

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.

*nVision 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

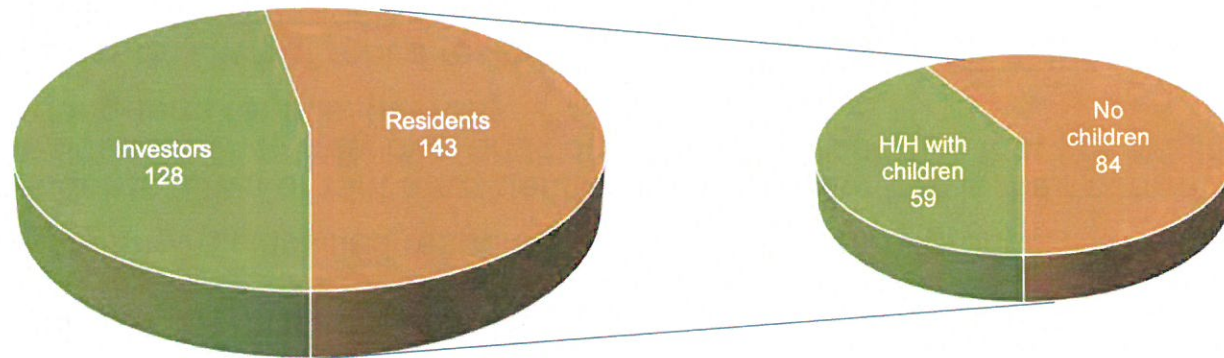
The survey questionnaire classified respondents into four primary groups:

- **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

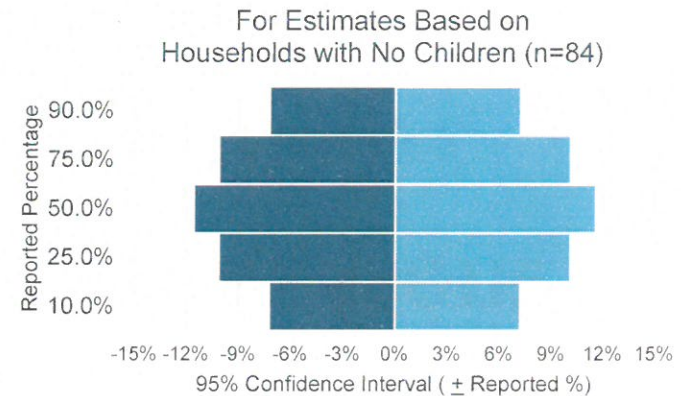
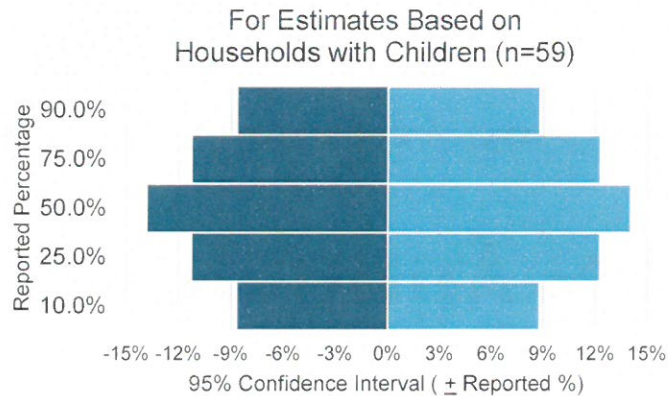
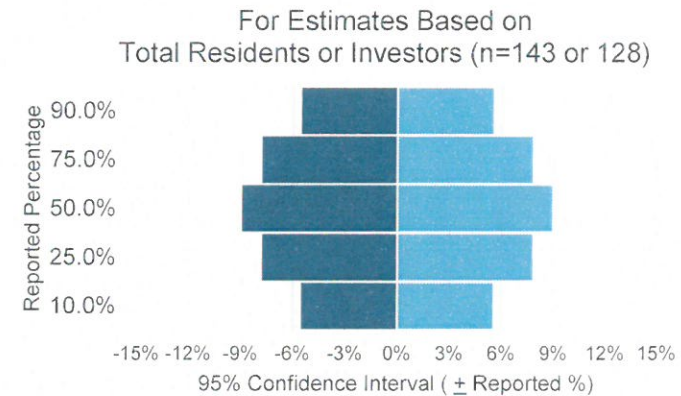
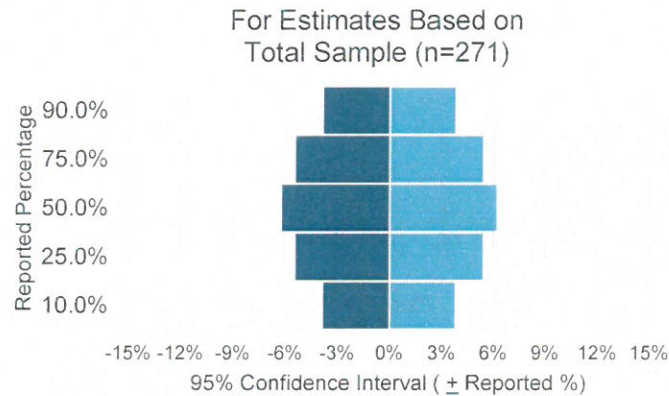
Sample Composition for Analysis

Of 271 total valid respondents ...



Survey Sampling Error Margins

Example 95% confidence intervals



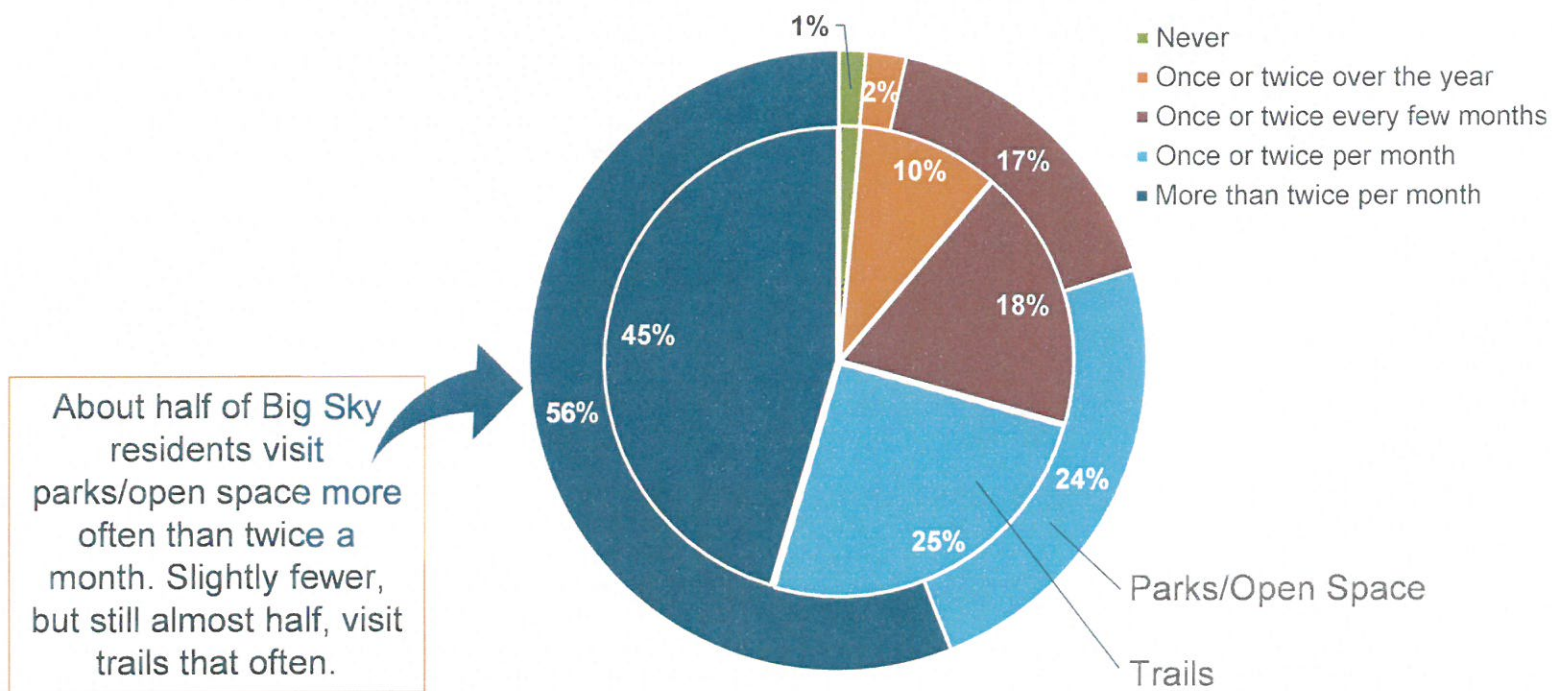
Error margins use normal approximation for sample estimates of given sample size (no fpc, continuity correction applied).

