



City of
Kelowna

2018 Citizen Survey

PREPARED FOR THE CITY OF KELOWNA BY:
Ipsos Public Affairs

FINAL REPORT

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INTRODUCTION

Background and Objectives

This report presents the findings of the City of Kelowna's 2018 Citizen Survey. The Citizen Survey is conducted to gauge public satisfaction with municipal programs and services and to gain insight into citizens' service priorities. Ipsos has conducted Citizen Surveys for the City in 2018, 2017, 2015, and 2012.

Specific research objectives for the 2018 Citizen Survey included:

- Identify important community issues
- Assess perceptions of Kelowna's quality of life
- Measure the importance of and satisfaction with municipal services and infrastructure
- Determine the perceived value for taxes and preferred funding options
- Identify priorities for investment
- Measure contact with the City and satisfaction with the City's customer service
- Assess perceptions of community safety

Insight gained by this research will help the City make important decisions regarding planning, budgeting, and community priorities.

Methodology

Ipsos conducted a total of 300 telephone interviews with a randomly selected representative sample of Kelowna residents aged 18 years or older, broken out by FSA (first three postal code digits) as follows: V1W (n76), V1Y (n76), V1V (n72), V1X/V1P (n76).

A dual frame cellphone/landline sampling methodology was used, with the final sample split 62% cellphones and 38% landlines. A screening question was included at the start of the survey to confirm residency in Kelowna.

All interviews were conducted between November 5 and 18, 2018.

Overall results are accurate to within $\pm 5.7\%$, 19 times out of 20. The margin of error will be larger for sample subgroups.

The final data has been weighted to ensure that the gender/age and neighbourhood distribution reflects that of the actual population in Kelowna according to 2016 Census data.

Tracking to Previous Surveys

Where appropriate, this year's results have been compared to the City of Kelowna's past Citizen Surveys. Comparing the year-over-year results allows the City to understand how citizens' attitudes and priorities are changing, identify new or emerging issues facing the community, and monitor perceptions of the City's performance in key areas.

Arrows (\updownarrow) are used to denote any significant differences between 2018 and 2017.

Normative Comparisons

Where appropriate, this year's results have been compared to Ipsos' database of municipal norms. These norms are based on research Ipsos has conducted in other British Columbian municipalities within the past five years. Normative comparisons provide additional insight, context, and benchmarks against which the City of Kelowna can evaluate its performance.

Interpreting and Viewing the Results

Some totals in the report may not add to 100%. Some summary statistics (e.g., total satisfied) may not match their component parts. The numbers are correct and the apparent errors are due to rounding.

Analysis of some of the statistically significant results is included where applicable. While a number of significant differences may appear in the cross-tabulation output, not all differences warrant discussion.

Neighbourhood Comparisons

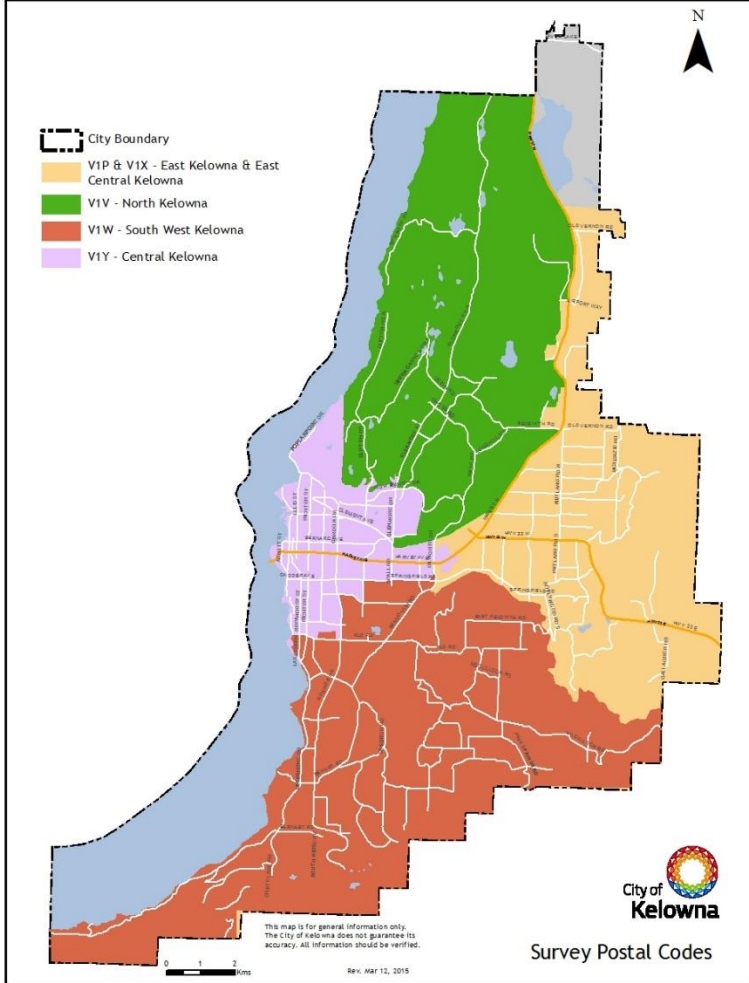
For the purposes of this research study, neighbourhoods are defined by FSA (first three postal code digits) as follows:

- V1W – South West Kelowna (includes Lakeshore south of KLO, Guisachan, Benvoulin, Hall Road, Southeast Kelowna, North Okanagan Mission, South Okanagan Mission)
- V1Y – Central Kelowna (includes Downtown, North End, South Glenmore, Orchard Park, KGH, Okanagan College, Pandosy north of KLO)
- V1V – North Kelowna (includes Clifton, Glenmore Valley, Dilworth, McKinley, Quail Ridge, Sexsmith)
- V1X/V1P – East Central Kelowna/East Kelowna (includes Hwy 97 North, Rutland, Toovey, Belgo, Black Mountain, Rutland Bench)

A map of these neighbourhoods can be found on the following page.

INTRODUCTION

FSA Zones



EXECUTIVE SUMMARY

Executive Summary

QUALITY OF LIFE

Citizens identify a variety of qualities and characteristics that make a city a good place to live, with the top open-ended responses being “low crime rate/safe” (16%), “good recreational facilities/opportunities/activities” (12%), “good amenities/services” (12%), and “convenient location/accessible to everything” (11%). This year’s results are not significantly different from 2017.

Overall perceptions of quality of life remain favourable. Nearly all (94%) citizens rate Kelowna’s overall quality of life as ‘very good’ or ‘good’, on par with 2017.

However, perceptions of the direction that quality of life is taking continue to deteriorate. While a plurality (42%) of residents say the quality of life in Kelowna has ‘stayed the same’ in the past three years, 36% say it has ‘worsened’ compared to just 21% saying ‘improved’, resulting in a net momentum score of -15 percentage points. This is the second consecutive year that quality of life has had negative momentum (down 4 percentage points from 2017) and represents a new low since the City began tracking this measure in 2012.

- Residents who think the quality of life has ‘improved’ attribute this to a number of different factors, with the top responses (coded open-ends) being “better/more amenities and services” (13%) and “City governance (Council/Administration)” (10%). While improved amenities and services were also among the top mentions in 2017, mentions of City governance are new this year.
- Residents who think the quality of life has ‘worsened’ point to (coded open-ends) “traffic congestion” (21%), as well as “increased poverty/homelessness” (16%), “safety concerns” (14%), “rising cost of living” (14%), and “level/pace of growth and development” (10%). While many of these same themes were also mentioned in 2017, “safety concerns” are up 11 percentage points this year.

Executive Summary

ISSUE AGENDA

Social issues (51%) and transportation (43%) continue to dominate the public issue agenda. Mentions of social issues have increased for the second consecutive year (up 11 percentage points from 2017). Transportation mentions this year remain on par with 2017.

- Social issues primarily consists of responses (coded open-ends) related to “poverty/homelessness” (34%), followed by “housing/affordable housing” (14%). Another 8% mention “drugs” while 3% mention “other social issues”.
- The most often cited transportation issue is “traffic congestion” (21%), followed by “condition of roads/highways” (7%), “transportation (general)” (5%), and “public transportation” (5%), among others.

COMMUNITY SAFETY

While crime places far below social issues and transportation on the public issue agenda, crime-related mentions are up this year. In total, 11% of citizens identify crime as an important community issue on an open-ended basis, making it the third most commonly cited issue overall. Crime-related mentions have increased 7 percentage points from 2017.

Kelowna continues to be seen as a safe community although perceptions have gradually declined over the past several years. Overall, 87% of residents say Kelowna is a safe community. While on par with 2017, overall perceptions of community safety are 7 percentage points lower than what was reported in 2015.

Moreover, perceptions of the direction that community safety is taking have deteriorated for the second consecutive year. When asked how community safety has changed over the past three years, 48% of citizens say ‘worsened’, 39% say ‘stayed the same’, and 11% say ‘improved’. Overall, this yields a net momentum score of -37 points (down 11 percentage points from 2017).

- Among those saying community safety has ‘worsened’, one-third (33%) point to “more homelessness/poverty” (coded open-ended responses). Other responses include “drugs” (16%), “break-ins/theft” (14%), and “increase in crime” (11%).

Executive Summary

CITY SERVICES AND INFRASTRUCTURE

Overall satisfaction with City services remains high although has gradually declined over the past several years. A strong majority (87%) of residents say they are satisfied with the overall level and quality of services provided by the City of Kelowna. While on par with 2017, overall satisfaction is 7 percentage points lower than what was reported in 2015.

Satisfaction extends to the delivery of specific services with the exception of traffic flow management. Of the 12 tested services, 9 receive a satisfaction score higher than 75%, with the highest rating going to fire services (97% satisfied). In comparison, city growth management (64%) and public transit (59%) score lower, although a majority of citizens still say they are satisfied with both of these services. Residents are considerably less likely to say they are satisfied with traffic flow management (36%). Rather, the majority (64%) say they are dissatisfied with this service, including one-quarter (24%) saying 'not at all satisfied'. Satisfaction with most services is consistent with 2017. The one exception is community cleanliness, which is down 10 percentage points this year.

All of the tested services are important to citizens. Importance scores range from a high of 100% for fire services to a low of 65% for public transit. Compared to 2017, the importance of City-operated recreational and cultural facilities and programs has increased (up 6 percentage points) while the importance of City growth management has decreased (down 6 percentage points).

Analyzing the perceived value (importance) versus performance (satisfaction) of each individual service helps identify the City's perceived strengths and areas for improvement. This year, the City has five **primary strengths** (fire, police, drinking water quality, community cleanliness, snow removal) and three **secondary strengths** (parks and sports fields, recreational and cultural facilities and programs, bike lanes and pedestrian sidewalks). The City's one **primary area for improvement** is traffic flow management; **secondary areas for improvement** are City growth management and public transit. Road maintenance is a borderline strength/weakness.

Perceptions of City inclusiveness and acceptance are favourable. In total, 90% of citizens agree that the City's municipal government fosters a city that is inclusive and accepting of all through its services and programs. Tracking data is unavailable for this question.

Executive Summary

FINANCIAL PLANNING

Perceptions of the City's value for taxes remain high. Overall, 79% of residents say they receive good value for their municipal tax dollars, statistically consistent with 2017.

Citizens continue to prefer tax increases over service reductions. When given a choice between increased taxes or service reductions, 55% choose increased taxes compared to 33% opting for service reductions. Overall, this year's results are statistically consistent with 2017. However, with slightly fewer saying increase taxes and slightly more saying cut services, the gap separating the two options has narrowed although is still in line with the past 6 year average.

PRIORITY SETTING

Residents continue to prioritize 'renewing existing infrastructure' (58%) over 'building new infrastructure' (40%). However, with four-in-ten residents prioritizing new infrastructure, there is clearly some interest in the City also investing in building new infrastructure. This year's results are similar to 2017.

Paired Choice Analysis shows that citizens' number one priority for investment over the next four years is addressing social issues such as homelessness, mental health, and addiction. Overall, addressing social issues is chosen 78% of the time when presented alongside other tested priorities. The emphasis placed on social issues is consistent with residents' most important community issues. Other priorities include traffic flow management (68%), drinking water (64%), encouraging a diverse supply of housing options at different price points (62%), police services (56%), road maintenance (56%), and fire services (52%). Of the 16 tested priorities, citizens' lowest priority for investment is preservation of historic places (24%).

Executive Summary

CUSTOMER SERVICE

Just under one-half (49%) of citizens say they personally contacted or dealt with the City of Kelowna or one of its employees in the last 12 months. Claimed contact with the City is on par with 2017. Among those saying they contacted the City in the last 12 months, the two most common contact methods (coded open-ends) are “in-person” (40%) and “telephone” (38%). These were also the main stated methods of contacting the City in 2017.

