



2018 Citizen Survey

PREPARED FOR THE CITY OF KELOWNA BY:
Ipsos Public Affairs

PRESENTED BY:
CATHERINE KNAUS, DIRECTOR

OBJECTIVES

- Gauge public satisfaction with municipal programs and services and gain insight into citizens' service priorities

METHODOLOGY

- Random and representative telephone survey conducted with 300 adult Kelowna residents
- Dual frame cellphone/landline sampling (62% cellphones, 38% landlines)
- Conducted November 5-18, 2018
- Final data weighted by gender/age and neighbourhood according to 2016 Census data
- MOE: $\pm 5.7\%$, 19 times out of 20
- Tracking and normative comparisons included where appropriate

Key Findings



- 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.
- Social issues are a growing concern and continue to top the public issue agenda. Addressing social issues such as homelessness, mental health, and addiction is citizens' leading priority for municipal investment.
- Transportation issues persist – emphasis is on traffic congestion and flow.
- 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.
- Overall satisfaction with City services remains high although has been gradually trending downward over the past several years.
- Key financial metrics hold steady.
- Residents prioritize existing infrastructure over 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.

QUALITY OF LIFE

QUALITY OF LIFE

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

(Coded Open-Ends, Multiple Responses Allowed)



Main mentions only

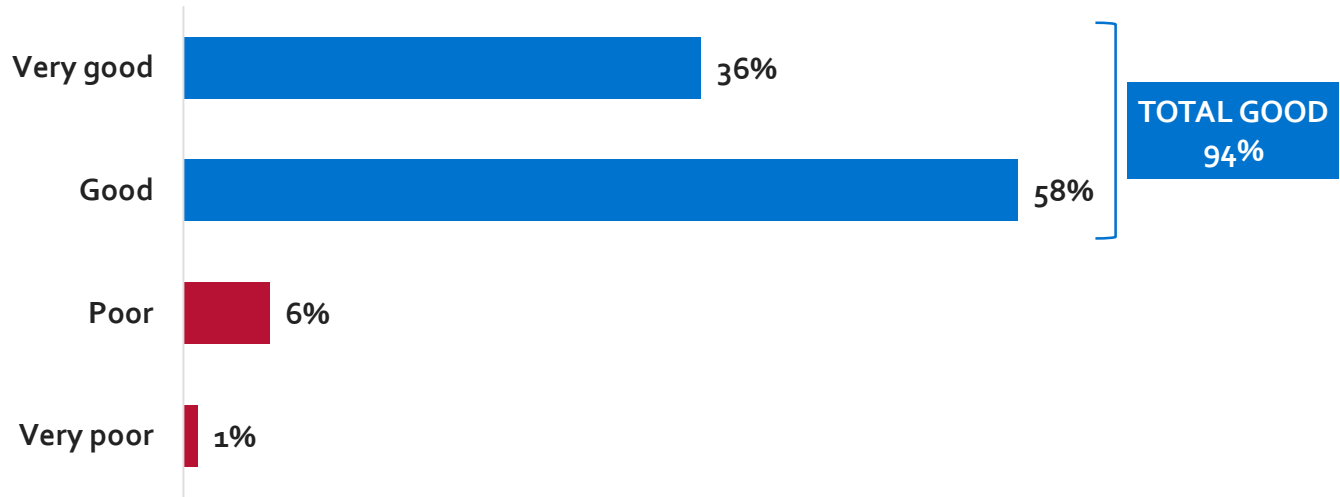
2017 Top Mentions (n=300)	
Good recreational facilities/opportunities/activities	14%
Low crime rate/safe	14%
Convenient location/accessible to everything	12%
Employment/job opportunities (incl. well paying jobs)	11%
Good weather/climate	11%

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)

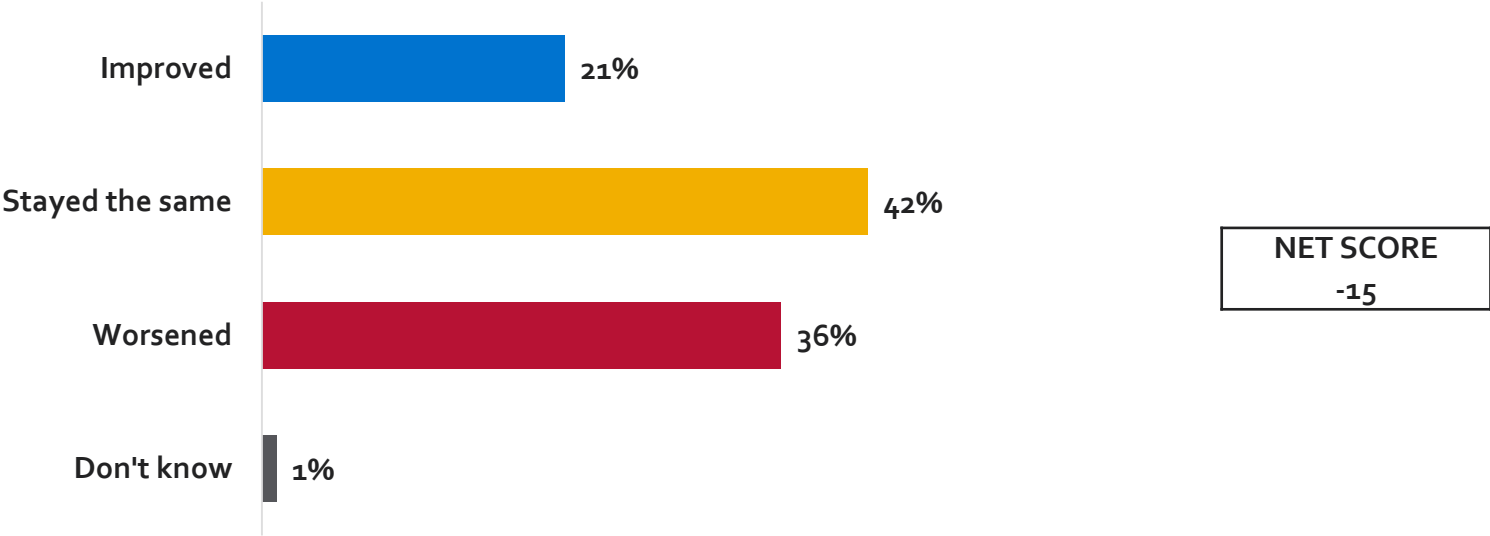
QUALITY OF LIFE

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



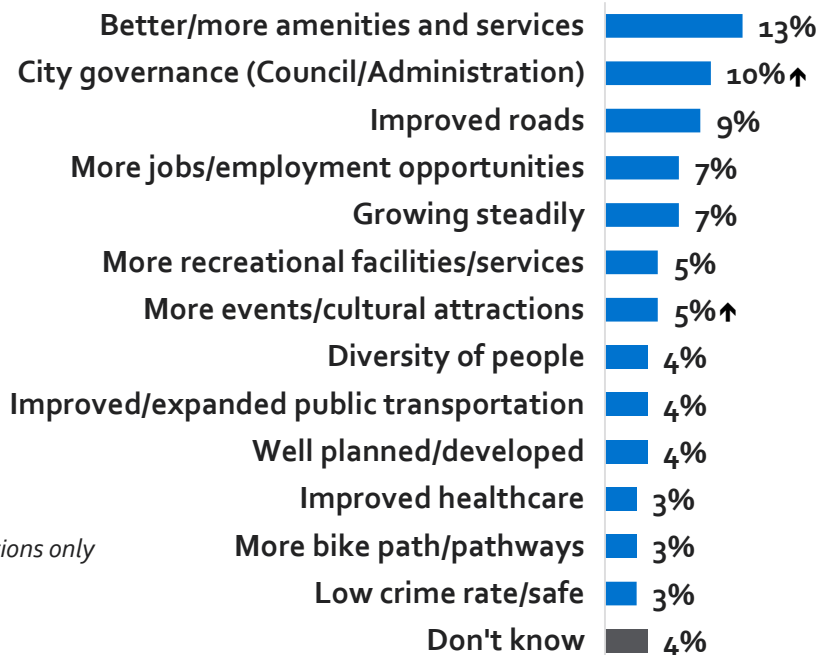
	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	NORM
NET SCORE	-5	+12	-11	-15	+2

