Big Bear Lake
COMMUNITY
VISION

COMMUNITY VISIONING SURVEY
SUMMARY REPORT

PREPARED FOR THE
CITY OF BIG BEAR LAKE

APRIL 2023

T A B L E   O F   C O N T E N T S

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INTRODUCTION

The City of Big Bear Lake relies on its General Plan to guide decisions with respect to land use, development, and related policy matters. Often referred to as a "blueprint" for achieving residents' vision for the future, the General Plan addresses a variety of topics that affect the quality of life in Big Bear Lake including land use, public safety, housing, the economy, parks, open space, and transportation.

Big Bear Lake's current General Plan was adopted in 1999, more than 20 years ago. Feeling that it was time to conduct a comprehensive review and update of the General Plan to ensure that it reflects current community values, updated technical and environmental information, and addresses relevant issues that have surfaced since the existing General Plan was created, in 2023 the City embarked upon the first step in the process: *Big Bear Lake Community Vision*. The main objectives of the visioning process are to better understand what residents, property owners, and stakeholders value about the City, gauge how well the City is meeting their needs and expectations, gather feedback on policy issues, as well as identify their priorities and concerns for the City—now and in the future.

Although City Council, staff, and consultants will play an important role in gathering data, organizing the process, and assisting in the production of visioning documents, residents and property owners in Big Bear Lake are the true inspiration and authors of the vision. Through their enthusiastic participation in workshops, exercises, committees, and community surveys, they will help to ensure the creation of a *Community Vision* that is consistent with their values, priorities and concerns for Big Bear Lake and its future.

PURPOSE OF SURVEY The purpose of the survey described in this report was to provide objective, *statistically reliable* measures of residents' and property owners' opinions on a number of key issues that will be addressed in the *Community Vision* and General Plan update. The results of the survey will be combined with information gathered through other public input methods to help the City Council, staff, and the City's consulting team develop the *Community Vision* and update the General Plan.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 22). In brief, the survey was administered to a random sample of 497 adults who reside and/or own property within the City of Big Bear Lake. The survey followed a mixed-method design that employed multiple recruiting methods (mail, email, text, and phone) and multiple data collection methods (phone and online). Administered in English and Spanish between April 7 and April 19, 2023, the average interview lasted 17 minutes.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It provides a summary of the most important factual findings of the survey in a Question & Answer format. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey 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 questionnaire used for the interviews is contained at the back of this report (see *Questionnaire & Toplines* on page 25), and a complete set of crosstabulations for the survey results is contained in Appendix A.

ACKNOWLEDGEMENTS   True North thanks the City of Big Bear Lake 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. A special thanks also to Kendall Flint (DKS Associates) for contributing to the design of the study.

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

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

During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,200 survey research studies for public agencies—including more than 400 studies for California municipalities and special districts.

K E Y   F I N D I N G S

As noted in the *Introduction*, this study was designed to provide the City of Big Bear Lake with statistically reliable information regarding residents' and property owners' opinions on key issues and themes that will be addressed in the *Community Vision* and General Plan update. Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, 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.

What do residents and property owners most value about Big Bear Lake that the General Plan should seek to preserve?

A clear theme of the survey results is that residents and property owners are focused on maintaining—rather than changing—the character of Big Bear Lake. The vast majority of respondents shared favorable opinions of the City's overall quality of life (83% excellent or good) and as a place to recreate (85%), and most also rated Big Bear Lake as an excellent or good place to shop and dine (56%) and retire (52%). The access Big Bear Lake offers to the forest, nature, and outdoors, the lake itself and lake-related activities, the small town feel of the community, and the many miles of hiking and biking trails were the most frequently cited aspects that residents like most about Big Bear Lake and would like to have preserved in the future. For more on this topic, see *Overall Quality of Life* on page 6 and *What do You Like Most About Big Bear Lake?* on page 7.

What changes do residents and property owners seek to improve the quality of life in Big Bear Lake?

Consistent with the aforementioned theme of maintaining the City's character, many of the changes that residents and property owners desire could more appropriately be described as efforts to preserve or enhance *existing* qualities of Big Bear Lake. When asked what they would most like to change about Big Bear Lake to make it a better place to live, approximately 15% of respondents were unsure of a change that could be made to improve the City or stated flatly that no changes are needed/everything is fine. Among the specific improvements that were desired, the most common were addressing vacation rental issues (10%), improving infrastructure (10%), addressing traffic control/congestion (10%), addressing lake water issues (6%), providing more/safer bike lanes and sidewalks (6%), and providing more entertainment options for all ages (4%). Additionally, when asked to rate the importance of 11 specific issues, respondents prioritized maintaining and improving city streets, sidewalks, and infrastructure, maintaining a high standard for public safety, promoting the conservation of natural resources, and preserving the character of Big Bear Lake. For more on this topic, see *What Should Be Changed?* on page 8 and *Importance of Issues* on page 9.

How do residents and property owners view different types of development in Big Bear Lake?

The General Plan will help shape the nature of Big Bear Lake's future development and redevelopment—including the size, type, character and location of new developments and redevelopment projects—as well as the pace at which these changes occur. Recognizing that opinions about development often hinge on the *type* of use being considered, the

survey sought to profile respondents' opinions about a variety of different development types and amenities.

As expected, respondents expressed quite different opinions depending on the type of development being considered. A majority of respondents perceived that there are too few entertainment uses such as movie houses, music and art (58%) and chain retail stores (52%) in Big Bear Lake. Although the dominant perception was that the current balance of the remaining development types tested in the survey was about right, at least one-quarter of respondents also perceived a lack of smaller boutique restaurants (45%), attached multi-family housing (34%), smaller boutique retail stores (32%), and mixed-use developments where residential housing is built on top of or next to commercial businesses on the same property (27%). When compared to the other use types, fewer respondents felt there are currently not enough warehouse and industrial uses (11%), hotels (13%), single family homes (16%), and chain restaurants (22%) in Big Bear Lake. For more on this topic, see *Land Use & Redevelopment* on page 11.

Is Big Bear Lake perceived to be a safe place?

Yes. More than nine-in-ten respondents rated Big Bear Lake as either very safe (48%) or somewhat safe (43%) as a place to live. This general perception of safety also extended to most specific locations and scenarios, including visiting parks and open space areas and driving on local streets (each 91% very or somewhat safe), walking in their neighborhood after dark (81%), walking in commercial areas of the City after dark (74%), and walking along the side of local streets or crossing streets on foot (73%). When compared to the other scenarios tested, there was just one that stood out for having much lower perceived safety ratings: bicycling on or alongside local streets (48% very or somewhat safe). For more on this topic, see *Safety* on page 13.

What are the best ways to communicate with residents and property owners?

To help the City identify the most effective means of communicating with residents and property owners, it is helpful to first understand what information sources they *currently* rely on for this type of information. When provided an open-ended opportunity to list the sources they typically use to find out about City of Big Bear Lake news, information, and programming, the most frequently-cited sources were social media including Facebook, Twitter, Instagram, and Nextdoor (49%), the City Newsletter/*Elevation 6752'* (40%), the *Grizzly* Newspaper (38%), the Internet/websites in general (not the City's) (32%), the City's website (31%), and friends/family/associates (29%). Overall, 72% of respondents indicated they were generally satisfied with the City's efforts to communicate with them through newsletters, the Internet, the City's cable TV channel, and other means.

When asked what they felt would be the most *effective* means for the City to communicate with residents, the balance of responses was some-

what different. Overall, email and electronic newsletters were identified as the most effective methods (93% very or somewhat effective), followed by a Big Bear Lake mobile app which would allow them to communicate with the City, report issues, and receive updates (85%), the City's website (82%), social media sites such as Facebook, Twitter, and Instagram (79%), and text messages (76%). At the other end of the spectrum, advertisements in local newspapers were generally viewed by respondents as a much less effective way for the City to communicate with them (37%). For more on this topic, see *Communication* on page 16.

QUALITY OF LIFE & ISSUES

The opening series of questions in the survey was designed to assess respondents' perceptions of the quality of life in Big Bear Lake, their ideas on changes city government could implement to make the community a better place to live, and the importance they assign to local issues.

OVERALL QUALITY OF LIFE At the outset of the survey, residents were asked to rate the City of Big Bear Lake on a number of key dimensions including overall quality of life, as a place to raise a family, and as a place to work, using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 1 below, the vast majority of respondents shared favorable opinions of the overall quality of life in the City (83% excellent or good) and Big Bear Lake as a place to recreate (85%). Most also rated Big Bear Lake as excellent or good when it comes to shopping and dining (56%) and as a place to retire (52%). Overall, the City received the lowest ratings as a place to raise a family (39%) and as a place to work (22%), although it should also be noted that a comparatively large percentage of respondents were unsure when it came to these dimensions.

Question 4 *How would you rate: _____? Would you say it is excellent, good, fair, poor or very poor?*

FIGURE 1 RATING CITY OF BIG BEAR LAKE
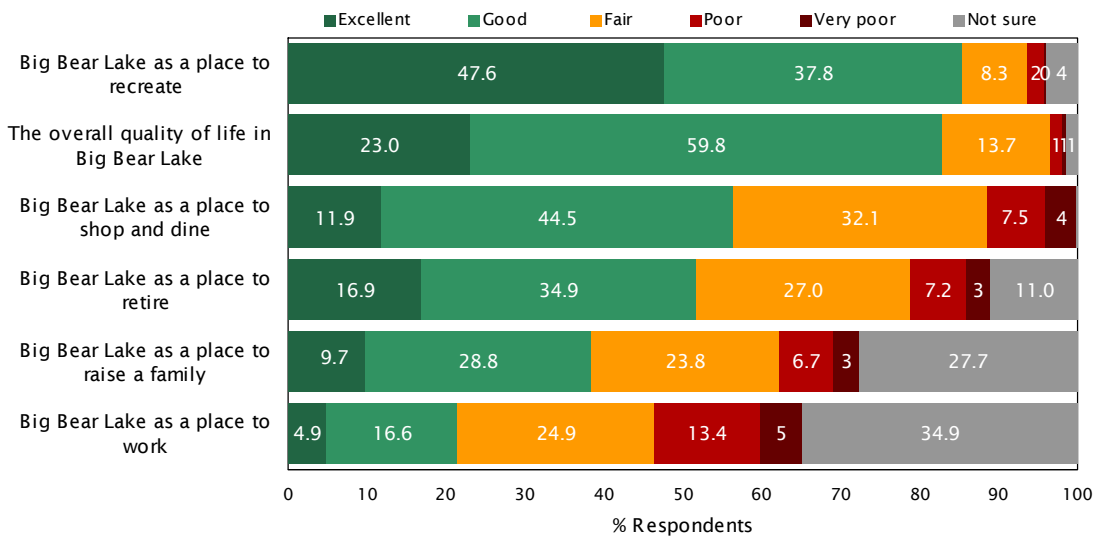
For the interested reader, tables 1-3 on the next page show how ratings of *excellent* or *good* for each dimension varied by residency status, years living/owning property in Big Bear Lake, age, homeownership, presence of a child in the home, presence of a senior in the home, and ethnicity. Although ratings were reasonably consistent for most dimensions, it's worthing noting that full-time residents were far less likely than their counterparts to rate the shopping and dining opportunities in the City as excellent or good, but more likely to provide positive ratings to Big Bear Lake as a place to work. Residents 55 to 64 years of age also tended to provide the most positive ratings among the age cohorts.