The City continues to provide good customer service overall. Among those who contacted the City in the last 12 months, 76% say they are satisfied with the overall service received, on par with 2017. One-quarter (24%) report being dissatisfied, including 16% saying ‘not at all satisfied’. Satisfaction extends to the six tested customer service elements, including staff’s courteousness (89%), staff’s helpfulness (83%), staff’s knowledge (83%), the ease of reaching staff (82%), the speed and timeliness of service (79%), and staff’s ability to resolve issues (78%).

Key Takeaways

- Overall, citizens continue to demonstrate mostly positive views of the community and City although slightly lower than previous years.
- While perceptions of overall quality of life remain high, there is growing negative momentum to the direction that quality of life is taking. A number of factors are driving perceptions of a worsening quality of life, including traffic congestion, poverty/homelessness, safety, the cost of living, and the level and pace of growth and development.
- Social issues are a growing concern and continue to top the public issue agenda. Poverty/homelessness is the most commonly cited social issue, and addressing social issues such as homelessness, mental health, and addiction is citizens' leading priority for municipal investment over the next four years. Housing affordability and supply is also emphasized.
- Transportation issues persist. Traffic congestion and flow consistently surfaces as the area most in need of improvement.
- While Kelowna continues to be seen as a safe community overall, crime is a growing top-of-mind issue and residents feel less safe now as compared to three years ago. Homelessness/poverty is the main driver behind perceptions of worsening community safety.
- Overall satisfaction with City services remains high although has been gradually trending downward over the past several years. While satisfaction with community cleanliness has dropped, it continues to be one of the City's primary strengths .
- Key financial metrics hold steady. Residents continue to say they receive good value for their taxes, and prefer tax increases over service reductions; however, the gap separating the two options has narrowed.
- Overall, residents prioritize renewing existing infrastructure over building new infrastructure although there is appetite for both.
- The City continues to provide good customer service overall, with staff's courteousness standing out as a service highlight. However, there is still room for improvement, with one-quarter of those who contacted the City in the last 12 months saying they are dissatisfied with the service received.

QUALITY OF LIFE

Qualities or Characteristics that Make a City a Good Place to Live

(Coded Open-Ends, Multiple Responses Allowed)

Citizens identify a variety of qualities and characteristics that make a city a good place to live, with the top open-ended responses being “low crime rate/safe” (16%), “good recreational facilities/opportunities/activities” (12%), “good amenities/services” (12%), and “convenient location/accessible to everything” (11%).

- This year’s results are not significantly different from 2017.

Analysis by Demographic Subgroup

Analysis by demographic subgroup shows some significant differences – highlights include:

- Mentions of “low crime rate/safe” are higher among those living in South West Kelowna (23% vs. 9% in Central Kelowna, 15% in East Central Kelowna/East Kelowna, 16% in North Kelowna) and those with household incomes of \$100k+ (24% vs. 10% of <\$60k, 12% of \$60k-<\$100k).
- Mentions of “good recreational facilities/opportunities/activities” are higher among those living in South West Kelowna and North Kelowna (both 17% vs. 6% in Central Kelowna, 8% in East Central Kelowna/East Kelowna) and those with household incomes of \$100k+ (17% vs. 6% of <\$60k, 12% of \$60k-<\$100k).
- Mentions of “good amenities/services” are higher among those who are 35-54 years of age (19% vs. 8% of 18-34 years, 8% of 55+ years).

Qualities or Characteristics that Make a City a Good Place to Live

(Coded Open-Ends, Multiple Responses Allowed)



Main mentions only

2017 Top Mentions (n=300)	
Good recreational facilities/opportunities/activities	14%
Low crime rate/safe	14%
Convenient location/accessible to everything	12%
Employment/job opportunities (incl. well paying jobs)	11%
Good weather/climate	11%

Q2. There are a number of reasons why people choose to live in one city or area over another. Assuming family and weather are not factors, what qualities or characteristics make a city a good place to live? That is, what qualities or characteristics would you use to describe your ideal city? Anything else?

Base: All respondents (n=300)

Overall Quality of Life

Overall perceptions of quality of life remain favourable, with 94% of citizens rating Kelowna's quality of life as 'very good' (36%) or 'good' (58%).

- Analysis of year-over-year tracking data shows that residents have consistently rated the quality of life in Kelowna highly and this year's results are on par with 2017.
- Overall perceptions (combined 'very good/good' responses) of quality of life in Kelowna are on par with the municipal norm. However, the intensity of ratings ('very good') is lower in Kelowna (36% vs. 47% norm).

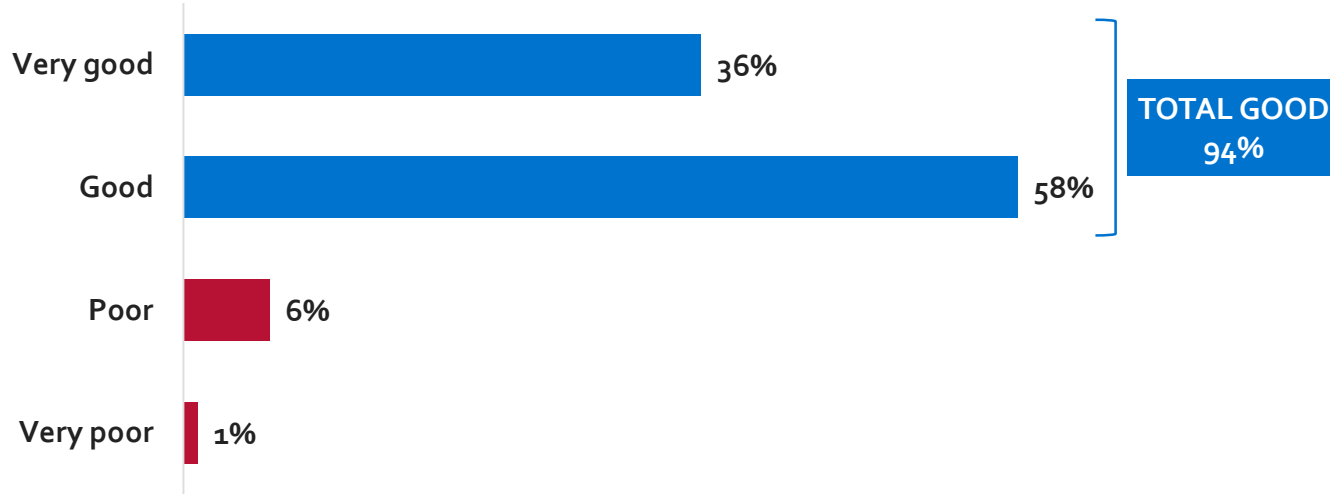
Analysis by Demographic Subgroup

Overall perceptions (combined 'very good/good' responses) of quality of life are high across all key demographic subgroups.

However, those living in South West Kelowna and North Kelowna are more likely to rate the quality of life as 'very good' (49% and 45% vs. 26% in East Central Kelowna/East Kelowna, 27% in Central Kelowna).

QUALITY OF LIFE

Overall Quality of Life



	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	NORM
TOTAL GOOD	96%	95%	94%	94%	97%
Very Good	36%	40%	40%	36%	47%

Change in Quality of Life Past Three Years

A plurality (42%) of residents say the quality of life in Kelowna has 'stayed the same' in the past three years. Among those saying the quality of life has changed, more say the quality of life has 'worsened' (36%) than 'improved' (21%), resulting in a net momentum score of -15 percentage points.

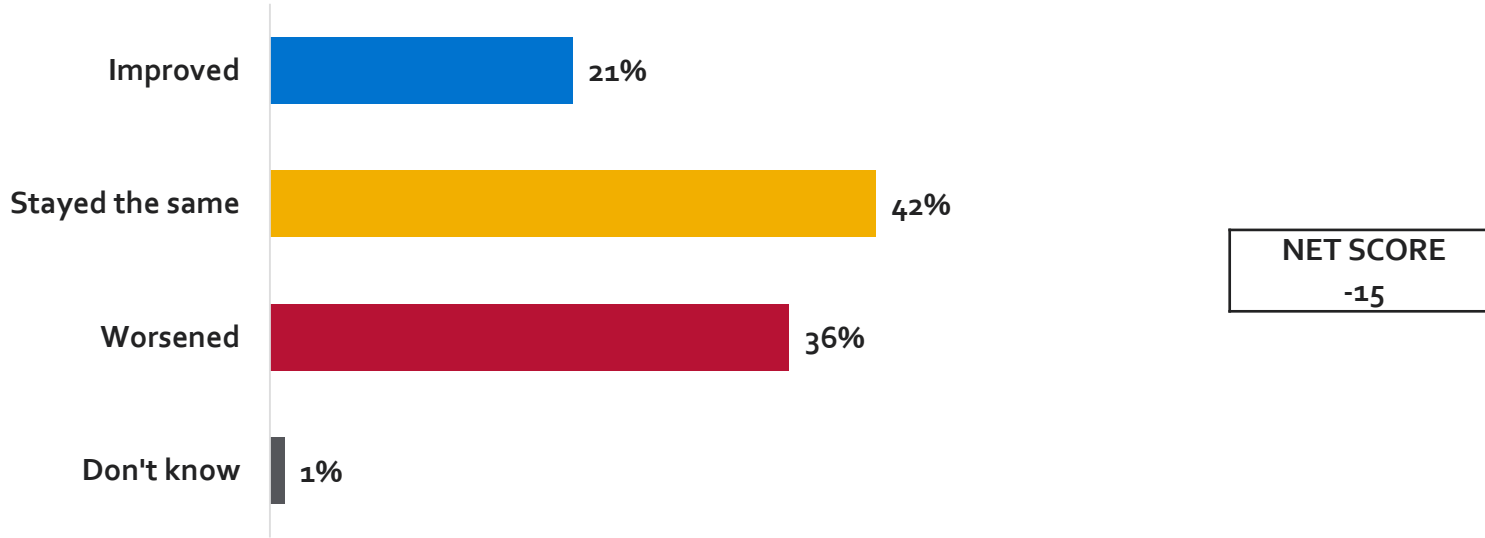
- This year's net score is down 4 percentage points from 2017. While this change is not statistically significant, it shows a continued pattern of deteriorating quality of life for the second consecutive year and represents a new low since the City began tracking this measure in 2012.
- These results are different from the municipal norm, where residents tend to take a more balanced view towards the direction quality of life is taking (net score of -15 points in Kelowna vs. +2 points norm).

Analysis by Demographic Subgroup

Younger residents are more likely to say the quality of life has 'improved' (30% of 18-34 years vs. 16% of 55+ years, 18% of 35-54 years).

Conversely, perceptions of a 'worsened' quality of life are higher among those who have lived in Kelowna for more than 15 years (42% vs. 30% of those who have lived in the area for 15 years or less).

Change in Quality of Life Past Three Years



	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	NORM
NET SCORE	-5	+12	-11	-15	+2

Q4. And, do you feel that the quality of life in the City of Kelowna in the past three years has improved, stayed the same, or worsened?

Base: All respondents (n=300)

Reasons Quality of Life has Improved/Worsened

(Among those saying the quality of life has improved/worsened) (Coded Open-Ends)

Reasons Quality of Life has Improved

Residents who think the quality of life has 'improved' attribute this to a number of different factors, with the top responses (coded open-ends) being "better/more amenities and services" (13%) and "City governance (Council/Administration)" (10%).

- While improved amenities and services were also among the top mentions in 2017, mentions of City governance are new this year.

Reasons Quality of Life has Worsened

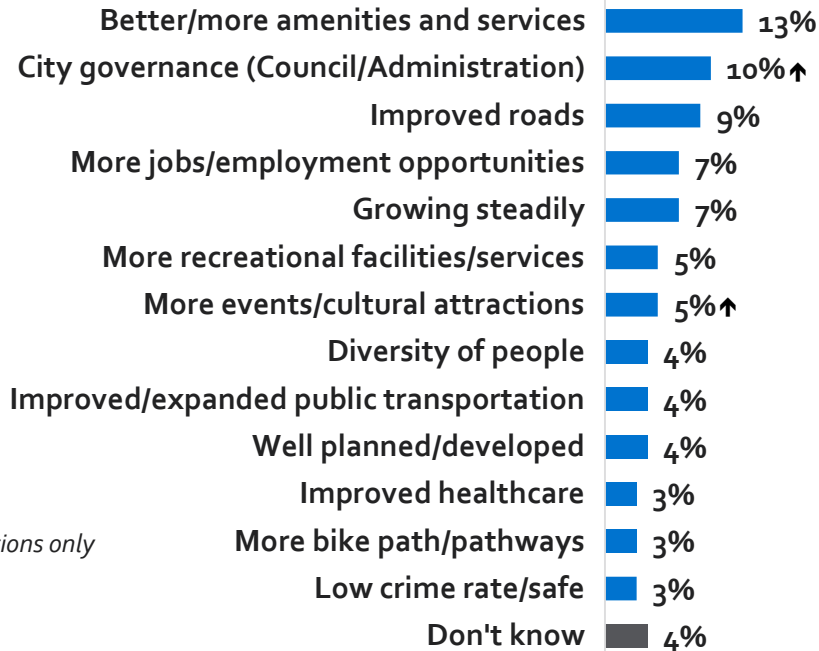
Residents who think the quality of life has 'worsened' point to (coded open-ends) "traffic congestion" (21%), as well as "increased poverty/homelessness" (16%), "safety concerns" (14%), "rising cost of living" (14%), and "level/pace of growth and development" (10%).