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)

QUALITY OF LIFE

Reasons Quality of Life has Improved

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



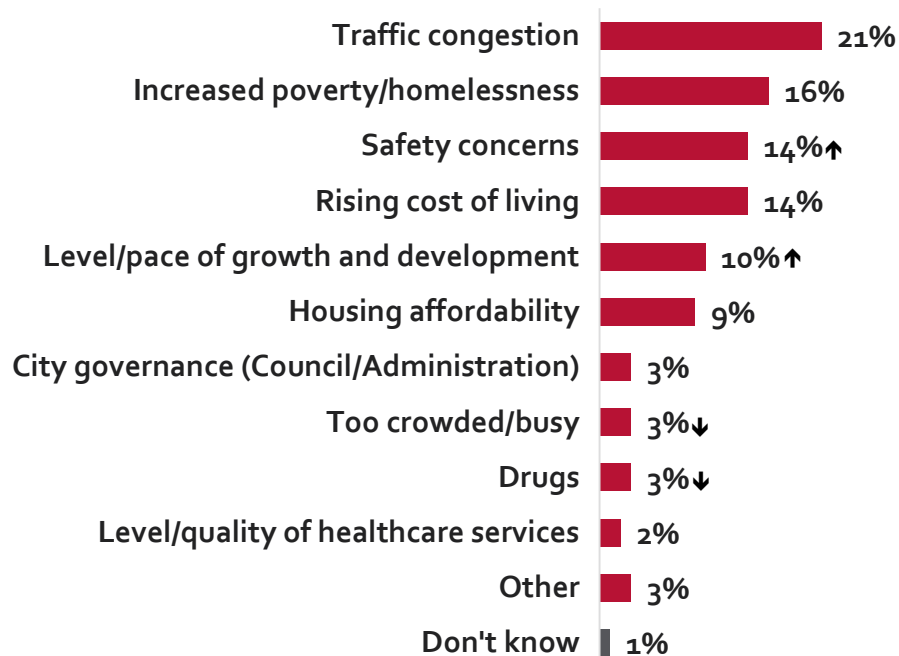
Main mentions only

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%

QUALITY OF LIFE

Reasons Quality of Life has Worsened

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



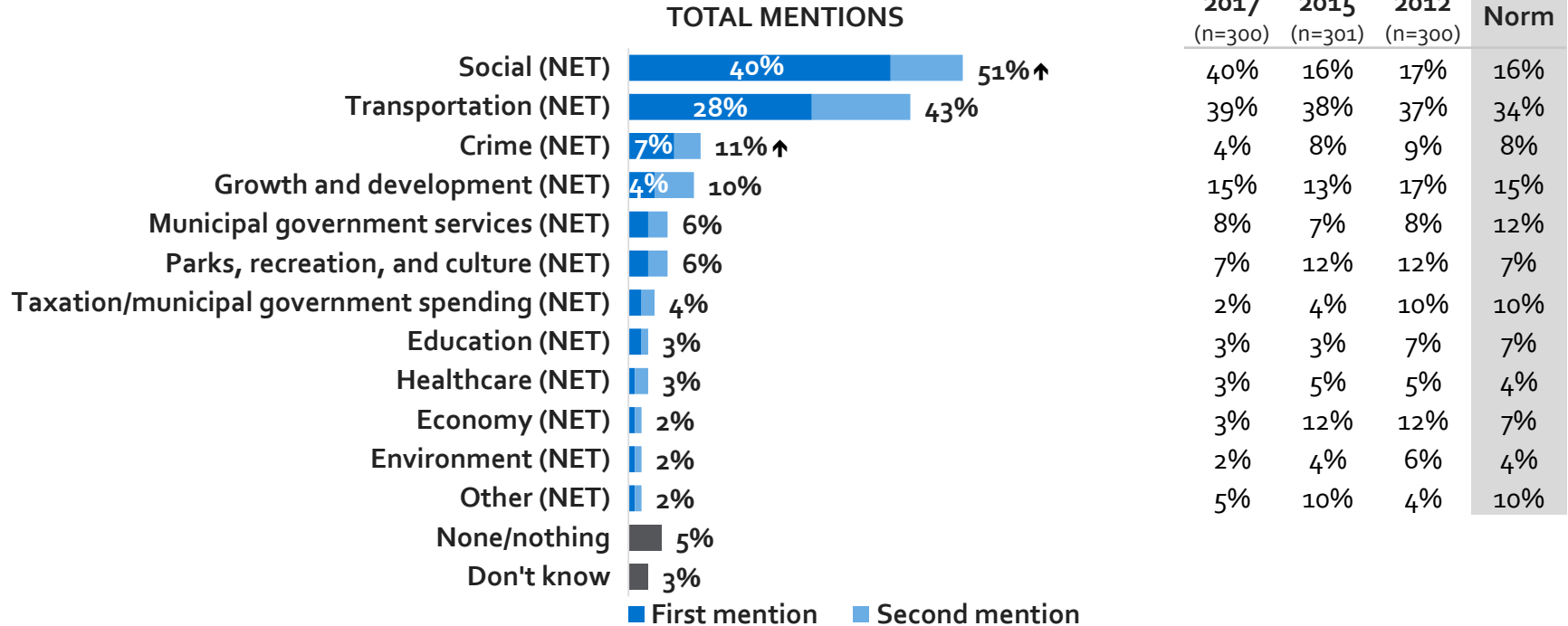
2017 Top Mentions (n=97)	
Rising cost of living	18%
Traffic congestion	14%
Drugs	14%
Too crowded/busy	13%
Housing affordability	12%
Increased poverty/homelessness	11%

ISSUE AGENDA

ISSUE AGENDA

Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)



2017 (n=300)	2015 (n=301)	2012 (n=300)	Norm
40%	16%	17%	16%
39%	38%	37%	34%
4%	8%	9%	8%
15%	13%	17%	15%
8%	7%	8%	12%
7%	12%	12%	7%
2%	4%	10%	10%
3%	3%	7%	7%
3%	5%	5%	4%
3%	12%	12%	7%
2%	4%	6%	4%
5%	10%	4%	10%

