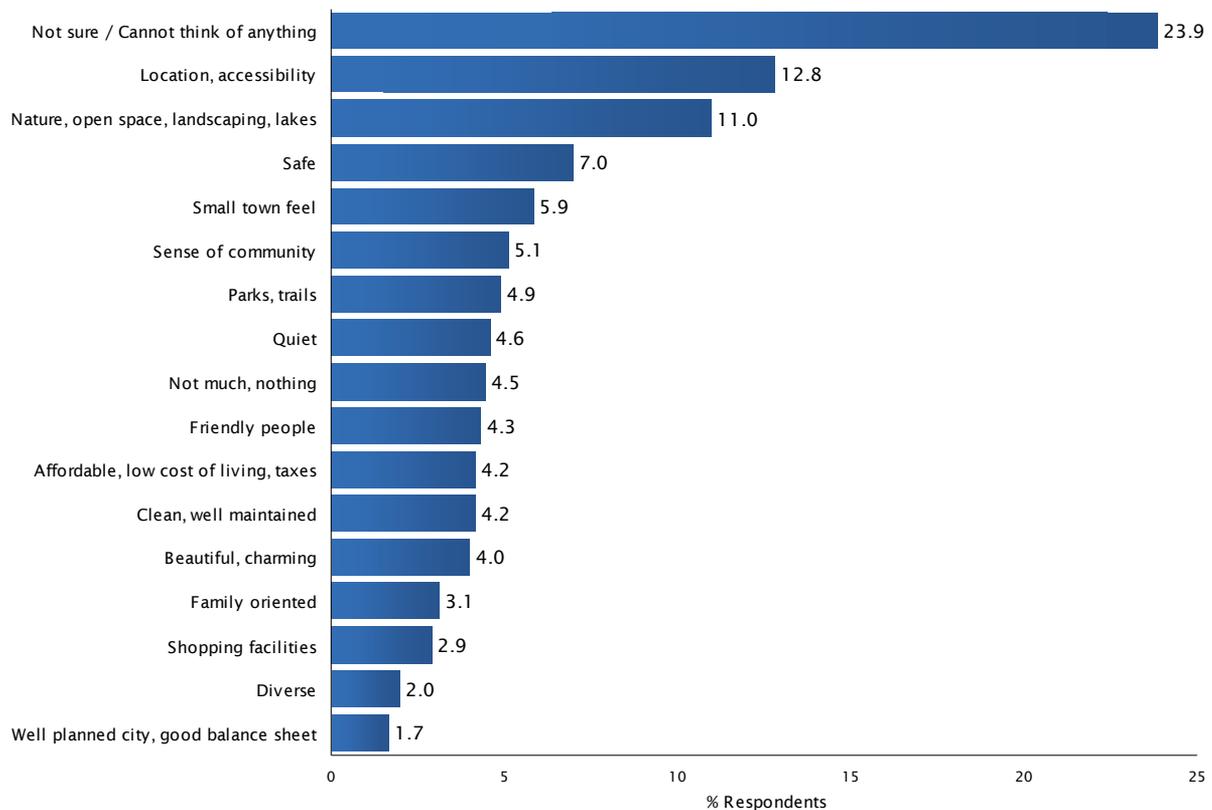


**WHAT MAKES LAKE FOREST SPECIAL?** Respondents were next asked to highlight what sets Lake Forest apart from other cities in the region (Figure 40). Lake Forest’s location/ accessibility (13%) and natural resources (open space, landscape, lakes, 11%) were mentioned most frequently as to what makes Lake Forest special, followed by the City’s safety (7%), small-town feel (6%), sense of community (5%), parks/trails (5%), and quiet atmosphere (5%).

Twenty-eight percent (28%) of residents were unsure, could not think of anything (24%), or indicated that Lake Forest was similar to other cities (5%).

**Question 17: Resident Survey** *When thinking about other cities in the region, what makes Lake Forest special?*

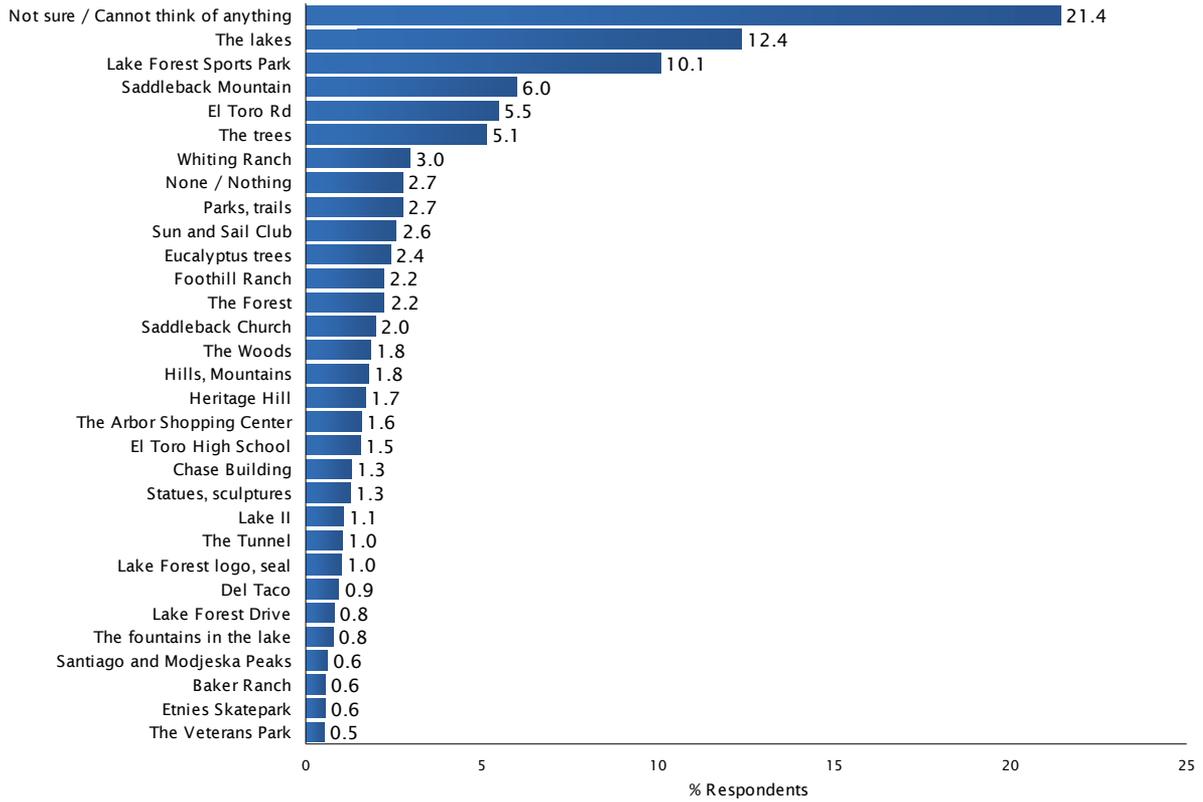
**FIGURE 40 WHAT MAKES LAKE FOREST SPECIAL**



**LOCATIONS & LANDMARKS** The last of the three question in this series asked residents to provide the location, landmark, or visual that they most associate with Lake Forest. The lakes (12%), Lake Forest Sports Park (10%), Saddleback Mountain (6%), El Toro Road (6%), and trees (5%) were the top mentions (see Figure 41 on the next page). Approximately one-in-four residents were unsure or could not think of a Lake Forest location, landmark, or visual (21%), or said that they did not associate any with the City (3%).

**Question 18: Resident Survey** *What location, landmark or visual do you associate with Lake Forest?*

**FIGURE 41 LOCATION, LANDMARK OR VISUAL ASSOCIATED WITH LAKE FOREST**



## 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. Beginning in 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 42, managers were most in agreement that *Learning how to better market or advertise our business would make us more profitable* (75% strongly or somewhat agree), followed by *The pandemic hurt our business* (69%), and *Updating our business website would help us attract more customers* (68%). Approximately six-in-ten respondents agreed that *Improving the physical appearance of our store or offices would help us attract more customers* (61%) and that *The technology in our business needs to be updated* (58%). Fewer respondents agreed that *Our business could use assistance with attracting and retaining employees* (53%).

Although there was movement in half of the statements from 2023 to 2024 ( $\pm$  6-7%), the magnitude of the changes were not statistically significant (Table 23).

**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 42 AGREEMENT WITH STATEMENTS: BUSINESS SURVEY

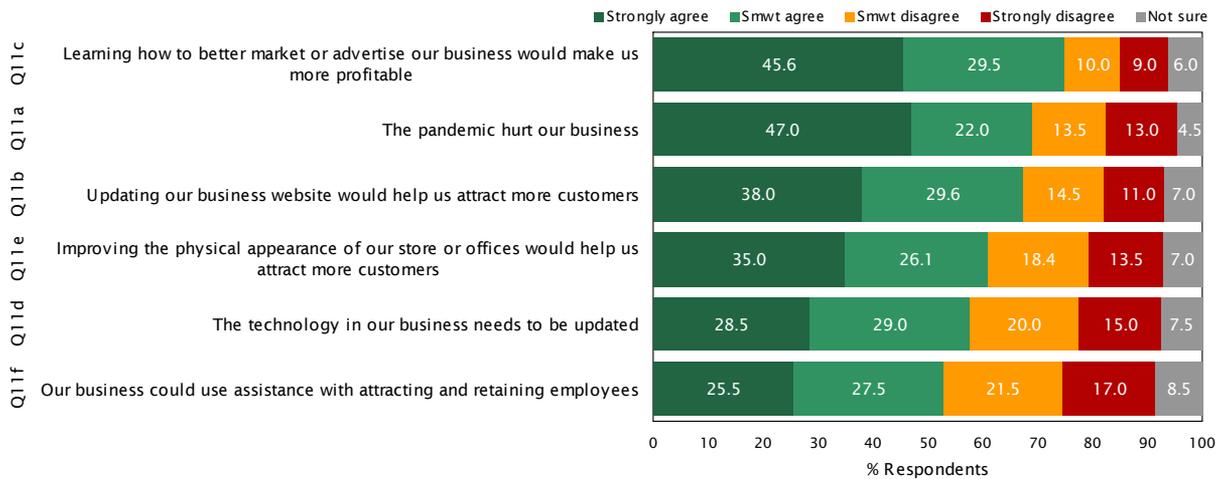


TABLE 23 AGREEMENT WITH STATEMENTS BY STUDY YEAR: BUSINESS SURVEY

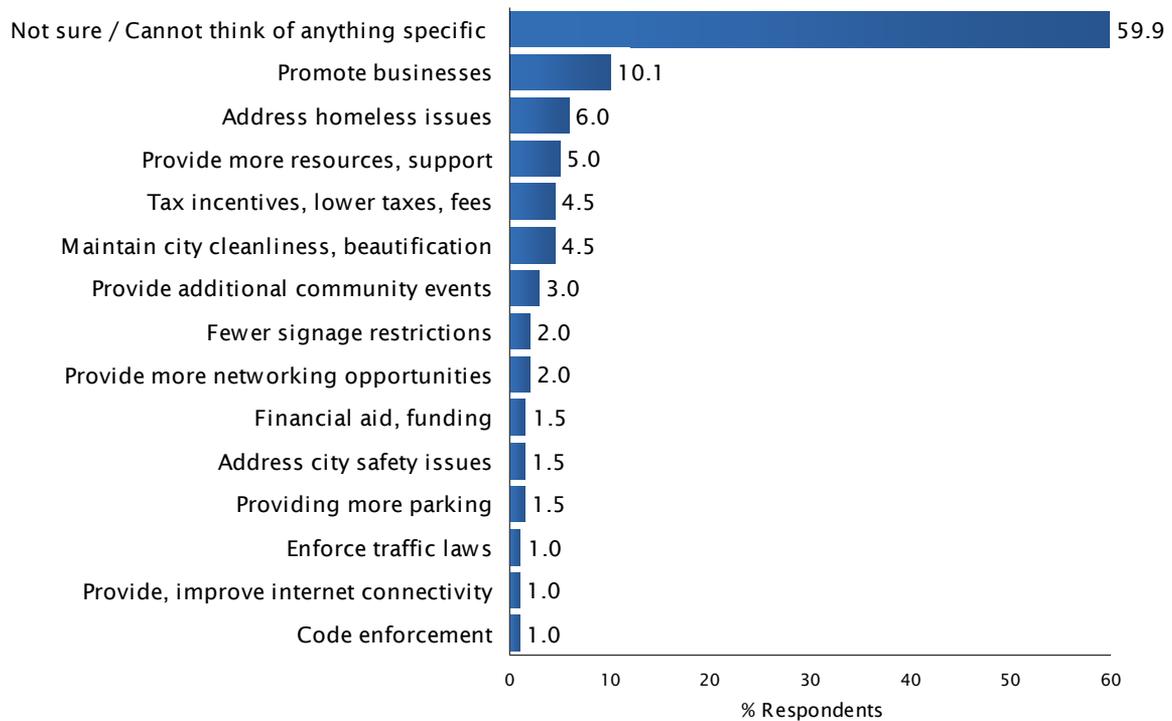
	Study Year		Change in Agreement 2023 to 2024
	2024	2023	
Updating our business website would help us attract more customers	67.6	60.3	+7.3
Learning how to better market or advertise our business would make us more profitable	75.0	68.7	+6.3
Improving the physical appearance of store or offices would help attract more customers	61.0	60.2	+0.9
The technology in our business needs to be updated	57.5	57.9	-0.3
Our business could use assistance with attracting and retaining employees	53.0	53.6	-0.5
The pandemic hurt our business	69.0	75.9	-6.8

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 43 below.

Six-in-ten business managers were not sure or could not think of anything specific (60%) when asked what the City could do to help their business be more successful. Among the specifics mentioned, promoting businesses topped the list at 10%, followed by addressing homeless issues (6%), providing more resources and support (5%), providing tax incentives and lower taxes/fees (5%), and keeping the City well-maintained and clean (5%).

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

**FIGURE 43 WAYS TO HELP BUSINESSES: BUSINESS SURVEY**



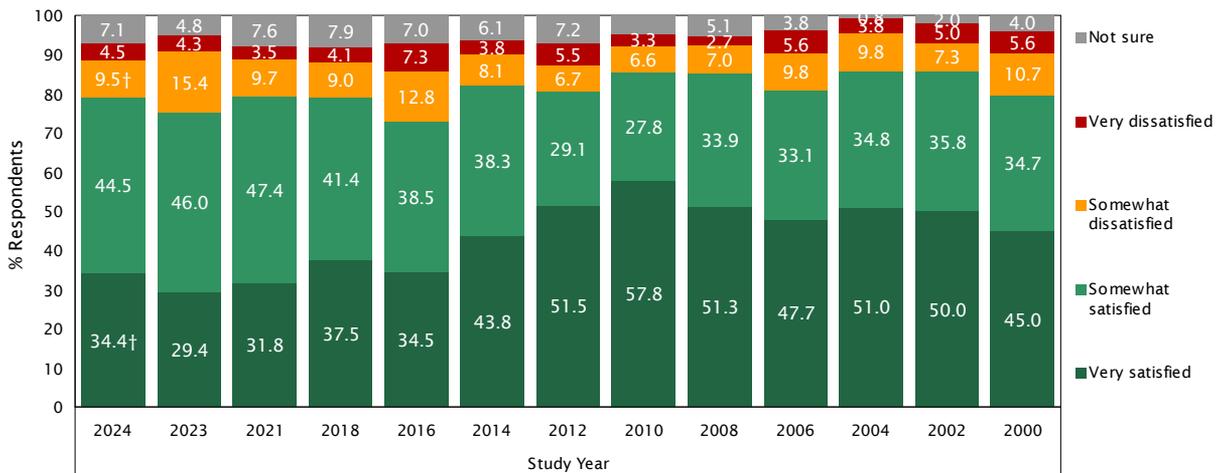
# COMMUNICATION

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, 79% of residents indicated that they were either very (34%) or somewhat (45%) satisfied with the City’s communication efforts. Although overall satisfaction was higher in 2024 than 2023 (+4%), the magnitude of the change did not reach statistical significance. There was, however, a significant shift in the intensity of satisfaction, with an increase in the percentage very satisfied and a decline in the percentage somewhat dissatisfied (see Figure 44).