- While many of these same themes were also mentioned in 2017, "safety concerns" are up 11 percentage points this year.
- There has also been a 7-point increase in mentions regarding the "level/pace of growth and development"; however, this is offset by a 10-point drop in mentions of "too crowded/busy".
- Drug-related mentions are also down 11 points this year.

QUALITY OF LIFE

Reasons Quality of Life has Improved

(Among those saying the quality of life has improved) (Coded Open-Ends)

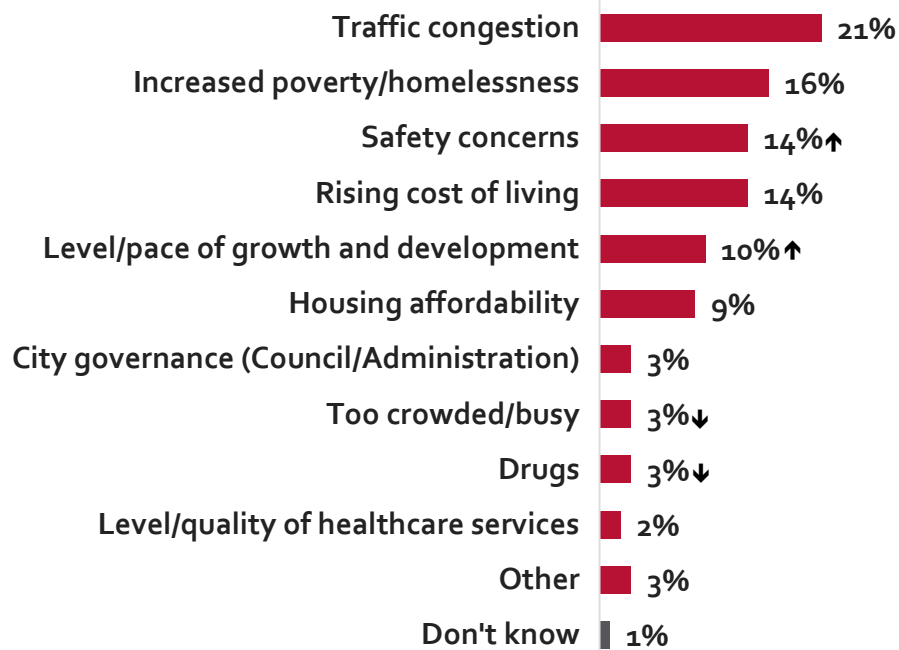


Main mentions only

2017 Top Mentions (n=65)	
Improved roads	11%
Better/more amenities and services	10%
More bike paths/pathways	8%
More businesses	6%
Growing steadily	6%
Improved economy	6%

Reasons Quality of Life has Worsened

(Among those saying the quality of life has worsened) (Coded Open-Ends)



2017 Top Mentions (n=97)	
Rising cost of living	18%
Traffic congestion	14%
Drugs	14%
Too crowded/busy	13%
Housing affordability	12%
Increased poverty/homelessness	11%

ISSUE AGENDA

Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)

Social issues (51%) and **transportation** (43%) continue to dominate the public issue agenda.

- Social issues primarily consists of responses (coded open-ends) related to “poverty/homelessness” (34%), followed by “housing/affordable housing” (14%). Another 8% mention “drugs” while 3% mention “other social issues”.
 - Mentions of social issues have increased for the second consecutive year (up 11 percentage points from 2017).
 - Mentions of social issues in Kelowna (51%) are also significantly higher than the municipal norm (16%).
- Transportation includes responses (coded open-ends) of “traffic congestion” (21%), “condition of roads/highways” (7%), “transportation (general)” (5%), “public transportation” (5%), “parking” (3%), “safety of streets (including speeding)” (2%), “bicycle paths/lanes” (1%), and “other transportation issues” (2%).
 - Transportation mentions this year are on par with 2017.
 - Mentions of transportation in Kelowna (43%) continue to be higher than the municipal norm (34%).

Analysis by Demographic Subgroup

Mentions of **social issues** are higher among those living in Central Kelowna (59% vs. 41% in South West Kelowna, 51% in East Central Kelowna/East Kelowna, 53% in North Kelowna) and women (57% vs. 44% of men). Mentions do not significantly vary by household income (51% of <\$60k, 51% of \$60k-<\$100k, 53% of \$100k+).

Transportation-related mentions are statistically consistent across all key demographic subgroups.

Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)

In comparison to social and transportation, all other issues are deemed a distant second in priority. Of these, the leading second-tier issues are **crime** (11%) and **growth and development** (10%).

- Crime is primarily comprised of responses (coded open-ends) related to “crime (general)” (10%). Other mentions include “policing/law enforcement” (1%) and “other crime mentions” (1%).
 - Crime-related mentions are up 7 percentage points this year.
 - However, mentions of crime in Kelowna are still on par with the municipal norm.
- Growth and development includes responses (coded open-ends) of “growth and development (general)” (6%), “too many high rises” (2%), “downtown development/planning” (2%), and “other growth and development issues” (1%).
 - Mentions of growth and development this year are on par with both 2017 and the municipal norm.

All other issues are mentioned by fewer than 10% of residents.

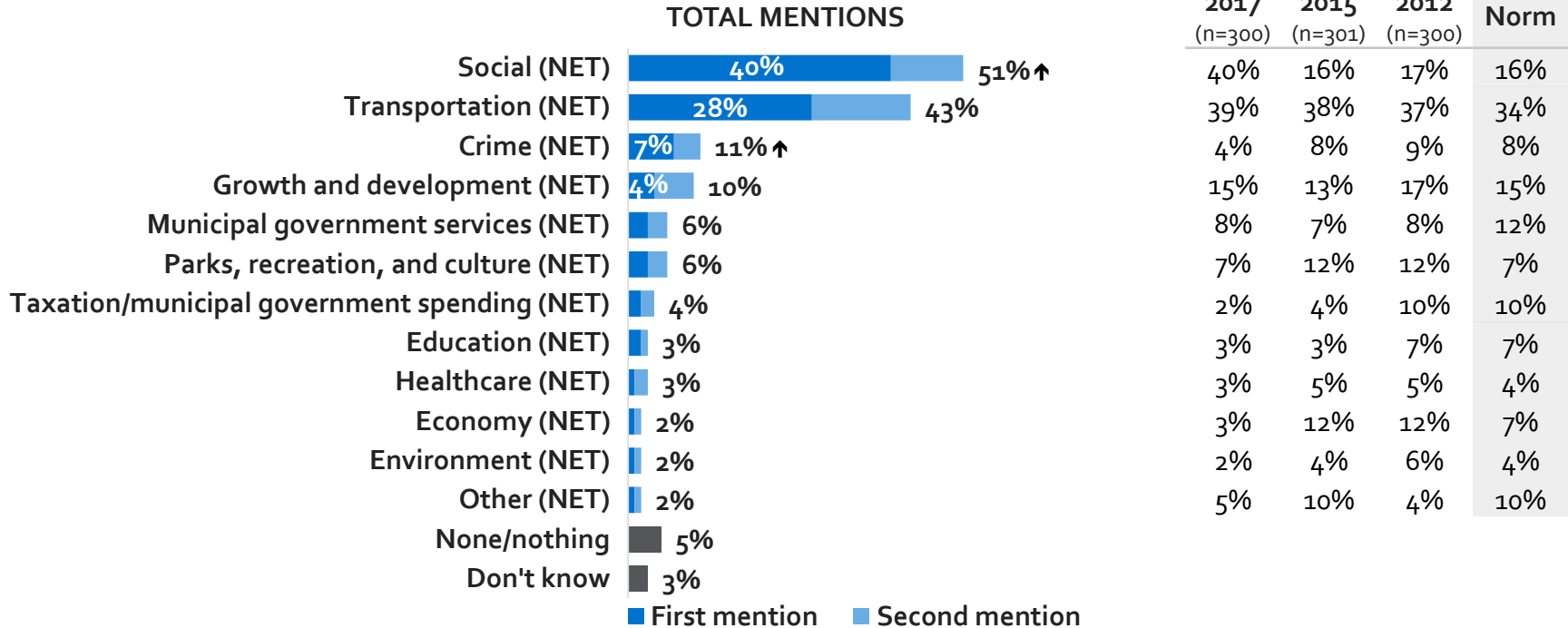
Analysis by Demographic Subgroup

Crime-related mentions are statistically consistent across all key demographic subgroups.

Mentions of **growth and development** are higher among those living in North Kelowna and East Central Kelowna/East Kelowna (16% and 13% vs. 3% in South West Kelowna, 11% in Central Kelowna). No other significant demographic differences are noted.

Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)



Q1. In your view, as a resident of the City of Kelowna, what is the most important issue facing your community, that is the one issue you feel should receive the greatest attention from local leaders? Are there any other important local issues?

Base: All respondents (n=300)

COMMUNITY SAFETY

Overall Community Safety

A strong majority (87%) of residents continue to describe Kelowna as a safe community, including 24% saying 'very safe' and 62% saying 'somewhat safe'

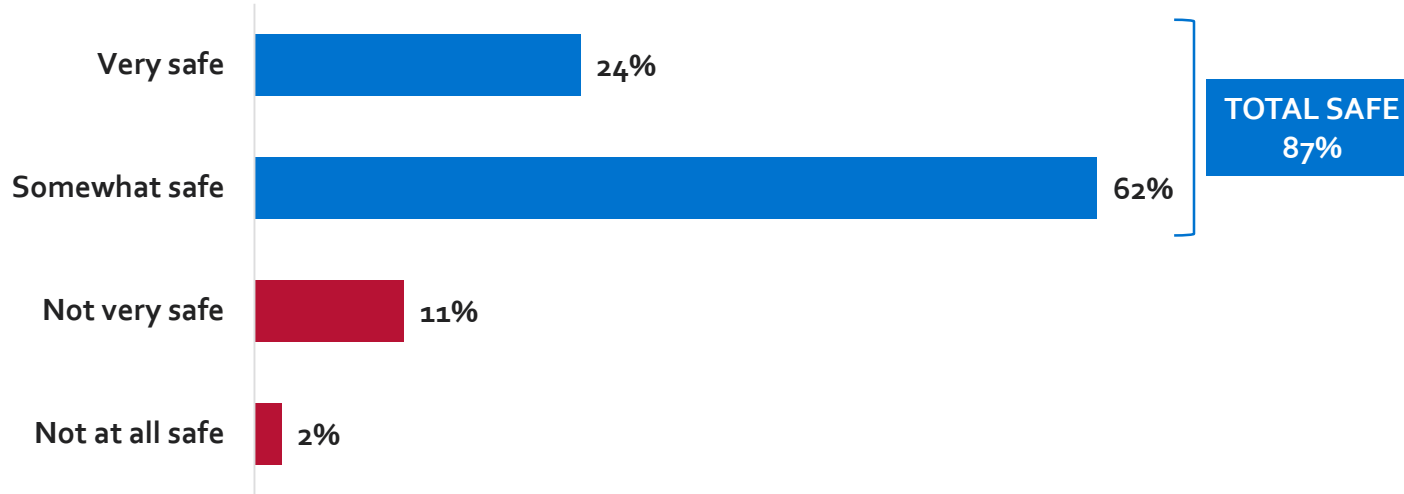
- While this year's results are on par with 2017, overall perceptions of community safety (combined 'very/somewhat safe' responses) have been gradually declining over the past few years and are now 7 percentage points lower than 2015.
- Moreover, perceptions of community safety this year are also lower than the municipal norm (87% in Kelowna vs. 93% norm).

Analysis by Demographic Subgroup

Overall perceptions (combined 'very/somewhat safe' responses) of community safety are consistent across all key demographic subgroups.

However, there are significant differences in the intensity of ratings, with older residents the most likely to describe Kelowna as 'very safe' (31% of 55+ years vs. 13% of 18-34 years, 25% of 35-54 years).

Overall Community Safety



	2015 (n=301)	2017 (n=300)	2018 (n=300)	NORM
TOTAL SAFE	94%	90%	87%	93%
Very Safe	32%	29%	24%	31%

Q17. Overall, would you describe the City of Kelowna as a very safe, somewhat safe, not very safe, or not at all safe community?

Base: All respondents (n=300)

Change in Community Safety Past Three Years

Nearly one-half (48%) of citizens say community safety in Kelowna has 'worsened' over the past three years. Another 39% say it has 'stayed the same'. Very few (11%) say community safety has 'improved'. Overall, these results yield a net momentum score of -37 points.