TABLE 1 RATING CITY OF BIG BEAR LAKE BY RESIDENCE STATUS & YEARS IN BIG BEAR, OWNING A PROPERTY (SHOWING % EXCELLENT OR GOOD)

	Residence Status (Q1)				Years in Big Bear, Owning Property (Q2,3)			
	Full-time res	Part-time res	Own 2nd home for vacation	Own res property for rental	Less than 5	5 to 9	10 to 14	15 or more
Big Bear Lake as a place to recreate	77.6	83.6	88.9	88.1	85.7	86.8	82.5	85.7
The overall quality of life in Big Bear Lake	78.1	90.9	84.0	82.2	82.5	80.0	83.3	86.4
Big Bear Lake as a place to shop and dine	29.3	63.6	66.0	61.4	53.7	57.1	54.2	61.2
Big Bear Lake as a place to retire	59.1	61.8	53.1	40.6	46.2	53.6	52.7	59.1
Big Bear Lake as a place to raise a family	49.6	40.0	38.9	28.7	25.4	38.5	41.5	58.5
Big Bear Lake as a place to work	37.4	18.2	17.3	14.9	17.3	14.8	30.2	30.0

TABLE 2 RATING CITY OF BIG BEAR LAKE BY AGE & HOME OWNERSHIP STATUS (SHOWING % EXCELLENT OR GOOD)

	Age (QD1)					Home Ownership Status (QD3)	
	Under 35	35 to 44	45 to 54	55 to 64	65 or older	Own	Rent
Big Bear Lake as a place to recreate	88.1	81.0	87.0	88.9	74.9	86.4	75.3
The overall quality of life in Big Bear Lake	77.9	79.9	87.6	89.7	65.7	83.7	74.4
Big Bear Lake as a place to shop and dine	50.3	56.4	53.4	67.2	42.4	60.4	18.9
Big Bear Lake as a place to retire	42.2	44.9	60.7	61.2	37.4	50.4	64.4
Big Bear Lake as a place to raise a family	25.9	29.4	42.6	55.2	30.1	38.6	37.1
Big Bear Lake as a place to work	23.5	16.2	23.4	27.0	7.3	20.5	29.9

TABLE 3 RATING CITY OF BIG BEAR LAKE BY CHILD IN HSLD, SENIOR IN HSLD & ETHNICITY (SHOWING % EXCELLENT OR GOOD)

	Child in Hsld (QD5)		Senior in Hsld (QD6)		Ethnicity (QD9)		
	Yes	No	Yes	No	Caucasian / White	Latino / Hispanic	Other / Mixed
Big Bear Lake as a place to recreate	88.0	84.5	87.3	85.1	87.1	80.7	85.2
The overall quality of life in Big Bear Lake	80.5	84.7	89.2	80.9	86.5	81.5	60.0
Big Bear Lake as a place to shop and dine	54.9	57.5	64.3	54.0	62.2	36.9	29.0
Big Bear Lake as a place to retire	50.2	53.8	61.4	48.1	53.7	61.1	32.5
Big Bear Lake as a place to raise a family	29.2	43.2	55.4	31.6	39.4	47.8	24.9
Big Bear Lake as a place to work	19.6	22.6	23.4	21.3	19.0	42.4	17.0

WHAT DO YOU LIKE MOST ABOUT BIG BEAR LAKE? The next question in this series asked respondents to identify what they like most about Big Bear Lake that city government should make sure to preserve in the future. Question 5 was posed in an open-ended manner, allowing respondents to mention any aspect or attribute that came to mind without being prompted by or restricted to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 2 on the next page.

Respondents were most apt to cite access to forest, nature, and the outdoors (31%), the lake (20%), the small town feel (16%), and biking/hiking trails (13%) as what they like most about Big Bear Lake that should be preserved in the future. Other specific attributes included lake activities (11%), small businesses, shops, and restaurants (7%), peaceful, serene atmosphere (7%), and the friendly community (6%).

Question 5 *What do you like most about the City of Big Bear Lake that should be preserved in the future?*

FIGURE 2 LIKE MOST ABOUT CITY
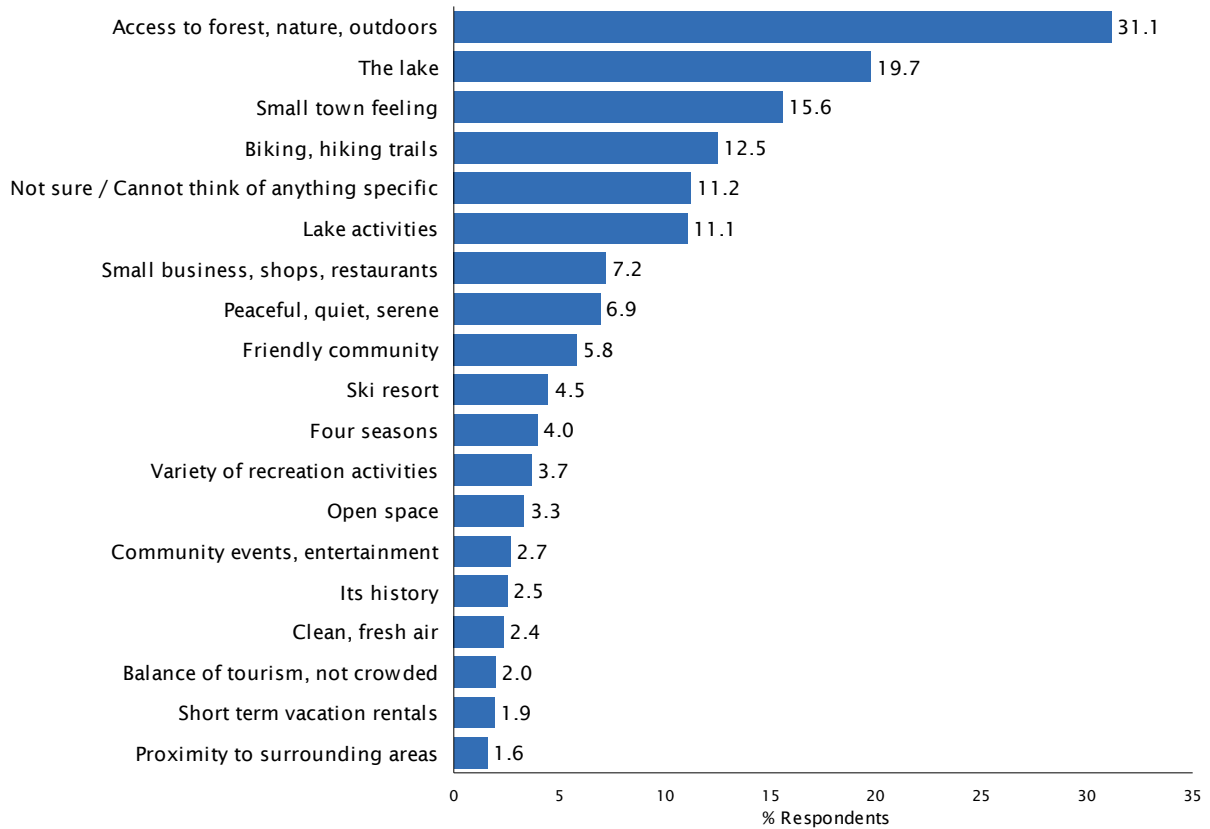
WHAT SHOULD BE CHANGED? In an open-ended manner similar to that described above for Question 5, all respondents were also asked to indicate the one thing that could be *changed* to make Big Bear Lake a better place to live, now and in the future. True North reviewed the verbatim responses to Question 5 and grouped them into the categories shown in Figure 3 on the next page.

Fifteen percent (15%) of those surveyed could not think of a change they desired (8%) or reported that no changes are needed (7%), both of which are indicative of a respondent who does not perceive any pressing issues or problems in Big Bear Lake. Among specific changes the were desired, the most common were addressing vacation rental issues (10%), improving infrastructure (10%), addressing traffic control/congestion (10%), addressing lake water issues (6%), providing more/safer bike lanes and sidewalks (6%), and providing more entertainment options for all ages (4%).

Question 6 *If you could change one thing to make Big Bear Lake a better place to live now and in the future, what change would you like to see?*

FIGURE 3 CHANGES TO IMPROVE CITY

Change	%
Provide more shops, restaurants	21.4
Address vacation rental issues	10.4
Improve infrastructure	10.4
Address traffic control, congestion	9.6
Not sure / Cannot think of anything specific	7.8
No changes needed / Everything is fine	7.2
Address lake water issues	6.4
Provide more safe bike lanes, sidewalks	5.5
Provide more entertainment for all ages	4.2
Provide more affordable housing	3.0
Address parking issues	2.8
Lower taxes, fees	2.6
Improve support tourism	2.5
Improve government, leadership	2.3
Beautify City, improve cleanliness	2.2
Provide more healthcare, medical facilities	2.1
Improve support to local residents	2.0
Improve community services	1.9
Enforce laws, codes	1.9
Reduce cost of living, inflation	1.9
Reduce number of visitors, tourism	1.9
Reduce government intervention, city restrictions	1.8
Provide, improve tourist attractions	1.8

% Respondents

IMPORTANCE OF ISSUES   Having provided respondents *open-ended* opportunities to identify topics of interest as they relate to Big Bear Lake's future, the survey next presented respondents with several issues facing the community and asked them to rate the importance of each issue. Because the same response scale was used for each issue, the results provide an insight into how important each issue is on a scale of importance *as well as* how each issue ranks in importance relative to the other issues tested. To avoid a systematic position bias, the order in which the issues were presented was randomized for each respondent.

Figure 4 on the next page presents the issues tested, as well as the importance assigned to each by survey participants, sorted by order of importance.[1] Overall, maintaining and improving city streets, sidewalks, and infrastructure received the highest percentage of respondents indicating that the issue was either extremely or very important (91%), followed by maintaining a high standard for public safety (87%), promoting the conservation of natural resources (86%), preserving the character of Big Bear Lake (84%), and improving the local economy (81%). At the other end of the spectrum, respondents assigned far less importance to promoting affordable multi-family attached housing in the city (36%).

1. Issues were ranked based on the percentage of respondents who indicated that the issue was either *extremely* important or *very* important.