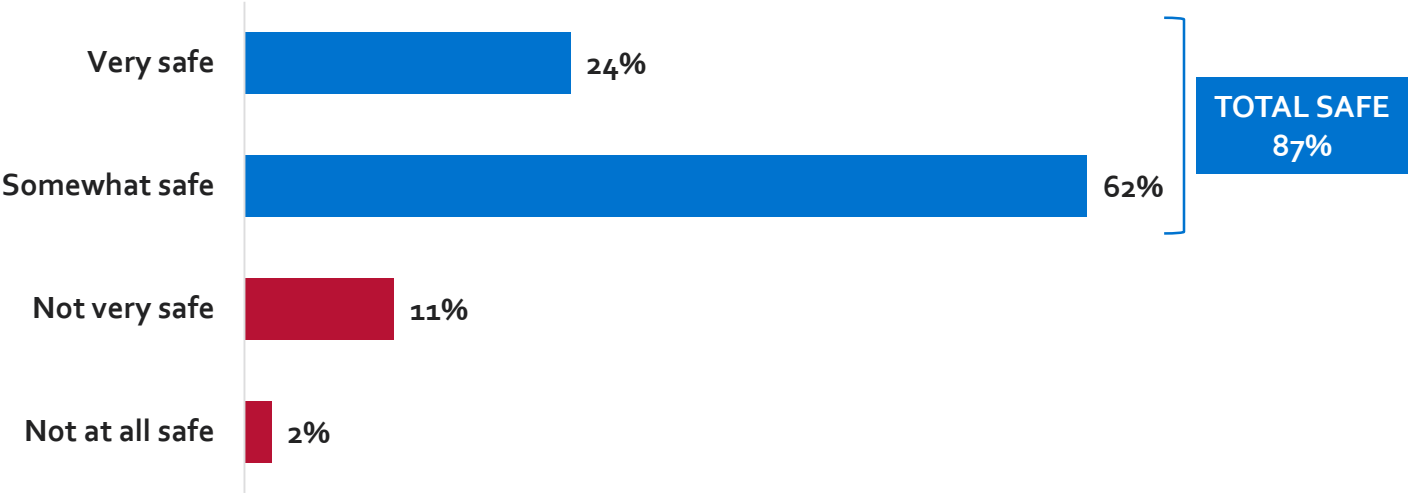
Q1. In your view, as a resident of the City of Kelowna, what is the most important issue facing your community, that is the one issue you feel should receive the greatest attention from local leaders? Are there any other important local issues?

Base: All respondents (n=300)

COMMUNITY SAFETY

COMMUNITY SAFETY

Overall Community Safety

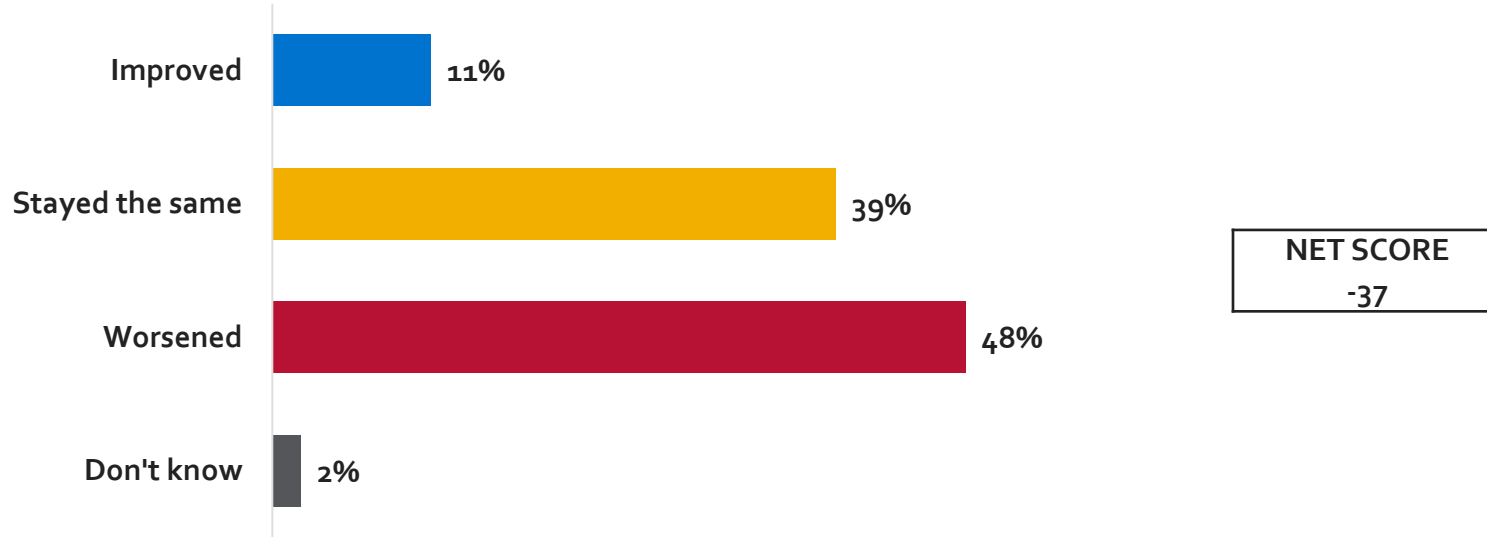


	2015 (n=301)	2017 (n=300)	2018 (n=300)	NORM
TOTAL SAFE	94%	90%	87%	93%
Very Safe	32%	29%	24%	31%

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



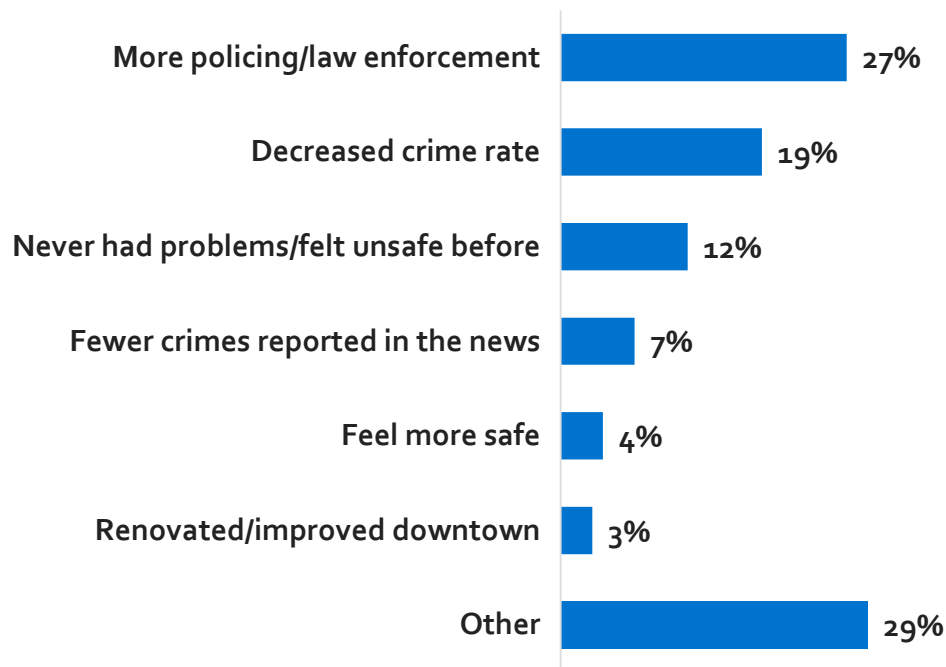
	2015 (n=301)	2017 (n=300)	2018 (n=300)
NET SCORE	+2	-26	-37↓