Community Needs Assessment

Usage of Big Sky Recreational Facilities/Amenities

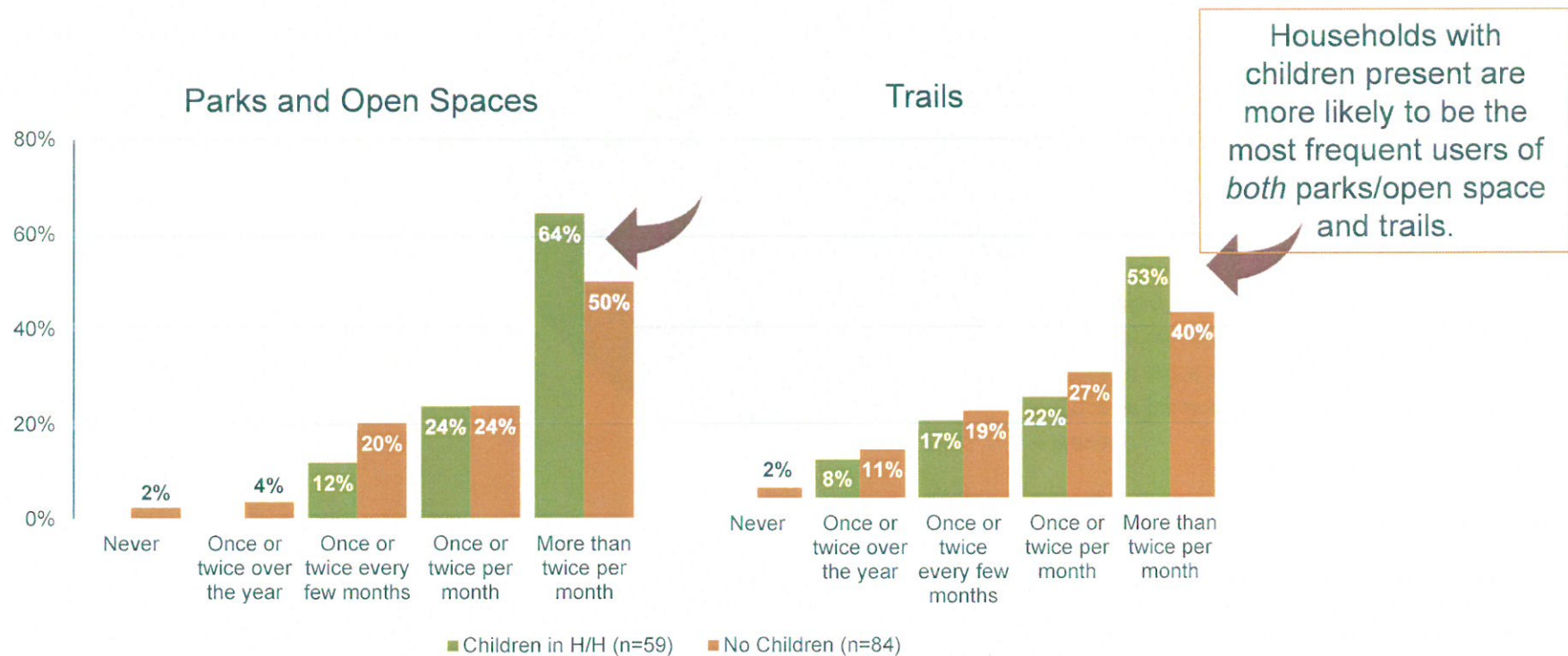
- Frequency of use
- Barriers to usage
- Extent of usage
- Perceptions of quality

Usage of Big Sky Recreational Facilities/Amenities: Frequency of visits to parks/open space and trails



Base: Total Residents (n=143)

Usage of Big Sky Recreational Facilities/Amenities: Frequency of visits to parks/open space and trails



Usage of Big Sky Recreational Facilities/Amenities:

Barriers to visiting parks/open space and trails more often

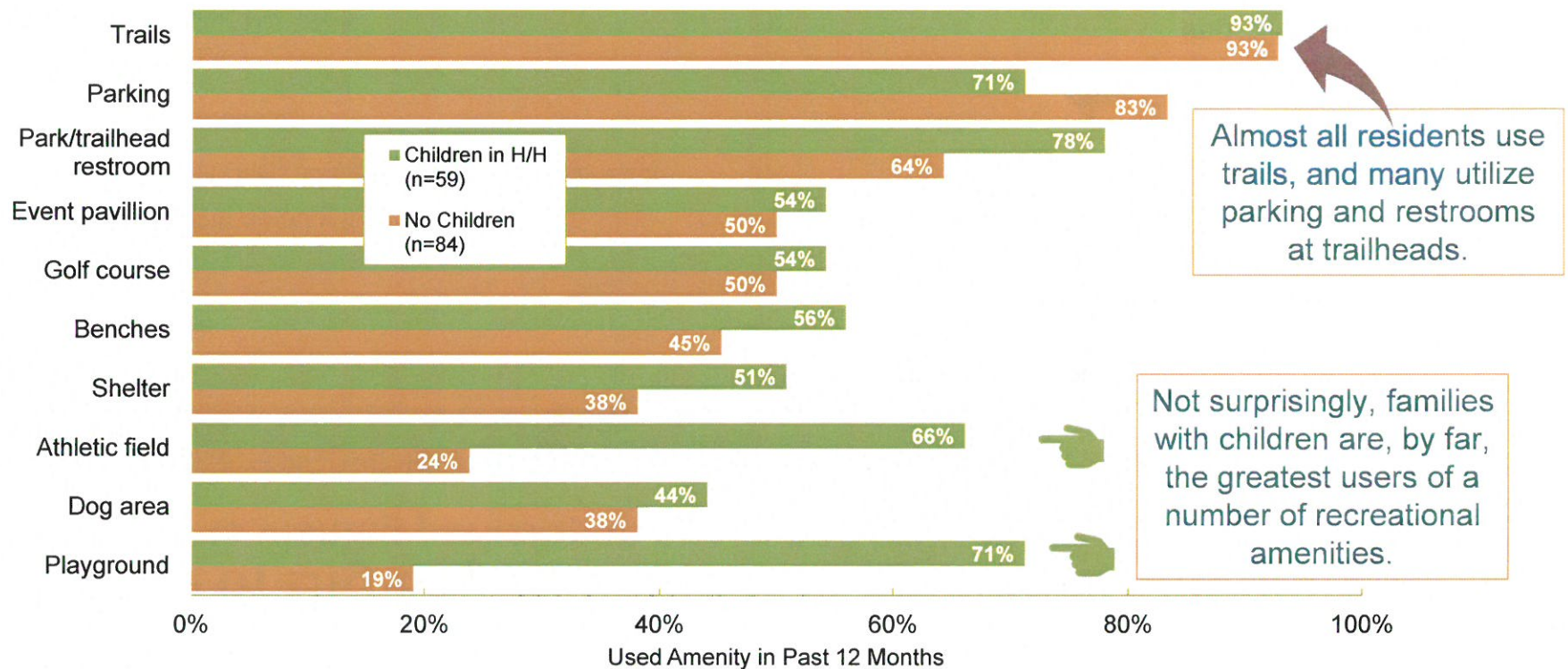
Barriers Mentioned	Parks/ Open Space	Trails
None	35%	34%
Don't have time	40%	35%
Weather	24%	19%
Use other options elsewhere	3%	5%
Concerns about safety (wildlife, pets, people, conditions)	3%	8%
Not aware of locations	1%	6%
Too crowded	4%	5%
Use other options elsewhere	3%	5%
Distance from home/work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

} Uncontrollable factors

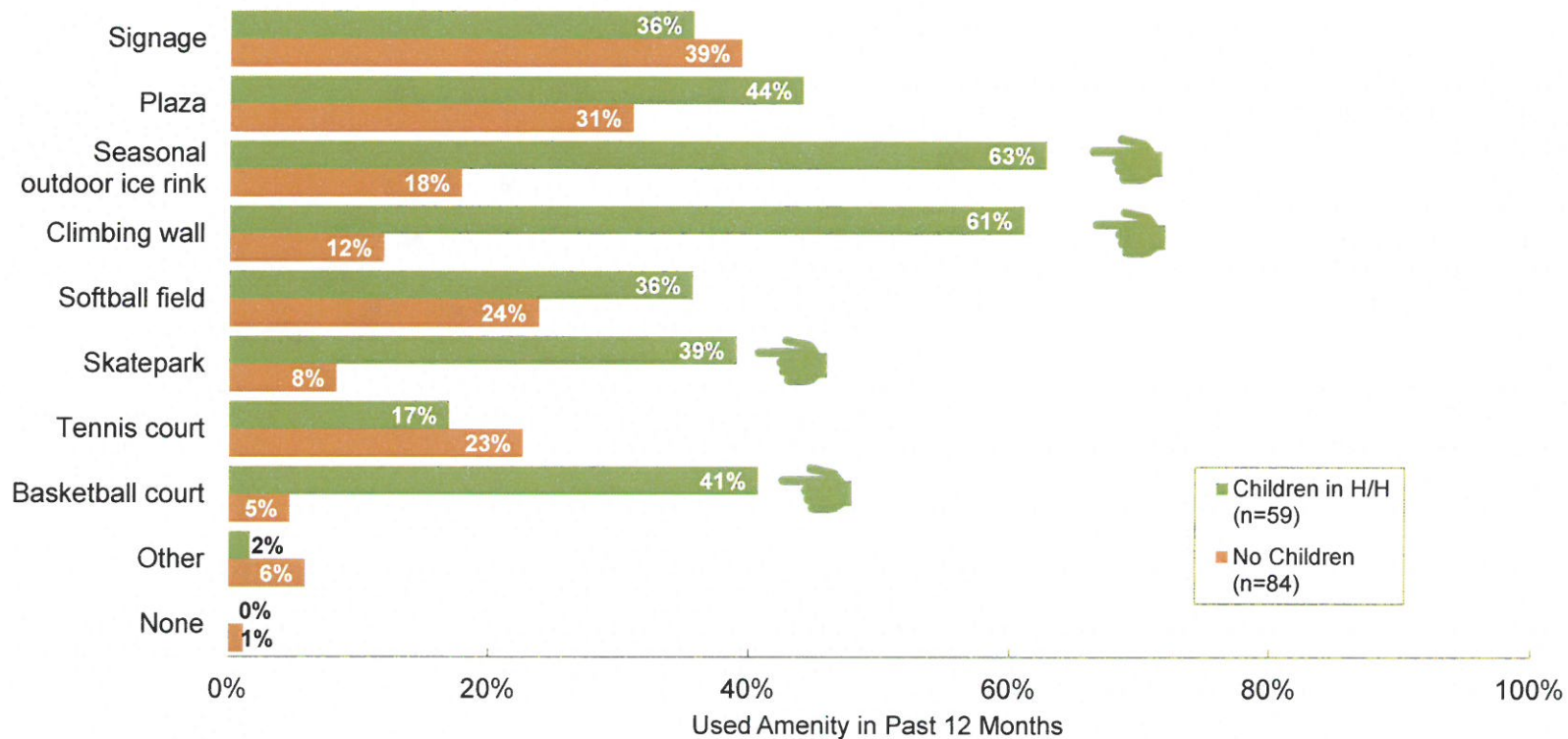
← Factors that can be improved are *not* barriers to usage for large numbers of Big Sky residents