Question 7 *Next, I'm going to read a list of issues facing Big Bear Lake and for each one, please tell me how important you feel the issue is to you, using a scale of extremely important, very important, somewhat important or not at all important.*

FIGURE 4 IMPORTANCE OF ISSUES
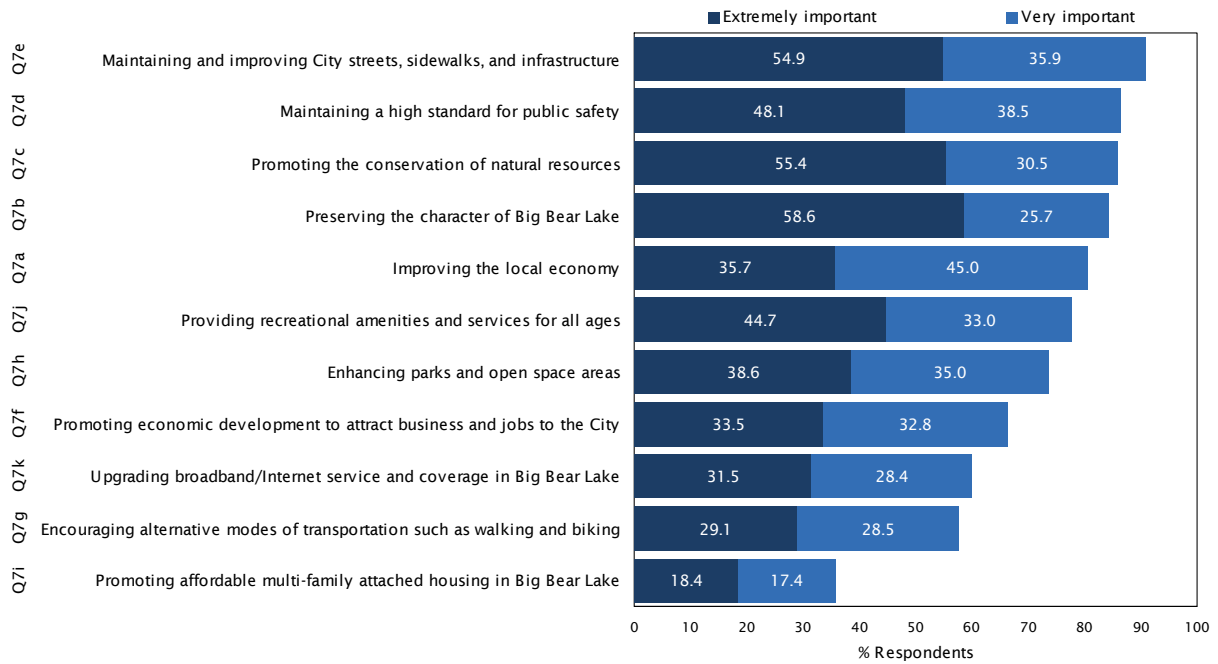
Table 4 shows how the percentage who identified each issue as extremely or very important varied according to their residency status. In general, the importance assigned to each issue was quite consistent regardless of whether an individual lived in Big Bear Lake full-time, part-time, owned a vacation home, or owned a residential property that they rented to others. The notable exception to this pattern is found for promoting affordable multi-family attached housing, which was far more important to those who reside in Big Bear Lake than it was for those who own property in Big Bear Lake, but don't live in the City.

TABLE 4 IMPORTANCE OF ISSUES BY RESIDENCE STATUS

	Residence Status (Q1)			
	Full-time res	Part-time res	Own 2nd home for vacation	Own res property for rental
Maintaining and improving City streets, sidewalks, and infrastructure	94.5	94.5	93.8	87.1
Maintaining a high standard for public safety	85.9	85.9	87.0	90.1
Promoting the conservation of natural resources	87.9	87.9	85.8	87.1
Preserving the character of Big Bear Lake	87.1	87.1	79.0	89.1
Improving the local economy	76.2	76.2	77.8	87.1
Providing recreational amenities and services for all ages	72.3	72.3	78.4	88.1
Enhancing parks and open space areas	67.5	67.5	75.3	77.2
Promoting economic development to attract business and jobs to the City	61.7	61.7	63.6	70.3
Upgrading broadband/Internet service and coverage in Big Bear Lake	61.6	61.6	61.1	61.4
Encouraging alternative modes of transportation such as walking and biking	58.0	58.0	58.6	61.4
Promoting affordable multi-family attached housing in Big Bear Lake	67.4	67.4	27.8	25.7

LAND USE & REDEVELOPMENT

The General Plan will help shape the nature of Big Bear Lake's future development and redevelopment—including the size, type, character and location of new developments and redevelopment projects—as well as the pace at which these changes occur. Recognizing that opinions about development often hinge on the *type* of use being considered, Question 8 sought to profile residents' opinions about a variety of different development types and amenities. For each item shown on the left of Figure 5, respondents were simply asked whether there is currently too much, about the right amount, or too little in Big Bear Lake.

Question 8 *There are several properties in Big Bear Lake that are vacant or have potential for redevelopment in the future. As I read the following list of development types, please tell me whether you feel there is currently too much, about the right amount, or too little of this type of development in Big Bear Lake.*

FIGURE 5 OPINION OF DEVELOPMENT TYPES IN CITY
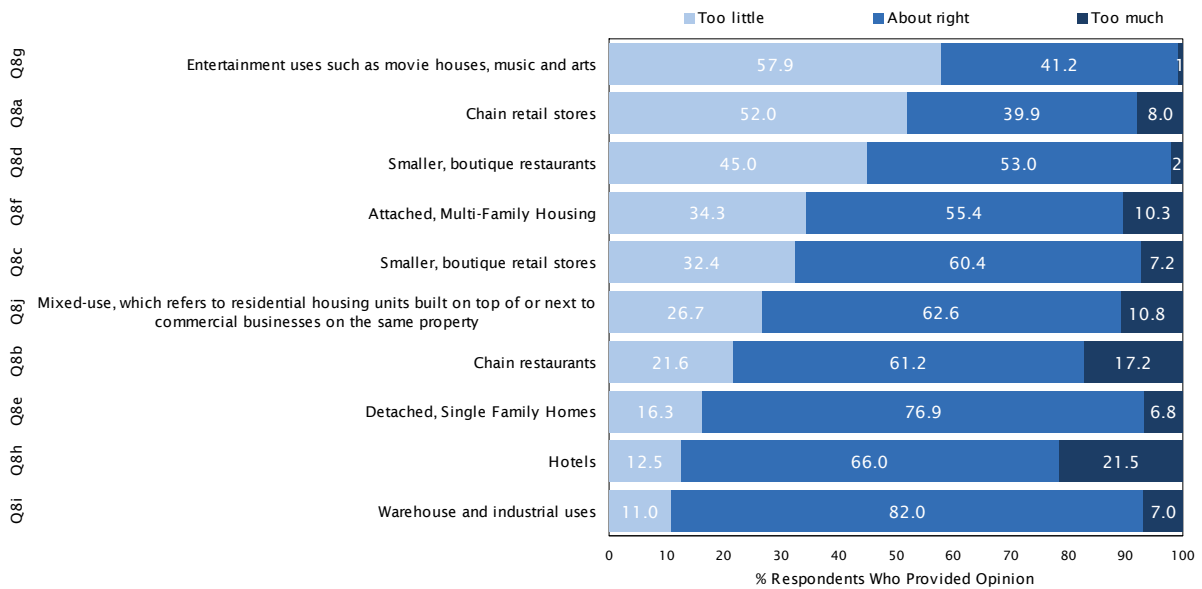
As expected, residents expressed quite different opinions depending on the type of development. Although the dominant response in most cases was that the current amount of a particular development type is about right, a majority of respondents perceived that there are too few entertainment uses such as movie houses, music and art (58%) and chain retail stores (52%) in Big Bear Lake. At least one-quarter of respondents also perceived a lack of smaller boutique restaurants (45%), attached multi-family housing (34%), smaller boutique retail stores (32%), and mixed-use developments where residential housing is built on top of or next to commercial businesses on the same property (27%). When compared to the other use types, fewer respondents felt there are currently not enough warehouse and industrial uses (11%), hotels (13%), single family homes (16%), and chain restaurants (22%) in Big Bear Lake. Table 5 on the next page shows how the percentage who saw a need for additional development types varied by residency status, with the top three uses highlighted in green to ease comparisons.

TABLE 5 OPINION OF DEVELOPMENT TYPES IN CITY BY RESIDENCE STATUS (SHOWING % TOO LITTLE)

	Residence Status (Q1)			
	Full-time res	Part-time res	Own 2nd home for vacation	Own res property for rental
Entertainment uses such as movie houses, music and arts	49.6	60.0	58.0	62.4
Chain retail stores	70.0	58.2	46.9	41.6
Smaller, boutique restaurants	30.4	50.9	41.4	55.4
Attached, Multi-Family Housing	53.8	30.9	29.0	25.7
Smaller, boutique retail stores	27.7	34.5	29.6	37.6
Mixed-use, refers to residential housing units built on top of or next to commercial businesses on same property	28.5	30.9	24.7	24.8
Chain restaurants	34.6	16.4	19.1	16.8
Detached, Single Family Homes	41.3	9.1	7.4	10.9
Hotels	20.2	12.7	9.9	9.9
Warehouse and industrial uses	20.8	16.4	6.2	5.9

SAFETY

Ensuring the personal safety of residents is the most basic function of local government. It is important to keep in mind, of course, that public safety is as much a matter of perceptions as it is a matter of reality. Regardless of actual crime statistics, if residents don't *feel* safe then they will not enjoy the many cultural, recreational, and shopping opportunities available in the City of Big Bear Lake that will enhance their quality of life. Accordingly, the survey included questions related to how safe residents feel overall as well as in a variety of situations.

HOW SAFE IS BIG BEAR LAKE AS A PLACE TO LIVE?   The first question in this series asked respondents to rate the overall safety of Big Bear Lake as a place to live. More than nine-in-ten respondents rated Big Bear Lake as either very safe (48%) or somewhat safe (43%) as a place to live, with the remainder viewing the City as somewhat unsafe (5%), very unsafe (<1%), or were unsure (4%).

Question 9   *Overall, how safe is Big Bear Lake as a place to live? Would you say it is very safe, somewhat safe, somewhat unsafe, or very unsafe?*

FIGURE 6 OPINION OF PUBLIC SAFETY
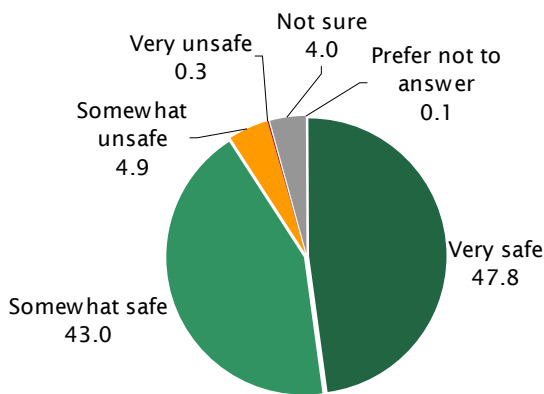
Figures 7 and 8 show how respondents' assessments of safety within Big Bear Lake varied across subgroups. Without exception, at least eight-in-ten respondents in every identified subgroup rated Big Bear Lake as a safe place to live.

