Community Needs Assessment

The Big Sky Community Survey was developed, administered, and analyzed by nVision Research, Inc., an independent market research firm located in Denver, CO. nVision is a contractor to Peaks to Plains Design for the purposes of the Parks Master Plan development process.
Community Needs Assessment

Survey Sample Representation

- Key Report Breakouts:
  - Total Sample
  - Investors (non-residents)
  - Residents (with and without children)
Survey Sample Representation

Completion & Response Rates

- The Big Sky Community Survey was administered online from February 25 to March 15, 2017.

- Email addresses of potential respondents were obtained from numerous organizations serving the Big Sky community. These potential respondent lists included primarily residents and property owners, but the survey questionnaire was adapted to accommodate visitors, as well.

- In total, 1,814 email invitations were sent to potential respondents. Questionnaires were completed by 291 respondents, representing a gross overall response rate of 16%.*

- Of the 291 completed questionnaires, 16 were discarded as duplicates within a household. Only 4 responses were received from Big Sky visitors, so these were discarded, as well. The total sample size available for analysis is 271.

*InVision typically targets a somewhat higher response rate (approximately 25%), but it was difficult to control the sample list and mailing quality for this study given data input from many different sources.
Survey Sample Representation

Categorization of the Sample

The survey questionnaire classified respondents into four primary groups:

• **Full-time residents**: Own or rent a residential unit in Big Sky that is their current permanent residence. They may own additional Big Sky properties that are available for short-term or long-term rentals. (n=135)

• **Part-time residents**: Own or rent a residential unit in Big Sky that is a second or vacation home, and spend at least 6 months per year in the area. (n=8)

• **Investors**: Own at least one residential unit in Big Sky that is available for short-term or long-term rentals, but do not spend at least 6 months per year in the area, themselves. (n=128)

• **Visitors**: Consider themselves visitors to Big Sky, with a permanent residence elsewhere, and do not own residential property in Big Sky. (n=4)

• Due to small n, visitors were dropped from the analysis, and part-time residents were combined with full-time residents into the category of "residents."
Survey Sample Representation

Sample Composition for Analysis

Of 271 total valid respondents ...

- Investors: 128
- Residents: 143
- H/H with children: 59
- No children: 84
Survey Sampling Error Margins

Example 95% confidence intervals

For Estimates Based on Total Sample (n=271)

- 90.0%
- 75.0%
- 50.0%
- 25.0%
- 10.0%

-15% -12% -9% -6% -3% 0% 3% 6% 9% 12% 15%

95% Confidence Interval (± Reported %)

For Estimates Based on Total Residents or Investors (n=143 or 128)

- 80.0%
- 75.0%
- 50.0%
- 25.0%
- 10.0%

-15% -12% -9% -6% -3% 0% 3% 6% 9% 12% 15%

95% Confidence Interval (± Reported %)

For Estimates Based on Households with Children (n=59)

- 90.0%
- 75.0%
- 50.0%
- 25.0%
- 10.0%

-15% -12% -9% -6% -3% 0% 3% 6% 9% 12% 15%

95% Confidence Interval (± Reported %)

For Estimates Based on Households with No Children (n=84)

- 90.0%
- 75.0%
- 50.0%
- 25.0%
- 10.0%

-15% -12% -9% -6% -3% 0% 3% 6% 9% 12% 15%

95% Confidence Interval (± Reported %)

Error margins use normal approximation for sample estimates of given sample size (no fpc, continuity correction applied).
Community Needs Assessment

Usage of Big Sky Recreational Facilities/Amenities

• Frequency of use
• Barriers to usage
• Extent of usage
• Perceptions of quality
Usage of Big Sky Recreational Facilities/Amenities:
Frequency of visits to parks/open space and trails

About half of Big Sky residents visit parks/open space more often than twice a month. Slightly fewer, but still almost half, visit trails that often.

