2020 CITIZEN SURVEY

PREPARED FOR THE CITY OF KELOWNA BY:

PRESENTED BY:

Catherine Knaus, Director

October 26, 2020

City of Kelowna

Ipsos

Objectives and Methodology

OBJECTIVES

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

- Understand the impact COVID-19 has had on residents and how the City can help the community recover

METHODOLOGY

- Random and representative telephone survey with 300 adult Kelowna residents

- Dual frame cellphone/landline sampling methodology (65% cellphones, 35% landlines)

- Conducted September 1 to 15, 2020

- Weighted by gender/age and neighbourhood

- MOE: ±5.7%, 19 times out of 20

- Tracking and normative comparisons provided where appropriate

Highlights

1 Most survey measures are stable and strong.

2 Satisfaction with individual services is largely unchanged and any shifts in overall satisfaction are positive.

3 Social issues and safety concerns are still making more see quality of life worsening versus improving.

4 Social issues continue to dominate the issue agenda and are citizens' number one priority for investment.

5 Perceptions of transportation, particularly traffic congestion, have improved this year.
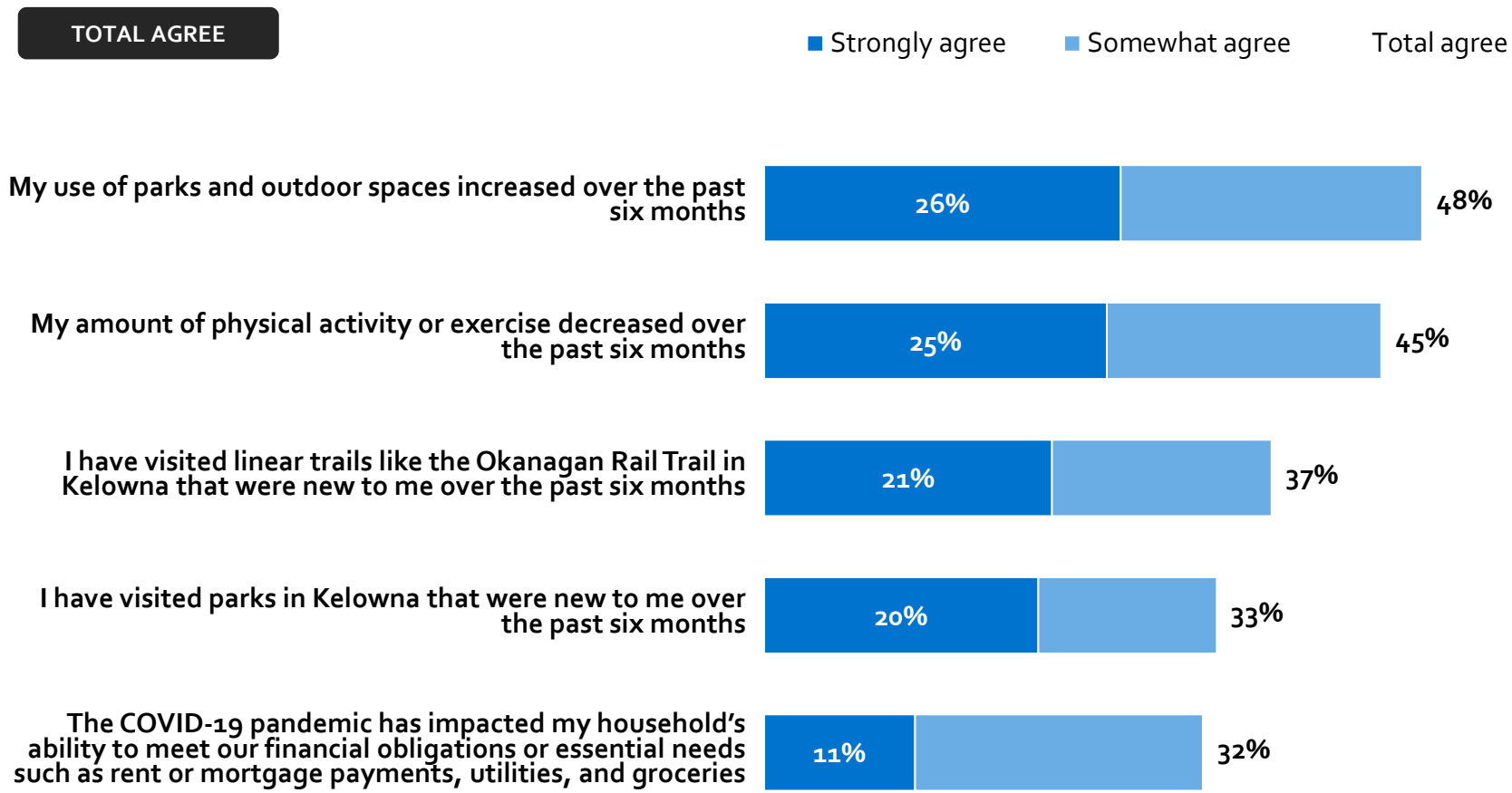
6 Citizens continue to demonstrate a strong preference for tax increases over service cuts.