Base: Total Residents (n=143)

Usage of Big Sky Recreational Facilities/Amenities: Usage over past 12 months

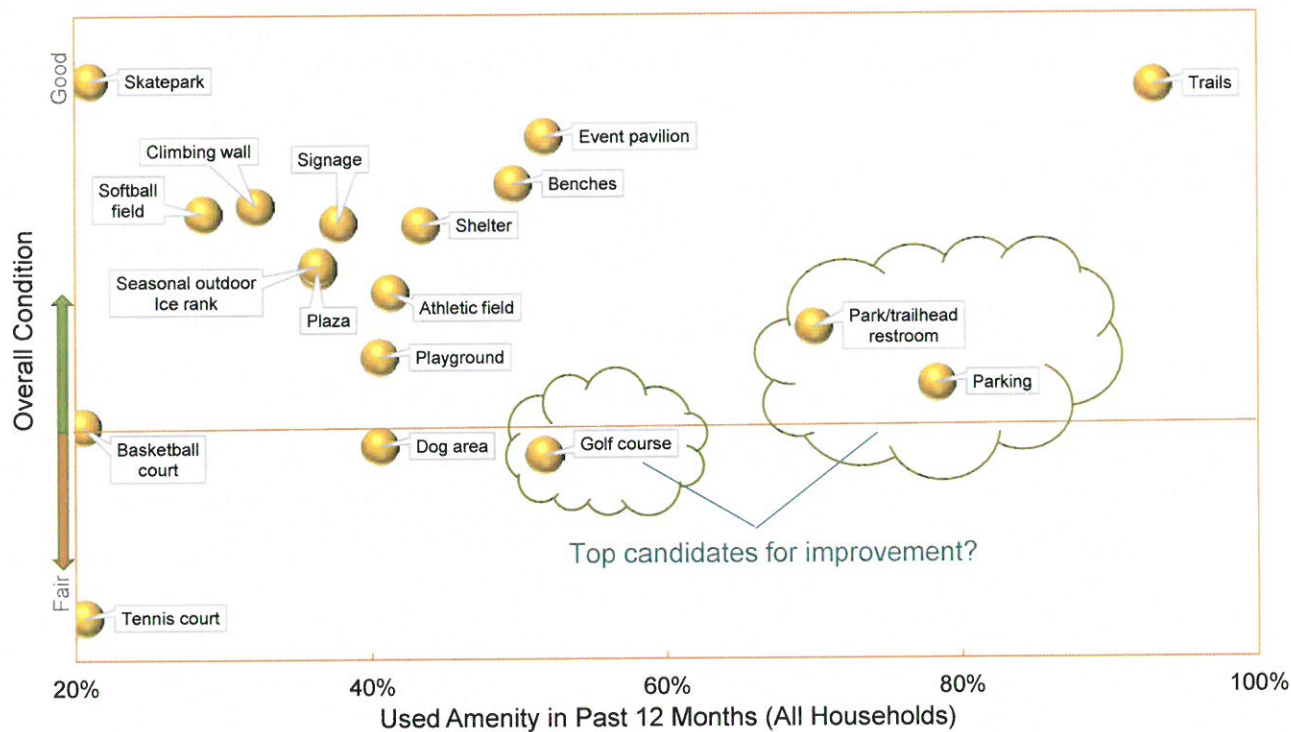


Usage of Big Sky Recreational Facilities/Amenities: Usage over past 12 months (cont.)



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

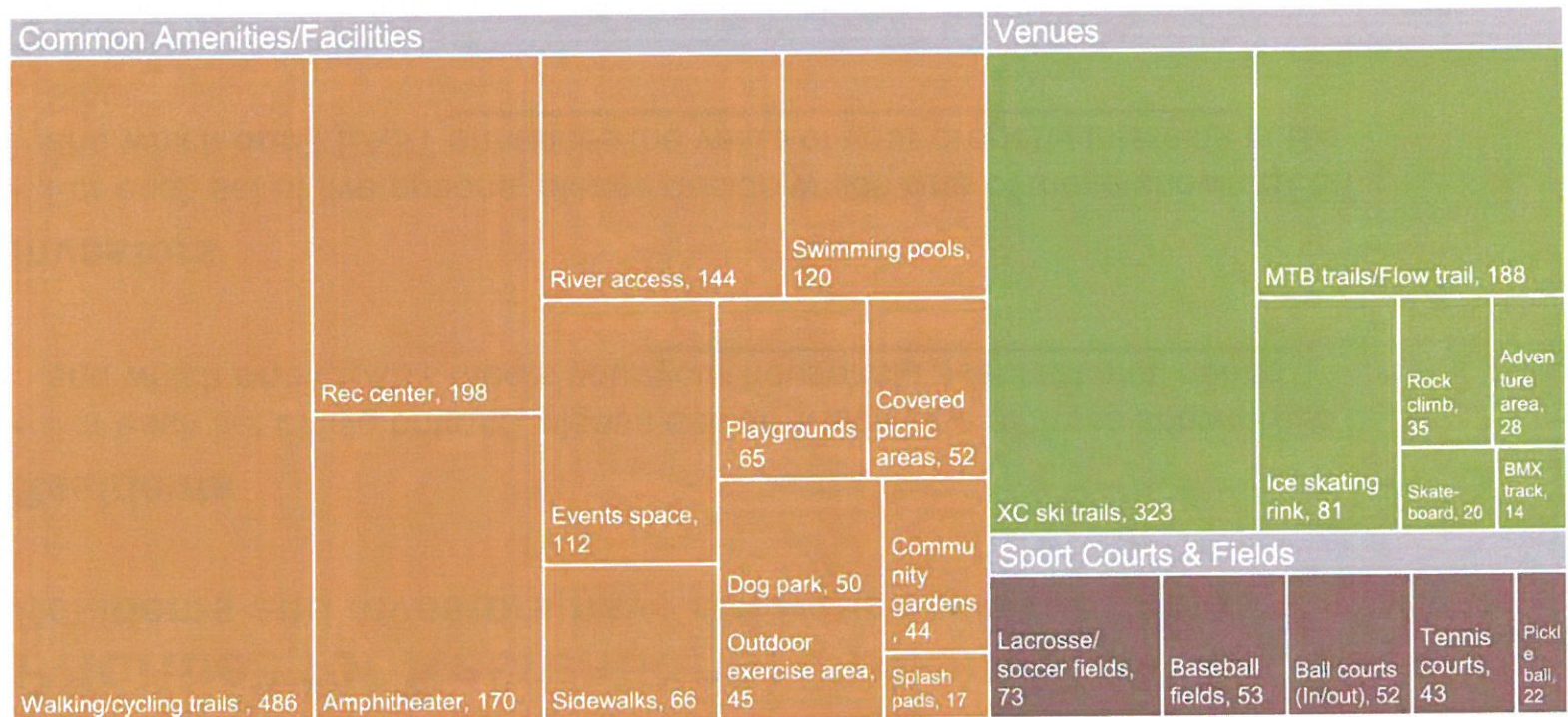
- For each set of five options, please decide which **one** of those shown BEST and which **one** LEAST meets your/your household's recreational needs.

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

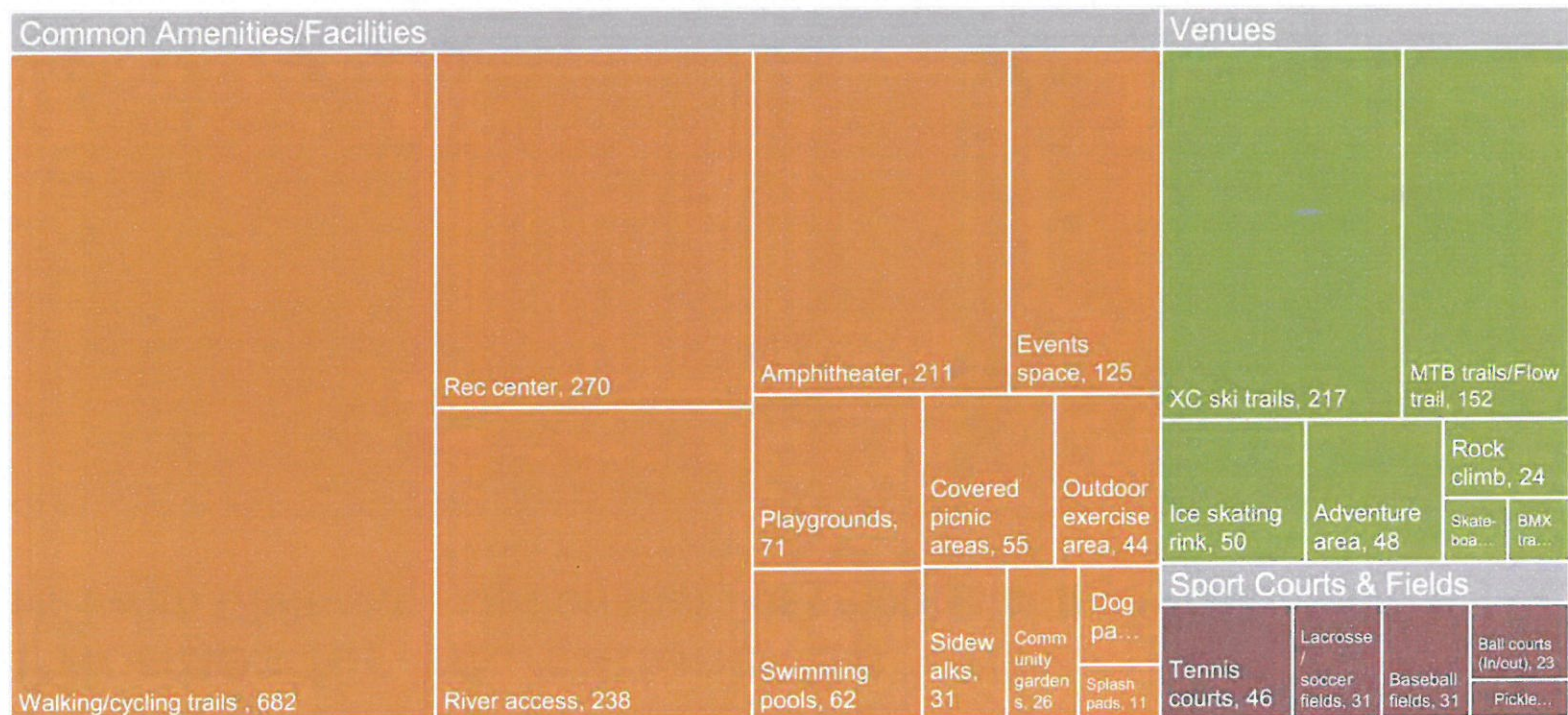
■ Venues ■ Common Amenities/Facilities ■ Sport Courts & Fields