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

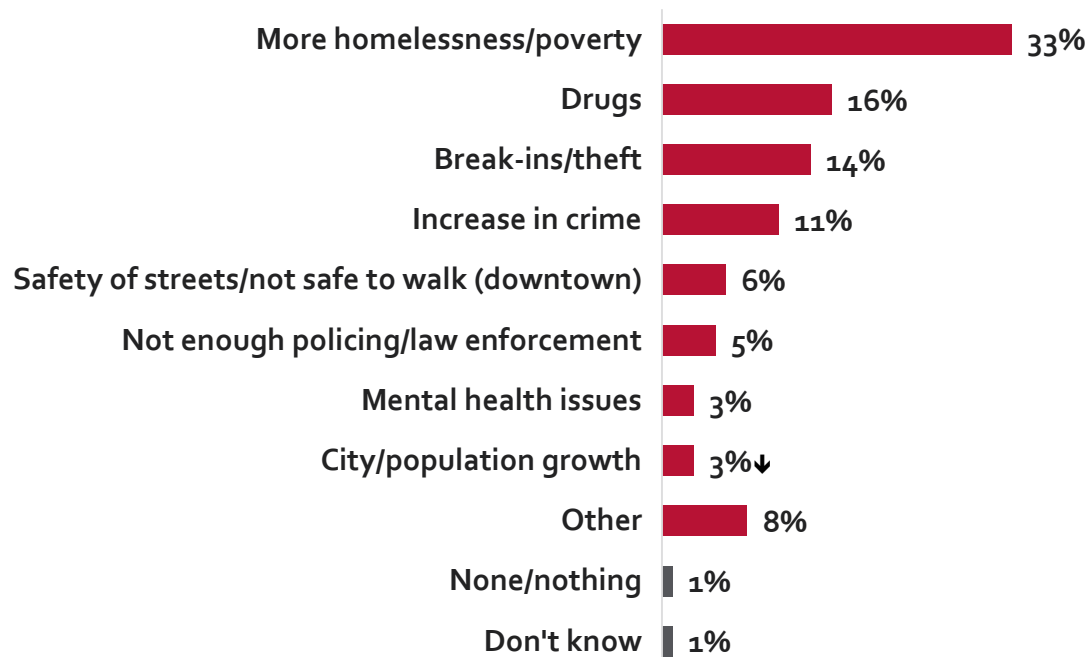
(Among those saying community safety has improved) (Coded Open-Ends)



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

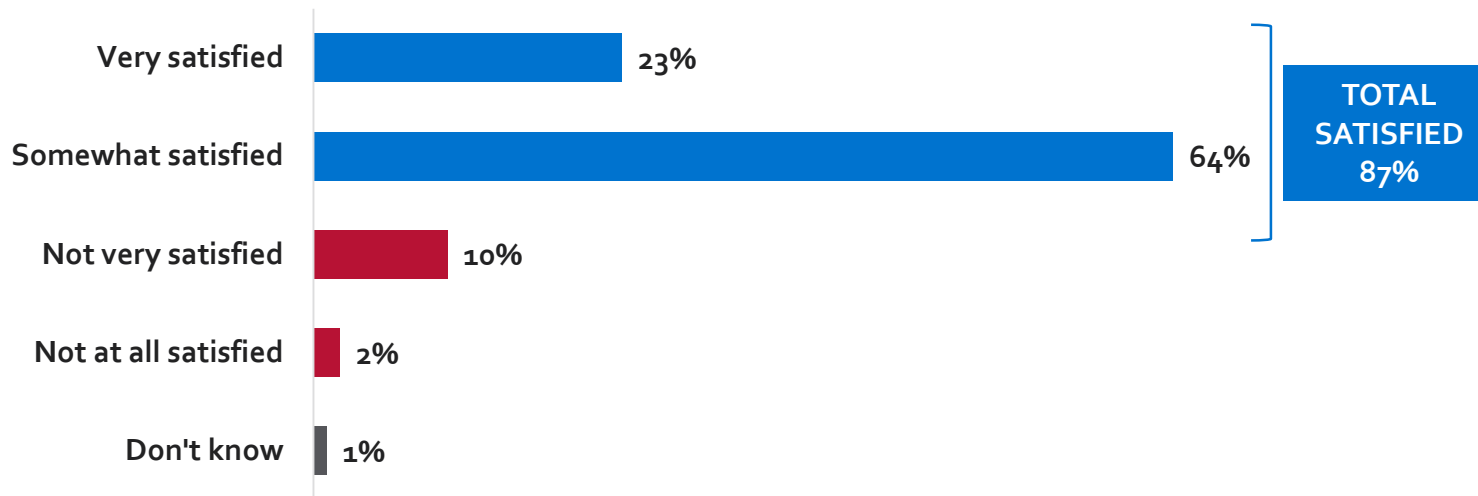
(Among those saying community safety has worsened) (Coded Open-Ends)



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



	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%

CITY SERVICES AND INFRASTRUCTURE

Satisfaction with Specific City Services



2017 (n=300)	2015 (n=301)	2012 (n=300)	Norm
95%	96%	97%	94%
93%*	92%*	95%*	93%*
91%*	90%*	91%*	89%*
88%	82%	n/a	n/a
85%	89%	88%	92%
92%	93%	n/a	n/a
74%	73%	83%	n/a
n/a	n/a	n/a	71%
78%	81%	78%	76%
65%	n/a	n/a	n/a
60%	68%	69%	52%
41%	n/a	n/a	n/a