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

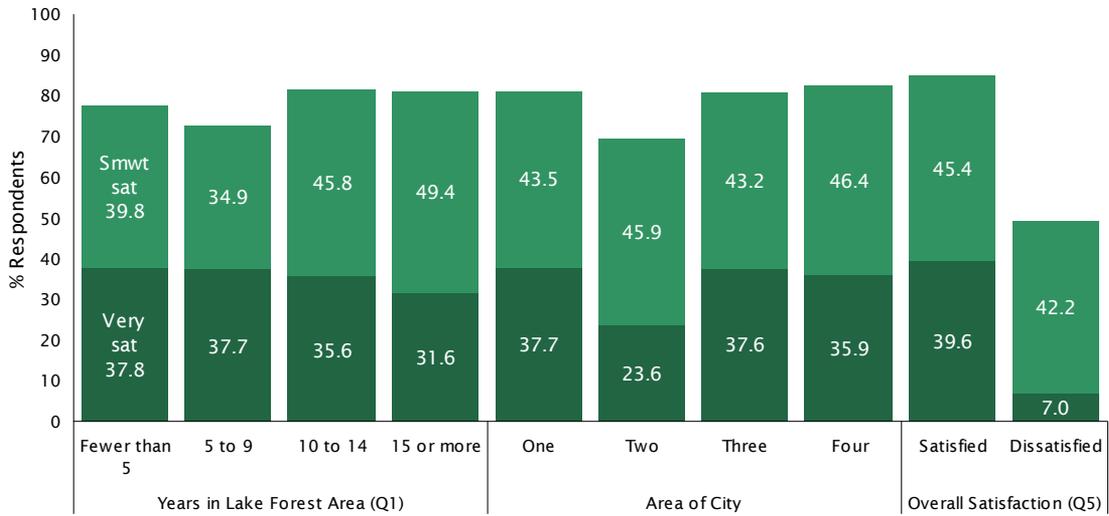
**FIGURE 44 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY STUDY YEAR**



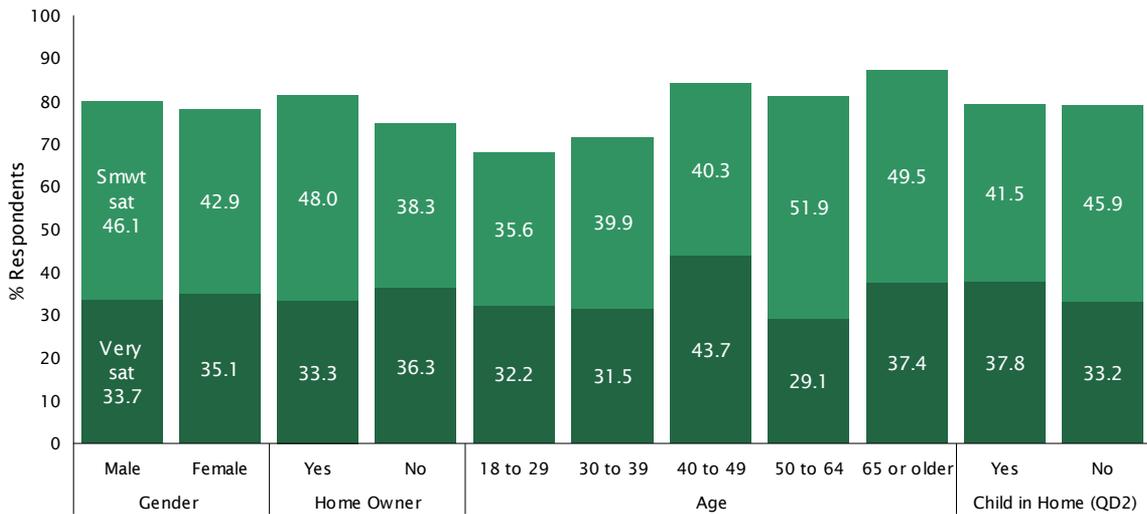
† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

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 45 through 47 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 (85% vs. 49%).

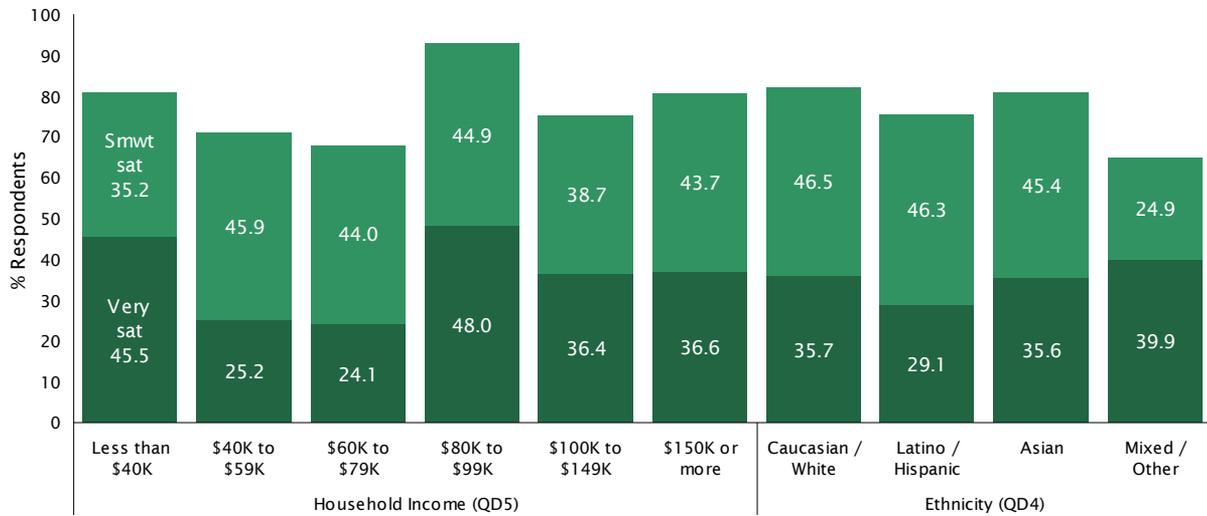
**FIGURE 45 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA, AREA OF CITY & OVERALL SATISFACTION**



**FIGURE 46 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY GENDER, HOME OWNER, AGE & CHILD IN HOME**



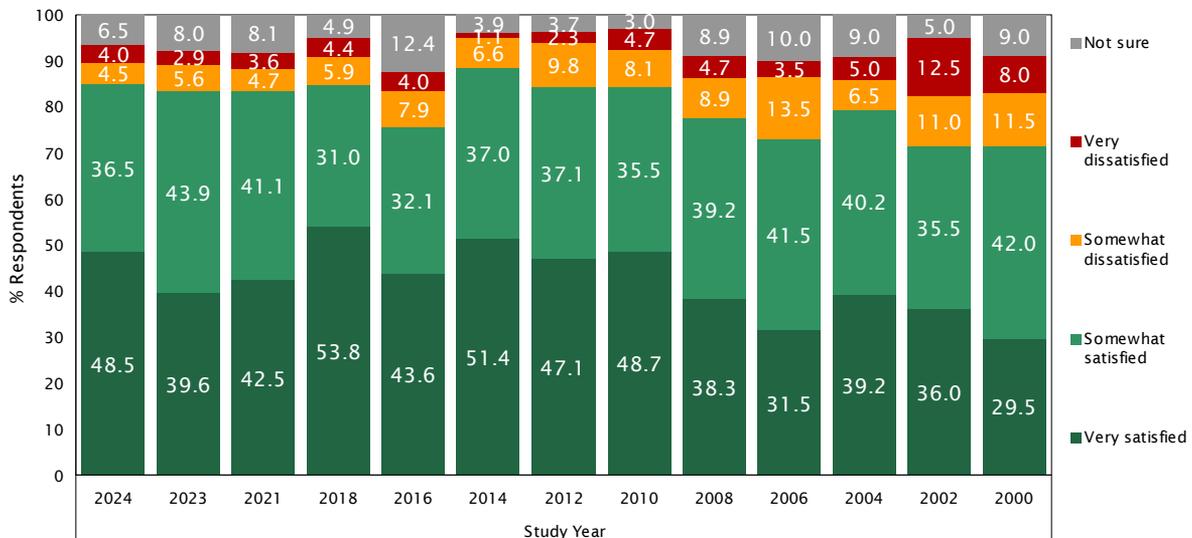
**FIGURE 47 SATISFACTION WITH COMMUNICATION: RESIDENT SURVEY BY HOUSEHOLD INCOME & ETHNICITY**



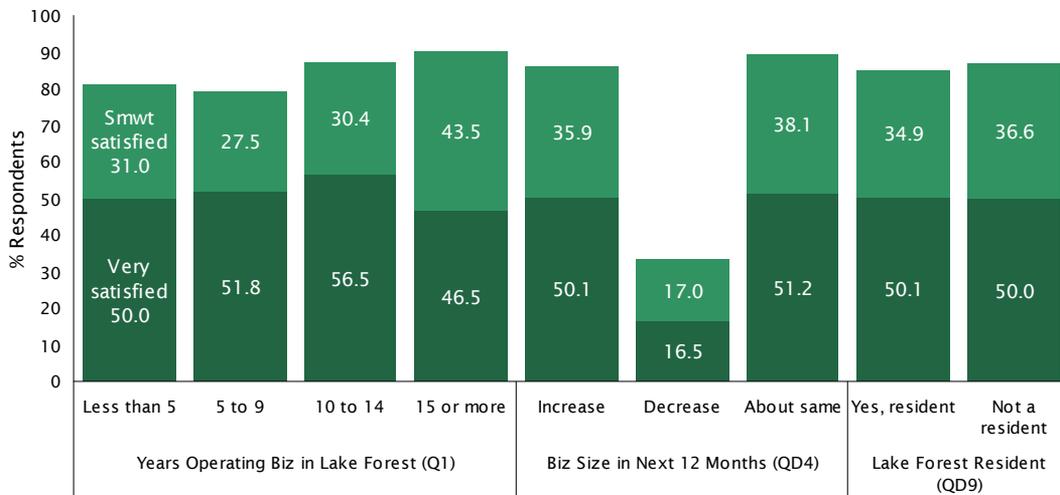
Among local businesses, 85% of business managers surveyed in 2024 indicated that they were satisfied with the City's efforts to communicate with Lake Forest businesses through newsletters, the Internet, social media, and other means, 9% said they were dissatisfied, and 7% were unsure (see Figure 48). Satisfaction with the City's communication efforts among business managers in 2024 was statistically consistent with 2023. For the interested reader, figures 49 and 50 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?*

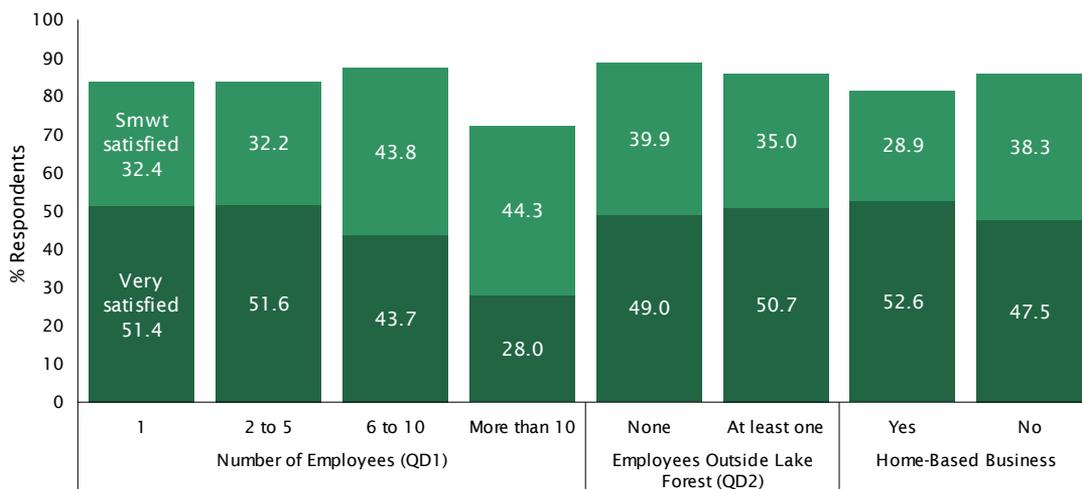
**FIGURE 48 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY STUDY YEAR**



**FIGURE 49 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST, BUSINESS SIZE IN NEXT 12 MONTHS & LAKE FOREST RESIDENT**



**FIGURE 50 SATISFACTION WITH COMMUNICATION: BUSINESS SURVEY BY NUMBER OF EMPLOYEES, EMPLOYEES WHO LIVE OUTSIDE LAKE FOREST & HOME-BASED BUSINESS**



Among business managers who were dissatisfied with the City’s communication efforts, Question 14 asked if there was a particular reason for their dissatisfaction. Because so few respondents were dissatisfied with communication *and* provided a reason for their dissatisfaction, the specific verbatim responses are shown below. Most respondents mentioned that they do not recall receiving information from the City as the reason for their dissatisfaction.