Base: Total Residents (n=143)

Priorities for Recreational Options: Investors – Option that best enhances property value

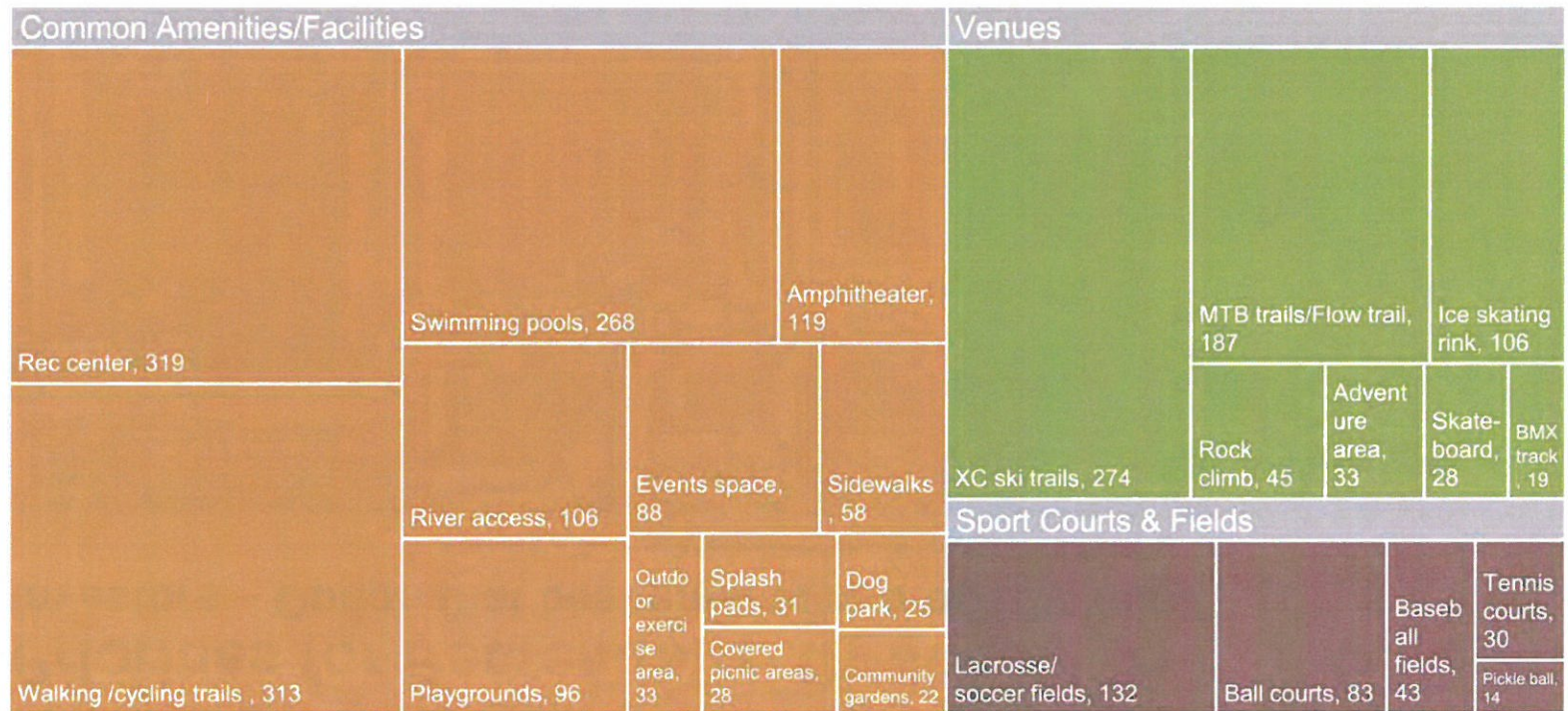
■ Venues ■ Common Amenities/Facilities ■ Sport Courts & Fields



Base: Total Investors (n=128)

Priorities for Recreational Options: H/H with Children – Option that best meets recreational needs

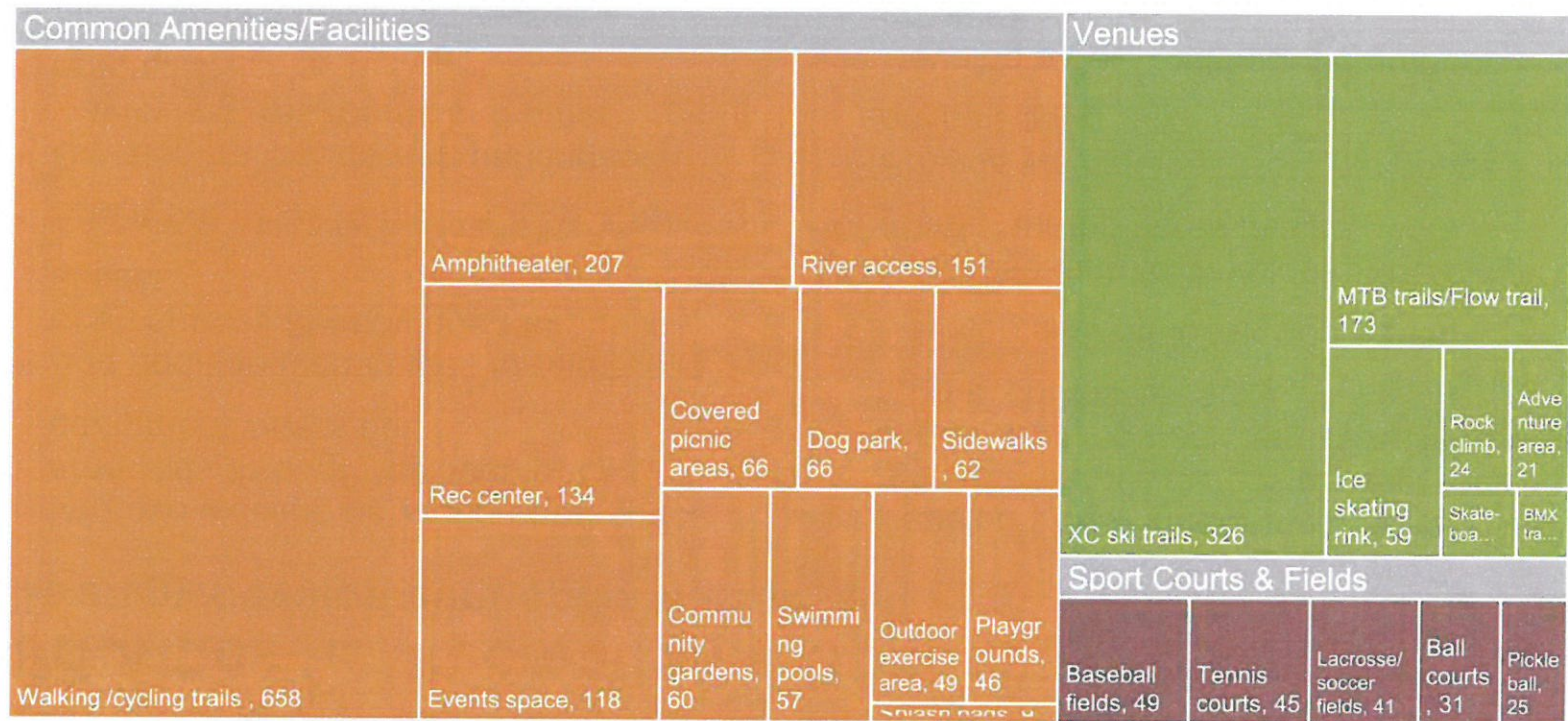
■ Venues ■ Common Amenities/Facilities ■ Sport Courts & Fields



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



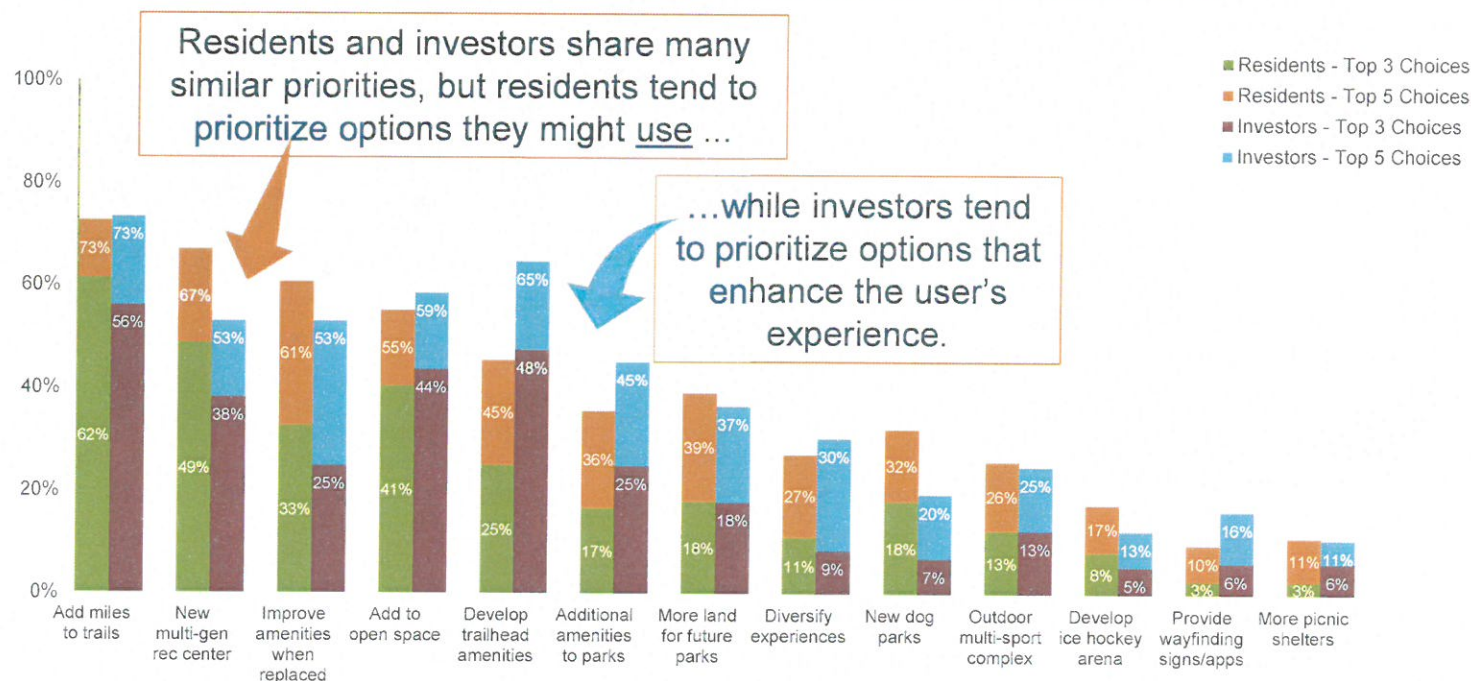
Base: Households with No Children (n=84)