FIGURE 7 OPINION OF PUBLIC SAFETY BY RESIDENCE STATUS, AGE & HOME OWNERSHIP STATUS
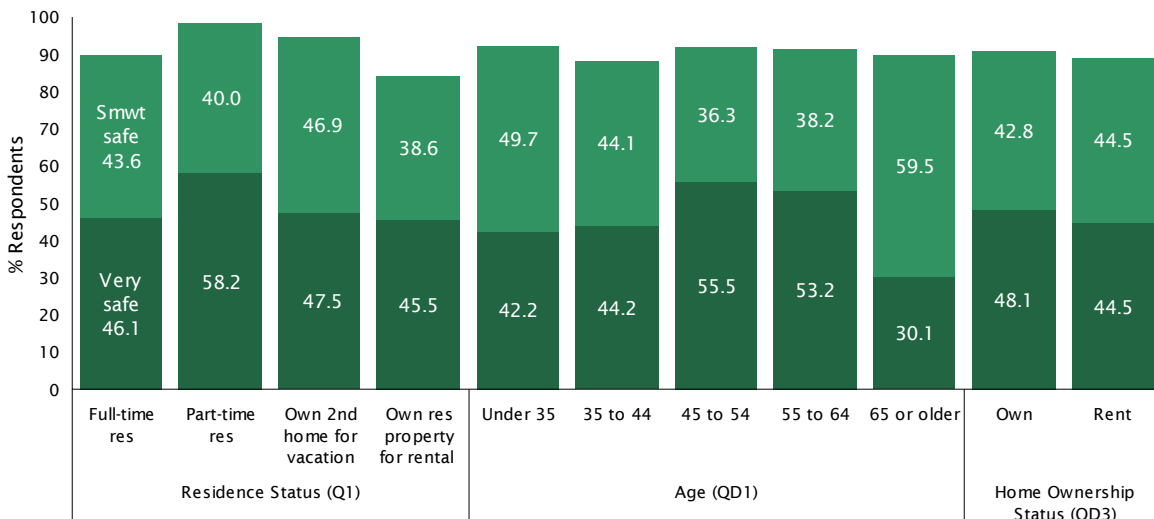
FIGURE 8 OPINION OF PUBLIC SAFETY BY YEARS IN BIG BEAR, OWNING PROPERTY, CHILD IN HSLD, SENIOR IN CHILD & ETHNICITY
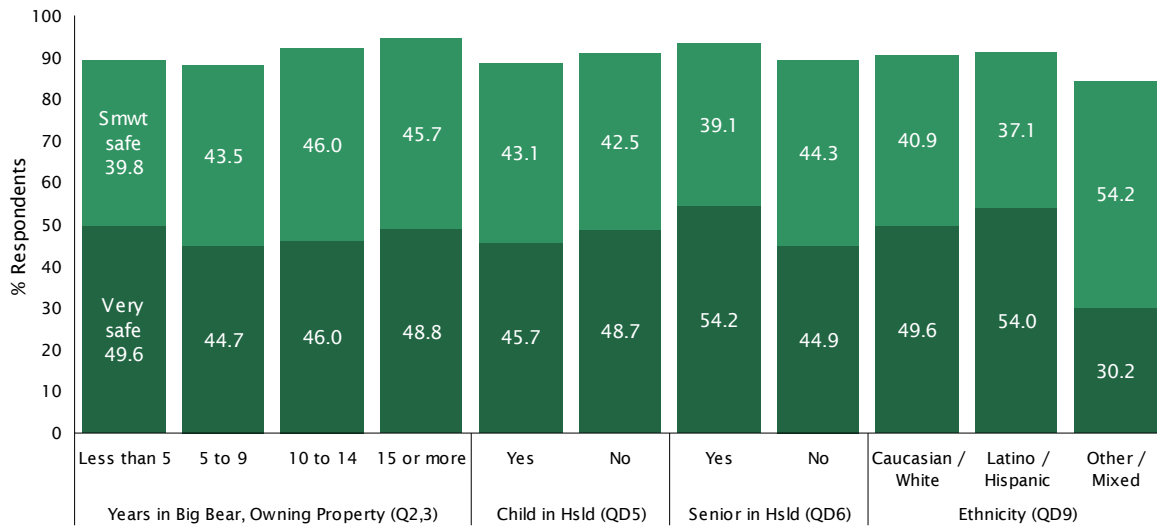
SAFETY IN SPECIFIC SCENARIOS   Whereas Question 9 asked respondents to rate the overall safety of Big Bear Lake as a place to live, Question 10 presented the six specific scenarios listed to the left of Figure 9 and asked respondents to describe how safe they feel in each scenario using the scale shown at the top of the figure.

Question 10   *When you are: _____, would you say that you feel very safe, somewhat safe, somewhat unsafe, or very unsafe?*

FIGURE 9 PUBLIC SAFETY RATINGS BY SCENARIO
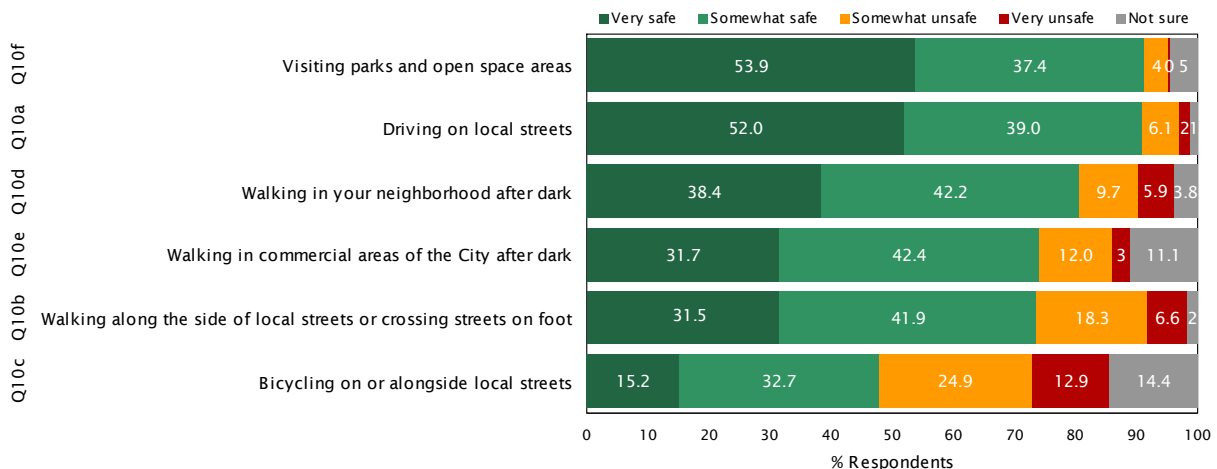
As shown in the figure, respondents' perceived safety varied depending on the scenario. Survey participants indicated that they felt safest visiting parks and open space areas and driving on local streets (each 91% very or somewhat safe), followed by walking in their neighborhood after dark (81%), walking in commercial areas of the City after dark (74%), and walking along the side

of local streets or crossing streets on foot (73%). When compared to the other scenarios tested, significantly fewer respondents expressed that they feel safe when bicycling on or alongside local streets (48%).

For the interested reader, tables 6-8 display the percentage of respondents who indicated they felt safe in each scenario by residency status, years living/owning property in Big Bear Lake, age, home ownership status, presence of a child in the home, presence of a senior in the home, and ethnicity.

TABLE 6 PUBLIC SAFETY RATINGS BY SCENARIO BY YEARS IN BIG BEAR & OWNING PROPERTY

	Residence Status (Q1)				Years in Big Bear, Owning Property (Q2,3)			
	Full-time res	Part-time res	Own 2nd home for vacation	Own res property for rental	Less than 5	5 to 9	10 to 14	15 or more
Visiting parks and open space areas	48.8	63.6	53.1	54.5	58.9	50.7	45.3	54.6
Driving on local streets	38.0	65.5	58.6	50.5	55.0	49.2	43.2	55.6
Walking in your neighborhood after dark	36.2	45.5	40.7	34.7	45.3	29.3	28.3	42.2
Walking in commercial areas of the City after dark	30.9	41.8	27.8	32.7	35.0	28.0	27.7	30.9
Walking along the side of local streets or crossing streets on foot	27.3	45.5	30.9	30.7	35.6	28.4	19.5	35.3
Bicycling on or alongside local streets	16.6	21.8	13.6	13.9	15.1	13.9	5.9	22.2

TABLE 7 PUBLIC SAFETY RATINGS BY SCENARIO BY AGE & HOME OWNERSHIP STATUS

	Age (QD1)					Home Ownership Status (QD3)	
	Under 35	35 to 44	45 to 54	55 to 64	65 or older	Own	Rent
Visiting parks and open space areas	57.5	60.2	55.1	49.1	35.0	55.1	42.2
Driving on local streets	41.3	52.9	53.8	60.5	40.6	54.6	27.6
Walking in your neighborhood after dark	35.6	37.1	45.5	36.7	33.1	39.5	27.7
Walking in commercial areas of the City after dark	27.4	35.4	32.5	34.2	17.8	32.2	26.2
Walking along the side of local streets or crossing streets on foot	30.0	31.7	34.2	32.5	22.7	32.6	21.8
Bicycling on or alongside local streets	16.9	12.0	13.1	19.4	13.5	15.1	16.0

TABLE 8 PUBLIC SAFETY RATINGS BY SCENARIO BY CHILD IN HSLD, SENIOR IN HSLD & ETHNICITY

	Child in Hsld (QD5)		Senior in Hsld (QD6)		Ethnicity (QD9)		
	Yes	No	Yes	No	Caucasian / White	Latino / Hispanic	Other / Mixed
Visiting parks and open space areas	55.7	53.6	47.7	56.7	57.5	50.4	31.7
Driving on local streets	53.0	51.9	55.0	50.5	57.5	33.6	39.8
Walking in your neighborhood after dark	39.5	39.0	35.1	40.2	41.7	30.3	24.0
Walking in commercial areas of the City after dark	32.9	31.0	31.3	31.5	33.7	28.6	10.5
Walking along the side of local streets or crossing streets on foot	31.3	32.5	32.8	31.3	34.8	22.2	20.6
Bicycling on or alongside local streets	13.2	16.6	16.4	14.6	15.7	16.8	7.5

COMMUNICATION

The importance of city communication with residents 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 Big Bear Lake's efforts to enhance the information flow *to* the City to better understand the community's opinions, perceptions, and needs. In this section, we present the results of several communication-related questions.

SOURCES   To help the City identify the most effective means of communicating with residents and property owners, it is helpful to understand what information sources they currently rely on for this type of information. In an open-ended manner, residents were asked to list the sources they typically use to find out about City of Big Bear Lake news, information, and programming. Because respondents were allowed to provide up to three sources, the percentages shown in Figure 10 represent the percentage of respondents who mentioned a source.