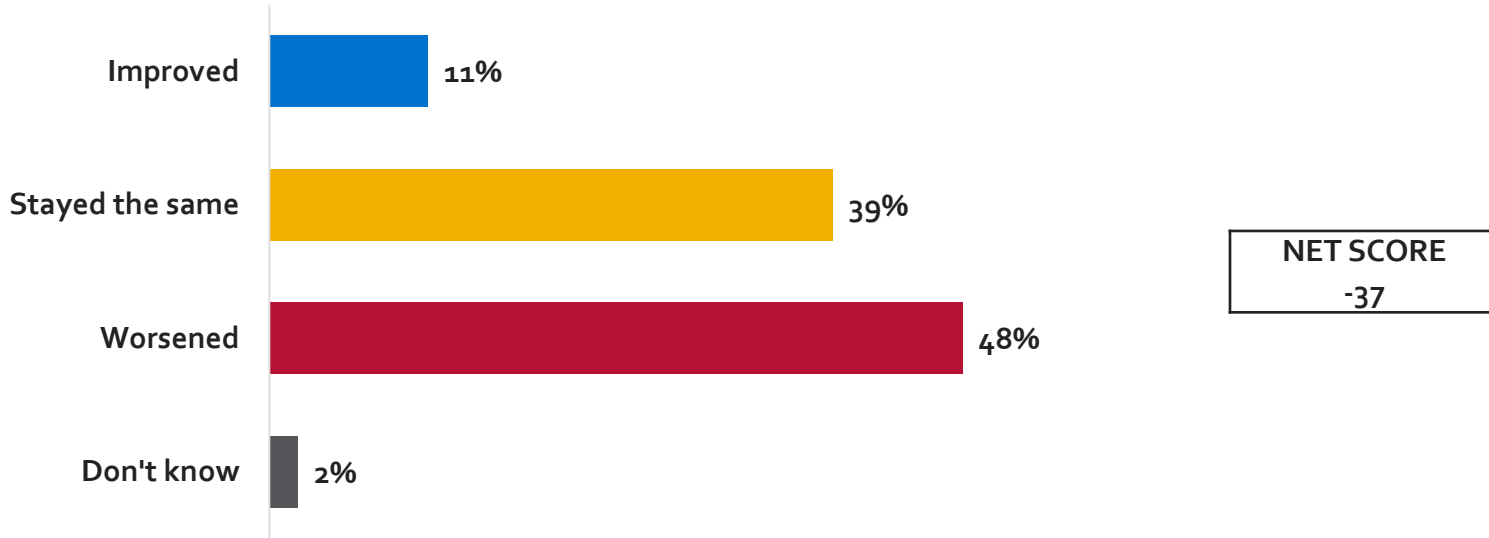
- Perceptions of the direction community safety is taking are down for the second consecutive year. This year's net score is 11 percentage points lower than 2017.
- Normative comparisons are unavailable for this question.

Analysis by Demographic Subgroup

Perceptions of 'improved' community safety are higher among those living in East Central Kelowna/East Kelowna (19% vs. 5% in South West Kelowna, 6% in North Kelowna, 12% in Central Kelowna) and men (16% vs. 7% of women).

Perceptions of 'worsened' community safety are higher among those living in households with children under the age of 18 (58% vs. 44% of those without children at home).

Change in Community Safety Past Three Years



	2015 (n=301)	2017 (n=300)	2018 (n=300)
NET SCORE	+2	-26	-37↓

Q18. Do you feel community safety in Kelowna has improved, stayed the same, or worsened over the past three years?

Base: All respondents (n=300)

Reasons Community Safety has Improved/Worsened

(Among those saying community safety has improved/worsened) (Coded Open-Ends)

Reasons Community Safety has Improved

Among those saying community safety has 'improved', 27% attribute this to "more policing/law enforcement" (coded open-ended responses). However, these results should be interpreted with caution due to small sample sizes (n<50).

- This is consistent with 2017.

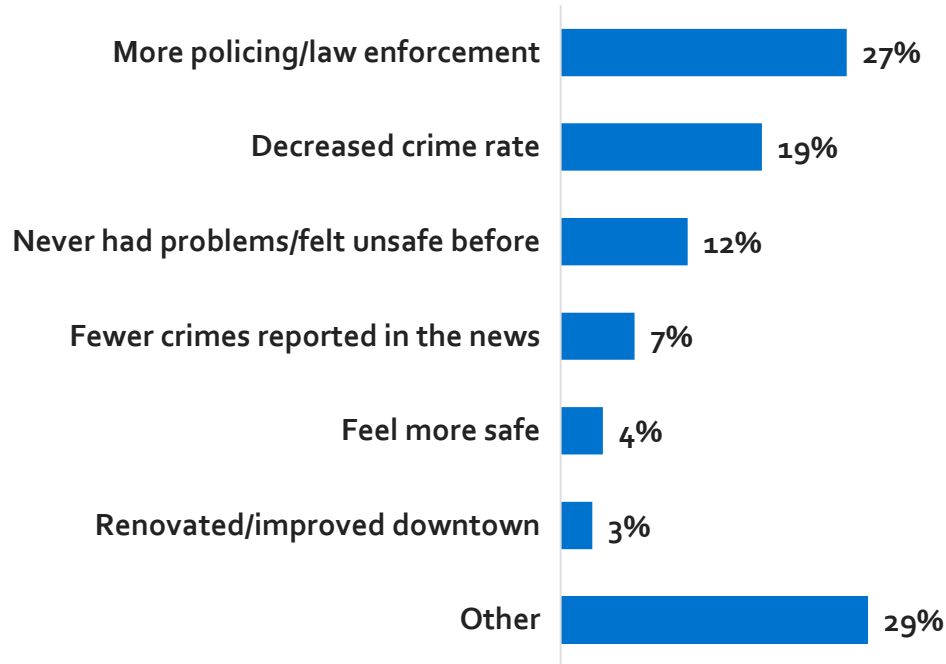
Reasons Community Safety has Worsened

Among those saying community safety has 'worsened', one-third (33%) point to "more homelessness/poverty" (coded open-ended responses). Other responses include "drugs" (16%), "break-ins/theft" (14%), and "increase in crime" (11%).

- These were also the top mentions in 2017.

Reasons Community Safety has Improved

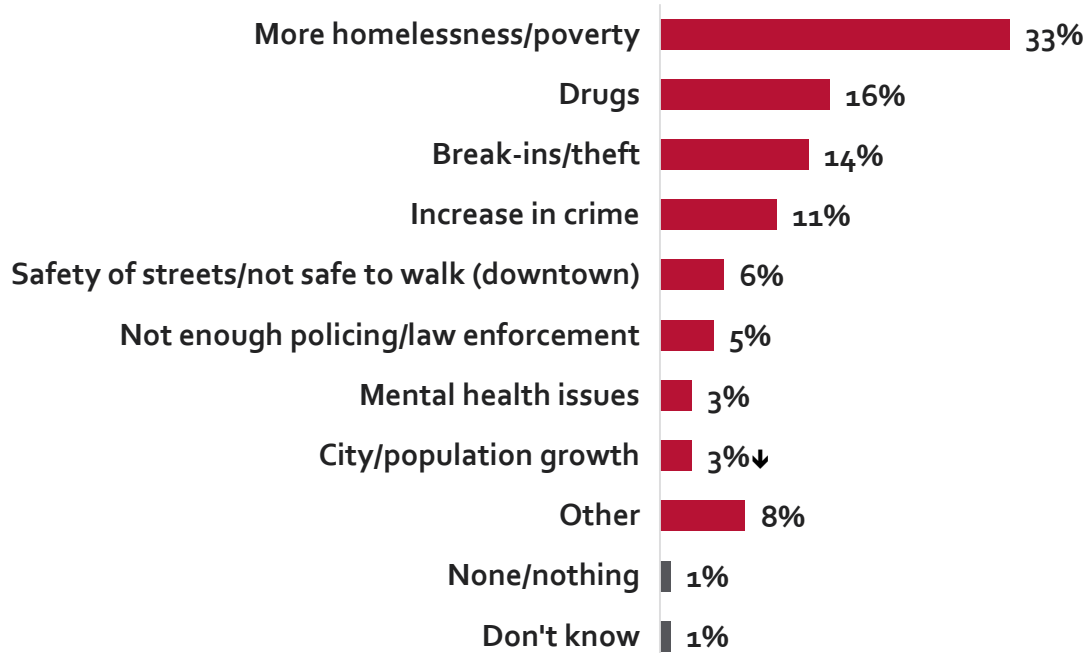
(Among those saying community safety has improved) (Coded Open-Ends)



2017 Top Mentions (n=31)	
More policing/law enforcement	32%
Feel more safe	16%
Decreased crime rate	13%
Renovated/improved downtown	12%

Reasons Community Safety has Worsened

(Among those saying community safety has worsened) (Coded Open-Ends)



2017 Top Mentions	
(n=111)	
More homelessness/poverty	24%
Drugs	17%
Break-ins/theft	15%
Increase in crime	13%
City/population growth	11%

CITY SERVICES AND INFRASTRUCTURE

Overall Satisfaction with City Services

A strong majority (87%) of residents continue to say they are satisfied (23% 'very satisfied', 64% 'somewhat satisfied') with the overall level and quality of services provided by the City of Kelowna.

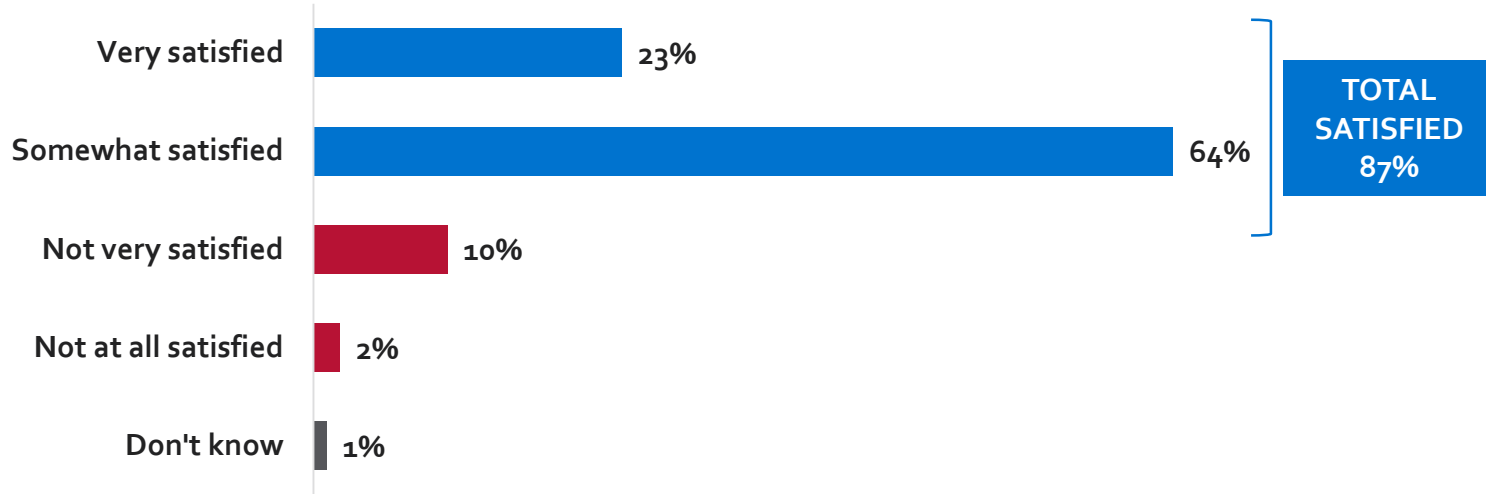
- While this year's results are on par with 2017, overall satisfaction (combined 'very/somewhat satisfied' responses) has been gradually declining over the past few years and is now 7 percentage points lower than 2015.
- Moreover, satisfaction with City services this year is also lower than the municipal norm (87% in Kelowna vs. 93% norm).

Analysis by Demographic Subgroup

Overall satisfaction (combined 'very/somewhat satisfied' responses) is higher among those living in North Kelowna and South West Kelowna (94% and 93% vs. 77% in Central Kelowna, 86% in East Central Kelowna/ East Kelowna) and older residents (92% of 55+ years vs. 80% of 18-34 years, 87% of 35-54 years).

Those living in North Kelowna are also more likely to say they are 'very satisfied' (38% vs. 16% in East Central Kelowna/East Kelowna, 22% in Central Kelowna, 24% in South West Kelowna).

Overall Satisfaction with City Services



	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	NORM
TOTAL SATISFIED	94%	94%	90%	87%	93%
Very Satisfied	23%	29%	26%	23%	34%

Satisfaction with Specific City Services

Satisfaction extends to the delivery of specific services. Of the tested services, citizens are the most satisfied (combined 'very/somewhat satisfied' responses) with **fire services** (97%, including 80% saying 'very satisfied').

Strong satisfaction ratings are also seen for:

- **Parks and sports fields** (91%)
- **City-operated recreational and cultural facilities and programs** (90%)
- **Drinking water quality** (87%)
- **Police services** (87%)
- **Community cleanliness** (82%)
- **Bike lanes and pedestrian sidewalks** (80%)
- **Snow removal** (79%)
- **Road maintenance** (77%)

In comparison, **city growth management** (64%) and **public transit** (59%) score lower, although a majority of citizens still say they are satisfied with both of these services.