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

- *Seems generic.*
- *I don't recall getting much information on the programs. Outside this survey and items I have come across at home, as a business, I don't recall getting anything from the City.*
- *We have been in Lake Forest for twenty years and I have never heard of any of these programs.*

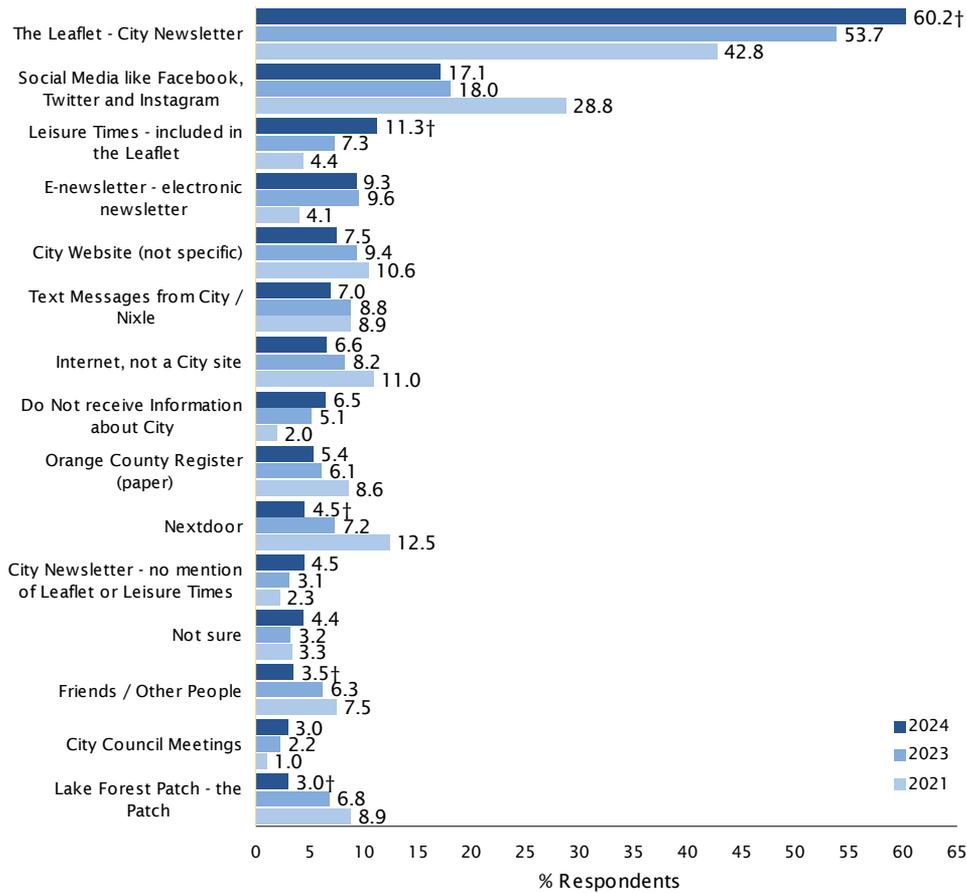
- *This is the first communication I have ever received.*
- *No one has ever communicated with us.*
- *I think we are very busy. We don't have time. The number of emails should be frequent, and maybe there could be more in-person and online networking.*
- *We barely see anything from them. We don't see emails or anything.*
- *I have not had a way to communicate with the City. Maybe, the PR may not be doing a good job on how the business owner can communicate with the City.*
- *I just don't receive a lot of communication compared to other cities I have been in.*
- *They don't update the internet that much. I don't see any updates or news on the internet.*
- *I have gone to their city site when I've had issues or anything, and it is hard to find things and hard to navigate. Also, with the City's communication in the Orange County Sheriff's Department, it is hard to find stuff to report.*
- *Yes, there is a very specific reason. As of right now, I'm getting much better communications from other neighboring cities that are farther from me. If I'm right here in Lake Forest, I should be getting more from Lake Forest, but I am going to other cities because I'm seeing more opportunities from them. I don't want to do the legwork of digging through what is available in Lake Forest. So, if other cities are already promoting to me, I think, for sure, at least be at par with that bar.*
- *It is because I have never received any communication.*
- *There is no communication.*
- *When you guys started the gift card thing, you didn't even tell us about it. I had to find out from customers. That was pretty sad.*
- *I don't get any communication from them. They don't communicate with me.*

**INFORMATION SOURCES** Residents and businesses were next asked to indicate the sources they use to find out about City of Lake Forest news, information, and programming. This question was asked in an open-ended format and respondents were allowed to report up to two sources of information. Thus, the percentages shown in the following figures reflect the percentage of residents and business managers who mentioned a given information source and will sum to more than 100.

As presented in Figure 51 on the next page, the single most frequently cited source of city information among residents in 2024 was *The Leaflet* (60%), distantly followed by social media (17%), *Leisure Times* (11%), electronic newsletters (9%), and one of the City's websites (general mention, 8%). From 2023 to 2024, there were statistically significant increases in *The Leaflet* (+7%) and *Leisure Times* (+4%) and declines in the Lake Forest Patch (-4%), friends/other people (-3%), and Nextdoor (-3%) as information sources for Lake Forest news, information, and programming.

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

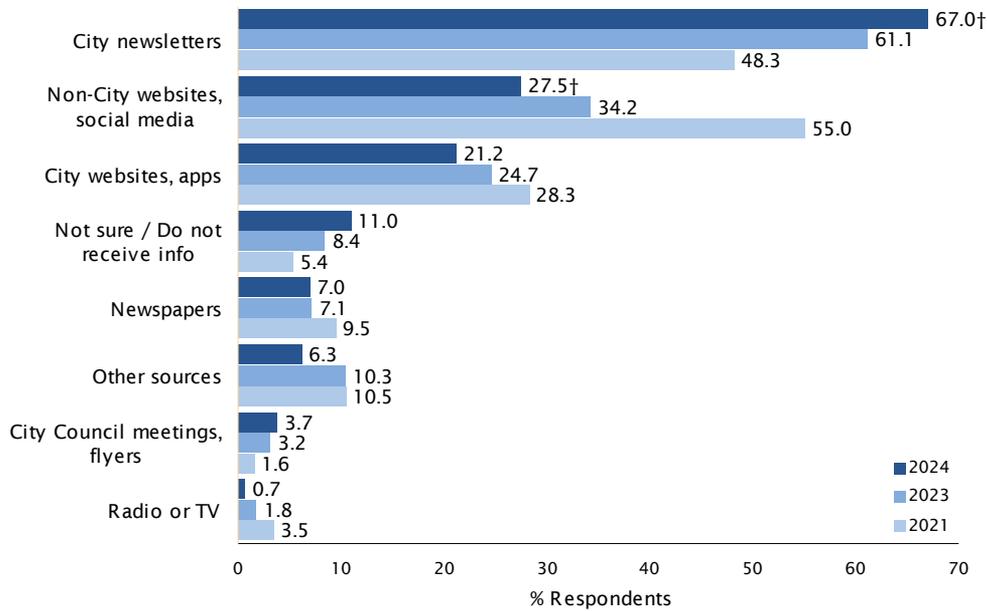
**FIGURE 51 SPECIFIC INFORMATION SOURCES: RESIDENT SURVEY BY STUDY YEAR**



† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

To summarize the wide variety of information sources mentioned and more easily compare the results between years and demographic subgroups, Figure 52 on the next page 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, 67% of residents surveyed in 2024 mentioned at least one of Lake Forest’s newsletters as a source of city information, 28% mentioned a non-city website or social media, and 21% cited one of the City’s websites or apps. Compared with 2023, statistically significant changes in use were apparent for city newsletters (up 6%) and non-city websites or social media (down 7%). Reliance on city newsletters is up markedly from 2021 during the pandemic (67% vs. 48%).

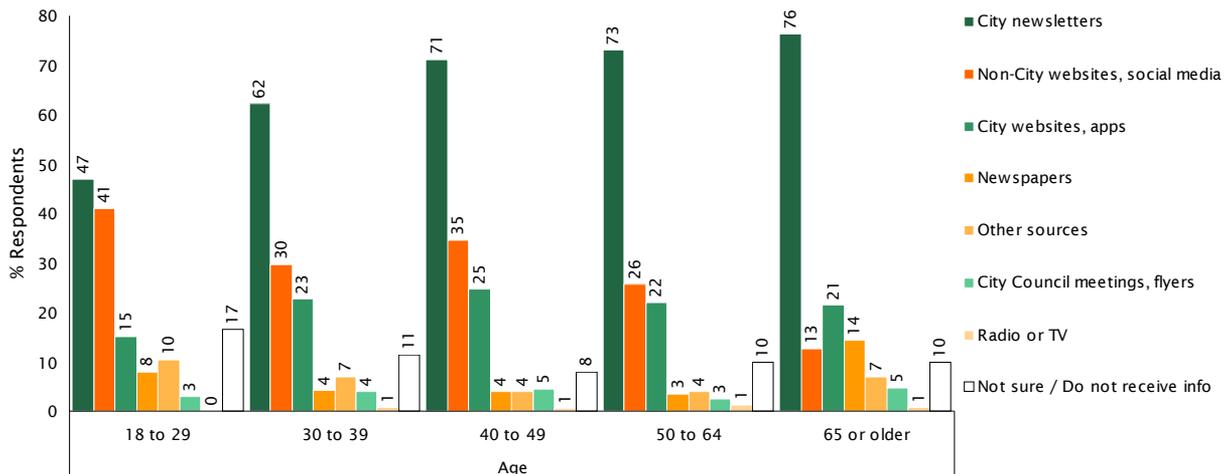
**FIGURE 52 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY STUDY YEAR**



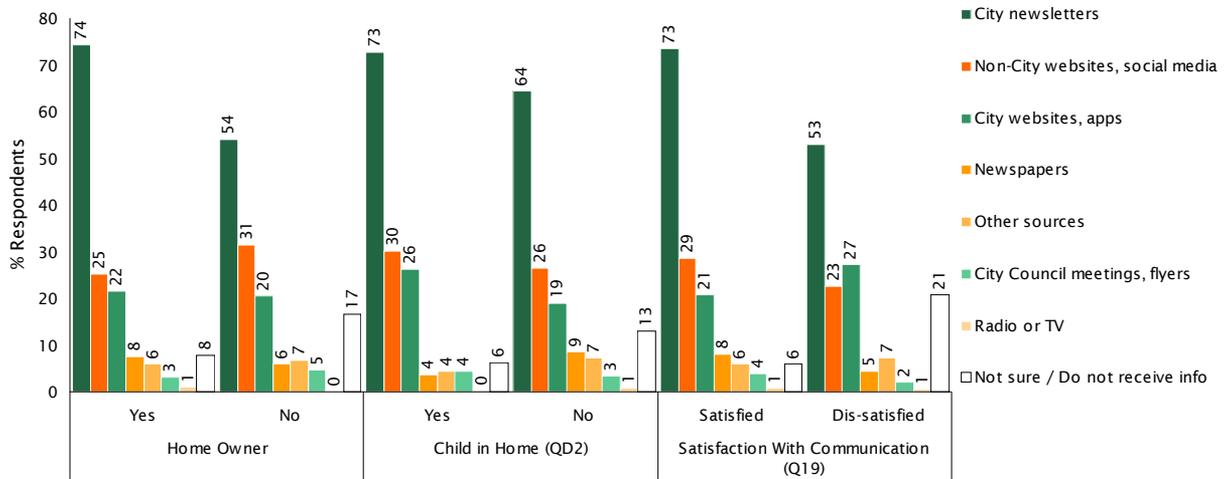
† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

Figures 53 through 55 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 40 years and older, home owners, residents with a child in the home, those currently satisfied with the City’s communication efforts, and respondents identifying as an ethnicity *other than* Latino/Hispanic were more likely to rely on city newsletters when compared with their respective counterparts.

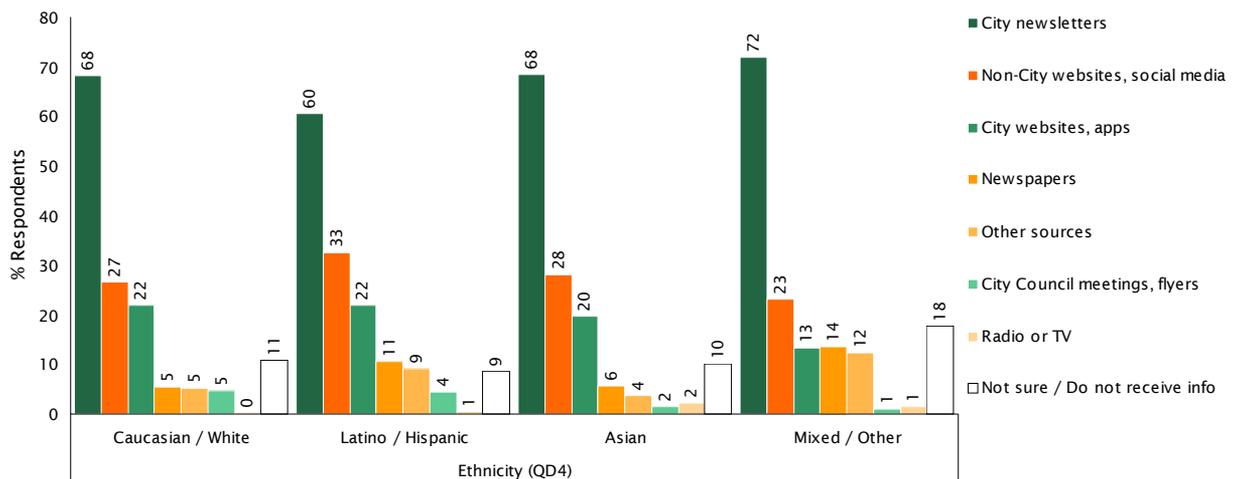
**FIGURE 53 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY AGE**



**FIGURE 54 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY HOME OWNER, CHILD IN HOME & SATISFACTION WITH COMMUNICATION**



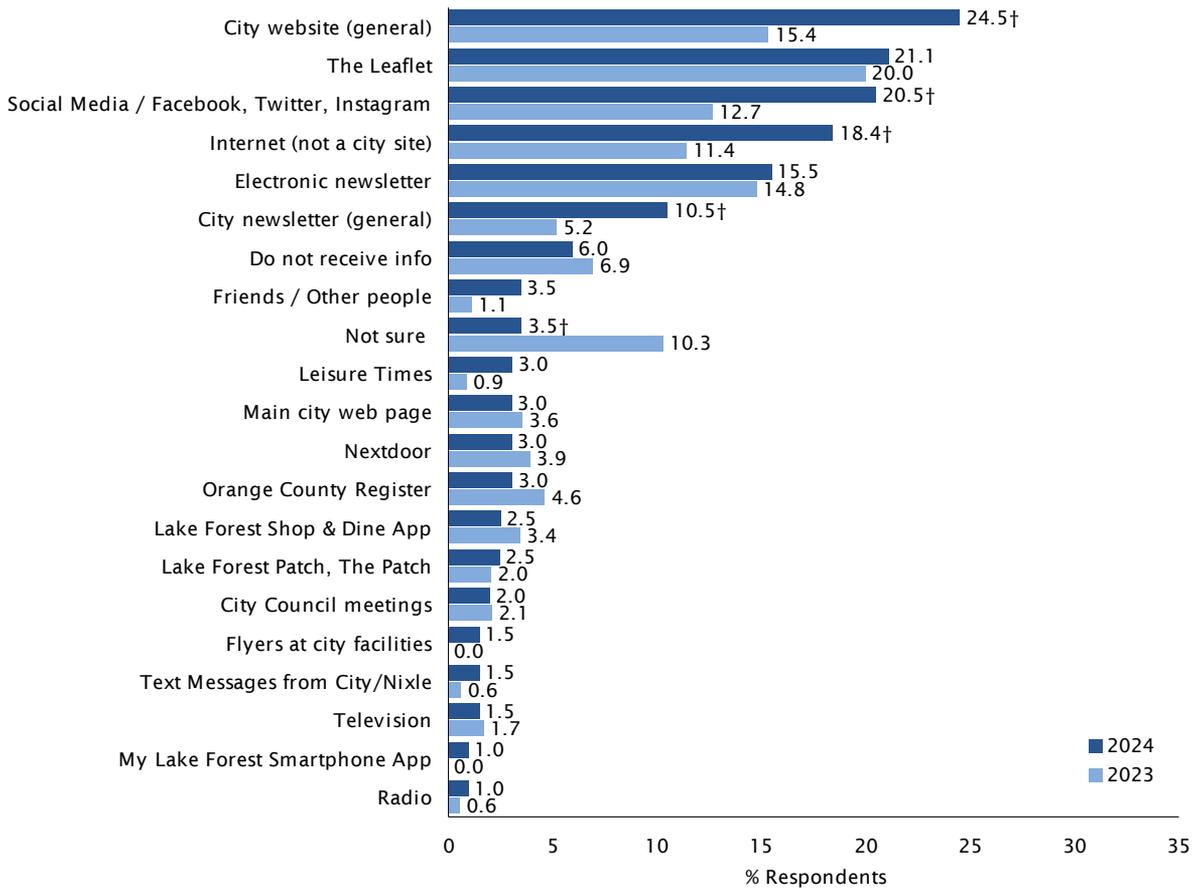
**FIGURE 55 INFORMATION SOURCE CATEGORIES: RESIDENT SURVEY BY ETHNICITY**



As shown in Figure 56 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 City’s website in general (25%), *The Leaflet* (21%), social media sites (21%), the Internet in general (18%), electronic newsletters (16%), and general references to the City’s newsletter (11%). Statistically significant changes from the 2023 study included increases in mentions of the City’s website (+9%), social media (+8%), the Internet in general (+7%), and general references to the City’s newsletter (+5%), as well as a decline in those unsure (-7%).