Priorities for Recreational Options:

Strategy/development options assessed

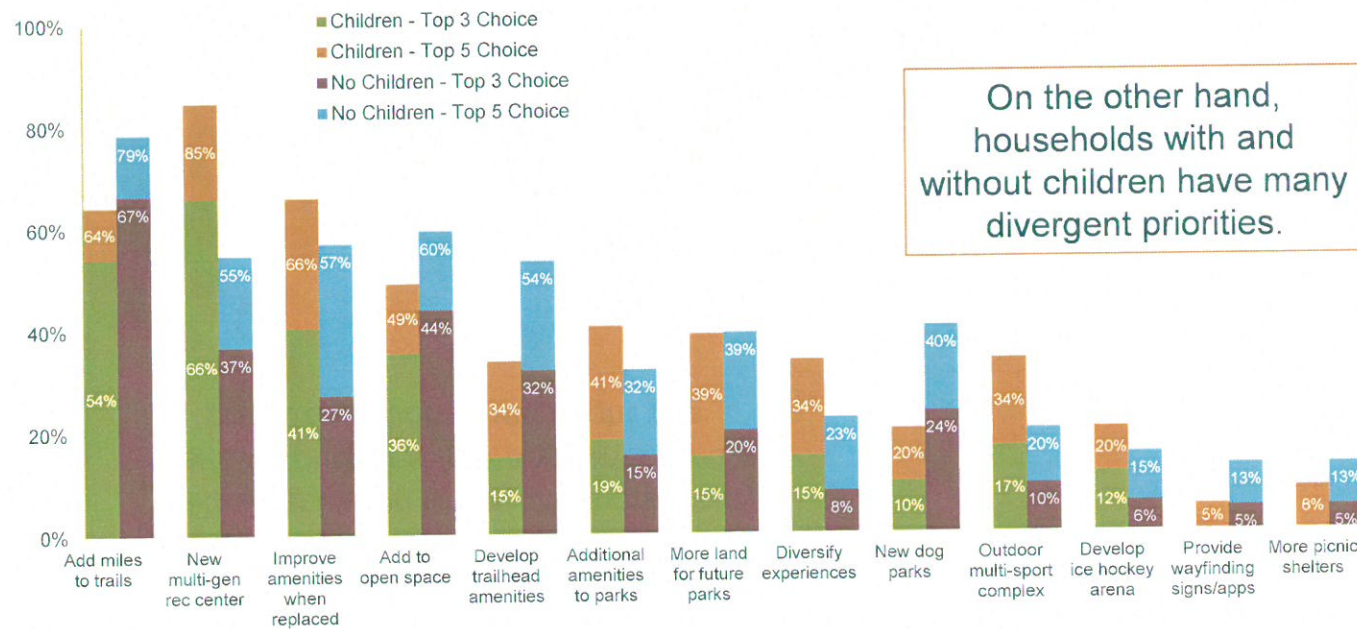
- Improve existing park and open space amenities through replacement as equipment wears out.
- Add additional amenities to parks and open spaces already open to public access.
- Add more miles to the trails system.
- Develop trailheads with parking lots, wayfinding, restrooms and other amenities.
- Install 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)



Base: Total Residents (n=143)
Total Investors (n=128)

Priorities for Facilities Improvement/Development: Top ranked options (comparing presence/absence of children)



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

Community Needs Assessment

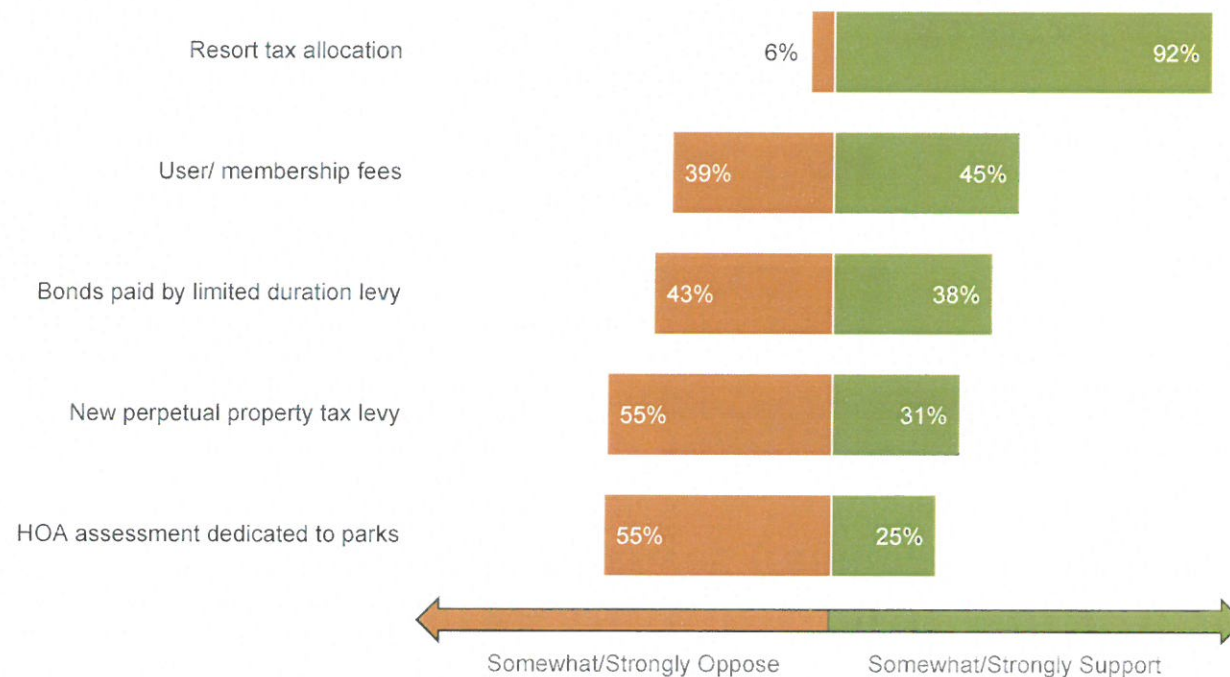
Support for Parks Funding and Administration

- 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

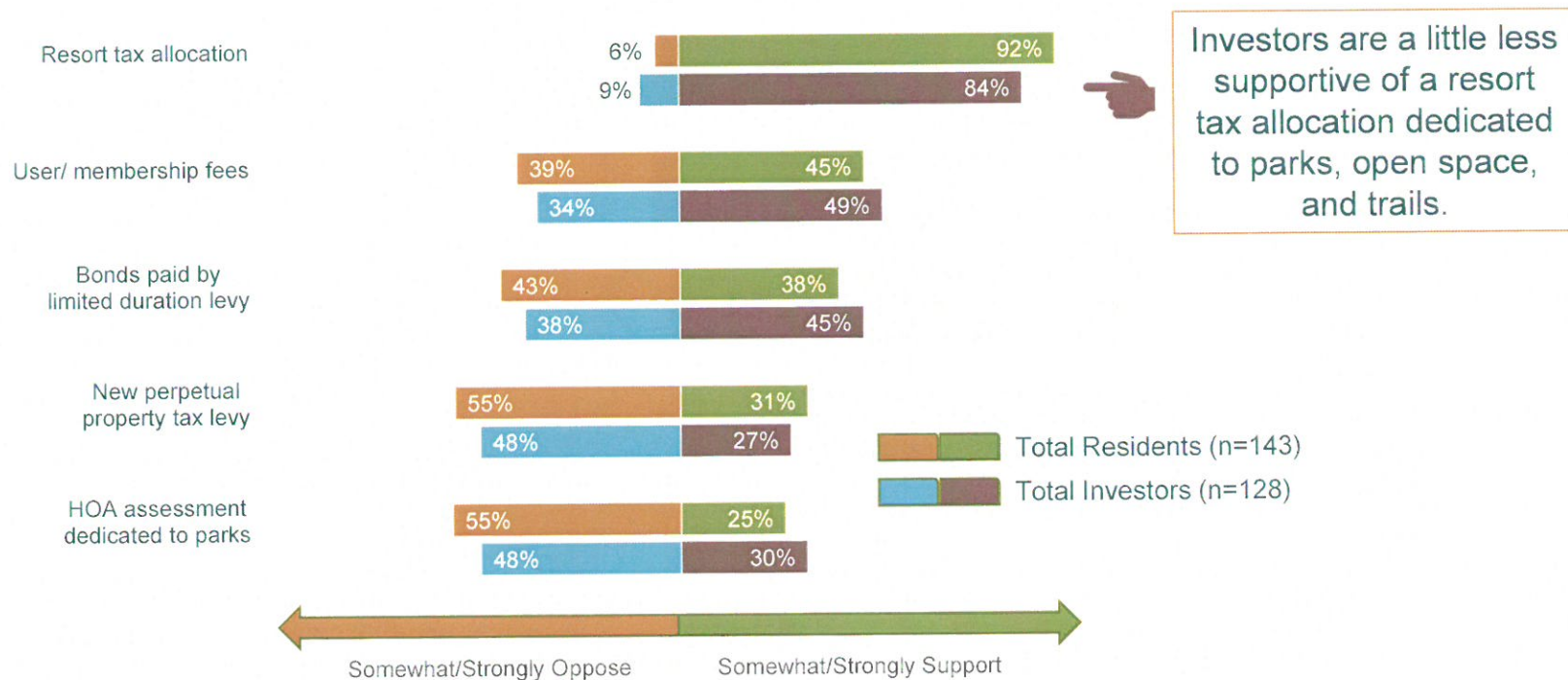
Support for Parks Funding and Administration: Support for funding alternatives (all respondents)



Revenue sources that impact residential property owners the least tend to have the highest support.