As shown in the figure, the most frequently-cited source for Big Bear Lake news, information and programming was social media including Facebook, Twitter, Instagram, and Nextdoor (49%), followed by the City Newsletter/*Elevation 6752'* (40%), the *Grizzly* Newspaper (38%), the Internet/websites in general (not the City's) (32%), the City's website (31%), and friends/family/associates (29%). Figures 11-13 on the following pages consolidate a number of the information source categories and show how their use varied by age, gender, home ownership status, ethnicity, satisfaction with the City's communication efforts, residency status, and years living/owning property in Big Bear Lake.

Question 11   *What information sources do you use to find out about City of Big Bear Lake news, information and programming?*

FIGURE 10 CITY INFORMATION SOURCES
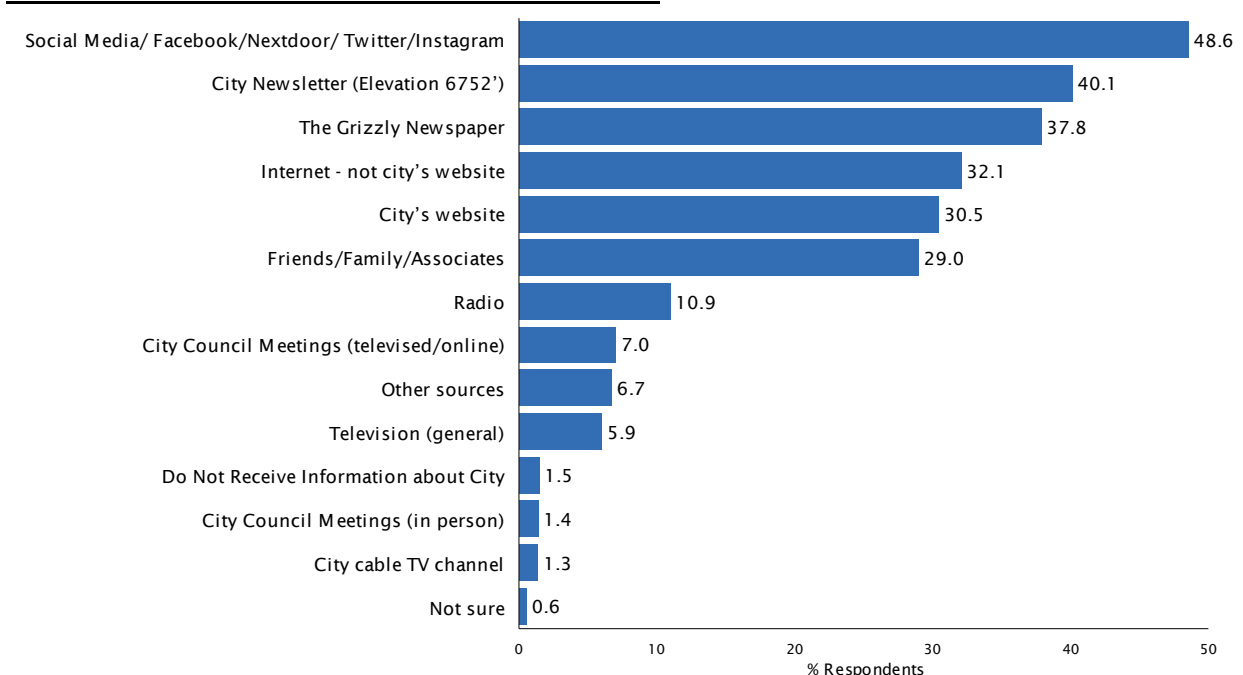
FIGURE 11 CITY INFORMATION SOURCES BY OVERALL, AGE & GENDER
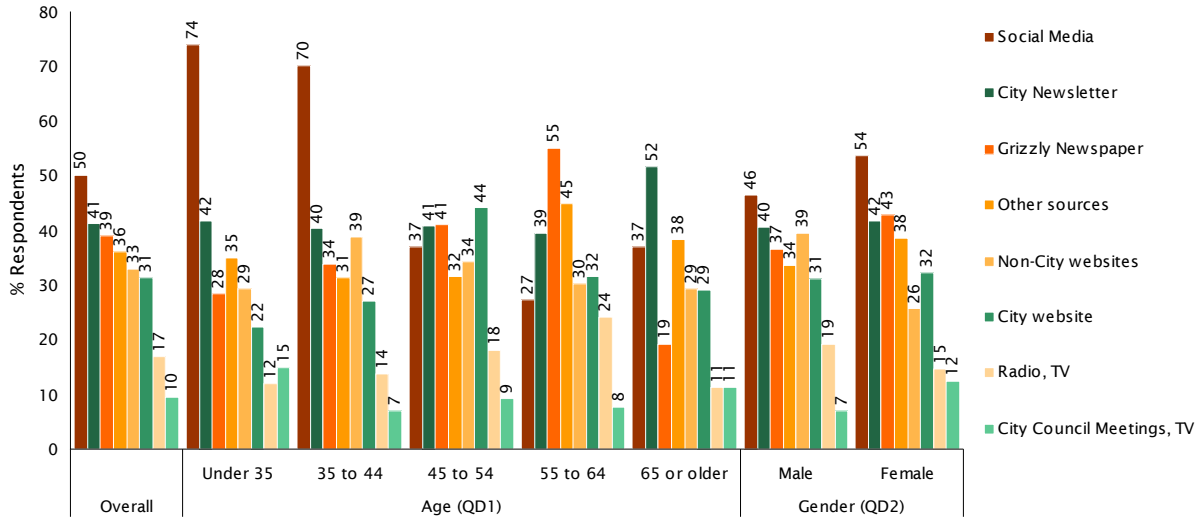
FIGURE 12 CITY INFORMATION SOURCES BY HOME OWNERSHIP STATUS, ETHNICITY & SATISFACTION WITH COMMUNICATION
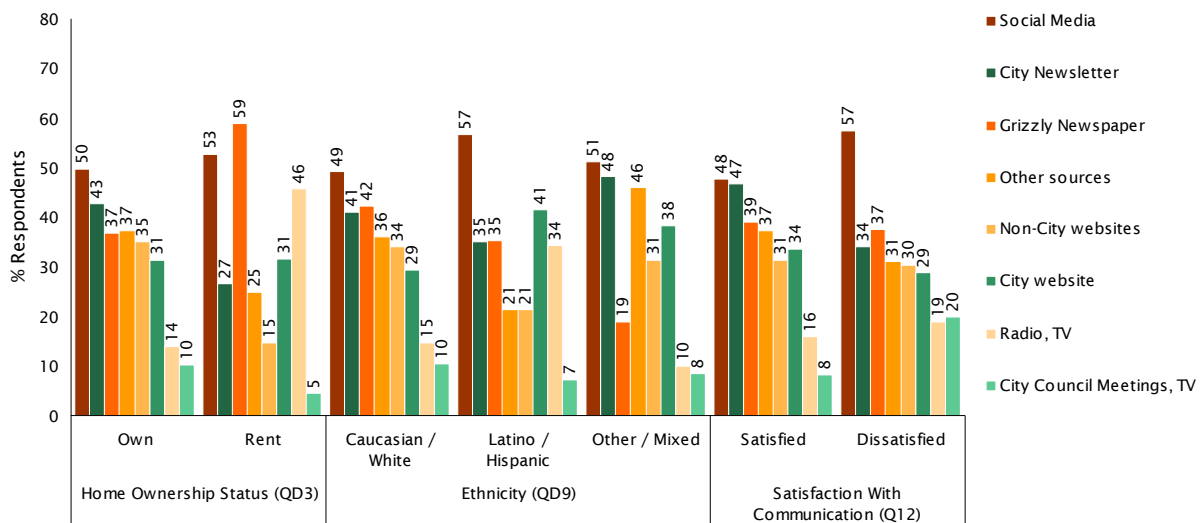
FIGURE 13 CITY INFORMATION SOURCES BY RESIDENCE STATUS & YEARS IN BIG BEAR, OWNING PROPERTY
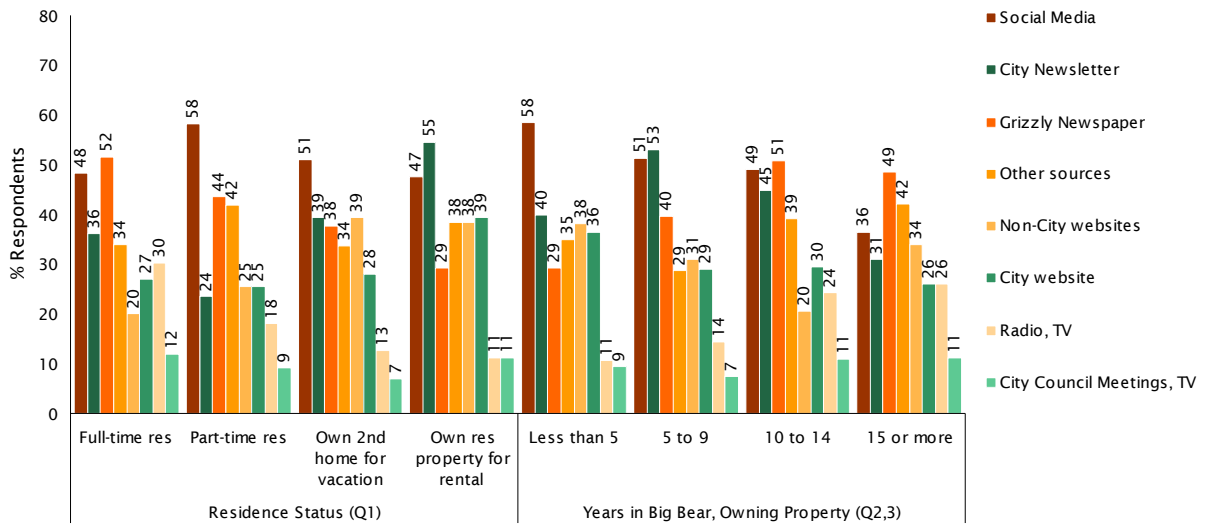
OVERALL SATISFACTION Question 12 of the survey asked respondents to report their satisfaction with the City of Big Bear Lake's efforts to communicate through newsletters, the Internet, the City's cable TV channel, and other means. Overall, 72% of respondents indicated they were satisfied with City efforts to communicate through these channels, whereas 17% expressed dissatisfaction and 10% were unsure or unwilling to share their opinion (Figure 14).