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

**FIGURE 56 INFORMATION SOURCES: BUSINESS SURVEY BY STUDY YEAR**

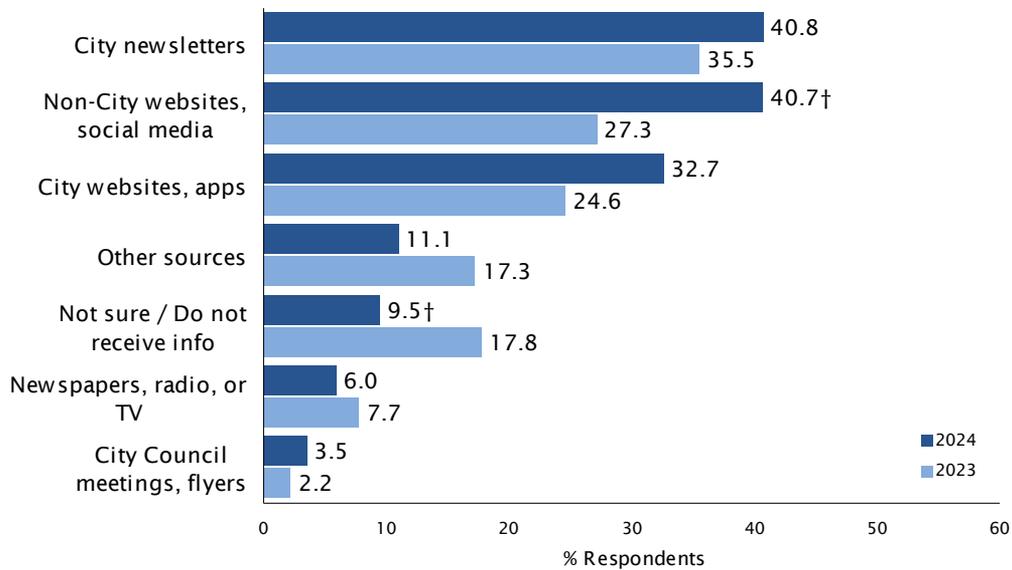


† Statistically significant difference (p < 0.05) between the 2023 and 2024 studies.

In the same manner described for the resident survey, Figure 57 on the next page provides the responses to this question among business managers, with specific sources grouped into larger meaningful categories. Because respondents were allowed to mention multiple sources, the percentages in the figure represent the percentage of businesses that mentioned at least one source within each category. As shown in the figure, 41% of businesses surveyed in 2024 mentioned at least one of Lake Forest’s newsletters as a source of information, 41% also mentioned a non-city website or social media, and 33% cited one of the City’s websites or apps.

Although reliance on each of the top three information categories increased from 2023 to 2024, only non-city websites or social media (+13%) met the threshold for statistical significance. At the same time, there was a statistically significant decline in the percentage who were unsure of their information sources or who indicated that they do not receive information about Lake Forest (-8%).

**FIGURE 57 INFORMATION SOURCE CATEGORIES: BUSINESS SURVEY BY STUDY YEAR**



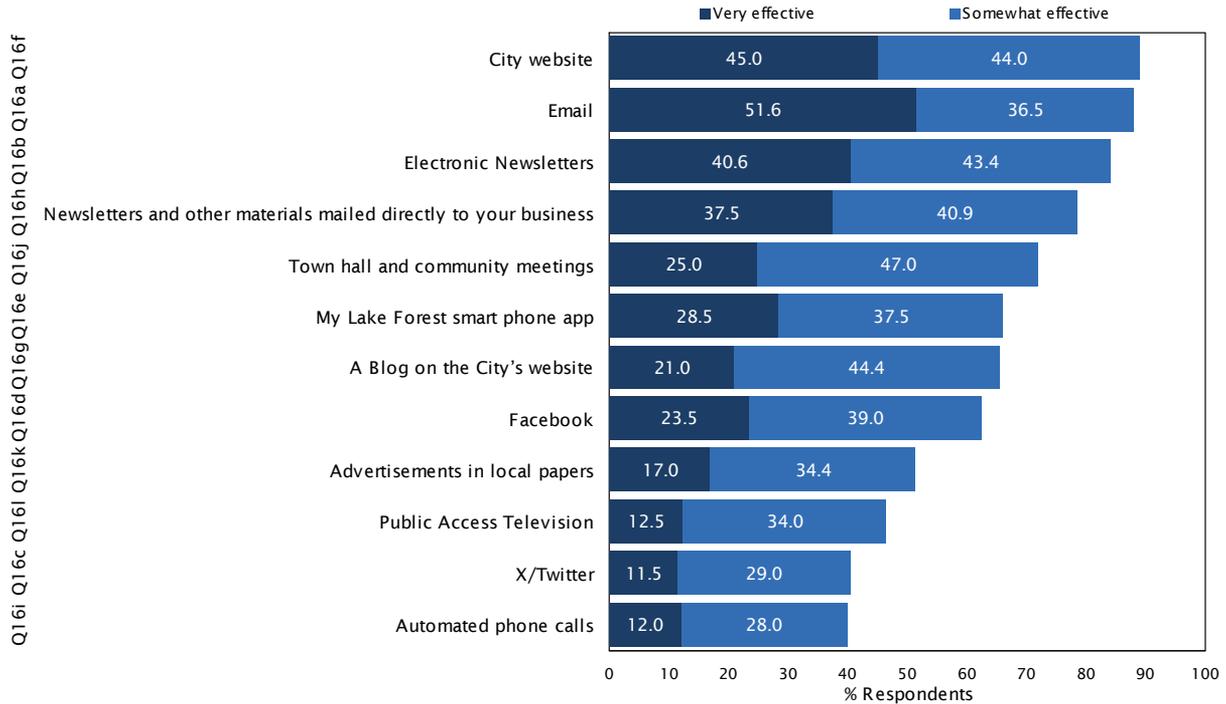
† Statistically significant difference ( $p < 0.05$ ) between the 2023 and 2024 studies.

**EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS** The next communication-related question presented local businesses with each of the methods shown on the left of Figure 58 on the next page 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 the City’s website (89% very or somewhat effective), followed by email (88%), electronic newsletters (84%), and newsletters and direct mail to their office (78%). Comparatively, automated phone calls (40%), X/Twitter (41%) and Public Access Television (47%) were rated as the least effective methods.

For the interested reader, Table 24 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.

**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 58 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS: BUSINESS SURVEY**



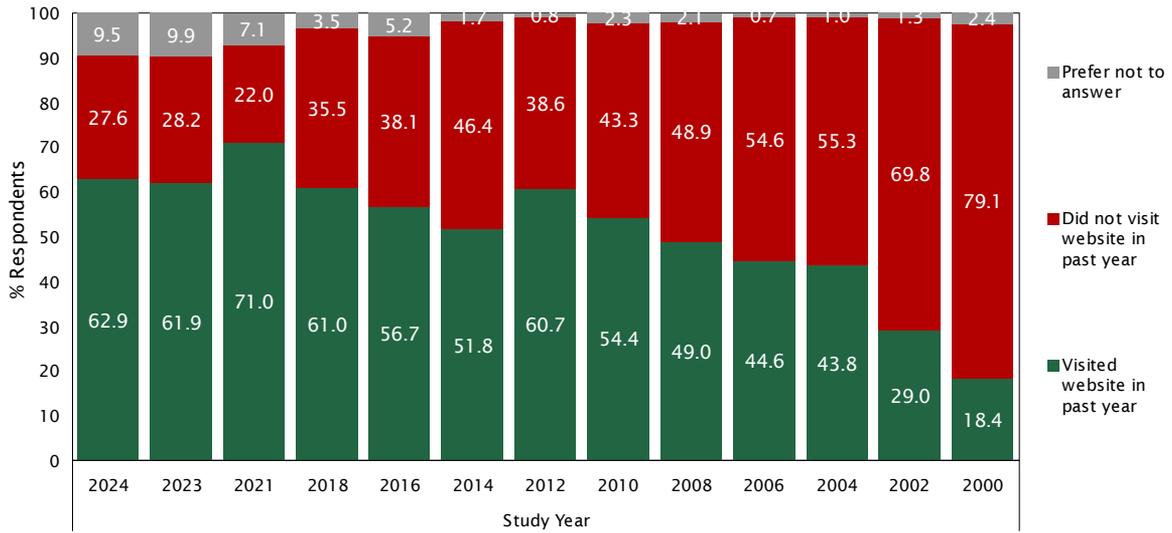
**TABLE 24 EFFECTIVENESS OF BUSINESS COMMUNICATION METHODS: BUSINESS SURVEY BY HOME-BASED BUSINESS, SATISFACTION WITH COMMUNICATION & BUSINESS SIZE IN NEXT 12 MONTHS (SHOWING % VERY EFFECTIVE)**

	Home-Based Business		Satisfaction With		Biz Size in Next 12 Months (QD4)		
	Yes	No	Satisfied	Dissatisfied	Increase	Decrease	About same
City website	44.7	45.1	48.8	23.5	48.0	50.0	40.4
Email	63.2	48.8	54.2	41.5	53.1	50.5	51.2
Electronic Newsletters	52.6	37.7	44.2	23.9	41.1	50.5	39.3
Newsletters and other materials mailed directly to your business	42.1	36.4	38.2	29.7	37.0	33.5	36.9
Town hall and community meetings	21.1	25.9	27.1	17.5	25.0	50.0	20.2
My Lake Forest smart phone app	23.7	29.6	30.6	11.8	29.0	33.5	26.1
A Blog on the City's website	21.1	21.0	22.9	17.7	25.1	33.0	14.2
Facebook	23.7	23.5	25.9	6.0	28.1	0.0	20.2
Advertisements in local papers	21.1	16.0	18.3	6.0	18.0	33.5	13.1
Public Access Television	13.2	12.3	14.1	0.0	12.0	16.5	10.7
X/Twitter	13.2	11.1	13.0	0.0	11.0	0.0	11.9
Automated phone calls	15.8	11.1	12.4	17.7	9.1	16.5	13.0

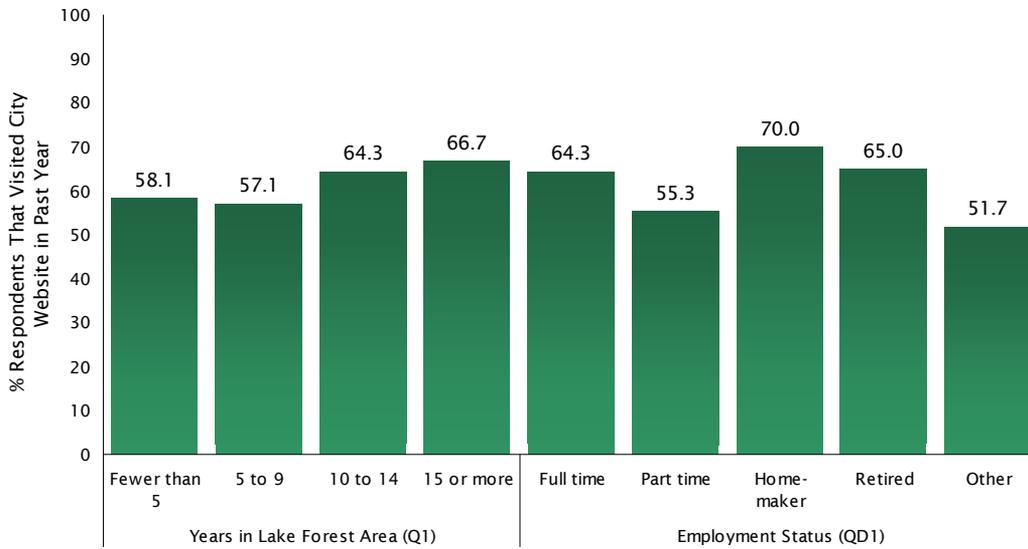
**CITY WEBSITES** The City of Lake Forest has been a leader among municipalities in developing websites tailored to different subgroups in the community. It is naturally of interest to specifically measure use of the City's websites and opinions regarding the content of the sites. Figure 59 on the next page shows that the percentage of residents who visited one of the City's websites has grown substantially since the 18% recorded in 2000, with 63% indicating they visited one or more of the City's websites in 2024 (similar to 2023's 62%). Figures 60 to 62 show how use of the City's websites in the past year varied by key resident subgroups.