7 Suggestions for actions the City can take to help Kelowna's recovery from COVID-19 primarily focus on measures to reduce the spread of the virus.

COVID-19

One-third of citizens are finding it difficult to make ends meet as a result of the COVID-19 pandemic. The impact on recreation is mixed.

TOTAL AGREE

■ Strongly agree   ■ Somewhat agree   Total agree

My use of parks and outdoor spaces increased over the past six months
26% | **48%**

My amount of physical activity or exercise decreased over the past six months
25% | **45%**

I have visited linear trails like the Okanagan Rail Trail in Kelowna that were new to me over the past six months
21% | **37%**

I have visited parks in Kelowna that were new to me over the past six months
20% | **33%**

The COVID-19 pandemic has impacted my household's ability to meet our financial obligations or essential needs such as rent or mortgage payments, utilities, and groceries
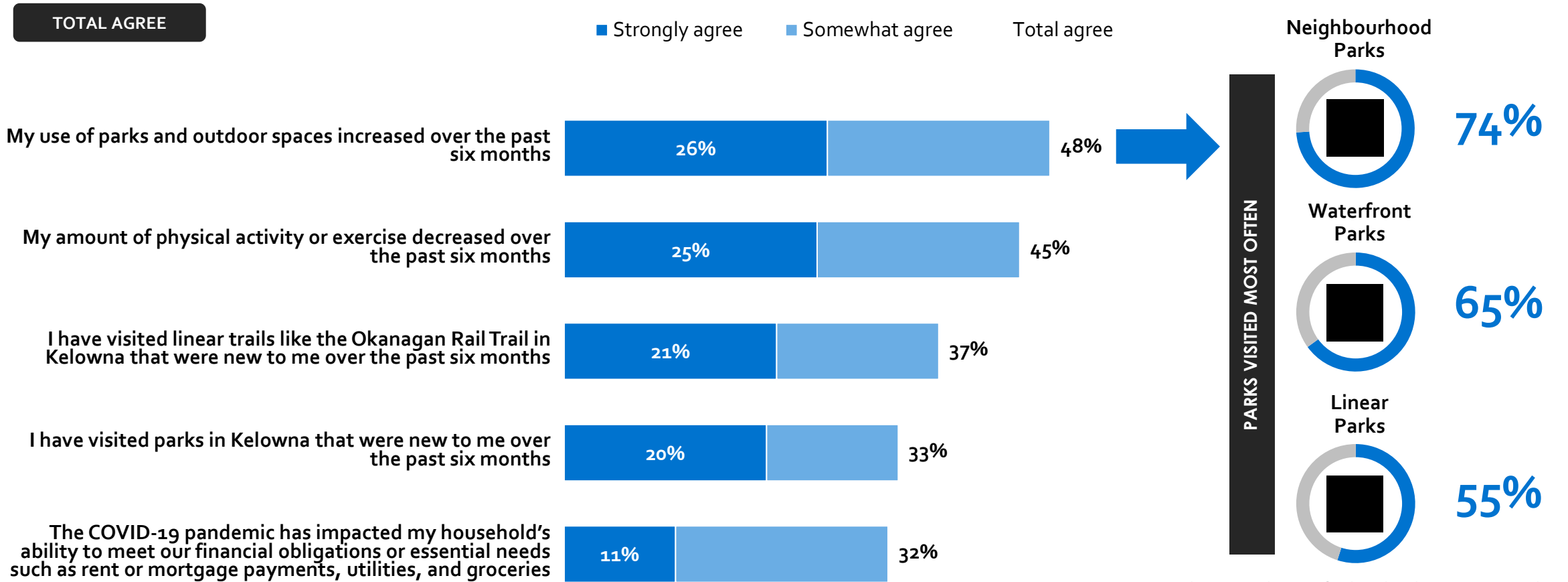**11%** | **32%**

One-third of citizens are finding it difficult to make ends meet as a result of the COVID-19 pandemic. The impact on recreation is mixed.