Question 12 *Overall, are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, the City's cable TV channel, and other means?*

FIGURE 14 SATISFACTION WITH CITY-RESIDENT COMMUNICATION
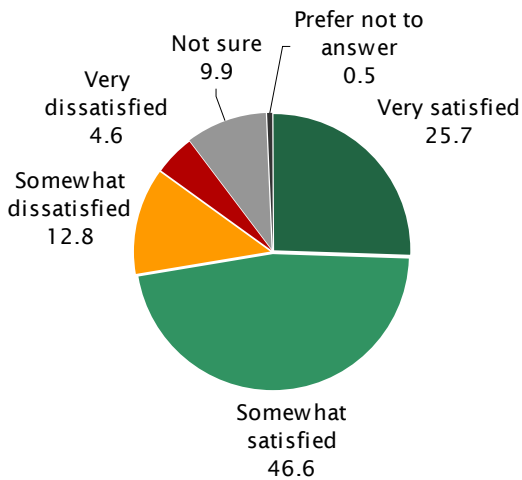
Figures 15 and 16 on the next page show that the level of satisfaction with the City's efforts to communicate with residents was reasonably consistent, ranging between 60% to 80% satisfied across nearly all demographic subgroups. The exceptions to this pattern were found among full-time residents and renters, with both groups being somewhat less satisfied than respondents in general.

FIGURE 15 SATISFACTION WITH CITY-RESIDENT COMMUNICATION BY RESIDENCE STATUS, AGE & HOME OWNERSHIP STATUS
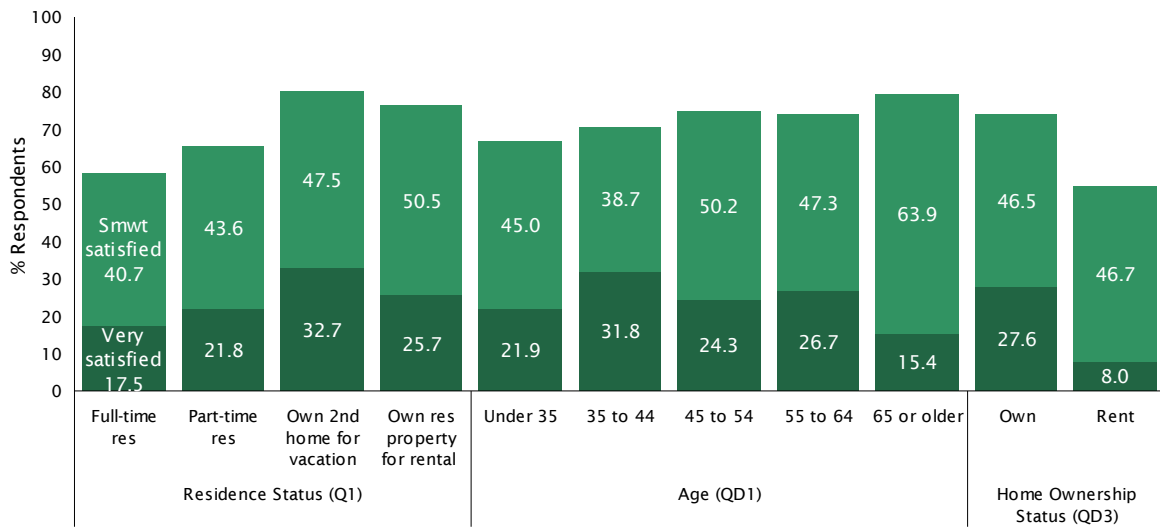
FIGURE 16 SATISFACTION WITH CITY-RESIDENT COMMUNICATION BY YEARS IN BIG BEAR, OWNING PROPERTY, CHILD IN HSLD, SENIOR IN HSLD & ETHNICITY
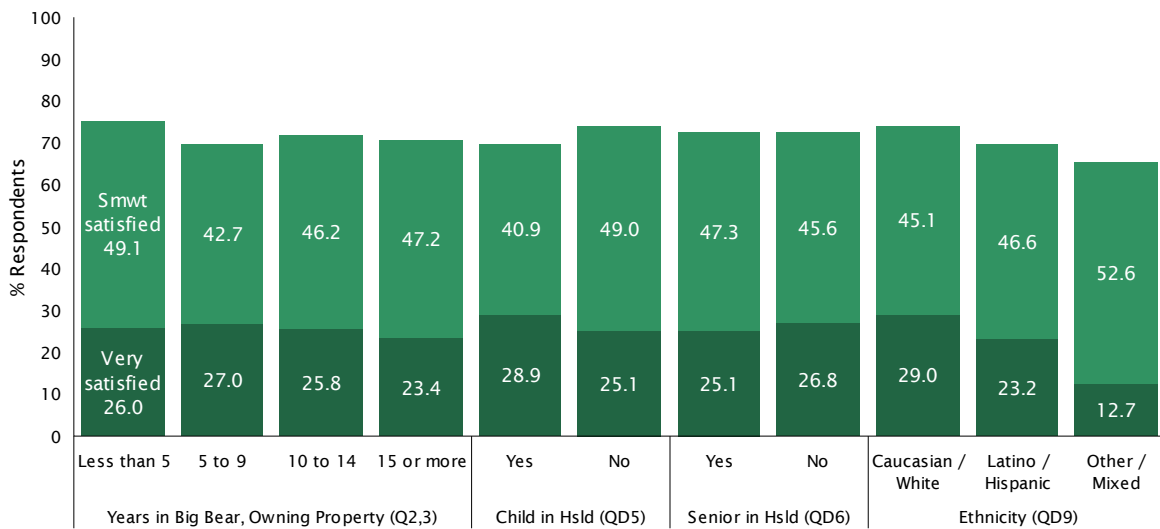
COMMUNICATION PREFERENCES The final substantive question of the survey presented respondents the methods shown to the left of Figure 17 and asked whether each would be an effective way for the City to communicate with them. Overall, respondents indicated that email and electronic newsletters were the most effective methods (93% very or somewhat effective), followed by a Big Bear Lake mobile app which would allow them to communicate with the City, report issues, and receive updates (85%), the City's website (82%), social media sites such as Facebook, Twitter, and Instagram (79%), and text messages (76%). At the other end of the spectrum, advertisements in local newspapers were generally viewed by respondents as a much less effective way for the City to communicate with them (37%). Tables 9-11 show how communication preferences varied by demographic subgroups, with the three methods receiving the highest percentage of *very* effective ratings highlighted in green for ease of comparison.

Question 13 *As I read the following ways that the City can communicate with residents, 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 you.*

FIGURE 17 EFFECTIVENESS OF COMMUNICATION METHODS
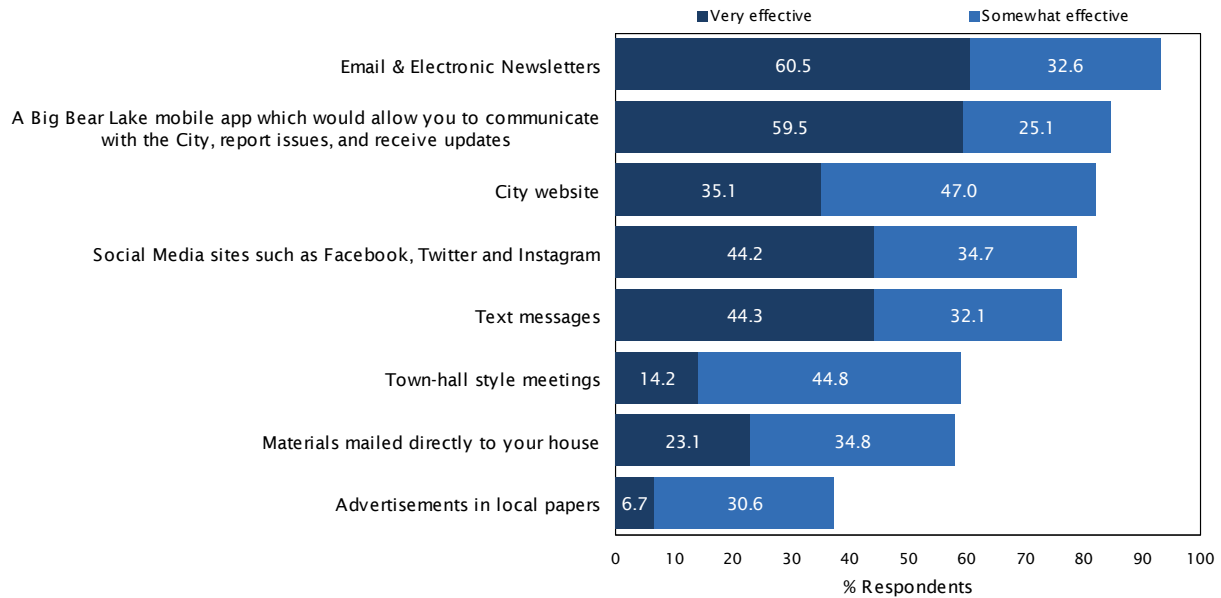
TABLE 9 EFFECTIVENESS OF COMMUNICATION METHODS BY RESIDENCE STATUS & YEARS IN BIG BEAR, OWNING PROPERTY

	Residence Status (Q1)				Years in Big Bear, Owning Property (Q2,3)			
	Full-time res	Part-time res	Own 2nd home for vacation	Own res property for rental	Less than 5	5 to 9	10 to 14	15 or more
E-mail & Electronic Newsletters	51.2	65.5	65.4	60.4	62.2	67.4	66.0	49.1
Big Bear Lake mobile app would allow to communicate with City, report issues, receive updates	56.7	52.7	62.3	61.4	60.2	64.3	60.9	52.2
Text messages	37.3	49.1	46.9	45.5	46.4	50.0	29.2	44.0
Social Media sites such as Facebook, Twitter and Instagram	49.9	52.7	38.9	43.6	51.2	49.0	42.4	29.9
City website	35.5	36.4	34.0	35.6	38.0	37.8	28.5	32.2
Materials mailed directly to your house	30.2	16.4	17.3	26.7	15.4	17.8	30.9	36.3
Town-hall style meetings	23.0	7.3	11.1	12.9	14.5	10.6	23.0	12.5
Advertisements in local papers	11.8	7.3	4.9	5.0	4.8	4.7	6.0	12.2

TABLE 10 EFFECTIVENESS OF COMMUNICATION METHODS BY AGE & HOME OWNERSHIP STATUS

|	Age (QD1)					Home Ownership Status (QD3)	
	Under 35	35 to 44	45 to 54	55 to 64	65 or older	Own	Rent
E-mail & Electronic Newsletters	57.3	56.1	59.7	69.7	54.0	61.8	48.1
Big Bear Lake mobile app would allow to communicate with City, report issues, receive updates	56.9	59.7	63.4	57.5	60.1	59.3	61.2
Text messages	44.9	42.2	48.5	42.3	43.6	46.1	27.7
Social Media sites such as Facebook, Twitter and Instagram	60.7	53.3	45.3	25.5	31.3	42.7	57.6
City website	25.5	35.8	42.3	37.7	25.8	35.2	34.3
Materials mailed directly to your house	16.3	15.7	25.7	32.4	24.4	22.9	24.7
Town-hall style meetings	8.7	11.6	20.4	16.0	11.5	13.6	19.6
Advertisements in local papers	4.7	3.5	11.3	7.3	6.2	5.9	13.8