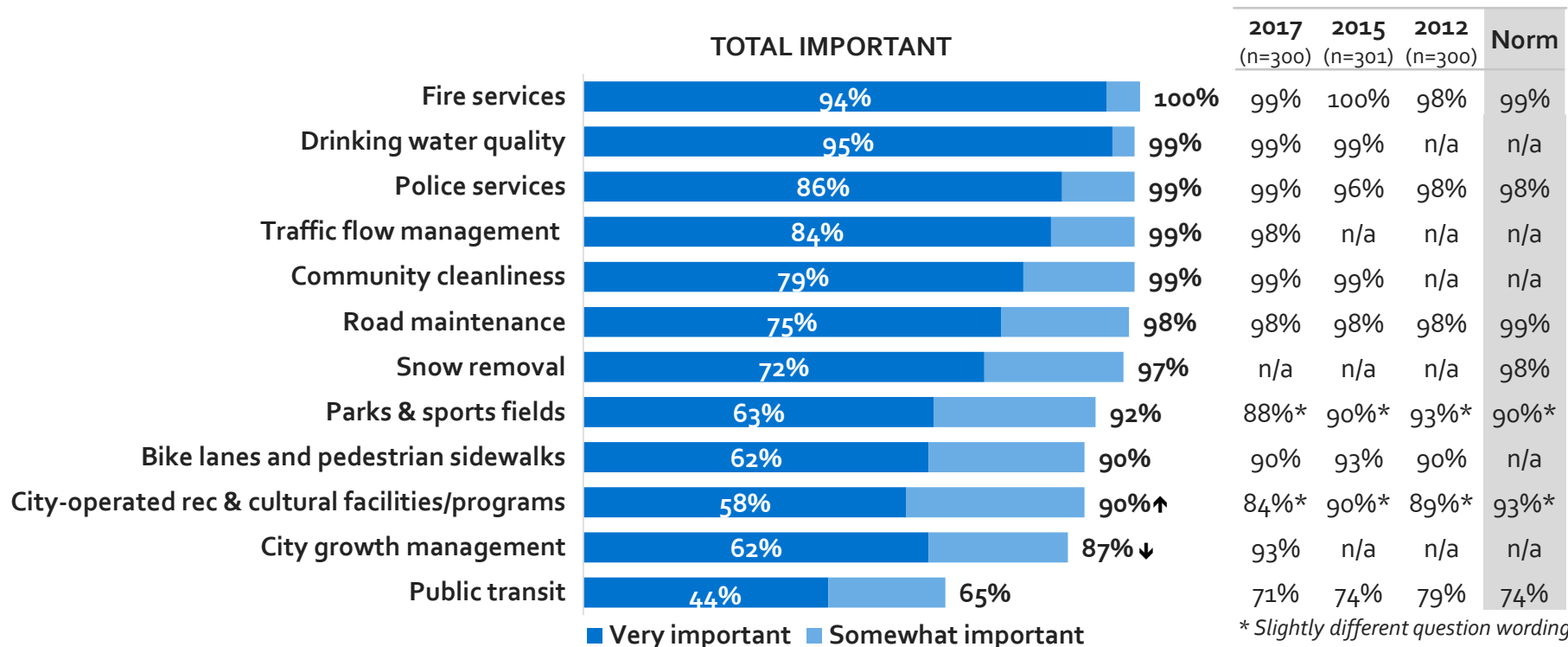
* Slightly different question wording

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)

CITY SERVICES AND INFRASTRUCTURE

Importance of Specific City Services

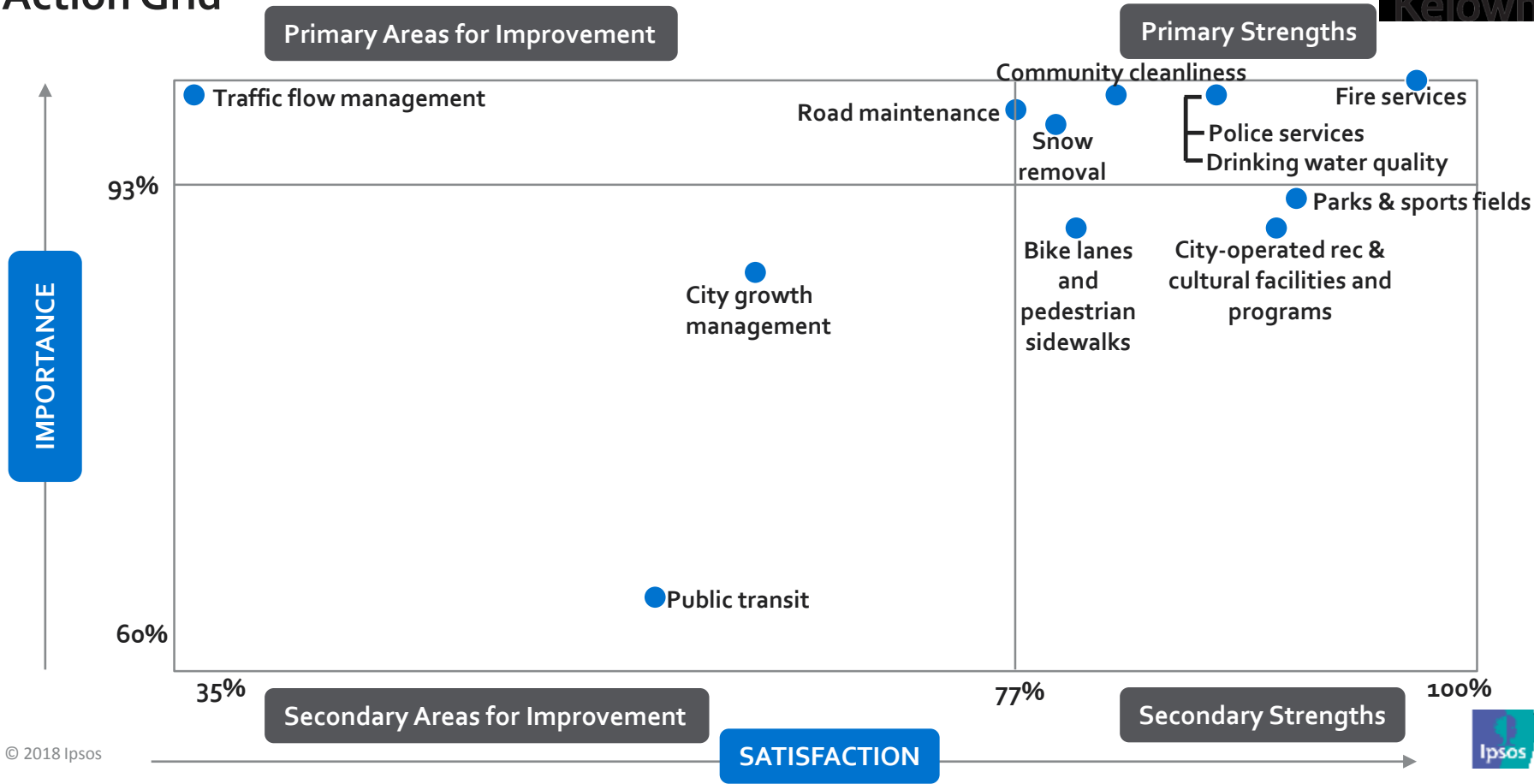


Q7. How important is...to you personally on a scale of very important, somewhat important, not very important, or not at all important?

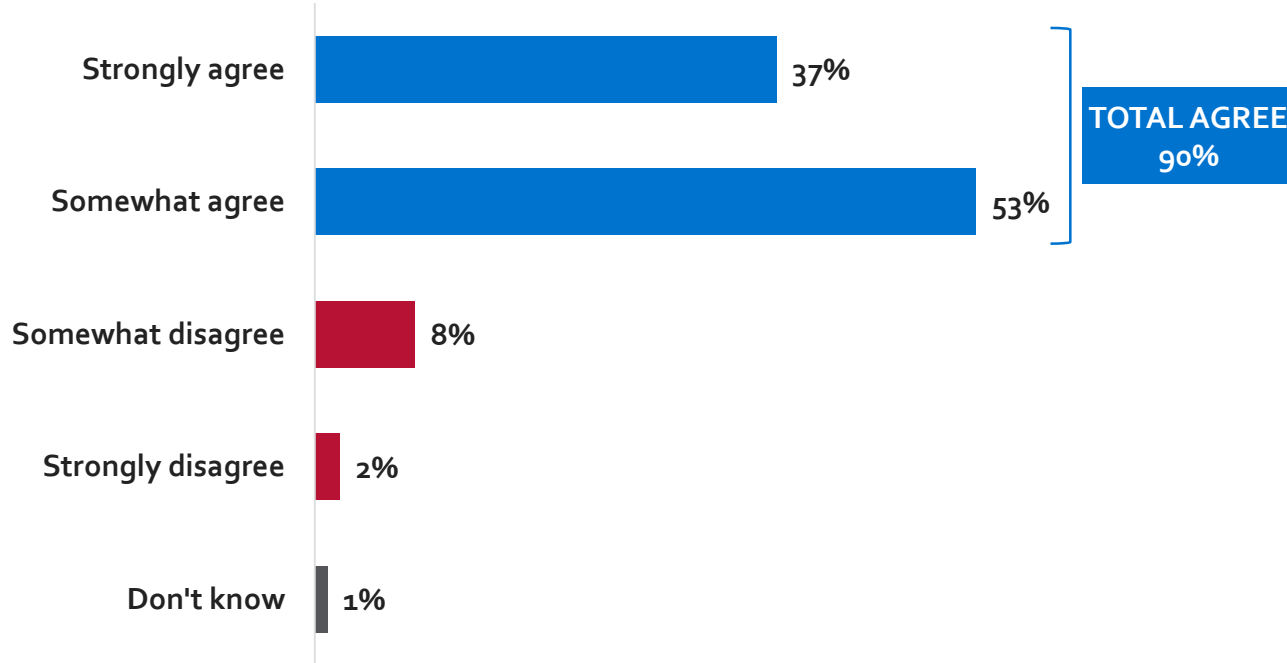
Base: All respondents (n=300)