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

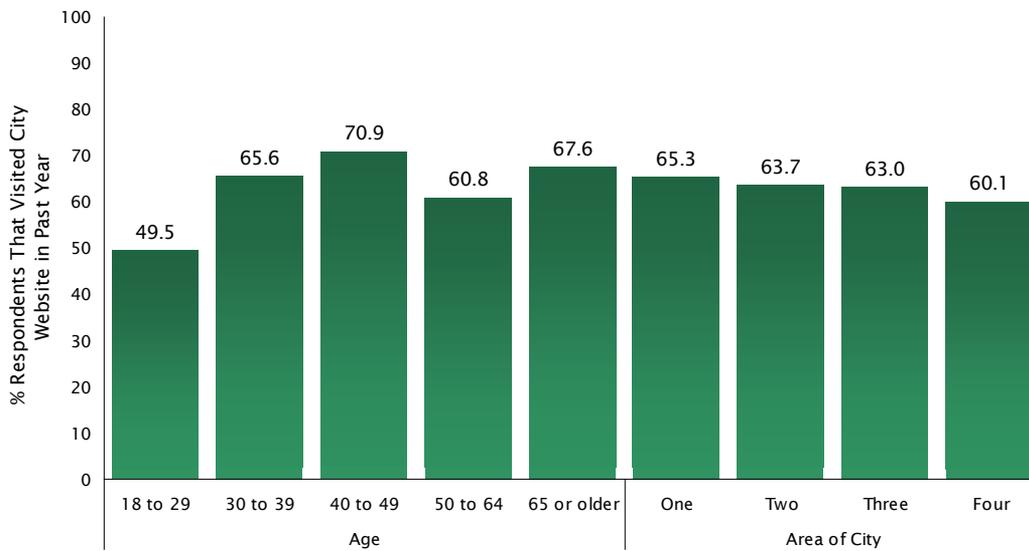
**FIGURE 59 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY STUDY YEAR**



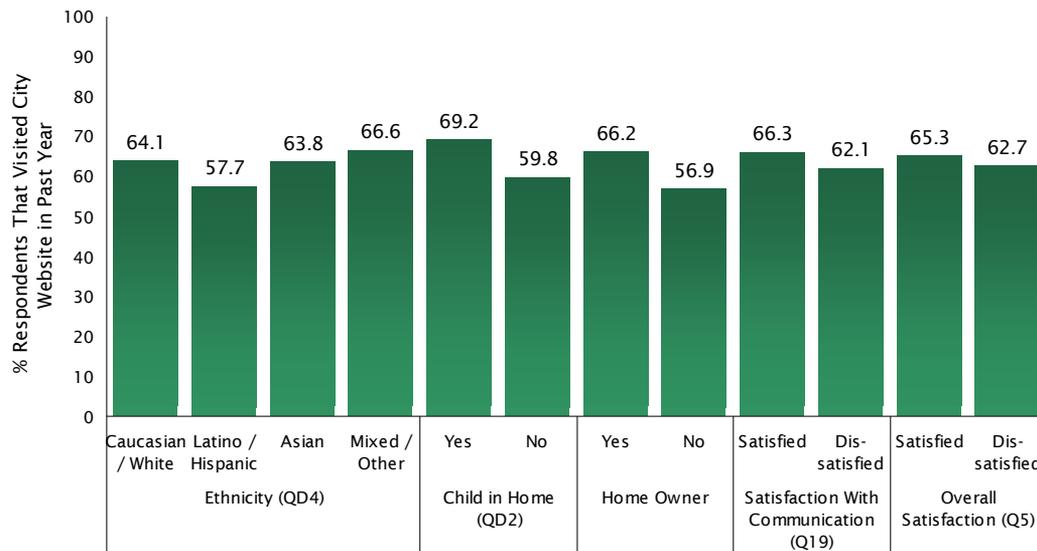
**FIGURE 60 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY YEARS IN LAKE FOREST AREA & EMPLOYMENT STATUS**



**FIGURE 61 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY AGE & AREA OF CITY**



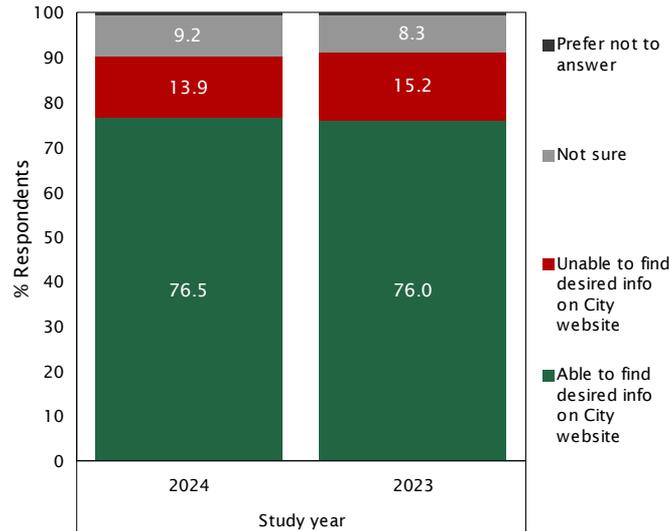
**FIGURE 62 VISITED CITY WEBSITE IN PAST YEAR: RESIDENT SURVEY BY ETHNICITY, CHILD IN HOME, SATISFACTION WITH COMMUNICATION & OVERALL SATISFACTION**



**WEBSITE CONTENT** Respondents who had visited a city website in the past year were next asked whether they were able to find the information they were looking for on the site. Consistent with 2023, more than three-quarters (77%) of website users answered Question 22 in the affirmative in 2024, whereas 14% indicated that they were unable to find the desired information on a city website and 9% were unsure or declined to state (Figure 63 on next page).

**Question 22: Resident Survey** *Were you able to find the information you were looking for on the City's website?*

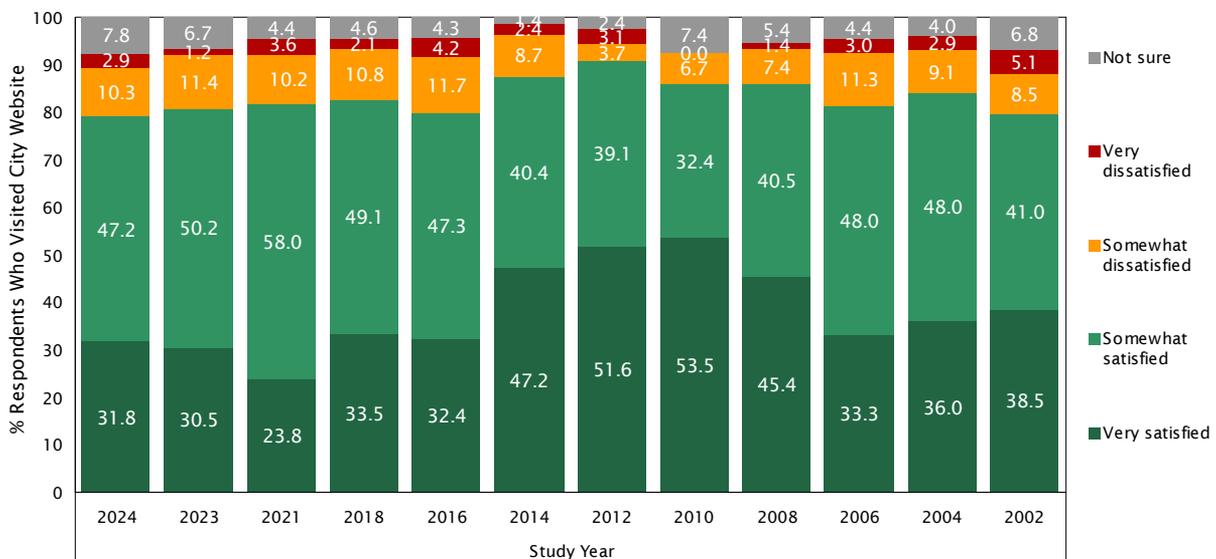
**FIGURE 63 ABLE TO FIND INFORMATION ON CITY'S WEBSITE BY STUDY YEAR**



Visitors to the City's websites were also asked to rate their level of satisfaction with the resources and content available on the sites—the results of which are shown in Figure 64. Overall, visitors expressed high levels of satisfaction with the City's websites, with 79% of residents indicating they were satisfied with the resources available on the sites (consistent with 2023).

**Question 23: Resident Survey** *Are you satisfied or dissatisfied with the resources and content available on the City's web sites?*

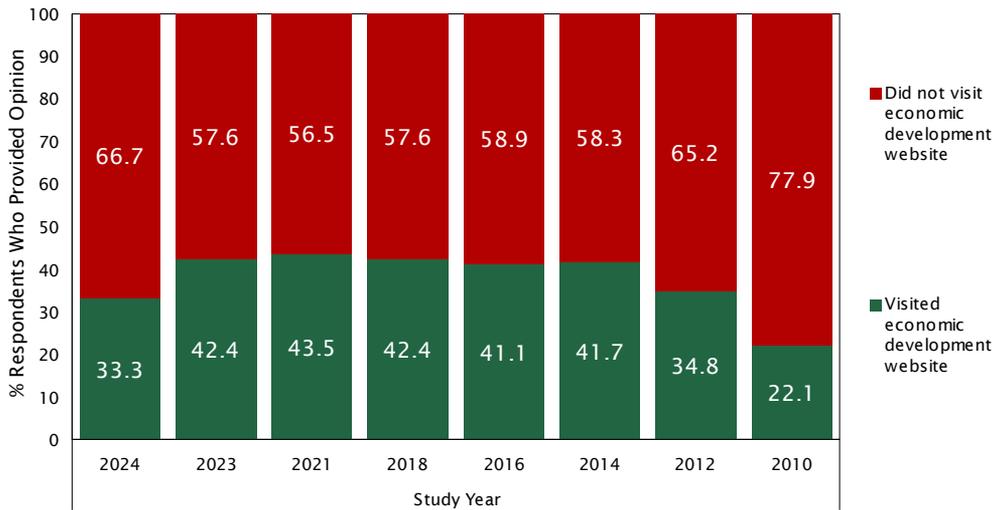
**FIGURE 64 SATISFACTION WITH CITY WEBSITE: RESIDENT SURVEY BY STUDY YEAR**



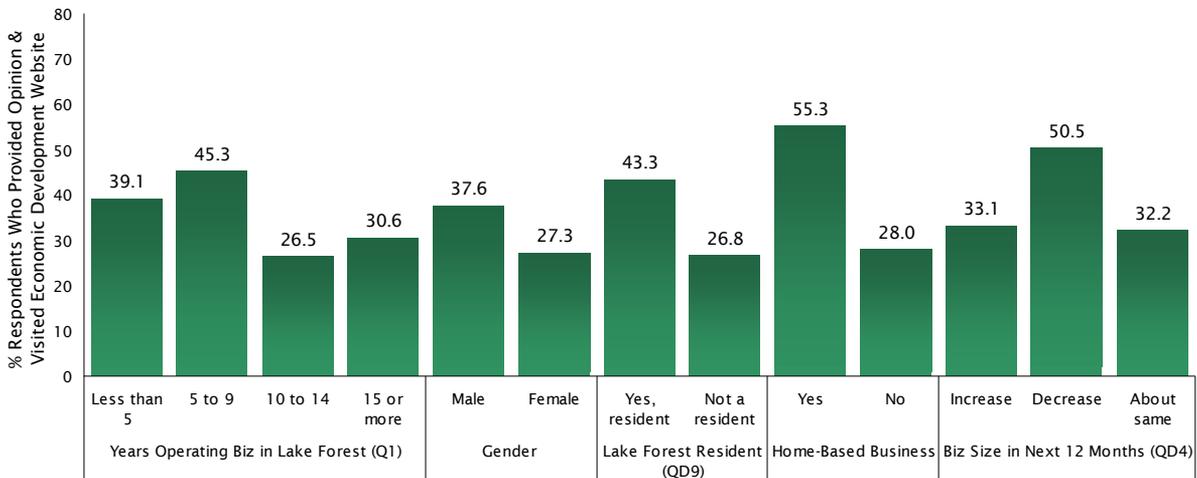
**ECONOMIC DEVELOPMENT WEBSITE** First asked in 2010, Question 17 of the business survey asked respondents whether they had ever visited the City’s economic development website at [www.lakeforestbusiness.com](http://www.lakeforestbusiness.com). As shown in Figure 65 below, one-third (33%) of local businesses in 2024 indicated that they had visited the site, which is lower than 2023’s 42% but the magnitude of the change did not reach statistical significance. Figure 66 presents the findings of this question by select business subgroups.

**Question 17: Business Survey** *Have you ever visited the City's economic development website at [www.lakeforestbusiness.com](http://www.lakeforestbusiness.com)?*

**FIGURE 65 VISITED ECONOMIC DEVELOPMENT WEBSITE: BUSINESS SURVEY BY STUDY YEAR**



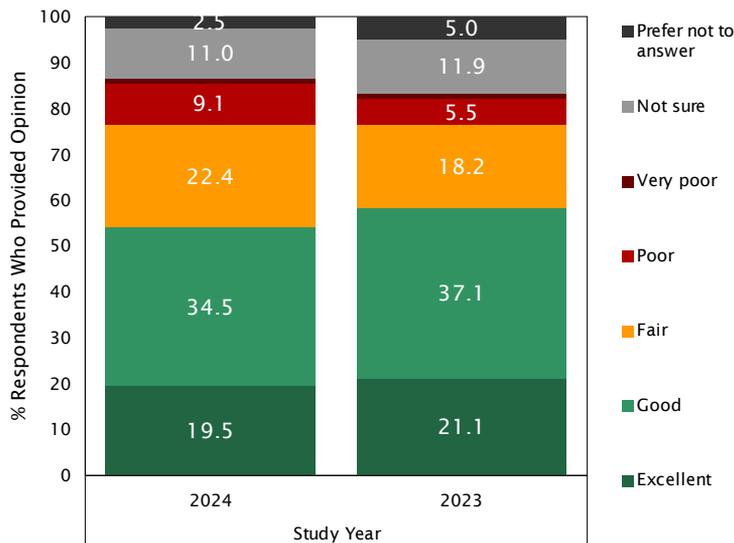
**FIGURE 66 VISITED ECONOMIC DEVELOPMENT WEBSITE: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST, GENDER, LAKE FOREST RESIDENT, HOME-BASED BUSINESS & BUSINESS SIZE IN NEXT 12 MONTHS**



**INCENTIVES TO SHOP LOCAL** 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. The majority of business managers surveyed indicated that the City does an excellent (20%) or good (35%) job incentivizing residents to shop locally. Twenty-two percent (22%) rated the City’s efforts in this area as fair, 10% used poor or very poor to describe the City’s efforts, whereas 14% were unsure or declined to provide a rating (Figure 67).

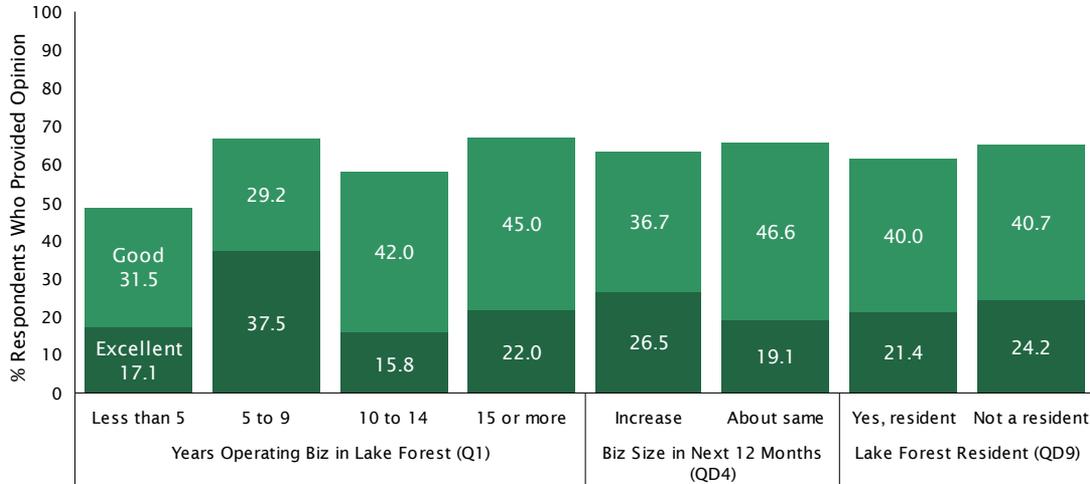
**Question 18: Business Survey** *Would you say the City of Lake Forest does an excellent, good, fair, poor, or very poor job of incentivizing residents to shop locally?*

**FIGURE 67 OPINION OF CITY’S JOB INCENTIVIZING RESIDENTS TO SHOP LOCALLY BY STUDY YEAR: BUSINESS SURVEY**

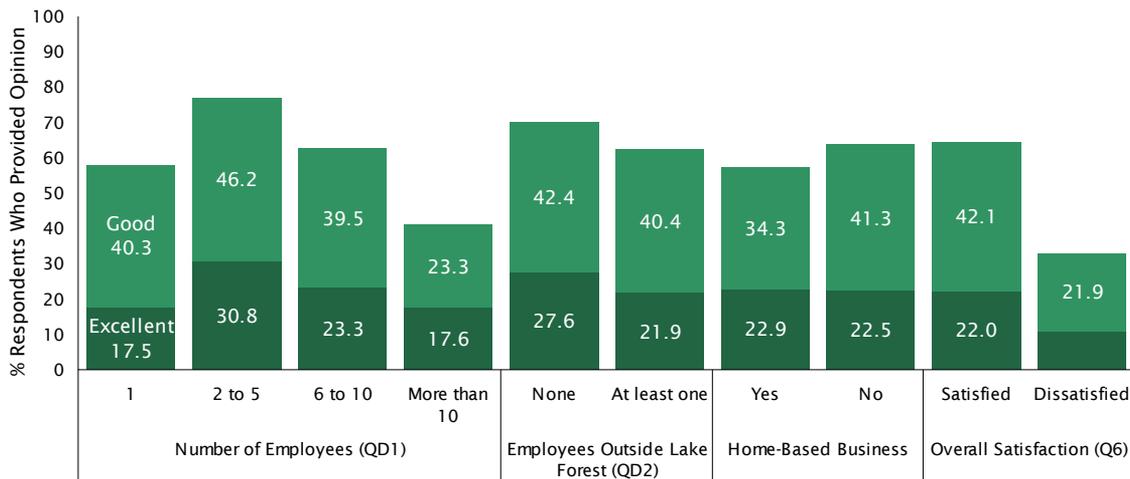


Compared with their counterparts, businesses who had been operating in the City between 5 and 9 years or at least 15 years, businesses with 2 to 5 employees, those who did not have any employees living outside of Lake Forest, and business managers who were satisfied with the City’s overall performance were much more likely (among those who provided an opinion) to rate the City’s efforts to incentivize residents to shop locally as excellent or good (see figures 68-69 on the next page).