TABLE 11 EFFECTIVENESS OF COMMUNICATION METHODS BY CHILD IN HSLD, SENIOR IN HSLD, ETHNICITY & SATISFACTION WITH COMMUNICATION

	Child in Hsld (QD5)		Senior in Hsld (QD6)		Ethnicity (QD9)			Satisfaction With Communication (Q12)	
	Yes	No	Yes	No	Caucasian / White	Latino / Hispanic	Other / Mixed	Satisfied	Dissatisfied
E-mail & Electronic Newsletters	55.1	63.9	66.3	58.2	64.0	59.4	53.2	63.0	56.0
Big Bear Lake mobile app would allow to communicate with City, report issues, receive updates	57.1	60.3	58.1	59.6	59.5	69.0	48.6	59.6	61.9
Text messages	47.0	43.5	42.4	44.9	45.0	54.7	36.2	45.0	48.0
Social Media sites such as Facebook, Twitter and Instagram	53.2	41.4	27.2	52.6	40.8	63.7	53.2	45.6	43.5
City website	34.3	36.2	36.6	34.8	34.6	39.7	30.1	38.9	22.2
Materials mailed directly to your house	14.4	26.4	33.0	18.6	25.0	20.2	24.2	19.9	34.7
Town-hall style meetings	10.1	15.8	17.5	12.4	13.7	21.1	14.5	12.3	25.8
Advertisements in local papers	3.5	8.2	8.4	5.8	7.0	12.2	2.5	7.5	5.6

BACKGROUND & DEMOGRAPHICS

TABLE 12 DEMOGRAPHICS OF SAMPLE

Total Respondents	497
Residence Status (Q1)	
Full-time res	22.3
Part-time res	11.8
Own 2nd home for vacation	34.7
Own res property for rental	30.5
Prefer not to answer	0.6
Years in Big Bear, Owning Property (Q2,3)	
Less than 5	38.7
5 to 9	23.1
10 to 14	13.6
15 or more	24.2
Prefer not to answer	0.4
Age (QD1)	
Under 35	19.4
35 to 44	24.7
45 to 54	23.2
55 to 64	25.8
65 or older	7.0
Gender (QD2)	
Male	52.8
Female	45.5
Non-binary	0.1
Prefer not to answer	1.5
Home Ownership Status (QD3)	
Own	90.3
Rent	9.7
Home Type (QD4)	
Single family detached home	89.1
Townhome	2.0
Condominium	3.1
Apartment	2.5
Mobile home	0.6
Prefer not to answer	2.7
Child in Hsld (QD5)	
Yes	27.3
No	70.0
Prefer not to answer	2.7
Senior in Hsld (QD6)	
Yes	31.6
No	65.3
Prefer not to answer	3.1
Employment Status (QD7)	
Full-time	58.8
Part-time	9.5
Retired	25.0
Other	5.5
Prefer not to answer	1.2
Work Place (QD8)	
Work from home	18.7
Commute outside home	24.0
Mixture of both	23.4
Do not work	30.7
Prefer not to answer	3.2
Ethnicity (QD9)	
Caucasian / White	70.5
Latino / Hispanic	11.9
Other / Mixed	8.6
Prefer not to answer	9.0

Table 12 presents the key demographic and background information that was collected during the survey. Because of the unique sampling design for this survey that included adult residents *and* those who own property in Big Bear Lake (but don't live in the City), the distributions shown in Table 12 are representative of the *combination* of these groups. 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 (see Appendix A for more details).

METHODOLOGY

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 Big Bear Lake to develop a questionnaire that covered the topics of interest and avoided 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 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 indicated they live in Big Bear Lake full-time or part-time (Question 1) were asked how long they have lived in the community (Question 2). The questionnaire included with this report (see *Questionnaire & Toplines* on page 25) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

PROGRAMMING, PRE-TEST & LANGUAGE TRANSLATION   Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the telephone interviews. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts interviewers to certain types of keypunching mistakes should they happen during the interview. The survey was also programmed into a passcode-protected online survey application to allow respondents who preferred to complete the survey online the opportunity to do so. The integrity of the questionnaire was pre-tested internally by True North and by dialing into random homes in the City prior to formally beginning the survey. The final questionnaire was also professionally translated into Spanish to allow for data collection in English or Spanish according to the preference of the respondent.

SAMPLE, RECRUITING & DATA COLLECTION   The sample for this study was derived from several sources in order to accommodate the City's interests in surveying full-time residents, part-time residents, as well as individuals who own vacation or rental properties in Big Bear Lake but do not reside in the community. Using city-provided sources (licensing and utility account information) as well as the voter file and other publicly-available datasets, a comprehensive database of Big Bear Lake households was created for this study, ensuring that all households in Big Bear Lake had the opportunity to be selected to participate in the survey. Once selected at random, contact information was appended to each record including email addresses and telephone numbers for residents and/or property owners associated with the property. In the event that the owners of a property were different than those residing in the property, both sets of individuals were included in the sample.

Individuals were recruited to participate in the survey through multiple recruiting methods, including mailed invitations, email invitations, text invitations, and telephone calls. Mail, email, and text invitations encouraged respondents to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. Each individual was assigned a unique passcode to ensure that only Big Bear Lake residents or property owners who received an

invitation could access the online survey site, and that the survey could be completed only one time per passcode. An email reminder notice was also sent to encourage participation among those who had yet to take the survey. Following a period of online data collection, True North placed telephone calls to land lines and cell phone numbers of respondents who had yet to participate in the online survey or for whom only telephone contact information was available.

Telephone interviews averaged 17 minutes in length 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 bias the sample. A total of 497 completed surveys were gathered online and by telephone between April 7 and April 19, 2023.

MARGIN OF ERROR DUE TO SAMPLING   The results of the survey can be used to estimate the opinions of all adult residents and property owners in Big Bear Lake. Because not every resident and property owner participated in the survey, 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 in the survey of 497 residents and property owners for a particular question and what would have been found if all of the estimated 9,568 *adult* residents and property owners[2] in Big Bear Lake had been interviewed.

Figure 18 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is ± 4.3 for questions answered by all 497 respondents.

FIGURE 18 MAXIMUM MARGIN OF ERROR

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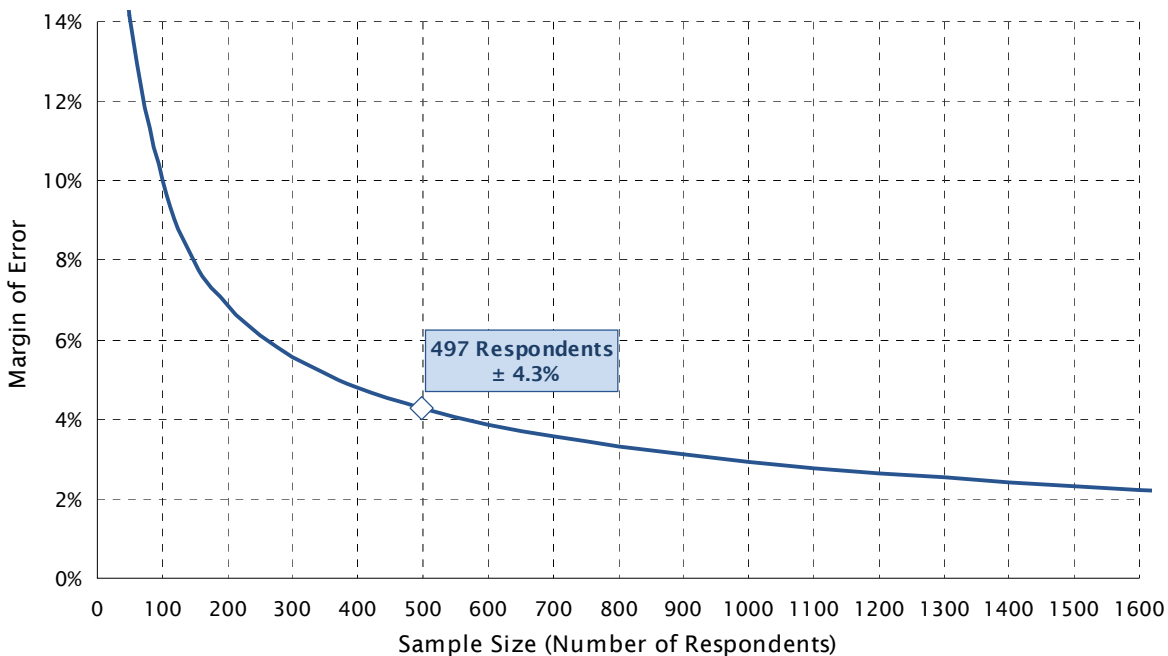
2. Sources: US Census ACS and City-provided databases on residential units and short-term vacation rental status.

Within this report, figures and tables show how responses to certain questions varied by demographic characteristics such as length of residence and age of the respondent. Figure 18 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 in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING & WEIGHTING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, and preparing frequency analyses and cross-tabulations. The final data were weighted to balance the sample by key demographics according to Census estimates.

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.

TRUE NORTH
RESEARCH

Section 1: Introduction to Study

Welcome! Thank you for taking this survey about important issues in the City of Big Bear Lake.

During this survey do not use the forward and back buttons on your browser – use the "Next" and "Back" buttons that appear at the bottom of your screen. When you are finished answering the questions on a page, click the "Next" button to move to the next page of questions. Only click the "Back" button if you need to change your answer to a previous question. If you need to stop while taking this survey, your answers will be saved so that you may return and resume where you left off by clicking the survey link in your invitation email.

Please click "Next" to begin.

Section 2: Quality of Life & Issues

Let's begin with a few questions about what it is like to live in the City of Big Bear Lake.

Q1	To begin, how would you describe your Big Bear Lake residency status?			
	1	Full-time resident	22%	Ask Q2
	2	Part-time/seasonal resident	12%	Ask Q2
	3	Own 2ⁿᵈ home in Big Bear Lake that I use for vacation	35%	Skip to Q3
	4	Own residential property in Big Bear Lake that I rent or lease to others	31%	Skip to Q3
	5	Own residential property in Big Bear Lake that I leave vacant – I don't visit or lease it to others	<1%	Skip to Q3
	6	Own commercial property in Big Bear Lake, but not residential property	<1%	Skip to Q3
	7	I don't live or own property in Big Bear Lake	0%	Terminate
	99	Prefer not to answer	0%	Terminate

Q2	How long have you lived in Big Bear Lake?	
	1	Less than 1 year	2%
	2	1 to 4 years	28%
	3	5 to 9 years	19%
	4	10 to 14 years	17%
	5	15 years or longer	34%
	99	Prefer not to answer	1%

Ask Q3 if Q1=(3,4,5,6). Otherwise skip to Q4.