Residents are considerably less likely to say they are satisfied with **traffic flow management** (36%). Rather, the majority (64%) say they are dissatisfied with this service, including one-quarter (24%) saying 'not at all satisfied'.

Satisfaction with Specific City Services

Satisfaction with most services is consistent with 2017. The one exception is **community cleanliness**, which is down 10 percentage points this year.

Satisfaction with most services is also consistent with the municipal norm although there are some notable exceptions. Specifically, Kelowna residents are *more* satisfied with **snow removal** (79% vs. 71% norm) and **public transit** (59% vs. 52% norm). However, satisfaction with **police services** is *lower* in Kelowna (87% vs. 92% norm).

Analysis by Demographic Subgroup

Satisfaction with **City-operated recreational and cultural facilities and programs** is higher among older residents (93% of 55+ years vs. 83% of 18-34 years, 92% of 35-54 years).

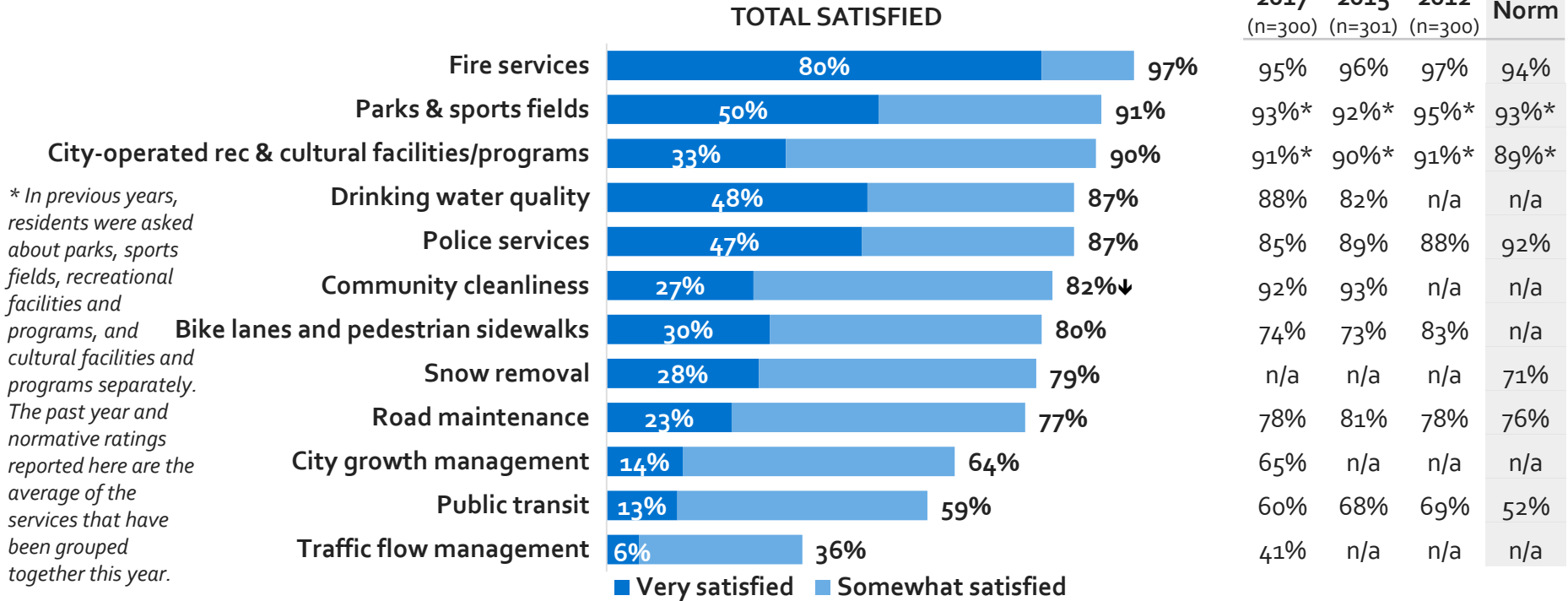
Satisfaction with **drinking water quality** is higher among those who have lived in Kelowna for more than 15 years (93% vs. 80% of those who have lived in the area for 15 years or less).

Satisfaction with **police services** is higher among those living in North Kelowna (98% vs. 82% in Central Kelowna, 84% in East Central Kelowna/East Kelowna, 87% in South West Kelowna) and older residents (93% of 55+ years vs. 81% of 18-34 years, 83% of 35-54 years).

Satisfaction with **community cleanliness** is higher among those living in North Kelowna (96% vs. 71% in East Central Kelowna/East Kelowna, 83% in Central Kelowna, 84% in South West Kelowna), older residents (87% of 55+ years vs. 76% of 35-54 years, 81% of 18-34 years), and those who have lived in Kelowna for 15 years or less (86% vs. 77% of those who have lived in the area for more than 15 years).

Satisfaction with **road maintenance** is higher among older residents (84% vs. 68% of 35-54 years, 76% of 18-34 years).

Satisfaction with Specific City Services



* In previous years, residents were asked about parks, sports fields, recreational facilities and programs, and bike lanes and pedestrian sidewalks and programs separately. The past year and normative ratings reported here are the average of the services that have been grouped together this year.

Q8. And now how satisfied are you with...? Would you say very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied?

Base: All respondents (n=300)

Importance of Specific City Services

All of the tested services are important to citizens, with 11 of the 12 services receiving an importance rating of 87% or higher (combined 'very/somewhat important' responses). Moreover, many of these services receive high 'very important' ratings.

- **Fire services** (100% important, 94% 'very important')
- **Drinking water quality** (99% important, 95% 'very important')
- **Police services** (99% important, 86% 'very important')
- **Traffic flow management** (99% important, 84% 'very important')
- **Community cleanliness** (99% important, 79% 'very important')
- **Road maintenance** (98% important, 75% 'very important')
- **Snow removal** (97% important, 72% 'very important')
- **Parks and sports fields** (92% important, 63% 'very important')
- **Bike lanes and pedestrian sidewalks** (90% important, 62% 'very important')
- **City-operated recreational and cultural facilities and programs** (90% important, 58% 'very important')
- **City growth management** (87% important, 62% 'very important')

In comparison, relatively fewer (65%) citizens say **public transit** is important, although this service is still important to nearly two-thirds of residents (including 44% saying 'very important').

Importance of Specific City Services

The importance of most services is consistent with 2017. Two notable exceptions are **City-operated recreational and cultural facilities and programs** (up 6 percentage points) and **City growth management** (down 6 percentage points). However, comparisons of the City's recreational and cultural facilities and programs should be considered directional in nature only due to changes in service wording.

The importance of most services is also consistent with the municipal norm. The one exception is **public transit**, which is rated less important in Kelowna (65% vs. 74% norm).

Analysis by Demographic Subgroup

Parks and sports fields are more important to those who are 35-54 years of age (96% vs. 88% of 55+ years, 93% of 18-34 years) and those living in households with children under the age of 18 (99% vs. 89% of those without children at home).

Bike lanes and pedestrian sidewalks are more important to those living in Central Kelowna and North Kelowna (both 96% vs. 85% in South West Kelowna, 86% in East Central Kelowna/East Kelowna).

City-operated recreational and cultural facilities and programs are more important to those living in North Kelowna (96% vs. 85% in South West Kelowna, 90% in Central Kelowna, 92% in East Central Kelowna/East Kelowna) and those with household incomes of \$60k-<\$100k (95% vs. 86% of <\$60k, 88% of \$100k+).

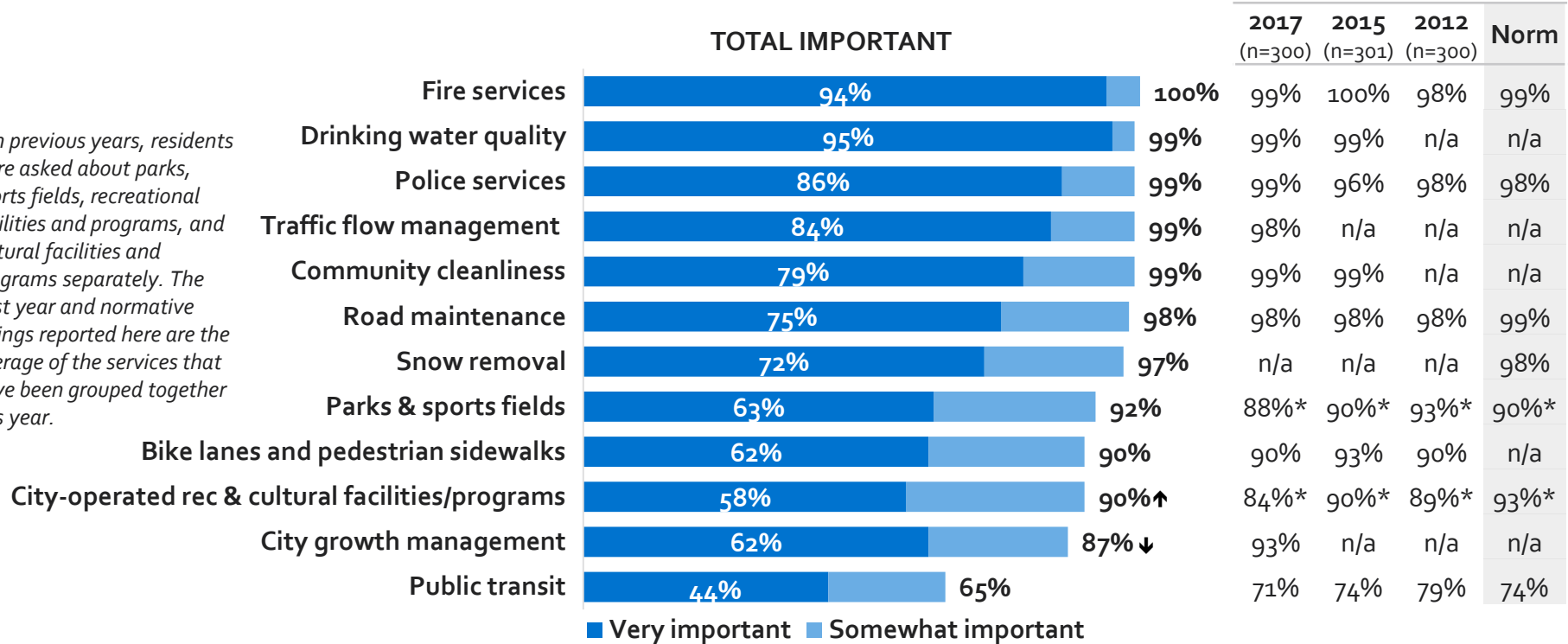
City growth management is more important to those living in North Kelowna (94% vs. 81% in East Central Kelowna/East Kelowna, 88% in Central Kelowna, 89% in South West Kelowna) and older residents (92% of 55+ years vs. 79% of 18-34 years, 89% of 35-54 years).

Public transit is more important to those with household incomes of \$60k-<\$100k (73% vs. 56% of \$100k+, 66% of <\$60k).

CITY SERVICES AND INFRASTRUCTURE

Importance of Specific City Services

* In previous years, residents were asked about parks, sports fields, recreational facilities and programs, and cultural facilities and programs separately. The past year and normative ratings reported here are the average of the services that have been grouped together this year.



Q7. How important is...to you personally on a scale of very important, somewhat important, not very important, or not at all important?

Base: All respondents (n=300)

Action Grid

An Importance versus Satisfaction Action Grid was plotted to better understand the City of Kelowna's perceived strengths and areas for improvement. This analysis simultaneously displays the perceived value (e.g., importance) of the City's services and how well the City is seen to be performing (e.g., satisfaction) in each area.

Action Grids are a relative type of analysis, meaning that services are scored relative to one another. As such, there will always be areas of strength and areas for improvement.

Individual services would fall into one of four categories:

- **Primary Strengths** represent services where the City is performing well and are of value to citizens. Efforts should be made to maintain high levels of satisfaction with these key services.
- **Primary Areas for Improvement** represent services where the City is performing relatively less well but are still of value to citizens. Delivery of these key services could be improved. They also represent the best opportunities for improving overall satisfaction with City services.
- **Secondary Strengths** represent services where the City is performing well but are of lesser value to citizens. These services can be considered as 'low maintenance'; while maintaining positive perceptions would be beneficial, they are of lower priority than other areas.
- **Secondary Areas for Improvement** represent services where the City is performing relatively less well and are also of lesser value to citizens. Depending on available resources, the City may or may not wish to make a concerted effort to improve performance in these lower priority areas. These could also be considered longer-term action items to be addressed when resources permit.

Action Grid

STRENGTHS

The City of Kelowna has five **primary strengths**, including fire services, police services, drinking water quality, community cleanliness, and snow removal.

The City's three **secondary strengths** are parks and sports fields, City-operated recreational and cultural facilities and programs, and bike lanes and pedestrian sidewalks.