Base: Total Residents (n=143)
Usage of Big Sky Recreational Facilities/Amenities:
Frequency of visits to parks/open space and trails

Households with children present are more likely to be the most frequent users of both parks/open space and trails.
## Usage of Big Sky Recreational Facilities/Amenities:
### Barriers to visiting parks/open space and trails more often

<table>
<thead>
<tr>
<th>Barriers Mentioned</th>
<th>Parks/ Open Space</th>
<th>Trails</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Don't have time</td>
<td>40%</td>
<td>35%</td>
</tr>
<tr>
<td>Weather</td>
<td>24%</td>
<td>19%</td>
</tr>
<tr>
<td>Use other options elsewhere</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Concerns about safety (wildlife, pets, people, conditions)</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>Not aware of locations</td>
<td>1%</td>
<td>6%</td>
</tr>
<tr>
<td>Too crowded</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Use other options elsewhere</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Distance from home/work</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Lack of parking</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Lack of amenities (water, restrooms)</td>
<td>6%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base: Total Residents (n=143)
Usage of Big Sky Recreational Facilities/Amenities:
Usage over past 12 months

- Trails: Used by 93% of residents
- Parking: Used by 83% of residents
- Park/trailhead restroom: Used by 71% of children in H/H
- Event pavilion: Used by 54% of residents
- Golf course: Used by 54% of residents
- Benches: Used by 56% of residents
- Shelter: Used by 51% of residents
- Athletic field: Used by 66% of residents
- Dog area: Used by 44% of residents
- Playground: Used by 38% of residents

Almost all residents use trails, and many utilize parking and restrooms at trailheads.

Not surprisingly, families with children are, by far, the greatest users of a number of recreational amenities.
Usage of Big Sky Recreational Facilities/Amenities:
Usage over past 12 months (cont.)

- Signage: 36% (Children in H/H), 39% (No Children)
- Plaza: 44% (Children in H/H), 39% (No Children)
- Seasonal outdoor ice rink: 63% (Children in H/H), 18% (No Children)
- Climbing wall: 61% (Children in H/H), 12% (No Children)
- Softball field: 36% (Children in H/H), 24% (No Children)
- Skatepark: 39% (Children in H/H), 8% (No Children)
- Tennis court: 23% (Children in H/H), 17% (No Children)
- Basketball court: 41% (Children in H/H), 5% (No Children)
- Other: 6% (Children in H/H), 2% (No Children)
- None: 1% (Children in H/H), 0% (No Children)
Usage of Big Sky Recreational Facilities/Amenities:
Perceptions of overall condition of facility/amenity

This chart plots usage level against how those users rate the condition of the facility or amenity.
High usage combined with low ratings of condition suggest areas where improvements could have high impact.

Points on vertical scale mark the average rating on scale of: Excellent/Good/Fair/Poor
Community Needs Assessment

Priorities for Recreational Options

- Scaling/ranking of preferences for selected:
  - Common amenities and facilities
  - Sports courts and fields
  - Venues
  - Strategies and facilities development options
Priorities for Recreational Options: 
Description of the process

Methodology
- Priorities for options were assessed through application of a research technique called MaxDiff.
- This technique simplifies the task of ranking a large number of options by allowing survey respondents to consider only a small subset of the options at one time, grouped by a random design.
- Each respondent was presented with 10 groupings of 5 options each in this survey. They were asked to select the ‘best’ and ‘worst’ option in each grouping.

Results
- From the ‘best’ and ‘worst’ choices of each respondent, it is possible to create a model that scales the preferences for each of the 25 options addressed in this study across various sample groups.
- The values on the scale represent the relative value of each option as contrasted to any other option. Thus, an option with a score of 250 is twice as ‘important’ as one with a score of 125.
- On the following charts, each option is shown with the area proportional to its scale score.
Priorities for Recreational Options:
Options assessed

COMMON AMMENITIES/FACILITIES

- Walking and bicycling trails
- Sidewalks
- Community gardens
- Off-leash dog park
- Covered picnic areas/places to sit
- Outdoor aquatic “splash” pads
- Playgrounds
- Gallatin River access
- Outdoor exercise/fitness area

- Amphitheater or performance stage
- Multi-generational recreation center (pools, courts, fitness, child care, etc.)
- Swimming pools (competition/recreation)
- Multi-use space for performing arts/special events/hobbies, etc.
Priorities for Recreational Options:
Options assessed (cont.)

SPORT COURTS & FIELDS
- Baseball/softball fields
- Tennis courts
- Pickle ball courts
- Lacrosse/soccer/multi-purpose fields
- Basketball/volleyball courts (indoor/outdoor)

VENUES
- Skateboard park
- Adventure area (ropes course, zipline, etc.)
- BMX bike course
- Ice skating rink
- Cross Country ski trails
- Mountain biking trails/Flow trail
- Rock climbing and rappelling
Priorities for Recreational Options:
Residents and investors have different basis for ratings

Residents
- For each set of five options, please decide which one of those shown BEST and which one LEAST meets your/your household’s recreational needs.