Q3	How long have you owned property in Big Bear Lake?	
	1	Less than 1 year	8%
	2	1 to 4 years	35%
	3	5 to 9 years	25%
	4	10 to 14 years	12%
	5	15 years or longer	19%
	99	Prefer not to answer	0%

Q4	How would you rate: _____?							
	Always ask A first, then randomize remaining items	Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
A	The overall quality of life in Big Bear Lake	23%	60%	14%	1%	1%	1%	0%
B	Big Bear Lake as a place to raise a family	10%	29%	24%	7%	3%	25%	3%
C	Big Bear Lake as a place to work	5%	17%	25%	13%	5%	31%	4%
D	Big Bear Lake as a place to retire	17%	35%	27%	7%	3%	10%	1%
E	Big Bear Lake as a place to shop and dine	12%	44%	32%	8%	4%	0%	0%
F	Big Bear Lake as a place to recreate	48%	38%	8%	2%	0%	3%	1%

Q5	What do you like **most** about the City of Big Bear Lake that should be preserved in the future? *Please enter your response in text box below OR check the appropriate box.* Verbatim responses recorded and later grouped into categories shown below.	
	Access to forest, nature, outdoors	31%
	The lake	20%
	Small town feeling	16%
	Biking, hiking trails	12%
	Lake activities	11%
	Not sure / Cannot think of anything specific	11%
	Peaceful, quiet, serene	7%
	Small business, shops, restaurants	7%
	Friendly community	6%
	Ski resort	4%
	Four seasons	4%
	Variety of recreation activities	4%
	Its history	3%
	Open space	3%

Questionnaire & Toplines

	Community events, entertainment	3%
	Clean, fresh air	2%
	Proximity to surrounding areas	2%
	Balance of tourism, not crowded	2%
	Short term vacation rentals	2%
Q6	If you could **change** one thing to make Big Bear Lake a better place to live now and in the future, what change would you like to see? *Please enter your response in text box below OR check the appropriate box.* Verbatim responses recorded and later grouped into categories shown below.	
	Provide more shops, restaurants	21%
	Improve infrastructure	10%
	Address vacation rental issues	10%
	Address traffic control, congestion	10%
	Not sure / Cannot think of anything specific	8%
	No changes needed / Everything is fine	7%
	Provide more safe bike lanes, sidewalks	6%
	Address lake water issues	6%
	Provide more entertainment for all ages	4%
	Lower taxes, fees	3%
	Provide more affordable housing	3%
	Address parking issues	3%
	Improve support for tourism	3%
	Beautify City, improve cleanliness	2%
	Reduce cost of living, inflation	2%
	Provide, improve snow removal services	2%
	Enforce laws, codes	2%
	Improve economy, jobs	2%
	Reduce number of visitors, tourism	2%
	Improve support to local residents	2%
	Improve community services	2%
	Allow more access to beaches, swimming areas	2%
	Reduce government intervention, city restrictions	2%
	Provide, improve tourist attractions	2%
	Improve government, leadership	2%
	Provide more healthcare, medical facilities	2%

Q7	Next is a list of issues facing Big Bear Lake and for each one, please indicate how important you feel the issue is to <u>you</u>, using a scale of extremely important, very important, somewhat important or not at all important.						
	Randomize	Extremely Important	Very Important	Somewhat Important	Not at all Important	Not sure	Prefer not to answer
A	Improving the local **economy**	36%	45%	16%	2%	1%	0%
B	Preserving the **character** of Big Bear Lake	59%	26%	12%	2%	1%	1%
C	Promoting the **conservation** of natural resources	55%	31%	12%	1%	0%	0%
D	Maintaining a high standard for **public safety**	48%	38%	11%	2%	0%	0%
E	Maintaining and improving City **streets**, **sidewalks**, and **infrastructure**	55%	36%	9%	1%	0%	0%
F	Promoting **economic development** to attract business and jobs to the City	34%	33%	24%	8%	1%	0%
G	Encouraging **alternative** modes of **transportation** such as walking and biking	29%	29%	29%	12%	1%	0%
H	Enhancing **parks** and **open space** areas	39%	35%	22%	2%	2%	0%
I	Promoting **affordable** multi-family attached **housing** in Big Bear Lake	18%	17%	27%	32%	4%	1%
J	Providing **recreational amenities and services** for all ages	45%	33%	18%	3%	1%	0%
K	Upgrading broadband/**Internet service** and coverage in Big Bear Lake	32%	28%	28%	10%	2%	0%

Section 3: Land Use & Redevelopment						
Q8	There are several properties in Big Bear Lake that are vacant or have potential for redevelopment in the future. For the following list of development types, please indicate whether you feel there is <u>currently</u> too much, about the right amount, or too little of this type of development in Big Bear Lake.					
	Randomize	Too Much	About Right	Too Little	Not sure	Prefer not to answer
A	"Chain" retail stores	8%	35%	52%	5%	1%
B	"Chain" restaurants	17%	57%	21%	4%	1%
C	Smaller, boutique retail stores	7%	57%	32%	3%	0%
D	Smaller, boutique restaurants	2%	50%	45%	3%	1%
E	Detached, Single Family Homes	7%	69%	16%	8%	1%
F	Attached, Multi-Family Housing	10%	37%	34%	18%	1%
G	Entertainment uses such as movie houses, music and arts	1%	38%	58%	3%	1%

H	Hotels	21%	58%	12%	8%	0%
I	Warehouse and industrial uses	7%	46%	11%	34%	2%
J	Mixed-use, which refers to residential housing units built on top of – or next to – commercial businesses on the same property	11%	34%	26%	27%	2%

Section 4: Safety

Q9	Overall, how **safe** is Big Bear Lake as a place to live?	
	1	Very safe	48%
	2	Somewhat safe	43%
	3	Somewhat unsafe	5%
	4	Very unsafe	0%
	98	Not sure	4%
	99	Prefer not to answer	0%

Q10	How safe do you feel when_____?

Ask in Order – Do not randomize	Very Safe	Somewhat Safe	Somewhat Unsafe	Very Unsafe	Not sure	Prefer not to answer
A	**Driving** on local streets	52%	39%	6%	2%	0%	1%
B	**Walking** along the side of local streets or crossing streets on foot	32%	42%	18%	7%	1%	0%
C	**Bicycling** on or alongside local streets	15%	33%	25%	13%	14%	1%
D	Walking in your **neighborhood** after dark	38%	42%	10%	6%	3%	0%
E	Walking in **commercial** areas of the City after dark	32%	42%	12%	3%	11%	0%
F	Visiting **parks** and open space areas	54%	37%	4%	0%	4%	0%

Section 5: Communication

Q11	What information sources do you use to find out about City of Big Bear Lake news, information and programming? *You may select up to 3 options.*	
	1	City Newsletter (*Elevation 6752'*)	40%
	2	City's website	30%
	3	City Council Meetings (in person)	1%
	4	City Council Meetings (televised/online)	7%
	5	City cable TV channel	1%
	6	The Grizzly Newspaper	38%

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7	Radio	11%
8	Television (general)	6%
9	Internet – not city's website	32%
10	Social Media/ Facebook/Nextdoor/ Twitter/Instagram	49%
11	Friends/Family/Associates	29%
12	Other sources	7%
13	Do Not Receive Information about City	1%
98	Not sure	1%
99	Prefer not to answer	1%

Q12	Overall, are you satisfied or dissatisfied with the City's efforts to communicate with residents through newsletters, the Internet, the City's cable TV channel, and other means?	
1	Very satisfied	26%
2	Somewhat satisfied	47%
3	Somewhat dissatisfied	13%
4	Very dissatisfied	5%
98	Not Sure	10%
99	Prefer not to answer	0%

Q13	For each of the following ways that the City can communicate with residents, please indicate if you think it would be a very effective, somewhat effective, or not at all effective way for the City to communicate with <u>you</u>.				
	Randomize	Very effective	Somewhat effective	Not at all effective	Not sure / Prefer not to answer
A	E-mail & Electronic Newsletters	61%	33%	5%	2%
B	Social Media sites such as Facebook, Twitter and Instagram	44%	35%	14%	7%
C	A Big Bear Lake mobile app which would allow you to communicate with the City, report issues, and receive updates	59%	25%	10%	6%
D	City website	35%	47%	12%	6%
E	Materials mailed directly to your house	23%	35%	37%	5%
F	Advertisements in local papers	7%	31%	53%	9%
G	Text messages	44%	32%	16%	7%
H	Town-hall style meetings	14%	45%	32%	9%

Section 6: Background & Demographics

Thank you so much for your participation. Next are just a few background questions for statistical purposes.

D1	In what year were you born? *Please enter the 4-digit year of birth in the box below or click the appropriate checkbox.* Year of birth recoded into age categories shown below.	
	Under 35	5%
	35 to 44	15%
	45 to 54	25%
	55 to 64	23%
	65 or older	26%
	Prefer not to answer	7%

D2	What is your gender?		
	1	Male	53%
	2	Female	46%
	3	Non-binary	0%
	99	Prefer not to answer	1%

D3	Do you own or rent your residence in Big Bear Lake?		
	1	Own	90%
	2	Rent	10%
	99	Prefer not to answer	0%

D4	Which of the following best describes your current home?		
	1	Single family detached home	89%
	2	Townhome	2%
	3	Condominium	3%
	4	Apartment	2%
	5	Mobile home	1%
	99	Prefer not to answer	3%

D5	Do you currently have any children under the age of 18 living in your home?		
	1	Yes	27%
	2	No	70%
	99	Prefer not to answer	3%

Questionnaire & Toplines

D6	Is there one or more individuals in your household that are 65 years of age or older?		
	1	Yes	32%
	2	No	65%
	99	Prefer not to answer	3%
D7	Which of the following best describes your employment status?		
	1	Employed full-time	59%	*Ask D8*
	2	Employed part-time	9%	*Ask D8*
	3	Student	0%	*Skip to D9*
	4	Homemaker/Caregiver	1%	*Skip to D9*
	5	Retired	25%	*Skip to D9*
	6	In-between jobs	1%	*Skip to D9*
	99	Prefer not to answer	4%	*Skip to D9*
D8	Are you currently working from home, commuting to a workplace outside of your home, or a mixture of both?		
	1	Working from home	27%
	2	Commuting to a workplace outside home	35%
	3	Mixture of both	34%
	99	Prefer not to answer	3%
D9	What ethnic group do you consider yourself a part of or feel closest to?		
	1	Caucasian/White	71%
	2	Latino/Hispanic/Mexican	12%
	3	Asian -- Korean, Chinese, Vietnamese, Japanese, Filipino, Southeast Asian	4%
	4	Middle Eastern/Persian	1%
	5	African-American/Black	<1%
	6	Native American Indian or Alaskan Native	<1%
	7	Pacific Islander	0%
	8	Mixed Heritage	2%
	9	Not Listed	2%
	99	Prefer not to answer	9%

Those are all of the questions! Thanks so much for participating in this important survey! Your survey has been stored, so you may close this browser window. This survey was conducted for the City of Big Bear Lake.