TOTAL AGREE

■ Strongly agree ■ Somewhat agree Total agree

My use of parks and outdoor spaces increased over the past six months
| 26% | 48% |

My amount of physical activity or exercise decreased over the past six months
| 25% | 45% |

I have visited linear trails like the Okanagan Rail Trail in Kelowna that were new to me over the past six months
| 21% | 37% |

I have visited parks in Kelowna that were new to me over the past six months
| 20% | 33% |

The COVID-19 pandemic has impacted my household's ability to meet our financial obligations or essential needs such as rent or mortgage payments, utilities, and groceries
| 11% | 32% |

PARKS VISITED MOST OFTEN

Neighbourhood Parks
74%

Waterfront Parks
65%

Linear Parks
55%

Citizens mainly suggest focusing on measures to reduce the spread of the virus.

Measure	%
Mandatory/more enforcement of mask use	18%
Support the economy/businesses	11%
Everything is okay/keep doing what they/we are doing	10%
Regulate/better enforcement of social distancing	9%
Stronger enforcement of safety protocols/penalties for non-compliance	8%
Restrict/regulate/better enforcement of (indoor) groups/social gatherings	7%
Open up/lift all restrictions/let it run its course/must go back to normal	6%
Close/regulate/monitor restaurants/clubs/bars	5%
Better/more sanitization/cleaning of public places	4%
More access to outdoor recreation (parks, outdoor spaces, bike paths, trails)	4%
Restrict tourists/should not have opened up for tourism	3%
Promote/support outdoor activities/events	3%
Close Bernard Avenue/downtown streets	3%
Support for those who are homeless	3%
None/nothing	4%
Don't know	15%

Note: Mentions <3% not shown.
Base: All respondents (n=300)
QCOVID2. What actions could the City take in response to COVID-19 that you think would be most helpful to Kelowna's recovery?
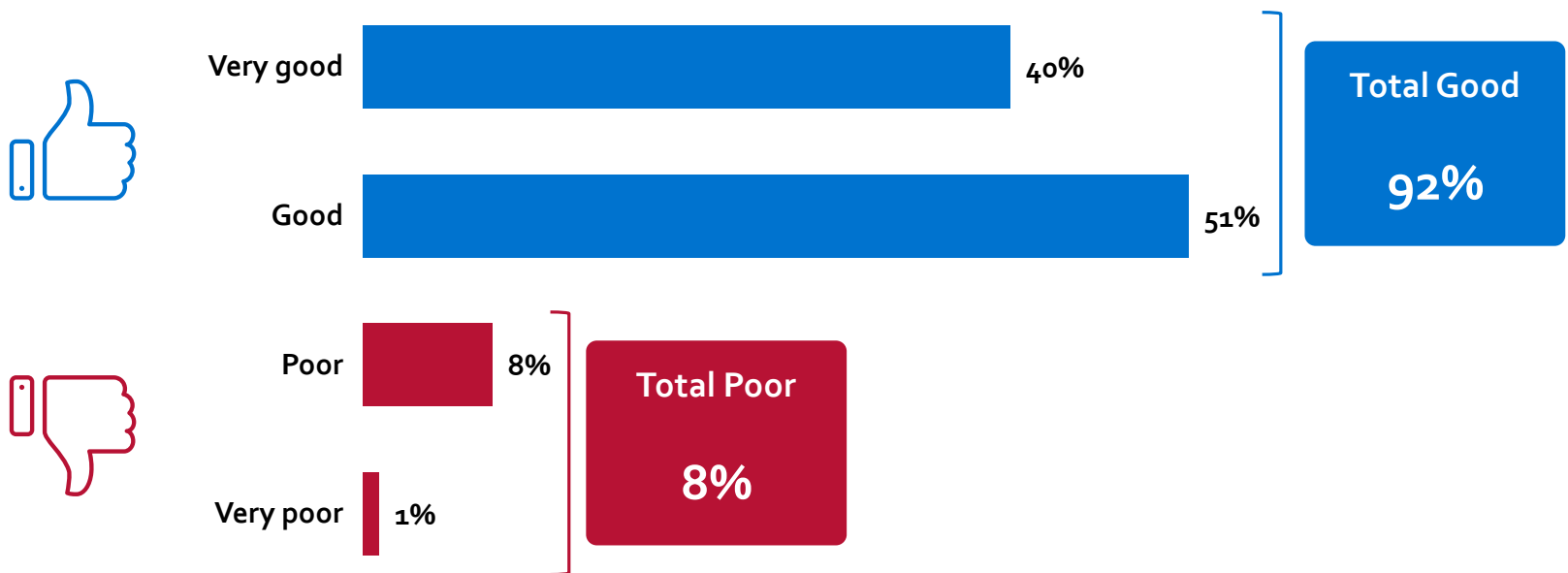
QUALITY OF LIFE

Citizens recognize that a number of elements contribute to making a city a good place to live – overall, a low crime rate, good recreational opportunities, and parks top the list.