CITY SERVICES AND INFRASTRUCTURE

Action Grid



Perceptions of City Inclusiveness and Acceptance

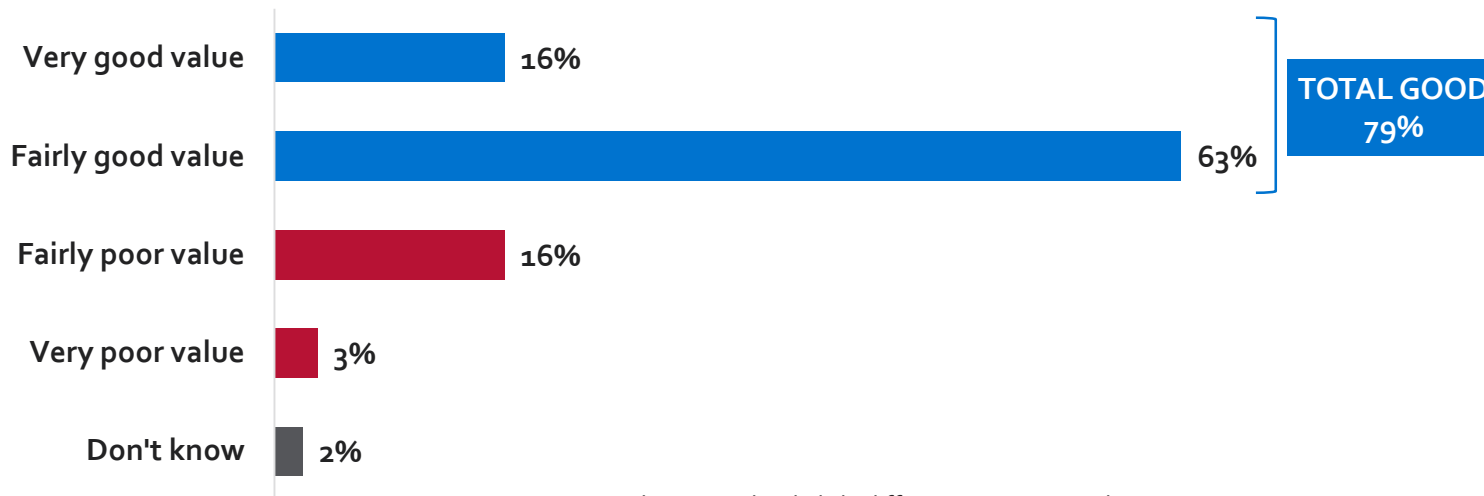


Q9a. Please tell me whether you agree or disagree with the following statement? The City of Kelowna municipal government fosters a city that is inclusive and accepting of all through its services and programs.

Base: All respondents (n=300)

FINANCIAL PLANNING

Value for Taxes



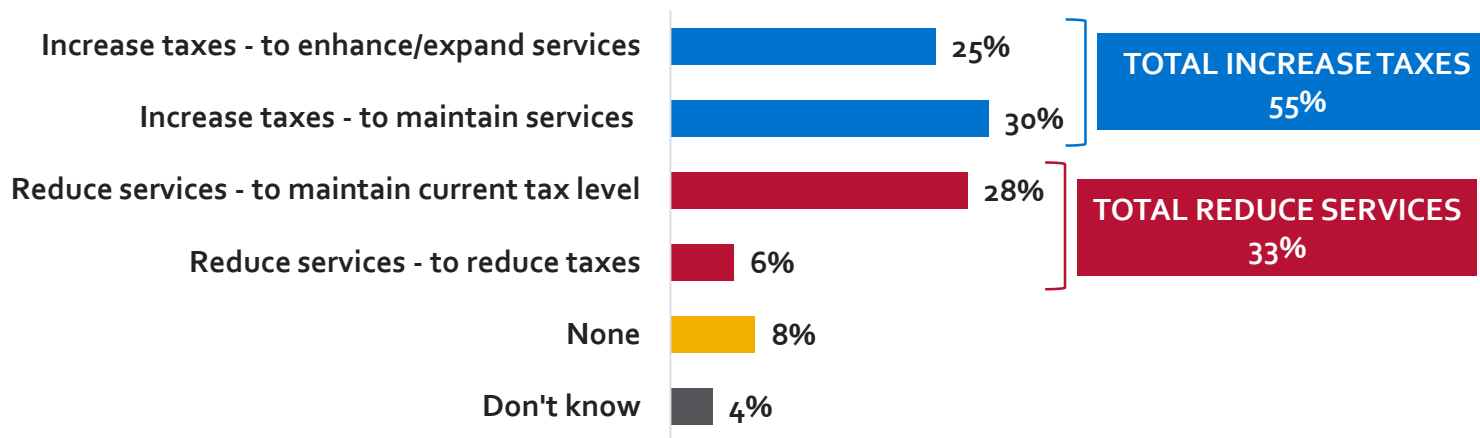
* 2012, 2015, and 2017 used a slightly different question wording