AREAS FOR IMPROVEMENT

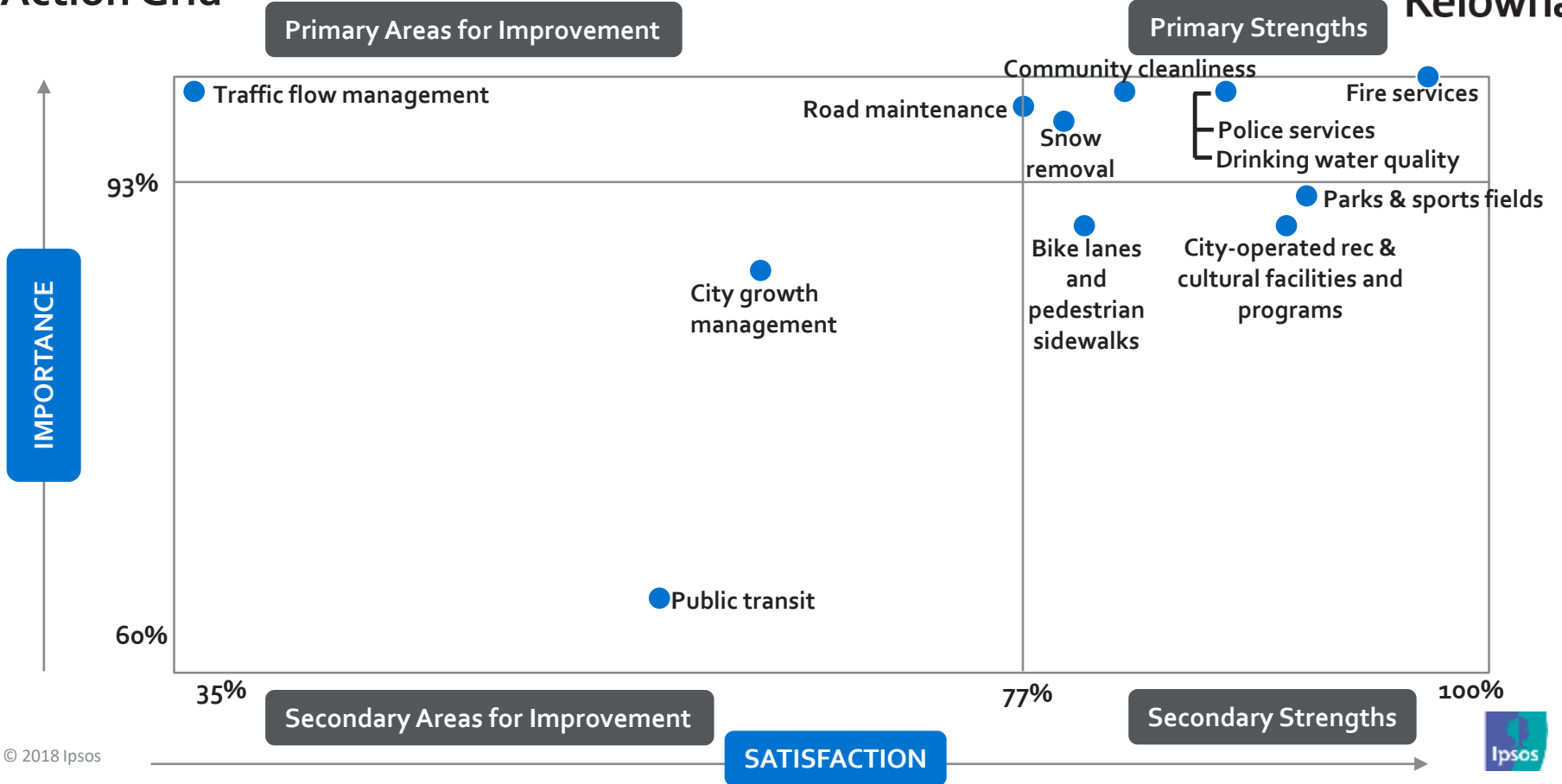
The City of Kelowna's one **primary area for improvement** is traffic flow management.

The City also has two **secondary areas for improvement**, including City growth management and public transit.

BORDERLINE SERVICES

Road maintenance falls on the border of being a primary strength vs. a primary area for improvement.

Action Grid



Perceptions of City Inclusiveness and Acceptance

Perceptions of City inclusiveness and acceptance are favourable, with 90% of citizens agreeing that the City's municipal government fosters a city that is inclusive and accepting of all through its services and programs. This includes 37% saying 'strongly agree' and 53% saying 'somewhat agree'.

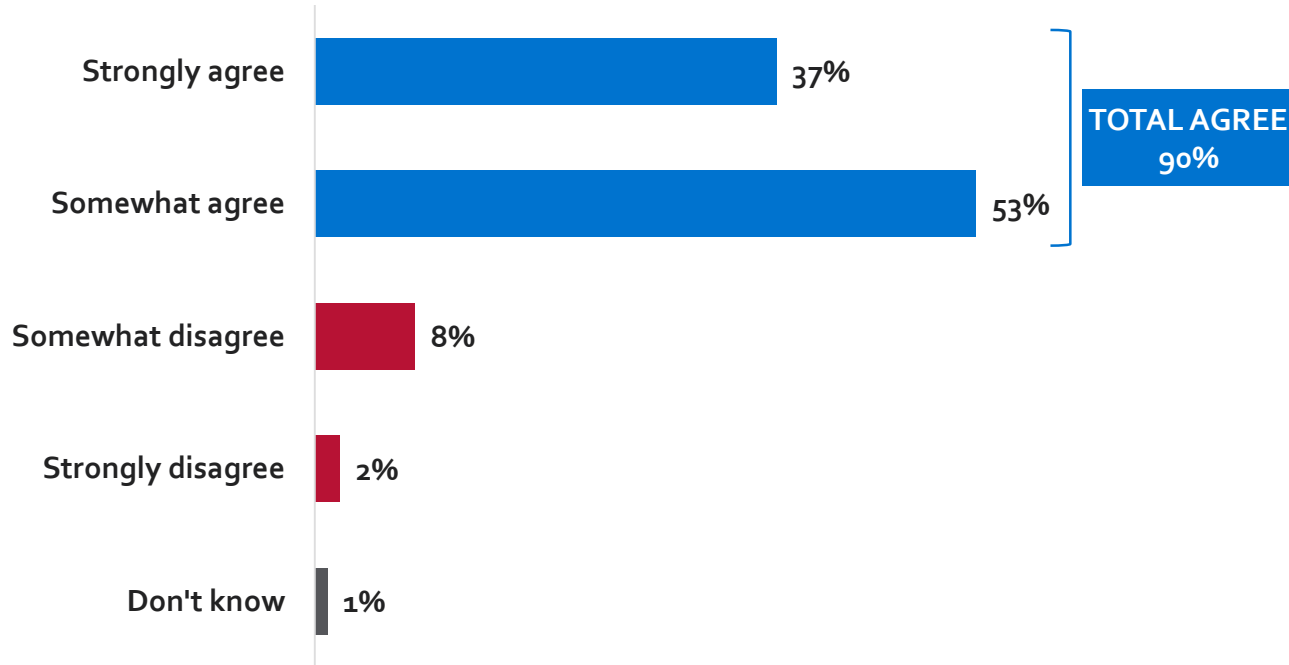
- Tracking and normative comparisons are unavailable for this question.

Analysis by Demographic Subgroup

Agreement (combined 'strongly/somewhat agree' responses) is higher among men (94% vs. 85% of women).

There are also demographic differences in the intensity of agreement, with higher 'strongly agree' responses reported by those who are 35-54 years of age (51% vs. 30% of 55+ years, 32% of 18-34 years) and those with children under the age of 18 living at home (50% vs. 32% of those without children at home).

Perceptions of City Inclusiveness and Acceptance



Q9a. Please tell me whether you agree or disagree with the following statement? The City of Kelowna municipal government fosters a city that is inclusive and accepting of all through its services and programs.

Base: All respondents (n=300)

FINANCIAL PLANNING

Value for Taxes

The majority (79%) of residents continue to say they receive good value for their municipal tax dollars. Most of these residents describe the value for taxes as 'fairly good' (63%) rather than 'very good' (16%).

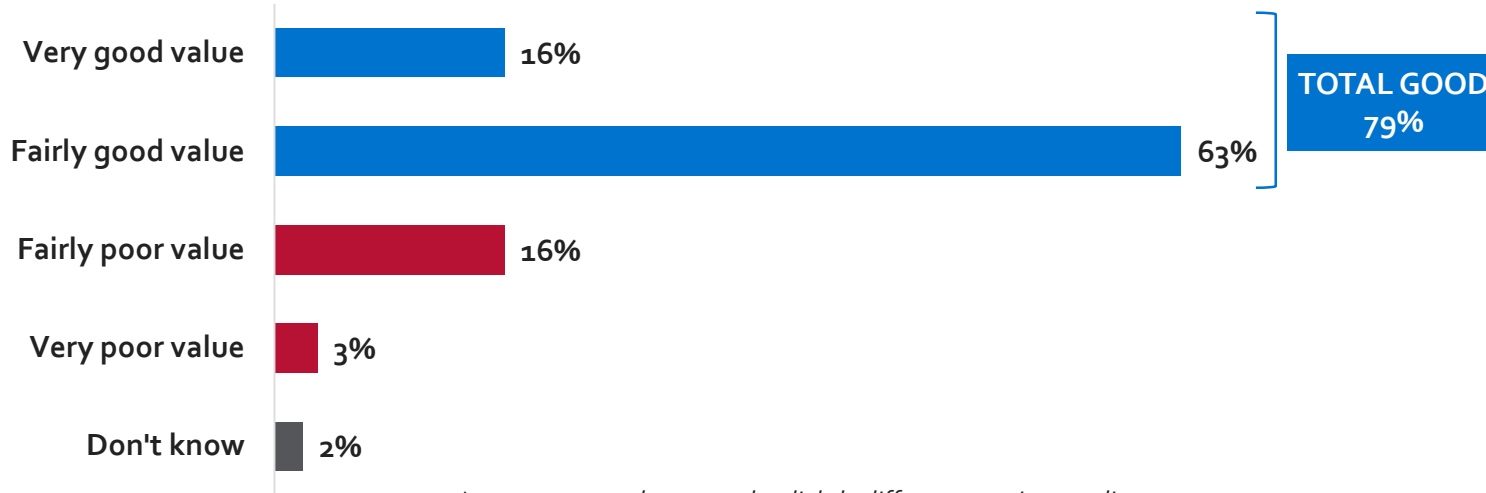
- Perceptions of the value for taxes are not significantly different from 2017.
- The perceived value for taxes in Kelowna is also similar to the municipal norm.

Analysis by Demographic Subgroup

Those living in North Kelowna are the most likely to say they receive good value (combined 'very/fairly good value' responses) for their tax dollars (86% vs. 72% in East Central Kelowna/East Kelowna, 75% in Central Kelowna, 85% in South West Kelowna).

There are also differences in the intensity of ratings, with those 35-54 years of age the most likely to say they receive 'very good value' for their tax dollars (21% vs. 8% of 18-34 years, 18% of 55+ years).

Value for Taxes



* 2012, 2015, and 2017 used a slightly different question wording

	2012* (n=300)	2015* (n=301)	2017* (n=300)	2018 (n=300)	NORM
TOTAL GOOD VALUE	81%	84%	84%	79%	83%
Very Good Value	16%	23%	18%	16%	21%

Q9. Your property tax dollars are divided between the City and the Province, with 58% of your total tax bill going towards municipal programs and services. Thinking about all the programs and services you receive from the City of Kelowna, how would you rate the overall value for the taxes you pay?

Base: All respondents (n=300)

Balancing Taxation and Service Delivery Levels

Citizens continue to prefer tax increases (55%) over service reductions (33%). Another 12% decline to identify a preferred approach to balancing taxation and service delivery levels (includes 8% saying 'none' and 4% saying 'don't know').

- Looking at tax increases specifically shows that 30% of citizens would prefer the City 'increase taxes to maintain services at current levels' while 25% say 'increase taxes to enhance or expand services'.
- The preference for service reductions is predominately driven by a desire to maintain rather than reduce taxes (28% say 'reduce services to maintain current tax level', 6% say 'reduce services to reduce taxes').