Category	%
Low crime rate/safe	16%
Good recreational facilities/opportunities/activities	13%
Good parks/green space	13% ▲
Good amenities/services	11%
Convenient location/accessible to everything	9%
Beautiful natural setting	9%
Employment/job opportunities (incl. well paying jobs)	8%
Friendly/welcoming people	8%
Good weather/climate	6%
Affordability/low cost of living	6%
Right size (not too big/small)	5%
Good healthcare access (doctors/hospitals)	5%
Good sense of community	5%
Nice beaches/lakes	4%
None/nothing	5%
Don't know	1%

2018 Top Mentions (n=300)	
Low crime rate/safe	16%
Good recreational facilities/opportunities/activities	12%
Good amenities/services	12%
Convenient location/accessible to everything	11%

Note: Mentions <4% not shown.
Base: All respondents (n=300)
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?

▲▼ Significantly higher/lower than 2018.

Overall perceptions of quality of life remain strong.

Very good — 40%

Good — 51%

Total Good

92%

Poor — 8%

Very poor — 1%

Total Poor

8%

	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	NORM
TOTAL GOOD	96%	95%	94%	94%	92%	96%
Very Good	36%	40%	40%	36%	40%	45%

Base: All respondents (n=300)
Q3. How would you rate the overall quality of life in the City of Kelowna today?

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Significantly higher/lower than 2018.

However, perceptions of how quality of life has changed are more negative than positive.

| | Improved | 22% |

| | Stayed the same | 42% |

| | Worsened | 35% |

| | Don't know | 2% |

NET Score (2020)
Improved – Worsened

-13
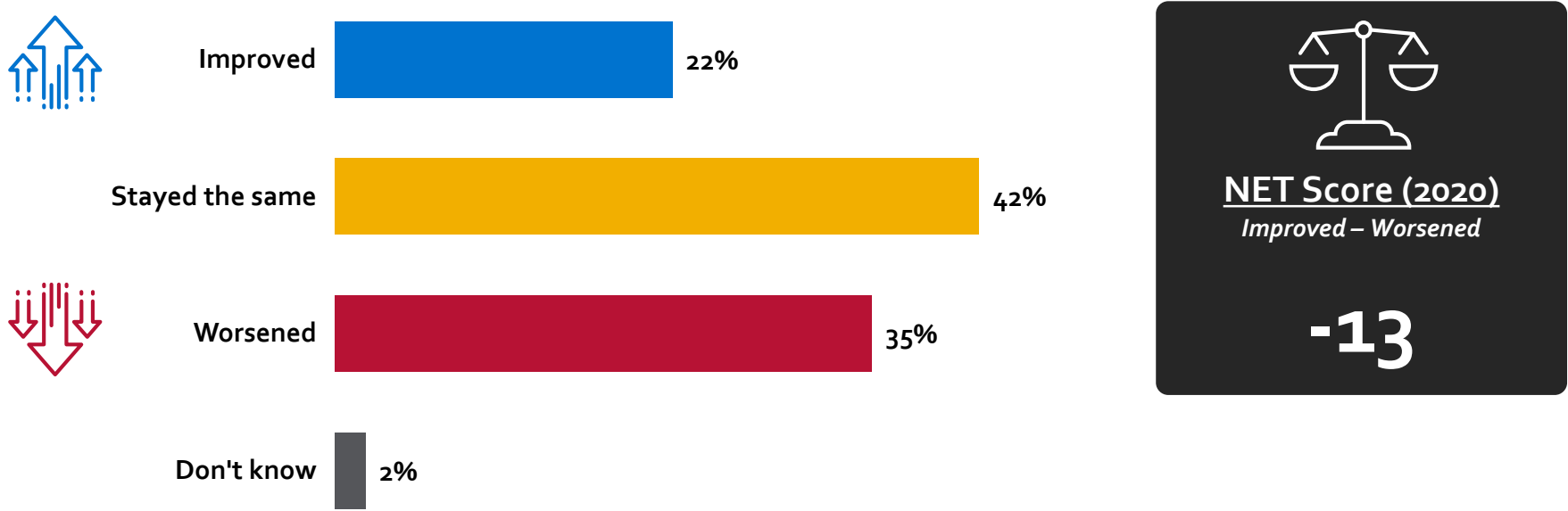
	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	NORM
NET SCORE	-5	+12	-11	-15	-13	0

Base: All respondents (n=300)
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?