	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



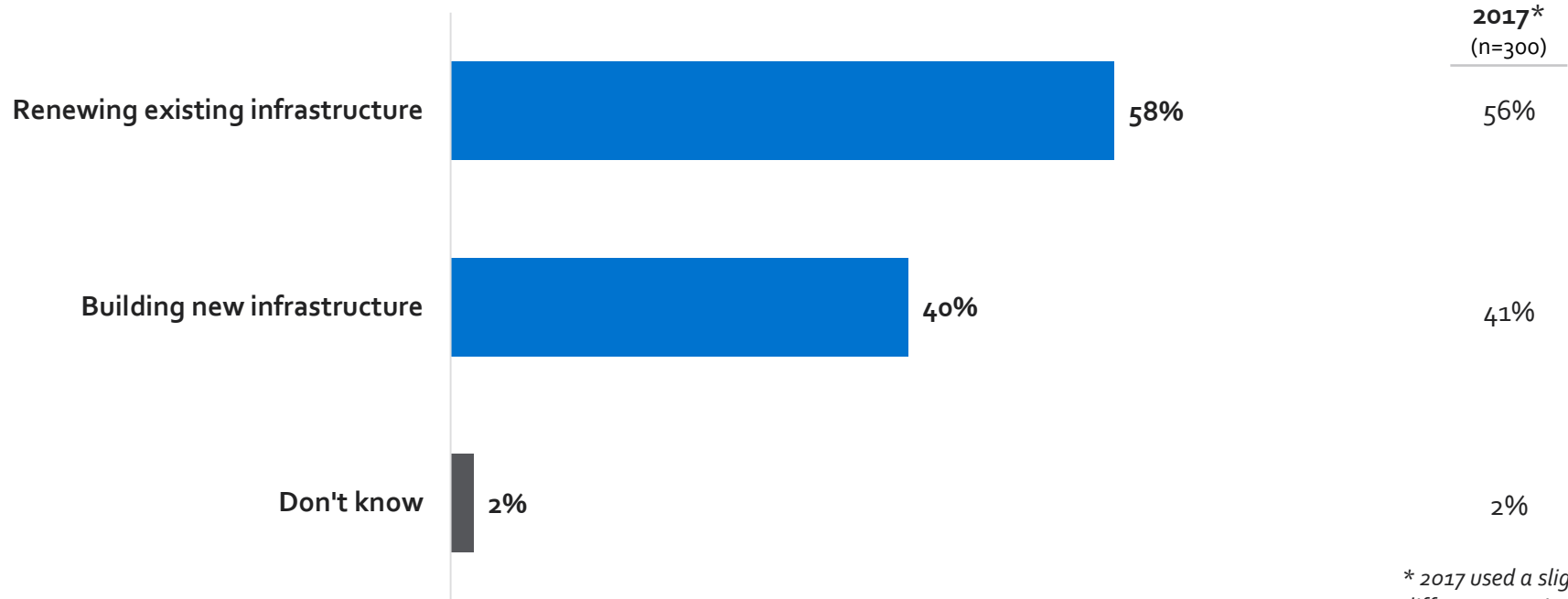
	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	NORM
TOTAL INCREASE TAXES	57%	56%	62%	55%	51%
TOTAL REDUCE SERVICES	34%	31%	30%	33%	35%

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

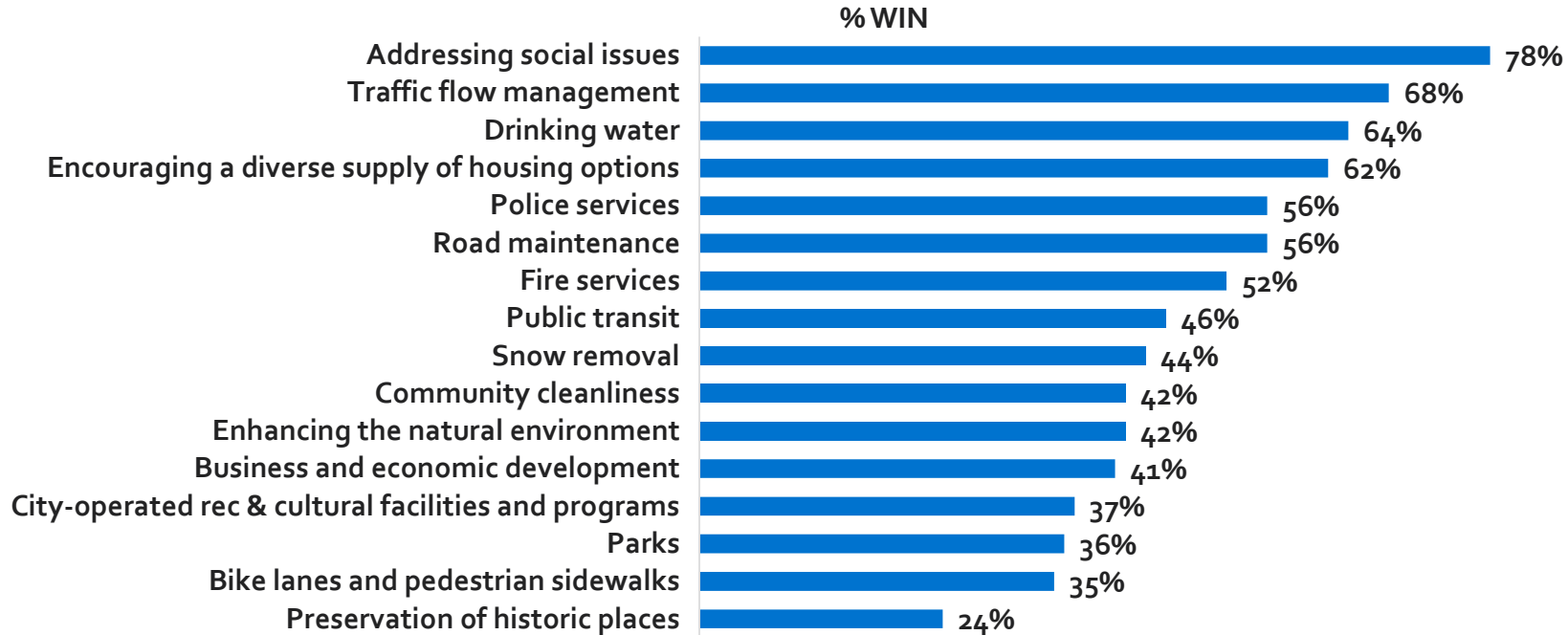


** 2017 used a slightly different question wording*

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

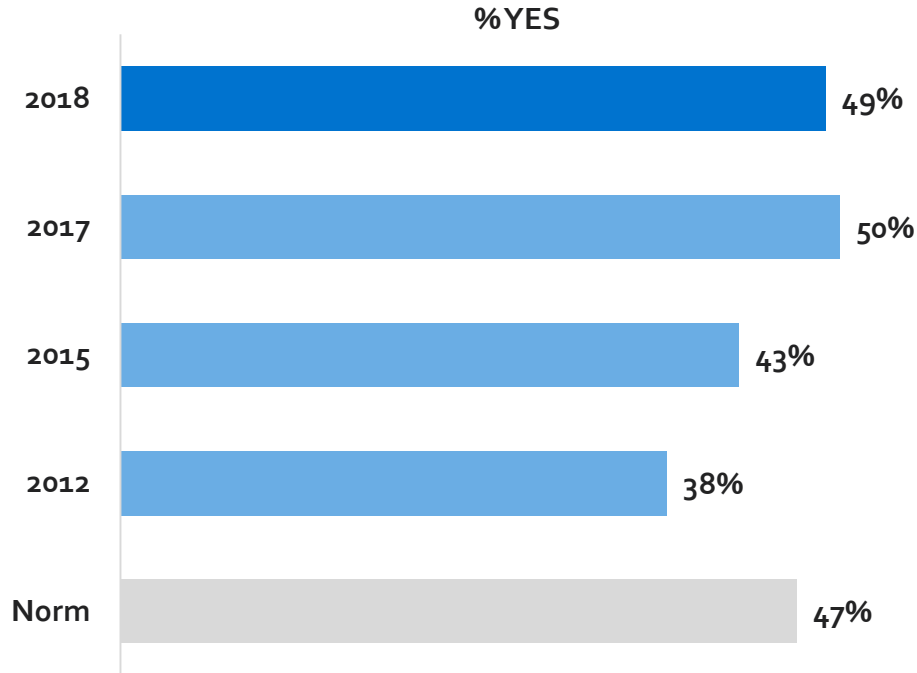
(Paired Choice Analysis)