**FIGURE 68 OPINION OF CITY'S JOB INCENTIVIZING RESIDENTS TO SHOP LOCALLY: BUSINESS SURVEY BY YEARS OPERATING BUSINESS IN LAKE FOREST, BUSINESS SIZE IN NEXT 12 MONTHS & LAKE FOREST RESIDENT**



**FIGURE 69 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, 29% mentioned the location/accessibility of Lake Forest and an additional 20% indicated that it was close to the owner’s home. The overall quality of the City (11%) and proximity to clients and customers (7%) were also mentioned by more than 5% of businesses.

**Question D3: Business Survey** *What would you say is the most important factor for why you chose to locate your business in the City of Lake Forest?*

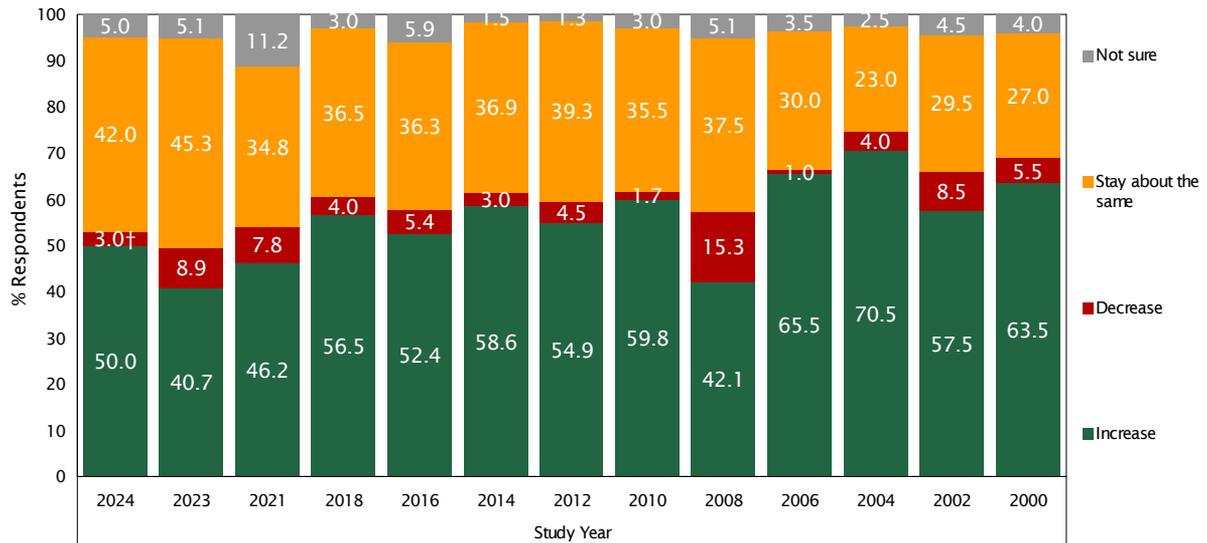
**FIGURE 70 PRIMARY REASON FOR LOCATING BUSINESS IN LAKE FOREST: BUSINESS SURVEY**



**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 2024 and prior studies are shown in Figure 71 on the next page. Local businesses were generally optimistic about the future, with 50% anticipating growth and 42% expecting that their business will remain about the same. Another 3% indicated that they expect their business to decrease in the coming year and 5% were unsure. Compared with 2023, business managers were much less likely to anticipate a decline (-6%).

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

**FIGURE 71 BUSINESS SIZE IN NEXT 12 MONTHS: BUSINESS SURVEY BY STUDY YEAR**

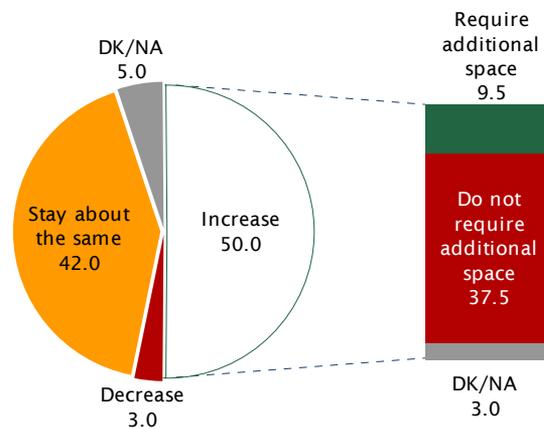


† Statistically significant difference ( $p < 0.05$ ) between the 2023 and 2024 studies.

Partitioning the 50% that anticipate growth (Figure 72), 10% of all businesses indicated that they would require additional space, whereas the remainder did not anticipate needing additional space (38%) or were unsure (3%).

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

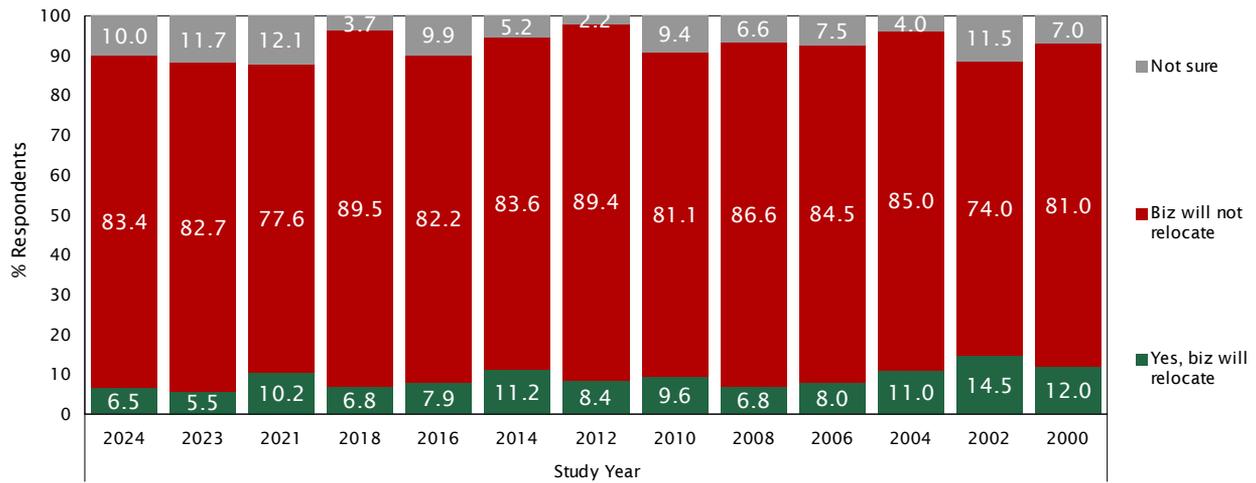
**FIGURE 72 BUSINESS SIZE AND SQUARE FOOTAGE REQUIREMENTS IN NEXT 12 MONTHS: BUSINESS SURVEY**



**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 73 shows that the percentage of businesses that anticipate relocating was 7% in the 2024 survey (statistically consistent with 2023's 6%). Among the 7% of businesses that anticipated relocating in the next year, 3% expected to relocate within Lake Forest, 3% to another community, and 1% were unsure (see Figure 74).

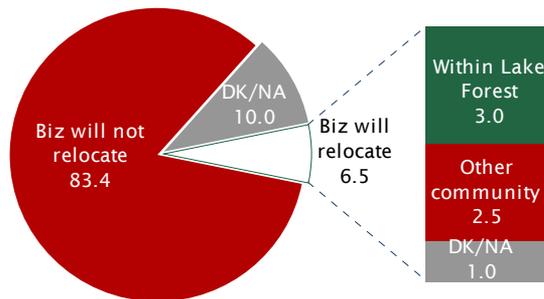
**Question D6: Business Survey** *In the next 12 months, do you think your business will relocate?*

**FIGURE 73 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 74 BUSINESS RELOCATION AND AREA IN NEXT 12 MONTHS: BUSINESS SURVEY**



## BACKGROUND & DEMOGRAPHIC INFO

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

**TABLE 25 SAMPLE DEMOGRAPHICS: RESIDENT SURVEY BY STUDY YEAR**

Study Year	2024	2023	2021	2018	2016	2014	2012	2010	2008	2006	2004	2002
<b>Total Respondents</b>	712	885	612	478	704	400	400	400	400	400	400	400
<b>QD1 Employment status</b>												
Employed full-time	57.2	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	7.6	6.1	9.4	7.5	11.1	9.4	10.6	9.1	13.7	11.0	N/A	N/A
Student	4.6	3.4	3.4	5.9	5.1	4.0	5.5	3.6	2.6	3.7	N/A	N/A
Homemaker	4.2	2.6	5.0	5.2	4.6	9.0	3.2	5.0	8.4	7.9	N/A	N/A
Retired	20.6	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	3.4	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	2.3	3.2	3.4	2.6	2.5	3.6	1.5	2.9	0.9	1.1	N/A	N/A
<b>QD2 Child in home</b>												
Yes	31.3	32.1	34.1	36.4	37.7	36.0	38.7	43.9	41.3	43.4	44.5	44.8
No	67.5	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	1.2	1.8	3.3	2.0	1.3	3.7	1.5	2.1	0.2	0.2	0.5	1.0
<b>QD3 Live in HOA</b>												
Yes	74.7	76.9	72.9	73.9	70.4	68.8	73.8	75.6	74.8	73.3	72.8	73.3
No	24.0	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	1.3	1.8	3.4	1.4	1.6	4.3	1.7	2.2	0.8	1.1	1.3	1.5
<b>Ethnicity (QD4)</b>												
Caucasian / White	54.0	54.1	N/A									
Latino / Hispanic	17.9	18.0	N/A									
Asian	16.4	16.2	N/A									
Mixed / Other	7.3	6.9	N/A									
Prefer not to answer	4.4	4.9	N/A									
<b>QD5 Household income</b>												
Under \$40K	5.0	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	6.8	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	6.3	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	9.3	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	56.7	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	15.8	10.0	12.0	10.8	14.0	20.8	12.9	12.5	15.4	12.9	10.3	14.3
<b>QD6 Gender</b>												
Male	51.3	48.9	48.4	51.6	46.8	46.1	47.7	47.7	47.7	47.5	49.8	49.3
Female	48.7	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	0.0	5.4	4.2	1.9	1.2	N/A						
<b>S1 Party</b>												
Democrat	35.8	37.2	33.1	30.5	32.4	30.3	28.0	26.7	26.9	25.5	28.3	26.5
Republican	36.1	35.1	37.8	37.1	41.9	38.8	44.8	49.6	50.2	52.5	50.3	54.8
Other	6.0	5.3	6.5	6.0	4.8	3.9	3.5	4.9	4.4	5.1	4.3	4.8
DTS	22.1	22.4	22.6	26.4	21.0	27.0	23.6	18.8	18.5	17.0	17.3	14.0
<b>S2 Age</b>												
18 to 29	17.6	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	16.9	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	16.4	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	25.4	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	23.7	21.9	22.0	20.7	23.2	19.1	16.9	17.5	14.9	13.0	12.3	12.3
<b>S6 Home Owner</b>												
Yes	64.2	64.5	63.8	65.1	68.4	70.3	69.5	79.9	72.0	75.3	66.5	N/A
No	35.8	35.5	36.2	34.9	31.6	29.7	30.5	20.1	28.0	24.7	33.5	N/A

Table 26 provides information that was collected from local businesses during the 2024 survey, along with the results to similar questions asked in prior surveys (where applicable). The information presented in the table was gathered during the survey or from the City’s database of local businesses.

**TABLE 26 SAMPLE DEMOGRAPHICS: BUSINESS SURVEY BY STUDY YEAR**

<i>Study Year</i>	2024	2023	2021	2018	2016	2014	2012	2010	2008	2006	2004	2002	2000
<i>Total Respondents</i>	200	202	200	200	200	200	200	200	200	200	200	200	200
<b>Number of employees (QD1)</b>													
1	17.6	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	34.0	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	15.4	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	23.9	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	9.0	8.3	4.9	9.7	4.4	3.3	2.2	2.7	N/A	N/A	N/A	N/A	N/A
<b>Number of employees who live outside Lake Forest (QD2)</b>													
None	22.7	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	10.5	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	31.9	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	11.0	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	13.4	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	10.5	8.5	8.5	10.9	8.5	2.7	4.8	3.1	N/A	N/A	N/A	N/A	N/A
<b>Resident of Lake Forest (QD9)</b>													
Yes	40.2	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	55.7	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	4.0	1.2	1.9	0.5	0.0	1.2	0.0	0.0	2.0	1.0	0.0	2.5	N/A
<b>Gender (S1)</b>													
Male	58.0	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	38.5	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	3.6	5.0	2.1	2.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
<b>Home-Based Business (S2)</b>													
Yes	19.5	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	80.5	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 76) identify the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

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

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

For the business survey, 200 business owners or managers completed the interview, representing a total of approximately 5,215 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 38 interviews were collected among home-based businesses, with the remaining 162 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 December 5 and December 17, 2024, a total of 712 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 200 local business owners and managers between November 22 and December 18, 2024.

**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 712 voters for a particular question and what would have been found if all 55,308 voters in Lake Forest had been surveyed.