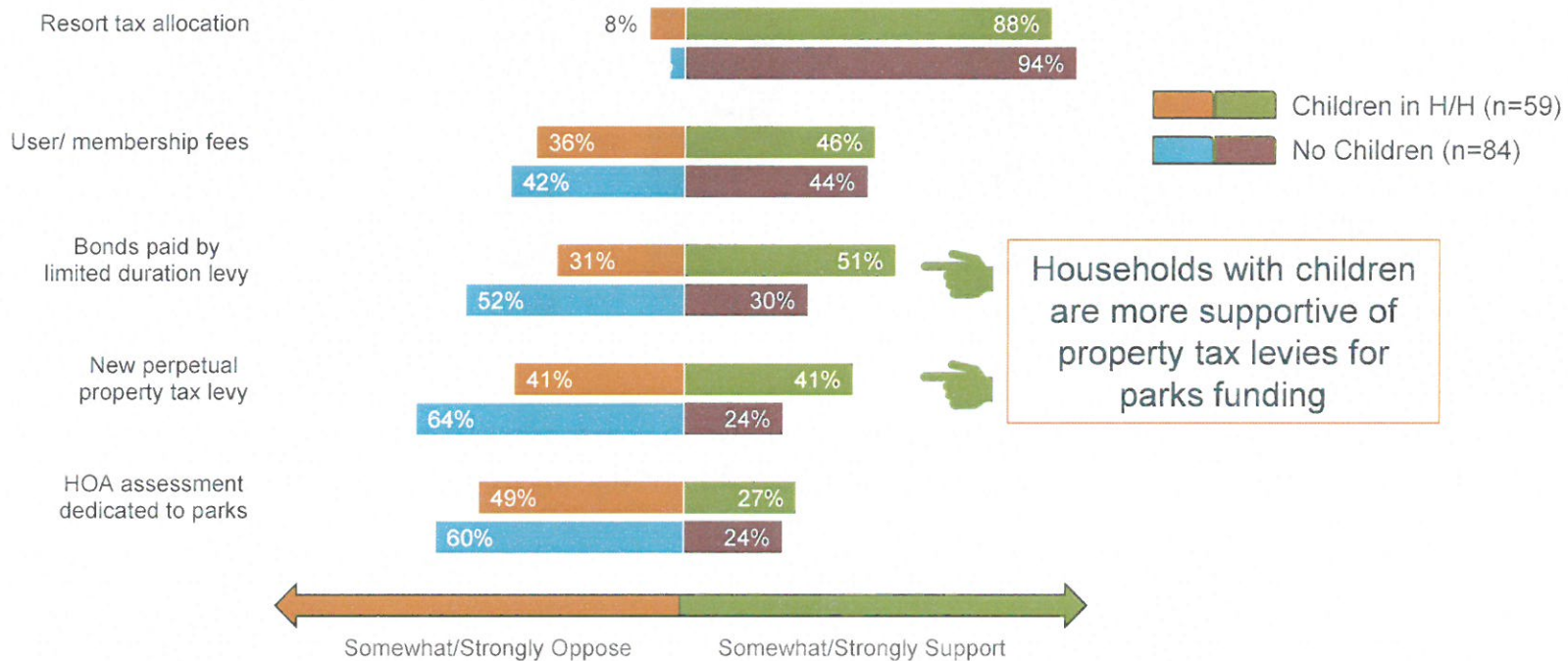
Support for Parks Funding and Administration:

Support for funding alternatives (residents compared to investors)



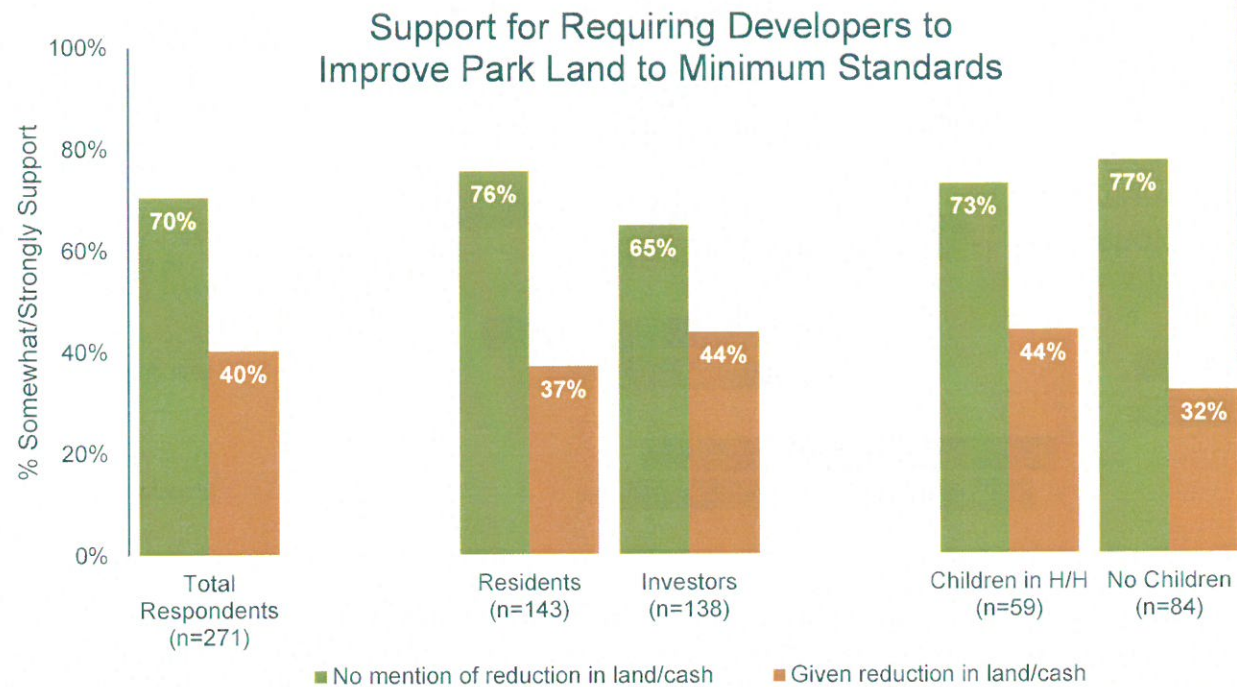
Support for Parks Funding and Administration:

Support for funding alternatives (comparing presence/absence of children)



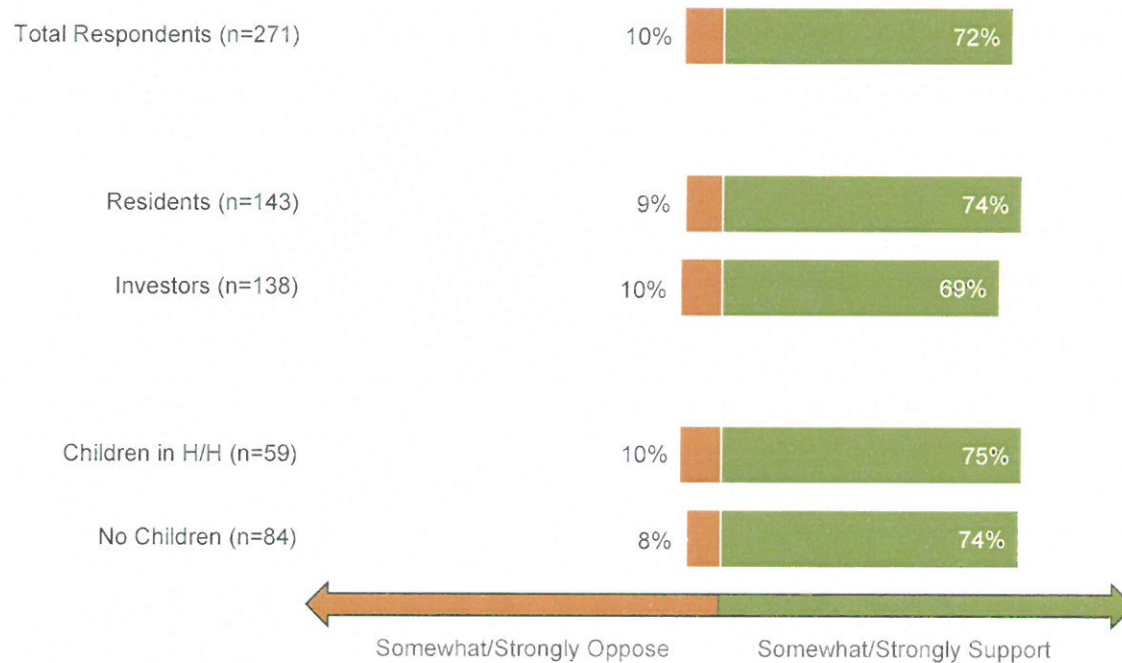
Support for Parks Funding and Administration:

Support for developer park land improvement requirements



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



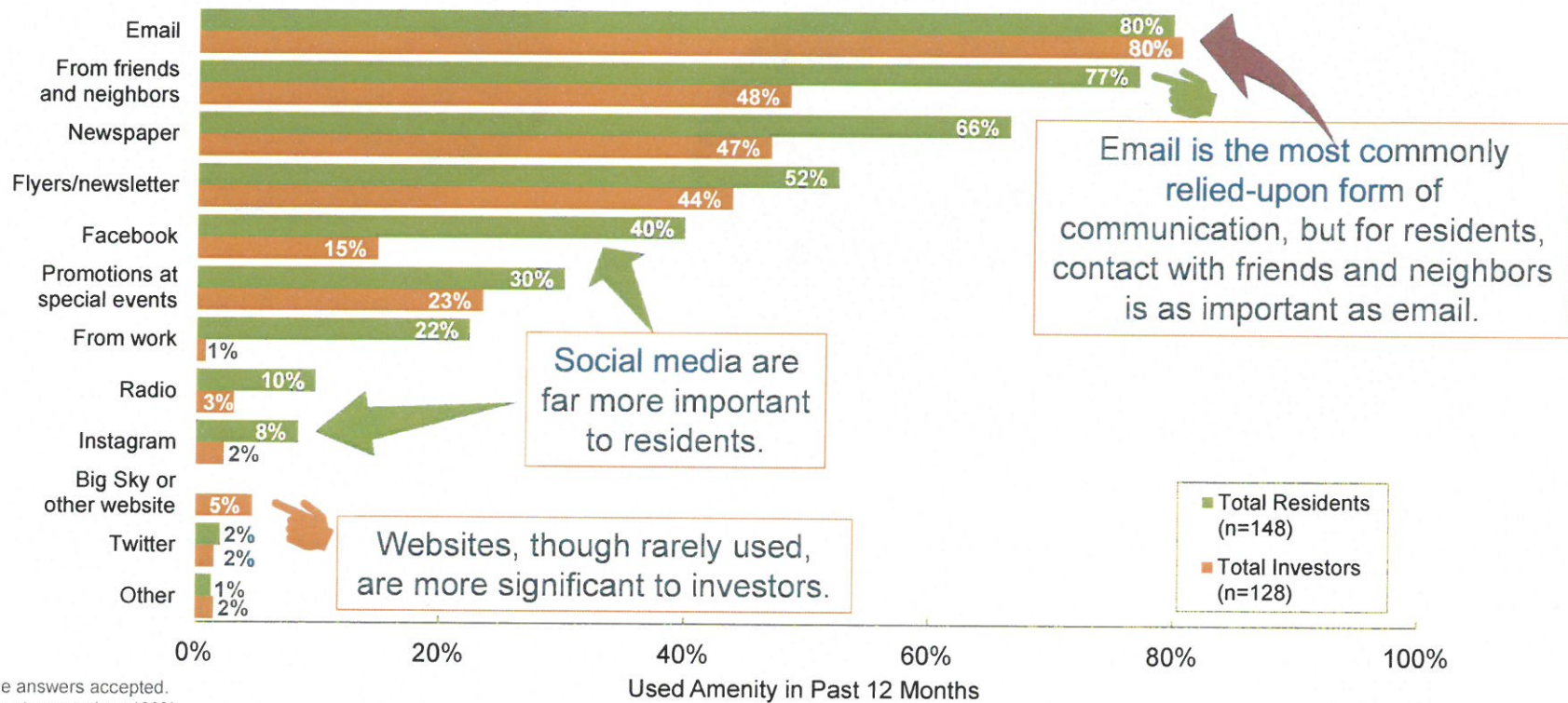
Support for Big Sky parks management under a single entity enjoys broad support across the spectrum.

Community Needs Assessment

Characteristics of the Sample

- Sources of information about Big Sky
- Profile of Residents
- Profile of Investors

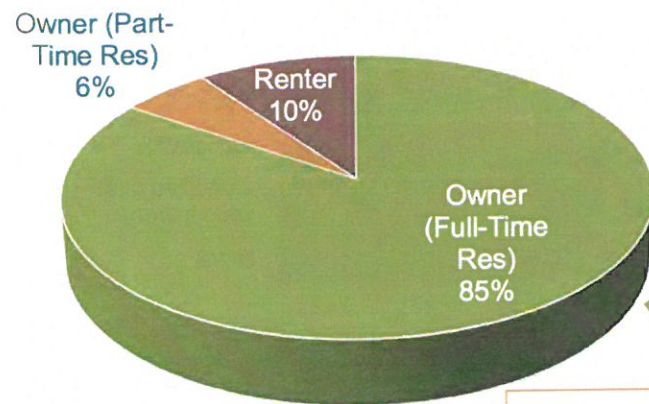
Characteristics of the Sample: Sources of information about Big Sky



Characteristics of the Sample: Profile of residents

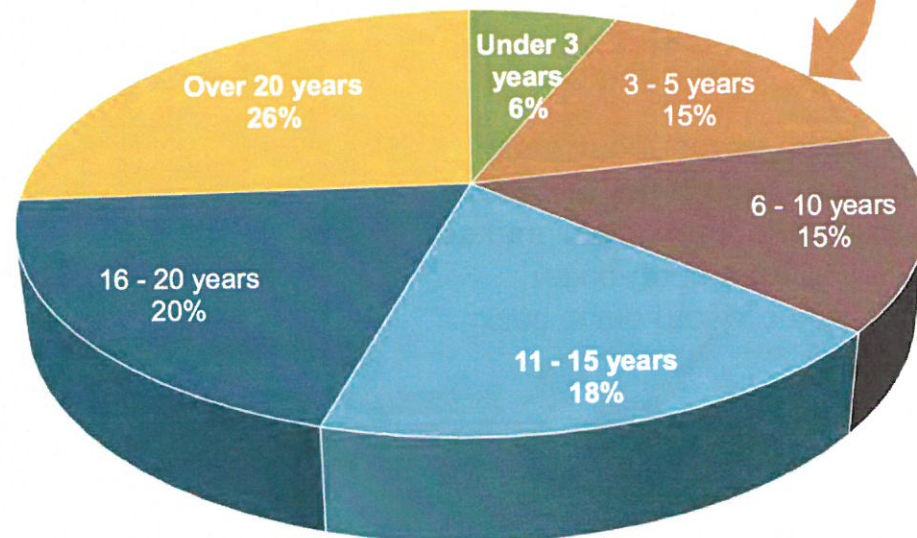
About one-fifth of residents are relative newcomers to Big Sky, living in the area for 5 years or less.

Housing Tenure



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

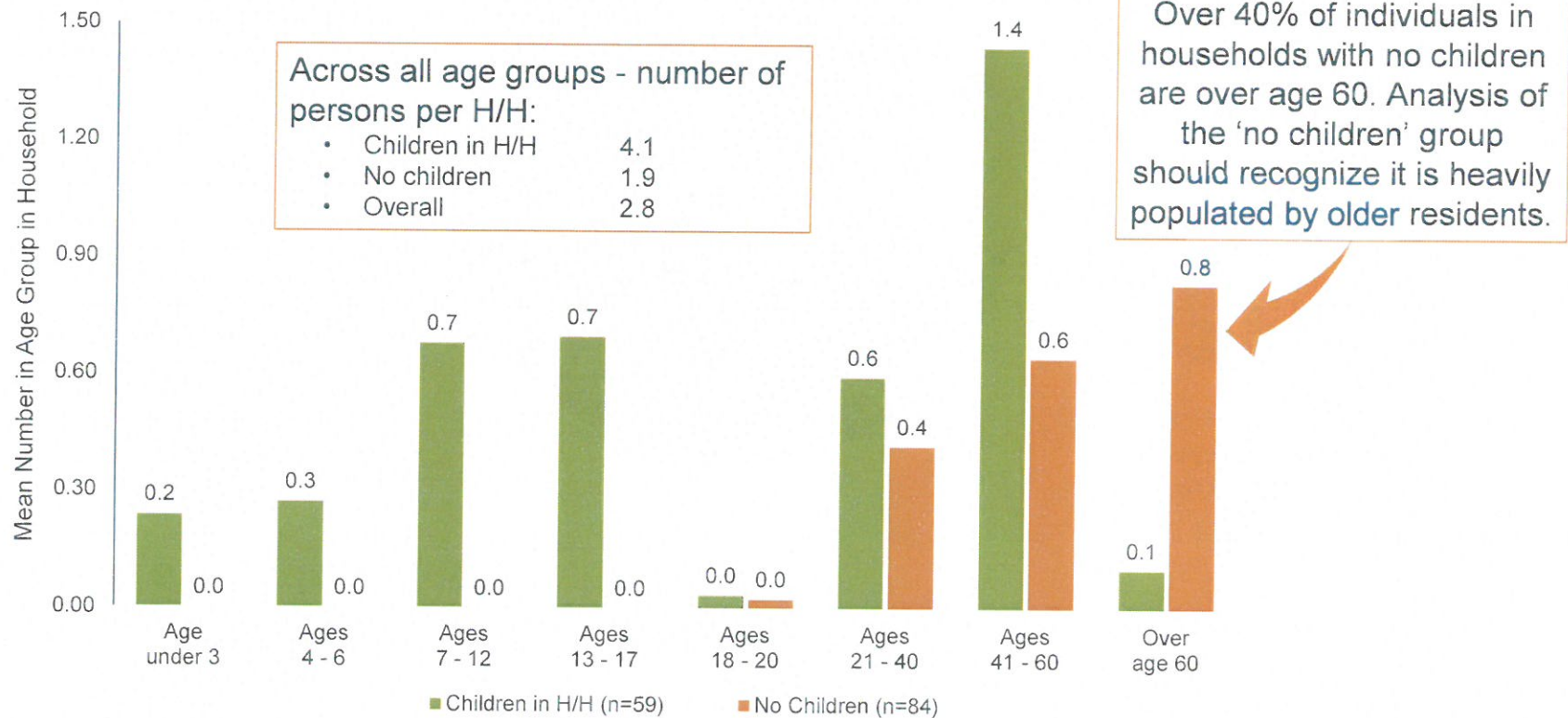
The vast majority (91%) are owner-occupants (either full- or part-time in Big Sky).