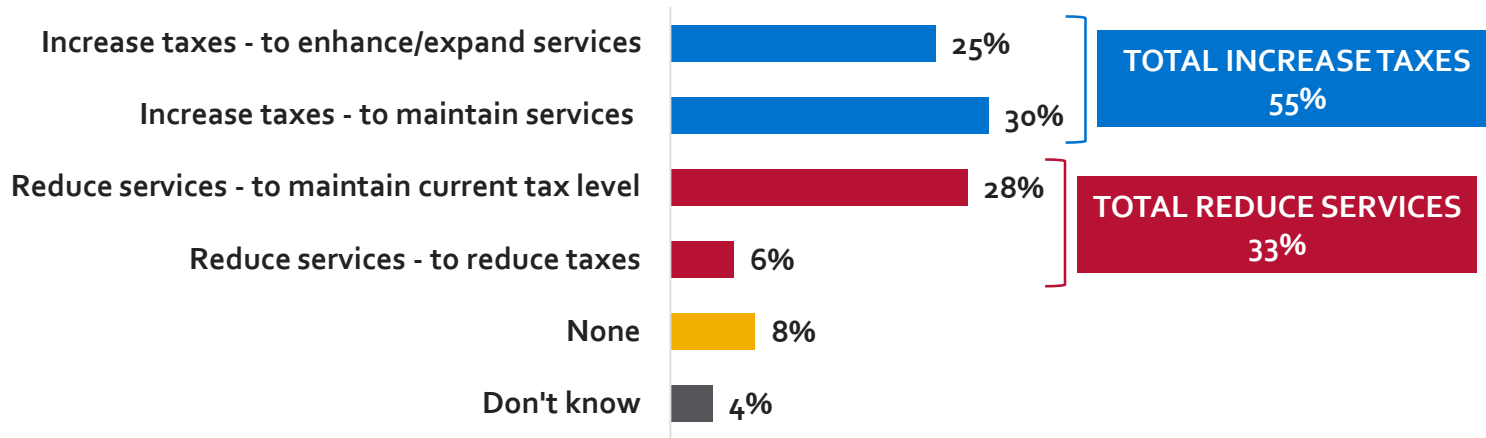
Overall, this year's results are statistically consistent with 2017. However, with slightly fewer saying increase taxes and slightly more saying cut services, the gap separating the two options has narrowed although is still in line with the past 6 year average.

Kelowna residents' tolerance for tax increases is on par with the municipal norm.

Analysis by Demographic Subgroup

This year's results are consistent across all key demographic subgroups.

Balancing Taxation and Service Delivery Levels



	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	NORM
TOTAL INCREASE TAXES	57%	56%	62%	55%	51%
TOTAL REDUCE SERVICES	34%	31%	30%	33%	35%

Q10. Municipal property taxes are one source of revenue used to pay for services provided by the City of Kelowna. Due to the increased cost of maintaining current service levels and infrastructure, the City must balance taxation and service delivery levels. To deal with this situation, which one of the following four options would you most like the City of Kelowna to pursue?

Base: All respondents (n=300)

PRIORITY SETTING

Renewing versus Building Infrastructure

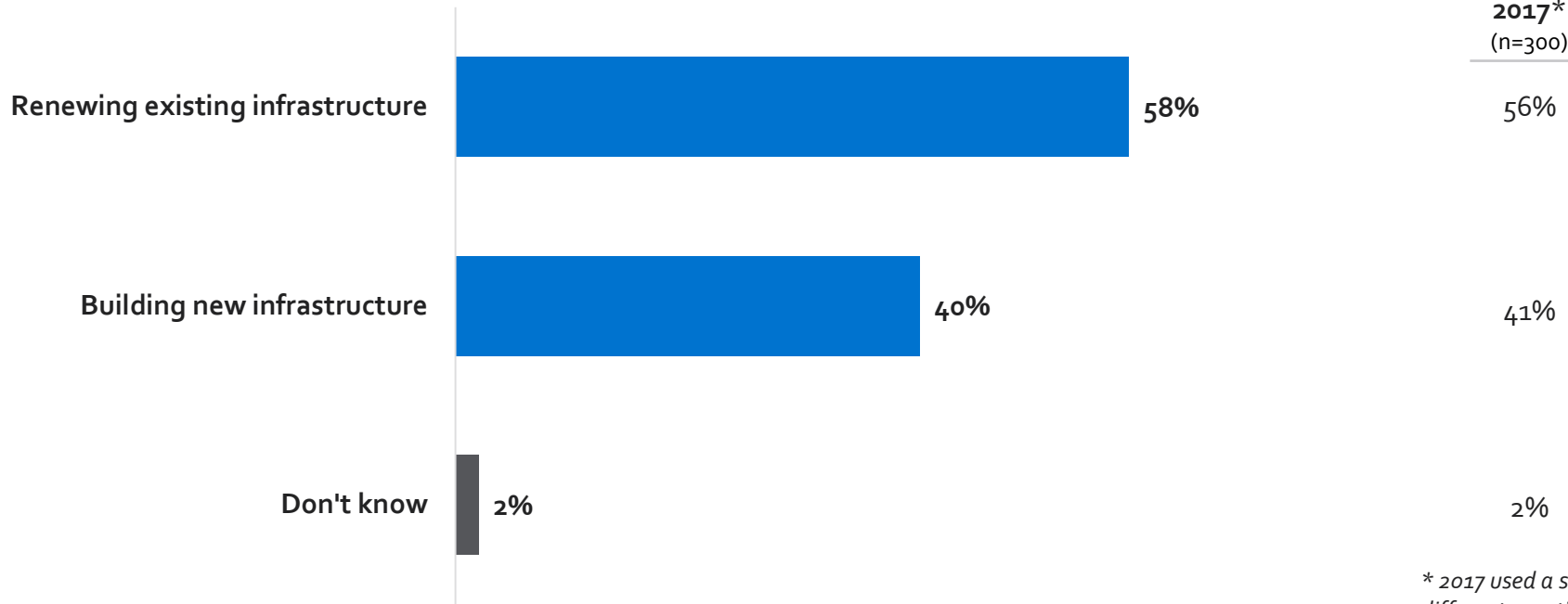
Residents continue to prioritize 'renewing existing infrastructure' (58%) over 'building new infrastructure' (40%). However, with four-in-ten residents prioritizing new infrastructure, there is clearly some interest in the City also investing in building new infrastructure.

- This year's results are consistent with 2017.

Analysis by Demographic Subgroup

Infrastructure investment preferences are consistent across all key demographic subgroups.

Renewing versus Building Infrastructure



** 2017 used a slightly different question wording*

Q11. Each year, the City is challenged with allocating limited capital dollars for roads, parks, utilities, buildings and IT infrastructure. In your opinion, which of the following should be the greater priority for investment for the City in 2019?

Priorities for Investment Over the Next Four Years

(Paired Choice Analysis)

While questions around local issues and municipal services provide some insight into citizens' priorities, Paired Choice Analysis provides a more refined appreciation for the priority that citizens place on a given set of items.

This analysis takes respondents through an exercise where they are presented with a series of paired items and asked to choose which one they think should be the greater priority for City investment over the next four years. The analytic output then shows how often each item is chosen when compared against the others (indicated by % Win).

For the City's 2018 Citizen Survey, a total of 16 items were considered, resulting in a total of 120 possible combinations. Each respondent was randomly presented with 8 different pairs, with controls in place to ensure that all respondents saw all 16 items and that each item was asked an equal number of times.

The 16 items included in this year's survey were:

- Addressing social issues such as homelessness, mental health and addiction
- Road maintenance
- Public transit
- Traffic flow management
- Bike lanes and pedestrian sidewalks
- City-operated recreational & cultural facilities and programs
- Parks
- Snow removal
- Drinking water
- Police services
- Fire services
- Encouraging a diverse supply of housing options at different price points
- Business and economic development
- Enhancing the natural environment
- Preservation of historic places
- Community cleanliness

Priorities for Investment Over the Next Four Years

(Paired Choice Analysis)

Paired Choice Analysis shows that citizens' number one priority for investment over the next four years is **addressing social issues such as homelessness, mental health, and addiction** (chosen 78% of the time). The emphasis placed on social issues is consistent with residents' most important community issues.

Other priorities include:

- **Traffic flow management** (68%)
- **Drinking water** (64%)
- **Encouraging a diverse supply of housing options at different price points** (62%)
- **Police services** (56%)
- **Road maintenance** (56%)
- **Fire services** (52%)

In comparison, less emphasis is placed on **public transit** (46%), **snow removal** (44%), **community cleanliness** (42%), **enhancing the natural environment** (42%), **business and economic development** (41%), **City-operated recreational and cultural facilities and programs** (37%), **parks** (36%), and **bike lanes and pedestrian sidewalks** (35%).

Citizens' lowest priority for investment is **preservation of historic places** (24%).

Priorities for Investment Over the Next Four Years

(Paired Choice Analysis)

Analysis by Demographic Subgroup

Addressing social issues is chosen more often by women (85% vs. 70% of men) and younger residents (89% of 18-34 years vs. 70% of 55+ years, 79% of 35-54 years).

Traffic flow management is chosen more often by men (77% vs. 59% of women), older residents (77% of 55+ years vs. 60% of 18-34 years, 62% of 35-54 years), and those living in households without children under the age of 18 (72% vs. 57% of those with children at home).

Encouraging a diverse supply of housing is chosen more often by those under the age of 55 years (includes 73% of 18-34 years and 66% of 35-54 years vs. 52% of 55+ years).

Road maintenance is chosen more often by those who are 35-54 years of age (63% vs. 44% of 18-34 years, 59% of 55+ years).

Fire services is chosen more often by those with household incomes of \$60k-<\$100k (57% vs. 40% of <\$60k, 52% of \$100k+).

Public transit is chosen more often by those who have lived in Kelowna for 15 years or less (55% vs. 37% of those who have lived in the area for more than 15 years).

Snow removal is chosen more often by those living in households without children under the age of 18 (48% vs. 34% of those with children at home).

continued on next page...

Priorities for Investment Over the Next Four Years

(Paired Choice Analysis)

Analysis by Demographic Subgroup

Community cleanliness is chosen more often by those living in South West Kelowna (51% vs. 33% in East Central Kelowna/East Kelowna, 42% in Central Kelowna, 44% in North Kelowna).

Business and economic development is chosen more often by those living in South West Kelowna (57% vs. 33% in Central Kelowna, 33% in North Kelowna, 38% in East Central Kelowna/East Kelowna) and younger residents (53% of 18-34 years vs. 35% of 35-54 years, 38% of 55+ years).

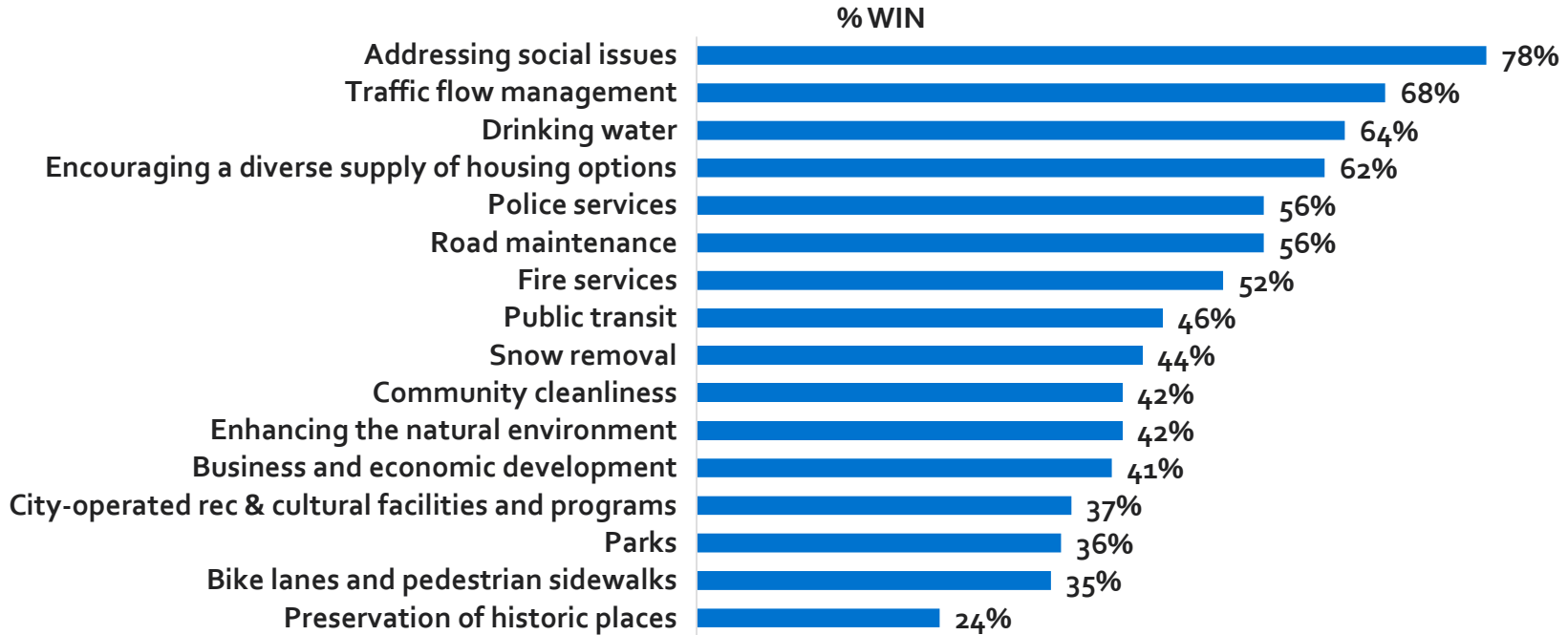
City-operated recreational and cultural facilities and programs are chosen more often by those living in Central Kelowna and East Central Kelowna/East Kelowna (both 42% vs. 27% in South West Kelowna, 39% in North Kelowna).