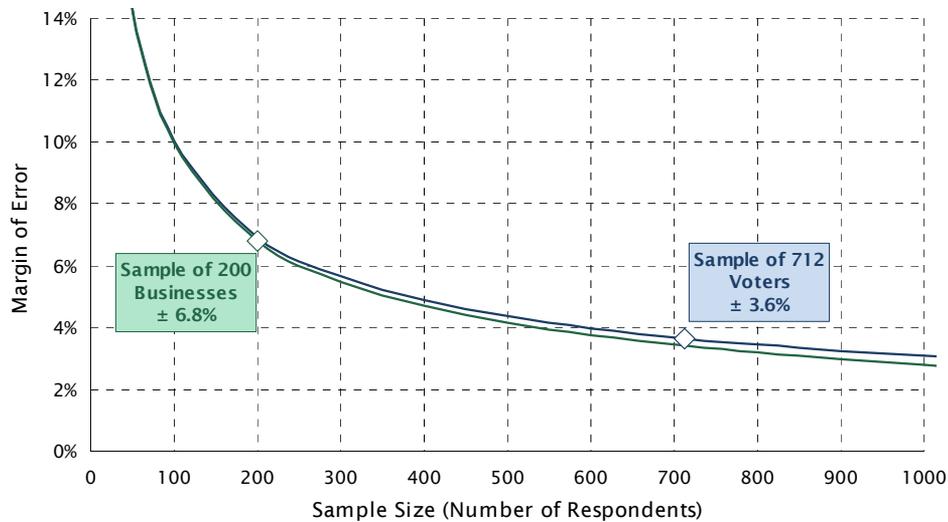
For example, in estimating the percentage of registered voters who have visited one or more of the City of Lake Forest’s websites in the past year (Question 21 of the resident survey), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence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

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

where  $\hat{p}$  is the proportion of voters who have visited a City of Lake Forest website in the past year (0.63 for 63% in this example),  $N$  is the population size of all registered voters (55,308),  $n$  is the sample size that received the question (712), 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  $\pm 3.5\%$ . This means that with 63% 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 66%.

Figure 75 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 712 registered voters is  $\pm 3.6\%$ , and the maximum margin of error for questions answered by all 200 business managers is  $\pm 6.8\%$ .

**FIGURE 75 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 75 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 2023 and 2024 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=712)  
 December 2024

### 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	24%
2	5 years to less than 10 years	16%
3	10 years to less than 15 years	12%
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	29%
2	Good	60%
3	Fair	11%
4	Poor	1%
5	Very poor	0%
98	Not sure	0%
99	Prefer not to answer	0%

Q3 How would you rate: _____? Would you say it is excellent, good, fair, poor or very poor?								
		Excellent	Good	Fair	Poor	Very poor	Not sure	Prefer not to answer
	<i>Randomize A-D</i>							
A	Lake Forest as a place to raise a family	34%	46%	11%	2%	1%	5%	2%
B	Lake Forest as a place to retire	20%	39%	22%	7%	3%	9%	1%
C	Lake Forest as a place to work	13%	40%	15%	5%	1%	24%	2%
D	Lake Forest as a place to shop and dine	14%	43%	32%	8%	3%	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					14%		
	Not sure / Cannot think of anything					13%		
	Address homeless, poverty issues					9%		
	Improve parks, recreation					7%		
	City beautification, landscape					7%		
	Enforce traffic laws, safety					6%		
	No changes needed / Everything is fine					6%		
	Reduce traffic congestion					5%		
	Improve public safety					5%		
	Limit growth, development					5%		
	Address parking issues					4%		
	Provide more affordable housing					4%		
	Reduce cost of living					4%		
	Improve budgeting, fiscal management					4%		
	Improve education, schools					3%		
	Provide more public transit					3%		
	Provide more entertainment, nightlife options					3%		
	Develop more walkable shopping, dining areas					3%		
	More police officers, patrols					3%		
	Do not allow street vendors					3%		
	Reduce taxes, fees					2%		
	Improve, repair infrastructure					2%		
	Clean up, improve appearance, rebuild deteriorating areas					2%		

	Provide more community-focused events	2%
	Improve, add more bike lanes	2%
	Enforce property codes	2%
	Improve city planning	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	51%
	3 Somewhat dissatisfied	9%
	4 Very dissatisfied	2%
	98 Not sure	5%
	99 Prefer not to answer	1%

**Section 3: Police Department**

Q6 Now, I'm going to ask you about a number of services provided by the City of Lake Forest's Police Department. For the following list of services, please tell me whether each service is extremely important to you, very important, somewhat important, or not too important.  
Here's the (first/next) one: \_\_\_\_\_. Do you think this service is extremely important, very important, somewhat important, or not too important?

<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Providing neighborhood watch programs	33%	31%	25%	8%	2%	0%
B	Investigating criminal activity	70%	22%	5%	1%	1%	0%
C	Providing child safety programs	42%	34%	16%	3%	4%	0%
D	Enforcing traffic laws	34%	35%	24%	6%	1%	0%
E	Maintaining a low crime rate	77%	17%	4%	1%	1%	0%
F	Preparing for emergencies	53%	37%	9%	1%	1%	0%
G	Providing crossing guards near schools	40%	31%	19%	8%	2%	0%
H	Providing animal control services	24%	31%	34%	10%	2%	0%

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? <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 neighborhood watch programs	18%	34%	8%	3%	34%	3%
B	Investigate criminal activity	23%	38%	8%	4%	26%	1%
C	Provide child safety programs	18%	31%	5%	2%	41%	2%
D	Enforce traffic laws	24%	39%	15%	8%	12%	1%
E	Maintain a low crime rate	31%	43%	12%	4%	9%	1%
F	Prepare for emergencies	28%	35%	6%	1%	30%	1%
G	Provide crossing guards near schools	46%	27%	2%	2%	20%	2%
H	Provide animal control services	24%	37%	5%	4%	28%	2%

<b>Section 4: Development Services</b>							
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	23%	32%	24%	10%	11%	0%
B	Inspecting buildings	25%	38%	22%	8%	8%	0%
C	Enforcing zoning regulations	23%	28%	28%	11%	10%	0%
D	Enforcing sign regulations	21%	28%	28%	13%	8%	0%

Q9		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	Issue building permits	14%	23%	6%	2%	53%	2%
B	Inspect buildings	13%	24%	7%	3%	53%	1%
C	Enforce zoning regulations	14%	24%	8%	4%	49%	1%
D	Enforce sign regulations	14%	29%	7%	3%	46%	1%
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		13%			
	2	No		85%			
	98	Not sure		1%			
	99	Prefer not to answer		1%			

#### 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	30%	38%	27%	5%	0%	0%
B	Maintaining trees	40%	45%	13%	2%	0%	0%
C	Preventing storm-water pollution	41%	39%	14%	3%	2%	0%
D	Reducing traffic congestion	56%	33%	10%	1%	0%	0%
E	Maintaining local streets and roads	62%	35%	3%	0%	0%	0%
F	Providing bike paths and pedestrian facilities	45%	36%	13%	5%	1%	0%
G	Maintaining parks and picnic areas	51%	39%	9%	0%	0%	0%
H	Maintaining public landscapes	42%	41%	16%	1%	0%	0%
I	Garbage collection services	57%	36%	7%	0%	0%	0%
J	Recycling services	36%	36%	20%	8%	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	37%	41%	9%	6%	8%	0%
B	Maintain trees	40%	42%	10%	3%	4%	0%
C	Prevent storm-water pollution	22%	33%	5%	2%	37%	1%
D	Reduce traffic congestion	16%	43%	22%	12%	7%	0%
E	Maintain local streets and roads	33%	44%	13%	8%	3%	0%
F	Provide bike paths and pedestrian facilities	33%	40%	10%	6%	11%	1%
G	Maintain parks and picnic areas	39%	45%	8%	3%	4%	0%
H	Maintain public landscapes	38%	45%	9%	4%	4%	0%
I	Provide garbage collection services	53%	35%	5%	3%	3%	0%
J	Provide recycling services	32%	41%	8%	4%	15%	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	29%	31%	17%	10%	10%	2%
B	Providing recreation programs for pre-school children	23%	26%	22%	16%	10%	2%
C	Providing recreation and sports programs for elementary school-aged children	30%	34%	17%	8%	9%	2%
D	Providing recreation and sports programs for teens	36%	30%	16%	7%	8%	2%
E	Providing adult recreation programs such as classes, concerts and trips	23%	26%	32%	14%	4%	1%
F	Providing adult sports programs	20%	21%	36%	19%	4%	1%
G	Providing recreation programs for seniors	25%	33%	25%	11%	5%	1%
H	Providing recreation programs for families	23%	32%	24%	14%	5%	1%
I	Providing special events like concerts in the park and the Fourth of July Parade	32%	32%	23%	9%	3%	0%

J	Providing recreation programs for special needs children	32%	38%	17%	7%	6%	1%
K	Providing summer-specific recreation programs such as camps	25%	30%	27%	12%	5%	2%
L	Addressing homelessness	69%	23%	6%	1%	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	15%	28%	7%	2%	46%	3%
B	Provide recreation programs for pre-school children	15%	21%	6%	2%	53%	3%
C	Provide recreation and sports programs for elementary school-aged children	20%	28%	5%	1%	43%	3%
D	Provide recreation and sports programs for teens	14%	28%	6%	2%	47%	3%
E	Provide adult recreation programs such as classes, concerts and trips	16%	28%	10%	3%	41%	2%
F	Provide adult sports programs	13%	26%	8%	2%	48%	2%
G	Provide recreation programs for seniors	16%	25%	5%	2%	50%	2%
H	Provide recreation programs for families	15%	31%	6%	2%	43%	2%
I	Provide special events like concerts in the park and the Fourth of July Parade	30%	40%	8%	2%	18%	1%
J	Provide recreation programs for special needs children	13%	18%	5%	2%	58%	3%
K	Provide summer-specific recreation programs such as camps	15%	26%	6%	2%	48%	2%
L	Address homelessness	12%	30%	21%	16%	20%	2%

Section 7: Neighborhood Issues							
Q15	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	12%	19%	25%	42%	3%	0%
B	Recreational vehicles parked on the street for more than 72 hours at a time	17%	16%	17%	42%	8%	0%

C	Landscapes and buildings <u>not</u> being properly maintained	11%	22%	20%	43%	4%	0%
D	Too many people living in one house	19%	13%	13%	42%	12%	1%
E	Excessive noise	13%	21%	21%	43%	1%	1%
F	Illegally parked vehicles	20%	20%	20%	33%	7%	0%
G	Too many vehicles for a single home	25%	20%	18%	31%	5%	0%
H	Garages that have been converted to living spaces	13%	10%	11%	49%	15%	1%

#### Section 7: Branding

Q16	What three words would you use to describe Lake Forest's character and community? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of anything	24%
	Safe	16%
	Peaceful, relaxing, calm, quiet	13%
	Family oriented	12%
	Nice, good place to live	10%
	Clean	10%
	Friendly	10%
	Beautiful, pretty	5%
	Diverse	5%
	Community	4%
	Small town	3%
	Green, open, scenic	3%
	Old, outdated	3%
	Needs improvement	3%
	Charming	2%
	Boring	2%
	Convenient	2%
	Progressive	2%
	Welcoming	2%
	Traffic	2%

Q17	When thinking about other cities in the region, what makes Lake Forest special? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of anything	24%
	Location, accessibility	13%
	Nature, open space, landscaping, lakes	11%
	Safe	7%
	Small town feel	6%
	Quiet	5%
	Parks, trails	5%
	Sense of community	5%
	Friendly people	4%
	Clean, well maintained	4%
	Affordable, low cost of living, taxes	4%
	Beautiful, charming	4%
	Not much, nothing	4%
	Shopping facilities	3%
	Family oriented	3%
	Diverse	2%
	Well planned city, good balance sheet	2%
Q18	What location, landmark or visual do you associate with Lake Forest? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of anything	21%
	The lakes	12%
	Lake Forest Sports Park	10%
	Saddleback Mountain	6%
	El Toro Rd	5%
	The trees	5%
	Parks, trails	3%
	Sun and Sail Club	3%
	Whiting Ranch	3%
	None / Nothing	3%
	Eucalyptus trees	2%
	Foothill Ranch	2%
	Heritage Hill	2%
	Hills, Mountains	2%

Saddleback Church	2%
The Arbor Shopping Center	2%
The Forest	2%
The Woods	2%
El Toro High School	2%
Baker Ranch	1%
Lake II	1%
The Tunnel	1%
The Veterans Park	1%
Chase Building	1%
Lake Forest logo, seal	1%
Santiago and Modjeska Peaks	1%
Etnies Skatepark	1%
The fountains in the lake	1%
Del Taco	1%
Statues, sculptures	1%
Lake Forest Drive	1%

#### Section 8: City-Resident Communication

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

1	Very satisfied	34%
2	Somewhat satisfied	45%
3	Somewhat dissatisfied	9%
4	Very dissatisfied	4%
98	Not sure	7%
99	Prefer not to answer	0%

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

#### City Sources

1	The Leaflet - City Newsletter	60%
2	Leisure Times - included in the Leaflet	11%
3	City Newsletter - no mention of Leaflet or Leisure Times	4%
4	E-newsletter - electronic newsletter	9%
5	City Council Meetings	3%
6	Lake Forest Shop & Dine App	3%

7	My Lake Forest Smartphone App	2%
8	Text Messages from City/Nixle	7%
9	City of Lake Forest <b>Alexa Skill</b>	0%
10	City Website (not specific)	8%
11	Skatepark site (Etnies)	0%
12	Main City Web Page	2%
13	Economic Development Website	0%
14	Flyers at City Facilities	1%
<b>Newspaper, Radio, &amp; TV</b>		
15	Saddleback Valley News (paper)	1%
16	Orange County Register (paper)	5%
17	Los Angeles Times (paper)	1%
18	Radio	0%
19	Television	0%
<b>Internet &amp; Social Media</b>		
20	Internet, not a City site	7%
21	Social Media like Facebook, Twitter and Instagram	17%
22	Lake Forest Patch - the Patch	3%
23	Nextdoor	5%
24	Friends / Other People	3%
25	Other	3%
26	Do Not Receive Information about City	6%
98	Not sure	4%
99	Prefer not to answer	1%
Q21	In the past year, have you visited one or more of the websites maintained by the City of Lake Forest?	
1	Yes	63% Ask Q22
2	No	28% Skip to D1
98	Not sure/No opinion	9% Skip to D1
99	Prefer not to answer	0% Skip to D1
Q22	Were you able to find the information you were looking for on the City's website?	
1	Yes	76%
2	No	14%
98	Not sure/No opinion	9%
99	Prefer not to answer	0%

Q23	Are you satisfied or dissatisfied with the resources and content available on the City's web sites? <i>Get answer, then ask: Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?</i>		
	1	Very satisfied	32%
	2	Somewhat satisfied	47%
	3	Somewhat dissatisfied	10%
	4	Very dissatisfied	3%
	98	Not sure	8%
	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	57%
	2	Employed part-time	8%
	3	Student	5%
	4	Homemaker	4%
	5	Retired	21%
	6	In-between jobs	3%
	98	Not sure	0%
	99	Prefer not to answer	2%
D2	Do you currently have any children under the age of 18 living in your home?		
	1	Yes	31%
	2	No	67%
	99	Prefer not to answer	1%
D3	Some residents live in Homeowners Associations and some do not. Do you live in a Homeowners Association?		
	1	Yes	75%
	2	No	24%
	99	Prefer not to answer	1%
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	<1%
5	Asian -- Korean, Japanese, Chinese, Vietnamese, Filipino or other Asian	16%
6	Pacific Islander	<1%
7	Mixed Heritage	4%
98	Other	1%
99	Prefer not to answer	4%
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	7%
3	\$60,000 to \$79,999	6%
4	\$80,000 to \$99,999	9%
5	\$100,000 to \$149,999	18%
6	\$150,000 or more	39%
98	Not sure	2%
99	Prefer not to answer	14%