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

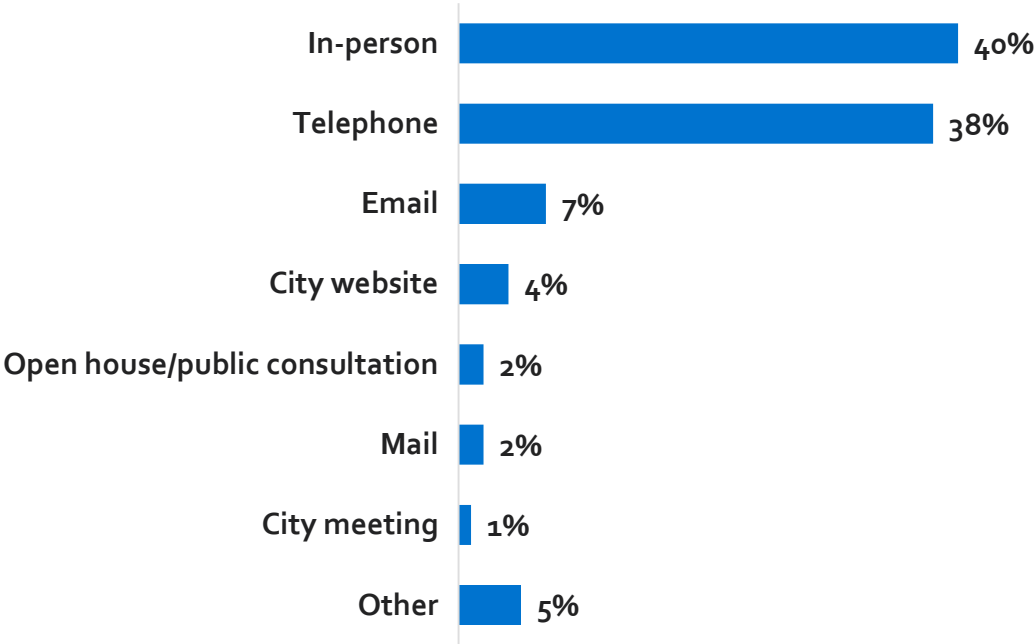


Q14. In the last 12 months, have you personally contacted or dealt with the City of Kelowna or one of its employees?

© 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%

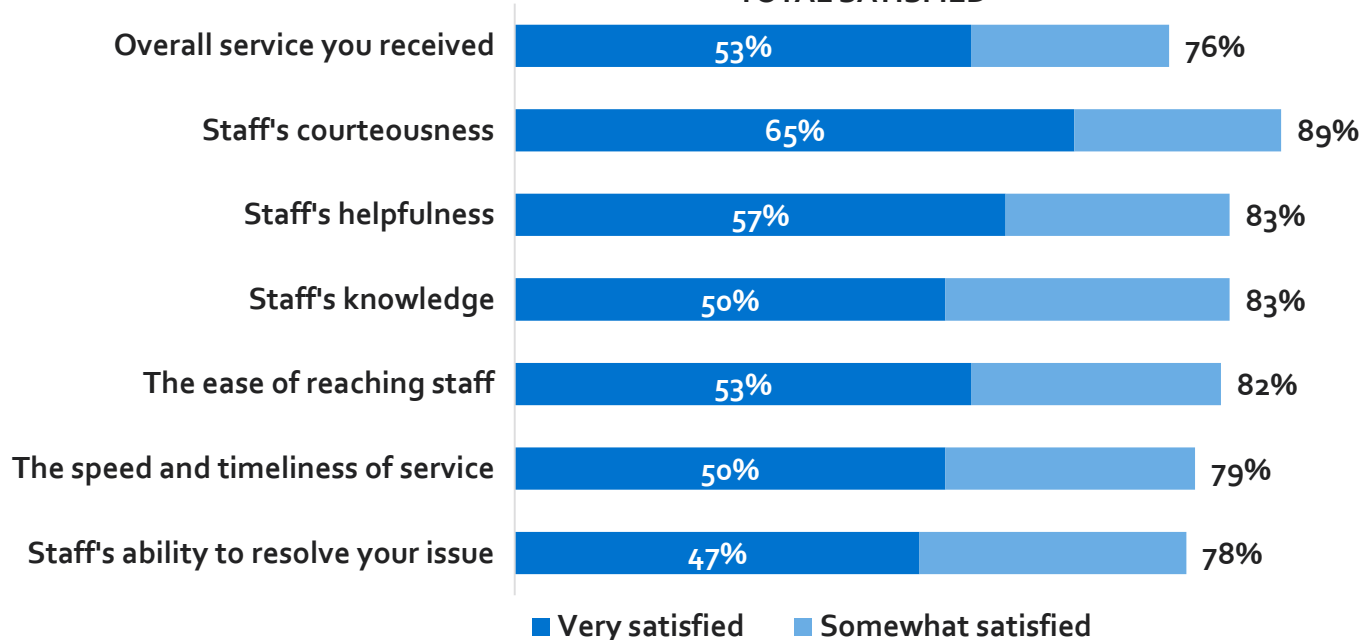
CUSTOMER SERVICE

Satisfaction with Customer Service

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



TOTAL SATISFIED



2017 (n=150)	2015 (n=136)	2012 (n=117)	Norm
78%	81%	81%	81%
93%	97%	95%	93%
83%	87%	83%	86%
84%	86%	85%	85%
86%	88%	90%	86%
83%	82%	84%	83%
78%	79%	77%	76%

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

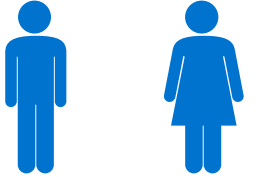
QUESTIONS?

WEIGHTED SAMPLE CHARACTERISTICS

Weighted Sample Characteristics



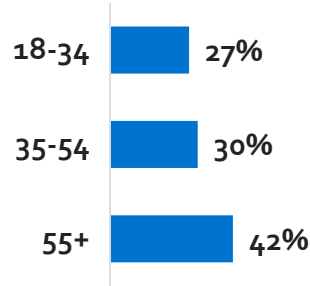
GENDER



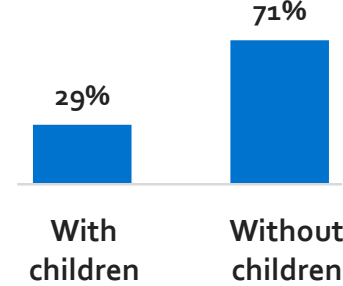
48%
Male

52%
Female

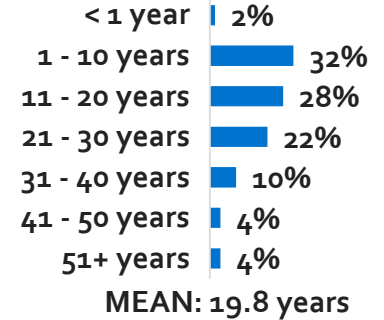
AGE



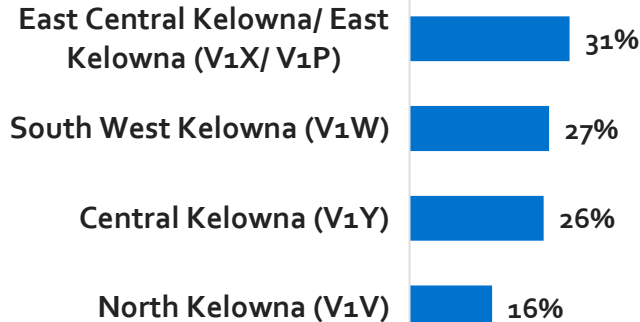
CHILDREN IN HH



YEARS LIVING IN KELOWNA



AREA OF CITY



HH INCOME