Bike lanes and pedestrian sidewalks are chosen more often by those living in South West Kelowna (44% vs. 24% in East Central Kelowna/East Kelowna, 36% in North Kelowna, 37% in Central Kelowna).

Preservation of historic places is chosen more often by younger residents (32% of 18-34 years vs. 17% of 35-54 years, 23% of 55+ years).

Priorities for Investment Over the Next Four Years

(Paired Choice Analysis)



Q12. The City of Kelowna has many different options for things it can invest in over the next four years. I'm now going to read you different pairs of priorities. For each pair, please tell me which item you think should be the greater priority for investment over the next four years.

CUSTOMER SERVICE

Contact with City Last 12 Months

Claimed Contact

Just under one-half (49%) of citizens say they personally contacted or dealt with the City of Kelowna or one of its employees in the last 12 months.

- Claimed contact with the City is on par with both 2017 and the municipal norm.

Analysis by Demographic Subgroup

Claimed contact with the City is higher among:

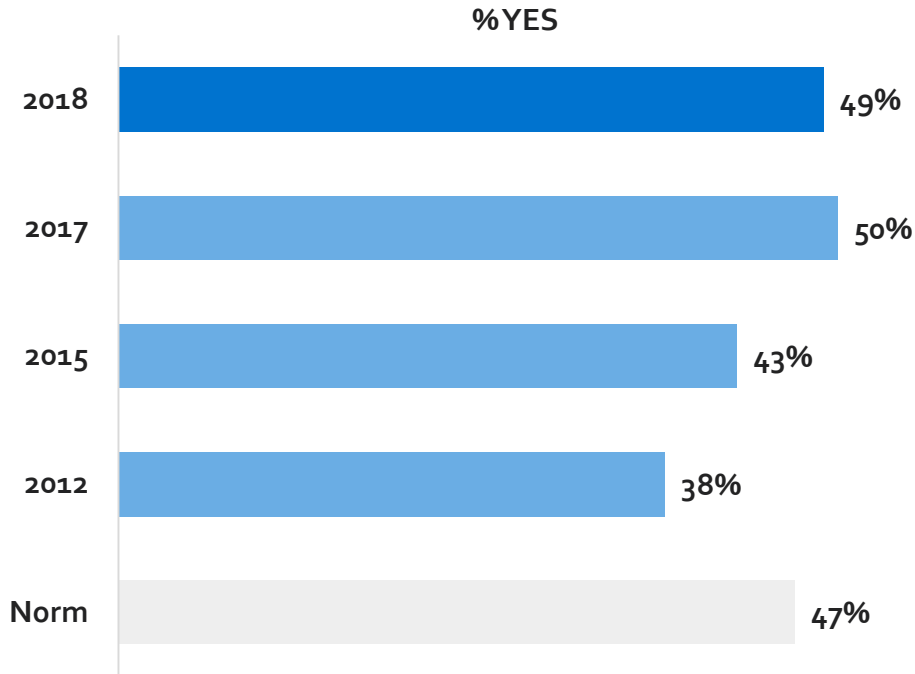
- Those who are 35-54 years of age (62% vs. 41% of 18-34 years, 44% of 55+ years)
- Those living in households with children under the age of 18 (61% vs. 44% of those without children at home)
- Those with household incomes of \$100k+ (65% vs. 33% of <\$60k, 44% of \$60k-<\$100k)

Contact Methods

Among those saying they contacted the City in the last 12 months, the two most common contact methods (coded open-ends) are “in-person” (40%) and “telephone” (38%).

- These were also the main stated methods of contacting the City in 2017.

Contact with City Last 12 Months

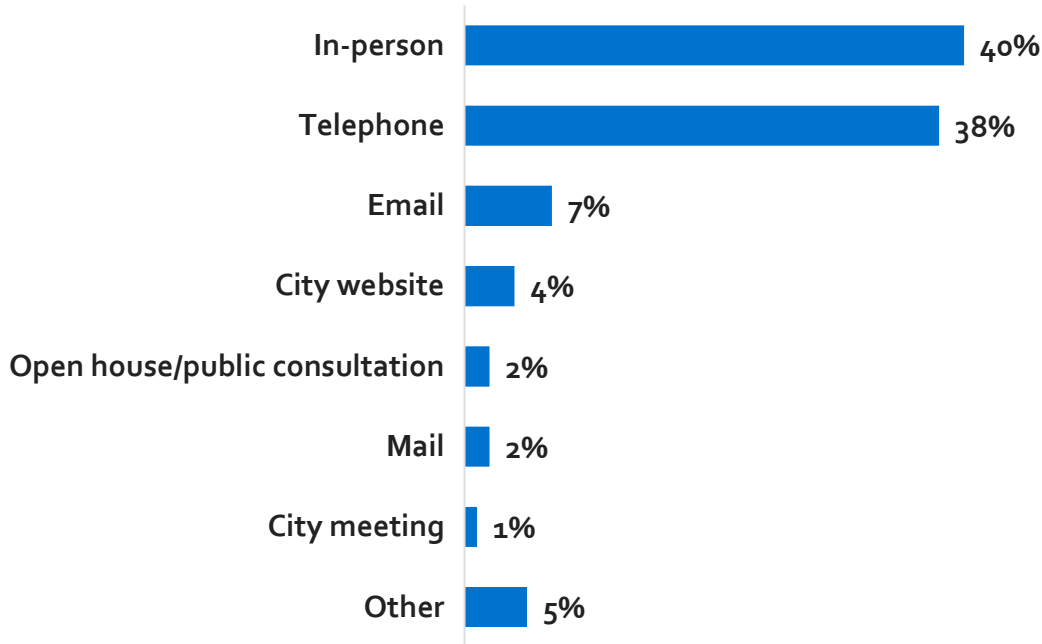


Q14. In the last 12 months, have you personally contacted or dealt with the City of Kelowna or one of its employees?

© 2018 Ipsos Base: All respondents (n=300)

Contact Method

(Among those saying they contacted the City in the last 12 months) (Coded Open-Ends)



2017 Top Mentions (n=150)	
Telephone	38%
In-person	37%
Email	10%
City website	6%

Q15. How did this contact occur?

© 2018 Ipsos Base: Those saying they contacted the City in the last 12 months (n=152)

Satisfaction with Customer Service

(Among those saying they contacted the City in the last 12 months)

Contact experiences continue to be satisfactory, with 76% of those who contacted the City in the last 12 months saying they are satisfied (53% 'very satisfied', 23% 'somewhat satisfied') with the **overall service received**. One-quarter (24%) report being dissatisfied, including 16% saying 'not at all satisfied'.

Satisfaction (combined 'very/somewhat satisfied' responses) extends to specific elements of the City's customer service. Specifically, among those who contacted the City in the last 12 months:

- 89% say they are satisfied with **staff's courteousness**
- 83% say they are satisfied with **staff's helpfulness**
- 83% say they are satisfied with **staff's knowledge**
- 82% say they are satisfied with **the ease of reaching staff**
- 79% say they are satisfied with **the speed and timeliness of service**
- 78% say they are satisfied with **staff's ability to resolve your issue**

While ratings in a number of areas are down slightly this year, satisfaction with the City's customer service is not significantly different from 2017 and remains on par with the municipal norm.

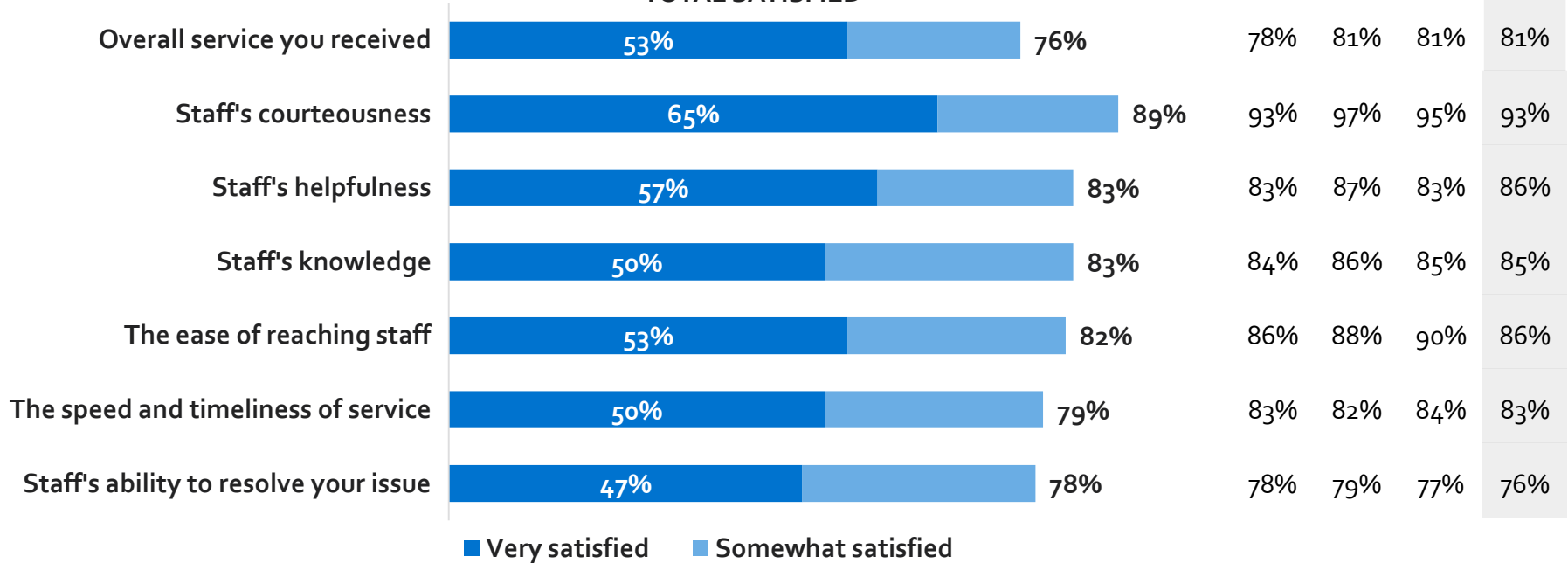
Analysis by Demographic Subgroup

Satisfaction with the **overall service received** is consistent across all key demographic subgroups.

Satisfaction with Customer Service

(Among those saying they contacted the City in the last 12 months)

TOTAL SATISFIED

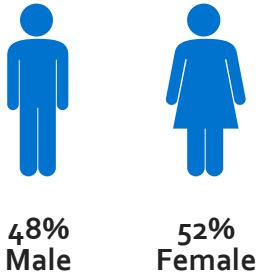


Q16. How satisfied are you with the...? Would you say very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied?

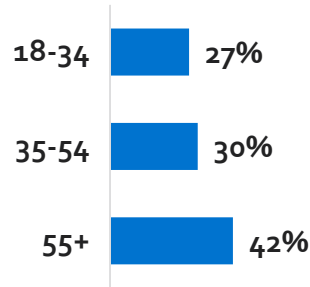
WEIGHTED SAMPLE CHARACTERISTICS

Weighted Sample Characteristics

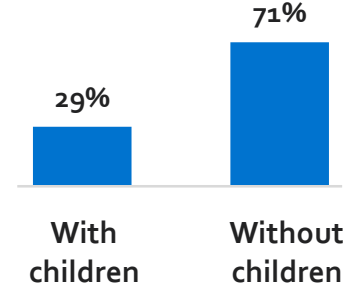
GENDER



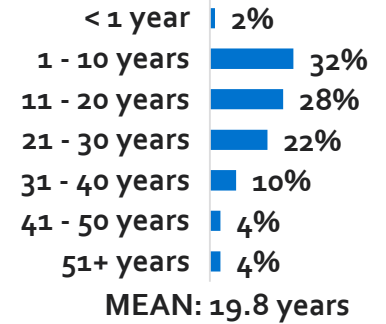
AGE



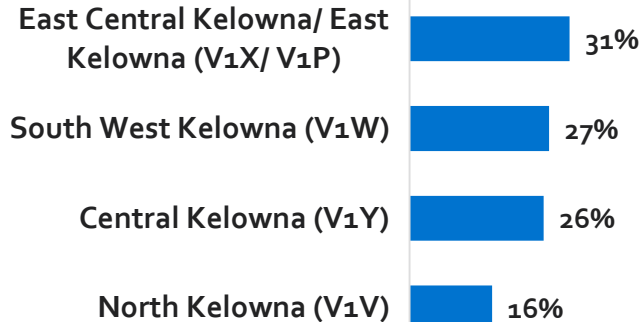
CHILDREN IN HH



YEARS LIVING IN KELOWNA



AREA OF CITY



HH INCOME