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

#### Section 10: Post-Interview & Sample Items

D6	Gender	
	Male	51%
	Female	49%
	Prefer not to answer	0%
S1	Party	
1	Democrat	36%
2	Republican	36%
3	Other	6%
4	DTS	22%

S2	Age		
	1	18 to 29	18%
	2	30 to 39	17%
	3	40 to 49	16%
	4	50 to 64	25%
	5	65 or older	24%
S3	Home Owner		
	Yes		64%
	No		36%
S4	Area of City		
	1	One	19%
	2	Two	20%
	3	Three	37%
	4	Four	24%
S5	Council District		
	1	One	23%
	2	Two	20%
	3	Three	19%
	4	Four	19%
	5	Five	20%



City of Lake Forest  
Business Survey  
Final Toplines (n=200)  
January 2025

**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
		21%
		15%
		11%
		50%
		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
		30%
		47%
		17%
		0%
		0%
		3%
		3%
Q3	If the city government could do one thing to improve the business climate in Lake Forest, what would you like to see? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of any	
	No changes / Everything is fine	
	Increase biz, networking opportunities	
	Promote, advertise local businesses	
	Resolve homeless, housing problem	
	Provide more incentives to attract business	
	Fewer restrictions, regulations	
		24%
		20%
		9%
		9%
		9%
		5%
		5%

	More business-friendly government	4%
	Improve City appearance, maintenance	4%
	Improve safety, security of biz areas	3%
	Improve traffic	3%
	Remove street vendors	3%
	Address parking issues	2%
	Reduce taxes, fees	2%
	Provide additional community events	2%
Q4	Is there a particular aspect or feature of Lake Forest that is <b>beneficial</b> to your business? <i>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.</i>	
	Not sure / No particular aspect	39%
	Good location, convenient access for customers	16%
	Support from City to businesses	10%
	Access to roads, freeways, surrounding communities	6%
	Business friendly area, climate, customers	6%
	No business license / Ease of startup	5%
	Access to other local business, services	5%
	Sense of community / Family-oriented City	4%
	Public safety, low crime rate	4%
	Cleanliness, beauty of City	4%
	Good balance, mixture of residential and businesses	3%
	Growth in business, residential areas	2%
	Environment, climate, weather	2%
	Low, affordable rent	2%
	Peaceful, quiet	2%
Q5	Are there any particular <b>challenges</b> associated with doing business in Lake Forest? <i>If yes, ask: Please briefly describe the particular challenges associated with doing business in Lake Forest. Verbatim responses recorded and later grouped into categories shown below.</i>	
	Not sure / Cannot think of any	73%
	Too many regulations	4%
	Safety of area, homelessness	4%
	Location, accessibility	3%
	Advertisement restrictions	3%
	City maintenance, infrastructure	2%
	Traffic, parking issues	2%

Lack of support from City	2%
High expenses, rents, fees	1%
Illegal immigrant issue	1%
Business competition	1%
Employee, laborer issues	1%
Improving sales, attracting customers	1%

**Section 3: City Services**

Q6	Generally speaking, are you satisfied or dissatisfied with the job the City of Lake Forest is doing to provide city services? ( <i>get answer, then ask</i> ): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?	
	1 Very satisfied	57%
	2 Somewhat satisfied	36%
	3 Somewhat dissatisfied	3%
	4 Very dissatisfied	2%
	98 Not sure	3%
	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	12%	37%	28%	16%	6%	0%
B	Investigating criminal activity	41%	49%	8%	1%	0%	0%
C	Enforcing traffic laws	23%	47%	22%	8%	0%	0%
D	Maintaining a low crime rate	50%	46%	3%	1%	0%	0%
E	Providing building permit services	20%	41%	25%	13%	1%	0%
F	Providing building inspection services	13%	40%	27%	19%	2%	0%
G	Promoting economic development	24%	49%	21%	6%	0%	0%
H	Revitalizing out-dated areas in the City	22%	48%	22%	8%	1%	0%
I	Providing business education events	12%	25%	41%	21%	1%	0%
J	Providing business networking events	14%	34%	32%	19%	2%	0%
K	Providing free business consulting services	10%	26%	32%	31%	1%	0%
L	Providing hiring or employee training services	9%	28%	27%	33%	2%	0%

Q8		For the same list of services I just read, I'd like you to tell me how satisfied you are with the job the City of Lake Forest is doing to provide the service. Are you satisfied or dissatisfied with the City's efforts to: _____, or do you not have an opinion? (Get answer. If 'satisfied' or 'dissatisfied', then ask): Would that be very (satisfied/dissatisfied) or somewhat (satisfied/dissatisfied)?					
<i>Randomize</i>		Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied	Not sure	Prefer not to answer
A	Provide business watch programs	26%	31%	5%	4%	34%	1%
B	Investigate criminal activity	47%	29%	5%	3%	16%	1%
C	Enforce traffic laws	49%	28%	4%	2%	17%	1%
D	Maintain a low crime rate	52%	26%	7%	2%	11%	1%
E	Provide building permit services	37%	26%	3%	2%	31%	1%
F	Provide building inspection services	40%	27%	1%	3%	28%	1%
G	Promote economic development	32%	38%	4%	2%	24%	1%
H	Revitalize out-dated areas in the City	38%	36%	4%	4%	18%	1%
I	Provide business education events	26%	33%	4%	3%	34%	1%
J	Provide business networking events	32%	30%	6%	2%	29%	1%
K	Provide free business consulting services	20%	34%	4%	2%	39%	1%
L	Provide hiring or employee training services	19%	29%	5%	4%	42%	1%
Q9		Now I'm going to ask you about another series of specific services provided by the City. Again, please tell me whether each service is extremely important to your business, very important, somewhat important, or not too important. Here's the (first/next) one: _____. Do you think this service is extremely important, very important, somewhat important, or not too important?					
<i>Randomize</i>		Extremely Important	Very Important	Somewhat Important	Not too Important	Not sure	Prefer not to answer
A	Enforcing zoning regulations	18%	40%	25%	14%	3%	0%
B	Enforcing sign regulations	18%	41%	25%	13%	3%	0%
C	Street sweeping	21%	43%	29%	6%	1%	0%
D	Reducing traffic congestion	27%	46%	19%	8%	0%	0%
E	Maintaining local streets and roads	33%	53%	13%	2%	0%	0%
F	Landscaping median strips and other areas of the City	20%	45%	26%	8%	0%	0%
G	Addressing homelessness	41%	45%	8%	4%	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	34%	31%	5%	2%	28%	1%
B	Enforce sign regulations	40%	28%	8%	2%	20%	1%
C	Provide street sweeping services	52%	30%	2%	3%	12%	1%
D	Reduce traffic congestion	31%	42%	10%	4%	13%	1%
E	Maintain local streets and roads	51%	31%	7%	2%	8%	1%
F	Landscape median strips and other areas of the City	54%	29%	4%	1%	11%	1%
G	Addressing homelessness	27%	29%	15%	12%	17%	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? Get answer, then ask: 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	47%	22%	13%	13%	3%	1%
B	Updating our business website would help us attract more customers	38%	30%	14%	11%	5%	2%
C	Learning how to better market or advertise our business would make us more profitable	46%	29%	10%	9%	5%	1%
D	The technology in our business needs to be updated	29%	29%	20%	15%	6%	1%
E	Improving the physical appearance of our store or offices would help us attract more customers	35%	26%	18%	14%	6%	1%
F	Our business could use assistance with attracting and retaining employees	25%	28%	21%	17%	7%	2%

Q12	Is there anything the City could do to help your business be more successful? <i>If yes, ask: Please describe the <b>most important</b> 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	60%
	Promote businesses	10%
	Address homeless issues	6%
	Tax incentives, lower taxes, fees	5%
	Provide more resources, support	5%
	Maintain city cleanliness, beautification	4%
	Provide additional community events	3%
	Fewer signage restrictions	2%
	Financial aid, funding	2%
	Provide more networking opportunities	2%
	Address city safety issues	1%
	Enforce traffic laws	1%
	Affordable rent, utilities	1%
	Providing more parking	1%
	Provide, improve internet connectivity	1%
	Code enforcement	1%

**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	49%	Skip to Q15
	2	Somewhat satisfied	36%	Skip to Q15
	3	Somewhat dissatisfied	5%	Ask Q14
	4	Very dissatisfied	4%	Ask Q14
	98	Not sure	6%	Skip to Q15
	99	Prefer not to answer	0%	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>Seems generic.</i>			
	<i>I don't recall getting much information on the programs. Outside this survey and items I have come across at home, as a business, I don't recall getting anything from the City.</i>			
	<i>We have been in Lake Forest for twenty years and I have never heard of any of these programs.</i>			
	<i>This is the first communication I have ever received.</i>			

<i>No one has ever communicated with us.</i>
<i>I think we are very busy. We don't have time. The number of emails should be frequent, and maybe there could be more in-person and online networking.</i>
<i>We barely see anything from them. We don't see emails or anything.</i>
<i>I have not had a way to communicate with the city. Maybe, the PR may not be doing a good job on how the business owner can communicate with the city.</i>
<i>I just don't receive a lot of communication compared to other cities I have been in.</i>
<i>They don't update the internet that much. I don't see any updates or news on the internet.</i>
<i>I have gone to their city site when I've had issues or anything, and it is hard to find things and hard to navigate. Also, with the city's communication in the Orange County Sheriff's Department, it is hard to find stuff to report.</i>
<i>Yes, there is a very specific reason. As of right now, I'm getting much better communications from other neighboring cities that are farther from me. If I'm right here in Lake Forest, I should be getting more from Lake Forest, but I am going to other cities because I'm seeing more opportunities from them. I don't want to do the legwork of digging through what is available in Lake Forest. So, if other cities are already promoting to me, I think, for sure, at least be at par with that bar.</i>
<i>It is because I have never received any communication.</i>
<i>There is no communication.</i>
<i>When you guys started the gift card thing, you didn't even tell us about it. I had to find out from customers. That was pretty sad.</i>
<i>I don't get any communication from them. They don't communicate with me.</i>

**Q15** What information sources do you use to find out about City of Lake Forest news, information and programming? *Don't read list. Record up to first 2 responses. If they say Internet or web, probe to see if a City website and - if yes - which one.*

City Sources		
1	The Leaflet - City Newsletter	21%
2	Leisure Times - included in the Leaflet	3%
3	City Newsletter - no mention of Leaflet or Leisure Times	10%
4	E-newsletter - electronic newsletter	15%
5	City Council Meetings	2%
6	Lake Forest Shop & Dine App	3%
7	My Lake Forest Smartphone App	1%
8	Text Messages from City/Nixle	2%
9	City of Lake Forest <b>Alexa Skill</b>	1%
10	City Website (not specific)	24%
11	Skatepark site (Etnies)	0%
12	Main City Web Page	3%
13	Economic Development Website	0%
14	Flyers at City Facilities	2%

Newspaper, Radio, & TV						
	15	Saddleback Valley News (paper)				0%
	16	Orange County Register (paper)				3%
	17	Los Angeles Times (paper)				0%
	18	Radio				1%
	19	Television				1%
Internet & Social Media						
	20	Internet, not a City site				18%
	21	Social Media like Facebook, Twitter and Instagram				21%
	22	Lake Forest Patch - the Patch				2%
	23	Nextdoor				3%
	24	Friends / Other People				4%
	25	Other				8%
	26	Do Not Receive Information about City				6%
	98	Not sure				3%
	99	Prefer not to answer				1%
Q16	As I read the following ways that the City of Lake Forest can communicate with local businesses, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for the City to communicate with your business.					
		<i>Randomize</i>	Very	Somewhat	Not at all	Not sure / Prefer not to answer
A	Email		52%	36%	10%	2%
B	Electronic Newsletters		41%	43%	13%	3%
C	X/Twitter		12%	29%	50%	10%
D	Facebook		24%	39%	32%	5%
E	The <b>My Lake Forest</b> smart phone application that allows you to communicate with the City, report issues, and receive updates		28%	37%	20%	14%
F	City website		45%	44%	8%	3%
G	A Blog on the City's website		21%	44%	26%	9%
H	Newsletters and other materials mailed directly to your business		38%	41%	17%	5%
I	Automated phone calls		12%	28%	55%	5%
J	Town hall and community meetings		25%	47%	24%	5%
K	Advertisements in local papers		17%	34%	45%	4%
L	Public Access Television		13%	34%	47%	7%

Q17	Have you ever visited the City's economic development website at <a href="http://www.lakeforestbusiness.com">www.lakeforestbusiness.com</a> ?	
	1	Yes 33%
	2	No 66%
	99	Prefer not to answer 0%
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 20%
	2	Good 34%
	3	Fair 22%
	4	Poor 9%
	5	Very poor 1%
	98	Not sure 11%
	99	Prefer not to answer 3%

#### 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	18%
	2 to 5	34%
	6 to 10	15%
	More than 10	24%
	Prefer not to answer	9%
D2	Approximately how many of these employees live <b>outside</b> of Lake Forest?	
	None	23%
	1	11%
	2 to 5	32%
	6 to 10	11%
	More than 10	13%
	Prefer not to answer	11%

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	4%	
	2	Quality business parks	2%	
	3	Proximity to freeways/transportation corridors	4%	
	4	Quality of housing stock	0%	
	5	Overall quality of the City	11%	
	6	Local amenities (dining/shopping)	0%	
	7	Close to clients/customers	7%	
	8	Close to owner's home	20%	
	9	Streamlined processes to locate or expand a business in Lake Forest	2%	
	10	Location/accessibility	29%	
	12	Other	9%	
	98	Not sure	9%	
	99	Prefer not to answer	2%	
D4	In the next 12 months, do you think your business will increase, decrease or stay about the same?			
	1	Increase	50%	Ask D5
	2	Decrease	3%	Skip to D6
	3	Stay about the same	42%	Skip to D6
	98	Not sure	4%	Skip to D6
	99	Prefer not to answer	1%	Skip to D6
D5	To accommodate the growth in your business, will you require additional square footage or a larger building?			
	1	Yes	19%	
	2	No	75%	
	98	Not sure	5%	
	99	Prefer not to answer	1%	
D6	In the next 12 months, do you think your business will relocate?			
	1	Yes	7%	Ask D7
	2	No	83%	Skip to D9
	98	Not sure	8%	Skip to D9
	99	Prefer not to answer	2%	Skip to D9

D7	Will you be relocating your business within Lake Forest or to another community?			
	1	Lake Forest	46%	Skip to D9
	2	Another community	38%	Ask D8
	98	Not sure	15%	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 5 respondents	
D9	Last question for you. Are you a resident of Lake Forest?			
	1	Yes	40%	
	2	No	56%	
	99	Prefer not to answer	4%	
Thank you for participating! This survey was conducted for the City of Lake Forest.				

#### Section 7: Post-Interview & Sample Items

S1	Gender		
	1	Male	58%
	2	Female	38%
	99	Prefer not to answer	4%
S2	Home-Based Business		
	1	Yes	19%
	2	No	81%