Investors
- For each set of five options, please decide which one of those shown BEST and which one LEAST enhances the value of your property interests in Big Sky.
Priorities for Recreational Options:
Residents – Option that best meets recreational needs

- Venues
- Common Amenities/Facilities
- Sport Courts & Fields

<table>
<thead>
<tr>
<th>Common Amenities/Facilities</th>
<th>Venues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking/cycling trails, 486</td>
<td>MTB trails/Flow trail, 188</td>
</tr>
<tr>
<td>Amphitheater, 170</td>
<td>Ice skating rink, 81</td>
</tr>
<tr>
<td>Rec center, 198</td>
<td>Rock climb, 35</td>
</tr>
<tr>
<td>Events space, 112</td>
<td>Adventure area, 28</td>
</tr>
<tr>
<td>Sidewalks, 66</td>
<td>Skateboard, 20</td>
</tr>
<tr>
<td>River access, 144</td>
<td>BMX track, 14</td>
</tr>
<tr>
<td>Swimming pools, 120</td>
<td></td>
</tr>
<tr>
<td>Playgrounds, 65</td>
<td></td>
</tr>
<tr>
<td>Covered picnic areas, 52</td>
<td></td>
</tr>
<tr>
<td>Community gardens, 44</td>
<td></td>
</tr>
<tr>
<td>Dog park, 50</td>
<td></td>
</tr>
<tr>
<td>Outdoor exercise area, 45</td>
<td></td>
</tr>
<tr>
<td>Splash pads, 17</td>
<td></td>
</tr>
<tr>
<td>Lacrosse/soccer fields, 73</td>
<td>Baseball fields, 53</td>
</tr>
<tr>
<td></td>
<td>Ball courts (in/out), 52</td>
</tr>
<tr>
<td></td>
<td>Tennis courts, 43</td>
</tr>
<tr>
<td></td>
<td>Pickleball, 22</td>
</tr>
</tbody>
</table>

Base: Total Residents (n=143)
Priorities for Recreational Options:
Investors – Option that best enhances property value

Base: Total Investors (n=128)
## Priorities for Recreational Options:
**H/H with Children – Option that best meets recreational needs**

### Common Amenities/Facilities
- Rec center, 319
- Swimming pools, 268
- River access, 106
- Playgrounds, 96
- Walking/cycling trails, 313
- Events space, 88
- Sidewalks, 58
- Outdoor exercise area, 33
- Splash pads, 31
- Covered picnic areas, 28
- Dog park, 25
- Community gardens, 22

### Venues
- Amphitheater, 119
- XC ski trails, 274
- MTB trails/Flow trail, 187
- Rock climb, 45
- Adventure area, 33
- Skateboard, 28
- BMX track, 19
- Ice skating rink, 106

### Sport Courts & Fields
- Lacrosse/soccer fields, 132
- Ball courts, 83
- Baseball fields, 43
- Tennis courts, 30
- Pickle ball, 14

**Base: Households with Children (n=59)**
Priorities for Recreational Options:
H/H with No Children – Option that best meets recreational needs

- Venues
- Common Amenities/Facilities
- Sport Courts & Fields

Common Amenities/Facilities

- Amphitheater, 207
- River access, 151
- Covered picnic areas, 66
- Dog park, 66
- Sidewalks, 62
- Rec center, 134
- Community gardens, 60
- Swimming pools, 57
- Outdoor exercise area, 49
- Playgrounds, 49
- Walking/cycling trails, 658
- Events space, 118

Venues

- MTB trails/Flow trail, 173
- Ice skating rink, 59
- Rock climb, 24
- Adventure area, 21
- BMX track

Sport Courts & Fields

- Baseball fields, 49
- Tennis courts, 45
- Lacrosse/soccer fields, 41
- Ball courts, 31
- Pickleball, 25

Base: Households with No Children (n=84)
Priorities for Recreational Options:
Strategy/development options assessed

• Improve existing park and open space amenities through replacement as equipment wears out.
• Add additional amenities to parks and open spaces already open to public access.
• Add more miles to the trails system.
• Develop trailheads with parking lots, wayfinding, restrooms and other amenities.
• Install additional picnic shelters.
• Diversify the types of experiences offered in the parks and open spaces.
• Develop a new indoor multi-generational recreation and wellness center (sport courts, walking track, aquatics, fitness rooms, child care, etc.).
• Develop new off-leash dog parks.
• Purchase land to develop future parks greater than 5 acres in size.
• Provide wayfinding through signage and online apps.
• Develop a new multi-sports outdoor complex.
• Develop an ice hockey arena.
• Purchase or acquire land to preserve open space and natural areas.
Priorities for Facilities Improvement/Development:
Top ranked options (comparing residents to investors)

Residents and investors share many similar priorities, but residents tend to prioritize options they might use ...