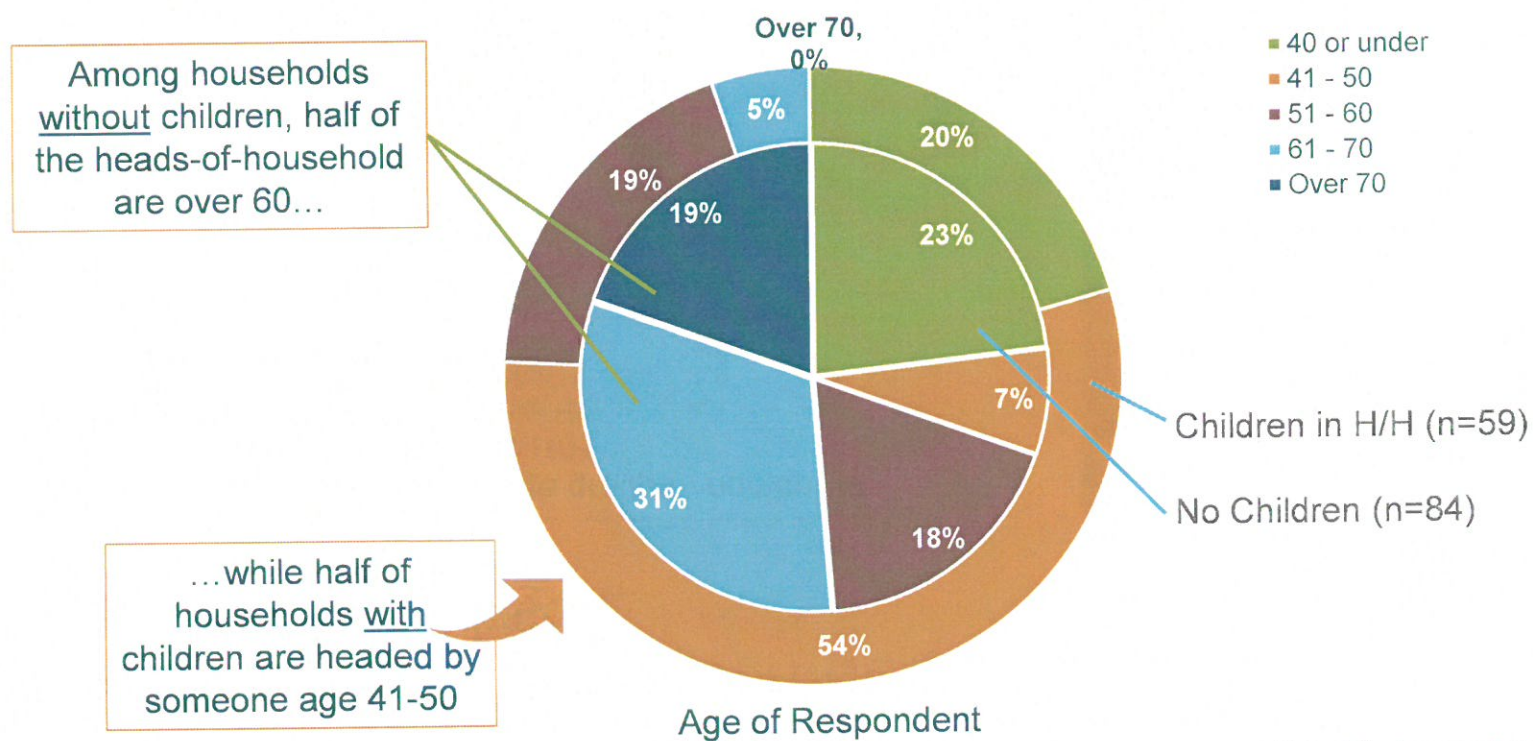
Years Lived in Big Sky

Base: Total Residents (n=143)

Characteristics of the Sample: Profile of residents (cont.)

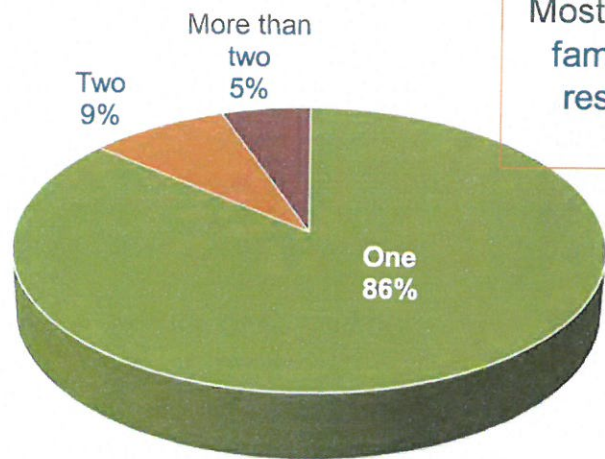


Characteristics of the Sample: Profile of residents (cont.)



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

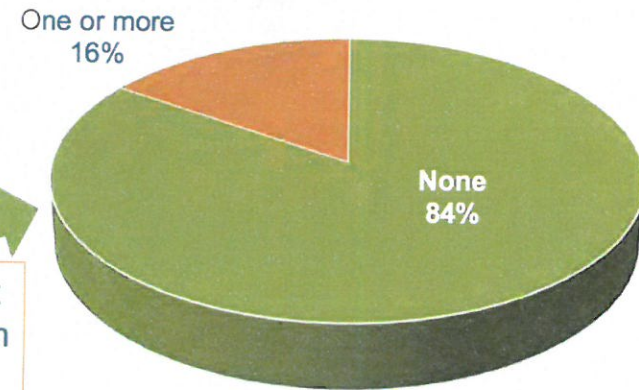
Characteristics of the Sample: Profile of investors



Number of Residential Units Owned
(Average = 1.3)

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

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

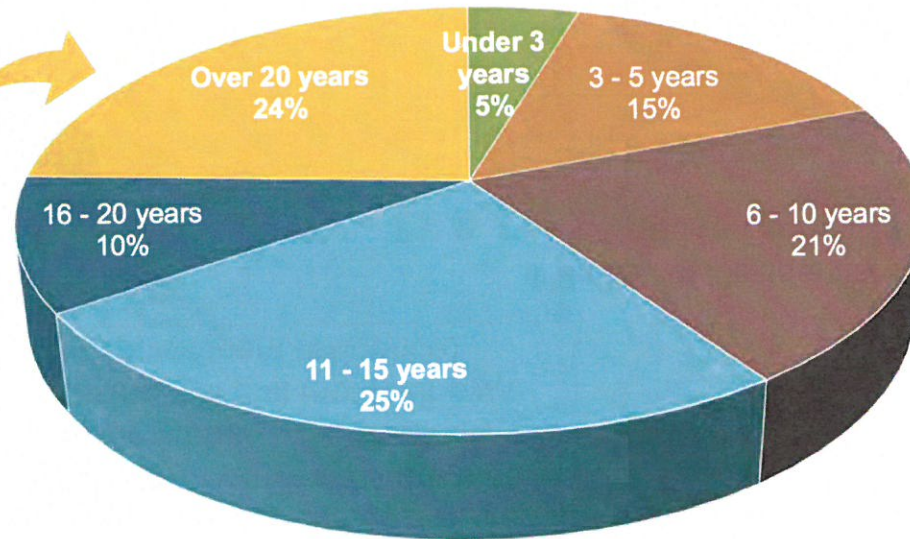


The majority of investment units are held for short-term rental or second/vacation homes.

Base: Total Investors (n=128)

Characteristics of the Sample: Profile of investors (cont.)

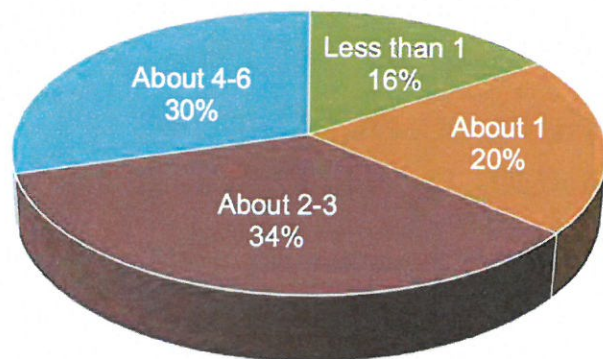
Approximately one-fourth
of all investors have
owned property in Big
Sky for over 20 years.



Years Owned Property in Big Sky

Base: Total Investors (n=128)

Characteristics of the Sample: Profile of investors (cont.)



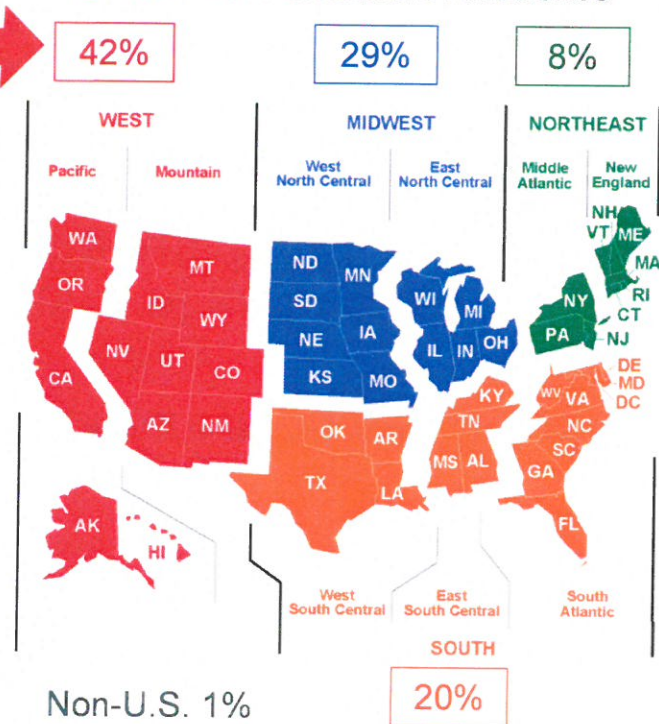
Average Months/Year in Big Sky
(Over 6 months treated as 'resident' for the analysis)

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.

Base: Total Investors (n=128)

Location of Permanent Residence



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?