...while investors tend to prioritize options that enhance the user's experience.

Base: Total Residents (n=143)
Total Investors (n=128)
Priorities for Facilities Improvement/Development:
Top ranked options (comparing presence/absence of children)

On the other hand, households with and without children have many divergent priorities.

Base: Households with Children (n=59)
Households with No Children (n=84)
Community Needs Assessment

Support for Parks Funding and Administration

• Evaluation of community acceptance of:
  • Alternative sources of funding
  • Changes to park/open space improvement requirements for developers
  • Consolidated management of parks and recreation
Support for Parks Funding and Administration:
Funding options assessed

- A new perpetual property tax levy dedicated to parks, open space, and trails
- Issue general obligation bonds, to fund new improvements paid for with a limited duration property tax levy
- Use a resort tax allocation to fund parks, open space, and trails
- A new assessment added to HOA dues dedicated to parks, open space, and trails
- User fees or membership fees
Support for Parks Funding and Administration:
Support for funding alternatives (all respondents)

- Resort tax allocation: 6% Support, 92% Oppose
- User/membership fees: 39% Support, 45% Oppose
- Bonds paid by limited duration levy: 43% Support, 38% Oppose
- New perpetual property tax levy: 55% Support, 31% Oppose
- HOA assessment dedicated to parks: 55% Support, 25% Oppose

Revenue sources that impact residential property owners the least tend to have the highest support.
Support for Parks Funding and Administration:
Support for funding alternatives (residents compared to investors)

- **Resort tax allocation**
  - Somewhat/Strongly Oppose: 6%, 9%
  - Somewhat/Strongly Support: 92%, 84%

- **User/membership fees**
  - Somewhat/Strongly Oppose: 39%, 34%
  - Somewhat/Strongly Support: 45%, 49%

- **Bonds paid by limited duration levy**
  - Somewhat/Strongly Oppose: 43%, 38%
  - Somewhat/Strongly Support: 39%, 45%

- **New perpetual property tax levy**
  - Somewhat/Strongly Oppose: 55%, 48%
  - Somewhat/Strongly Support: 31%, 27%

- **HOA assessment dedicated to parks**
  - Somewhat/Strongly Oppose: 55%, 49%
  - Somewhat/Strongly Support: 25%, 30%

**Investors** are a little less supportive of a resort tax allocation dedicated to parks, open space, and trails.

Total Residents (n=143)
Total Investors (n=128)
Support for Parks Funding and Administration:
Support for funding alternatives (comparing presence/absence of children)

- Resort tax allocation:
  - Children in H/H (n=59): 88%
  - No Children (n=84): 94%

- User/membership fees:
  - Children in H/H (n=59): 46%
  - No Children (n=84): 44%

- Bonds paid by limited duration levy:
  - Children in H/H (n=59): 51%
  - No Children (n=84): 30%

- New perpetual property tax levy:
  - Children in H/H (n=59): 41%
  - No Children (n=84): 24%

- HOA assessment dedicated to parks:
  - Children in H/H (n=59): 27%
  - No Children (n=84): 24%

Households with children are more supportive of property tax levies for parks funding.
Support for Parks Funding and Administration:
Support for developer park land improvement requirements

Support for Requiring Developers to Improve Park Land to Minimum Standards

<table>
<thead>
<tr>
<th></th>
<th>% Somewhat/Strongly Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Respondents (n=271)</td>
<td>70% 40%</td>
</tr>
<tr>
<td>Residents (n=143)</td>
<td>75% 37%</td>
</tr>
<tr>
<td>Investors (n=138)</td>
<td>65% 44%</td>
</tr>
<tr>
<td>Children in H/H (n=59)</td>
<td>73% 44%</td>
</tr>
<tr>
<td>No Children (n=84)</td>
<td>77% 32%</td>
</tr>
</tbody>
</table>

While the concept of requiring minimum development standards is supported by a majority of the community, that support drops substantially if the requirement would result in less land or money.
Support for Parks Funding and Administration:
Support for consolidating public parks under a single Big Sky entity

Total Respondents (n=271)
- Somewhat/Strongly Oppose: 10%
- Somewhat/Strongly Support: 72%

Residents (n=143)
- Somewhat/Strongly Oppose: 9%
- Somewhat/Strongly Support: 74%

Investors (n=138)
- Somewhat/Strongly Oppose: 10%
- Somewhat/Strongly Support: 69%

Children in H/H (n=59)
- Somewhat/Strongly Oppose: 10%
- Somewhat/Strongly Support: 75%

No Children (n=84)
- Somewhat/Strongly Oppose: 8%
- Somewhat/Strongly Support: 74%

Support for Big Sky parks management under a single entity enjoys broad support across the spectrum.
Community Needs Assessment

Characteristics of the Sample

- Sources of information about Big Sky
- Profile of Residents
- Profile of Investors
Characteristics of the Sample:
Sources of information about Big Sky

Email: 80%
From friends and neighbors: 48%
Newspaper: 47%
Flyers/newsletter: 44%
Facebook: 40%
Promotions at special events: 30%
From work: 22%
Radio: 10%
Instagram: 8%
Big Sky or other website: 5%
Twitter: 2%
Other: 2%

Multiple answers accepted.
%'s sum to more than 100%.

Social media are far more important to residents.

Email is the most commonly relied-upon form of communication, but for residents, contact with friends and neighbors is as important as email.

Websites, though rarely used, are more significant to investors.
**Characteristics of the Sample:**
Profile of residents

**Housing Tenure**
- Owner (Part-Time Res) 85%
- Owner (Full-Time Res) 6%
- Renter 10%

**Years Lived in Big Sky**
- Over 20 years 26%
- Under 3 years 6%
- 3 - 5 years 15%
- 6 - 10 years 15%
- 11 - 15 years 18%
- 16 - 20 years 20%

Renters are full-time residents. Part-time owner-occupants are analyzed as 'residents.'

The vast majority (91%) are owner-occupants (either full- or part-time in Big Sky).

About one-fifth of residents are relative newcomers to Big Sky, living in the area for 5 years or less.

Base: Total Residents (n=143)
Characteristics of the Sample:
Profile of residents (cont.)

Across all age groups - number of persons per H/H:
- Children in H/H: 4.1
- No children: 1.9
- Overall: 2.8

Over 40% of individuals in households with no children are over age 60. Analysis of the 'no children' group should recognize it is heavily populated by older residents.
Characteristics of the Sample:
Profile of residents (cont.)

Among households without children, half of the heads-of-household are over 60...

...while half of households with children are headed by someone age 41-50

- 40 or under
- 41 - 50
- 51 - 60
- 61 - 70
- Over 70

Children in H/H (n=59)
No Children (n=84)

Note: 2% of respondents in each household type refused to answer the age question
Characteristics of the Sample:
Profile of investors

Most Big Sky investors are small, family groups, who own only 1 residential unit (not their own permanent residence).

Number of Residential Units Owned
(Average = 1.3)

- One 86%
- Two 9%
- More than two 5%

The majority of investment units are held for short-term rental or second/vacation homes.

Number of Residential Units Owned That are Leased to Current Permanent Resident
(Average = 0.3)

- One or more 16%
- None 84%

Base: Total Investors (n=128)
Characteristics of the Sample:
Profile of investors (cont.)

Approximately one-fourth of all investors have owned property in Big Sky for over 20 years.

- Over 20 years: 24%
- Under 3 years: 5%
- 3 - 5 years: 15%
- 6 - 10 years: 21%
- 11 - 15 years: 25%
- 16 - 20 years: 10%

Years Owned Property in Big Sky

Base: Total Investors (n=128)
Characteristics of the Sample:
Profile of investors (cont.)

Almost half of investors live in a western state (two-thirds of those are in the area classified as ‘mountain’ states)

One in three spends a month or less in Big Sky each year.

Average Months/Year in Big Sky
(Over 6 months treated as ‘resident’ for the analysis)

Base: Total Investors (n=128)
Level of Service

What is Level of Service?

- A standard to measure how well the park & recreation system is serving the community
- The ratio of the number of park acreage (or # of amenities) provided in comparison to the number of the residents served – typically expressed in terms of acres per 1,000 (or amenity per \( n \) people)

- Common Metrics
  - Acres per 1,000 residents – do we have enough land?
  - Facilities per 1,000 residents – do we have enough facilities?
  - Square footage per capita – do we have enough indoor recreation space?