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Significantly higher/lower than 2018.

A variety of factors are behind perceptions of an 'improved' quality of life.

(Among those saying the quality of life has improved)

Factor	%
More construction (housing/buildings)	10%
Better/more amenities and services	8%
Well planned/developed	7%
City governance (Council/Administration)	6%
More bike path/pathways	5%
Better/more accessible parks/outdoor spaces	5%
Retired/enjoying life	5%
Attracting more business	5%
Revitalization of downtown	4%
More jobs/employment opportunities	4%
Improved roads	4%
Improved/expanded public transportation	3%
Growing steadily	3%
Don't know	5%

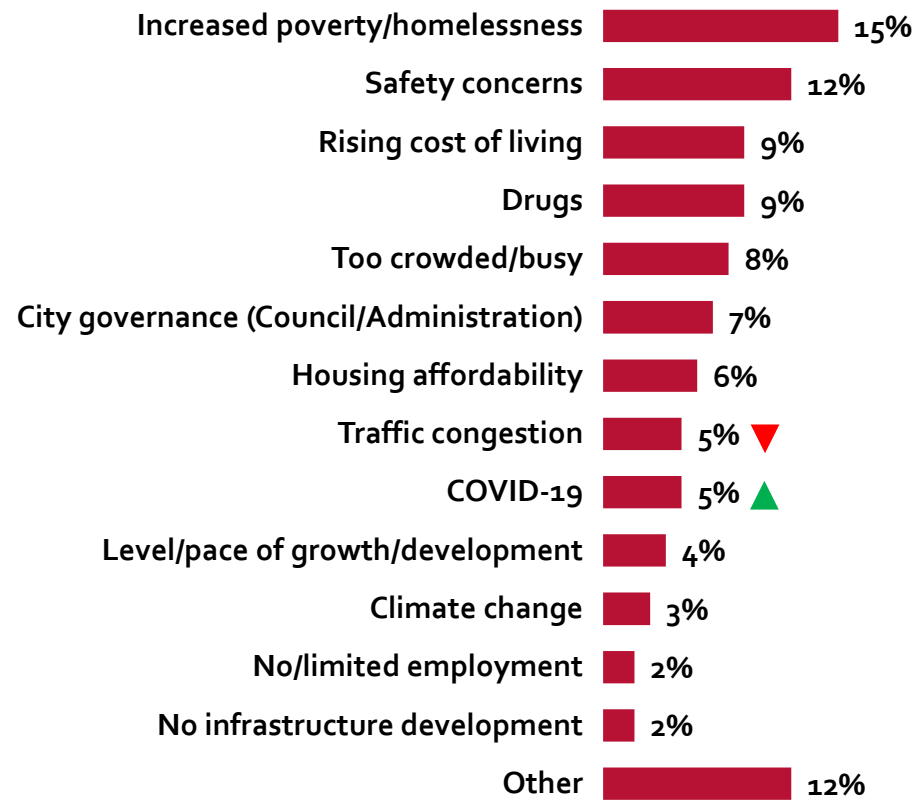| 2018 Top Mentions (n=58)*	
Better/more amenities and services	13%
City governance (Council/Administration)	10%
Improved roads	9%

Note: Mentions <3% not shown.
*Small base size, interpret with caution.
Base: Those saying the quality of life has improved (n=63)*
Q5. Why do you think the quality of life has improved?

Significantly higher/lower than 2018.

Social issues and safety concerns are the most frequently mentioned reasons for saying the quality of life has 'worsened'.

(Among those saying the quality of life has worsened)

Reason	%
Increased poverty/homelessness	15%
Safety concerns	12%
Rising cost of living	9%
Drugs	9%
Too crowded/busy	8%
City governance (Council/Administration)	7%
Housing affordability	6%
Traffic congestion	5% ▼
COVID-19	5% ▲
Level/pace of growth/development	4%
Climate change	3%
No/limited employment	2%
No infrastructure development	2%
Other	12%

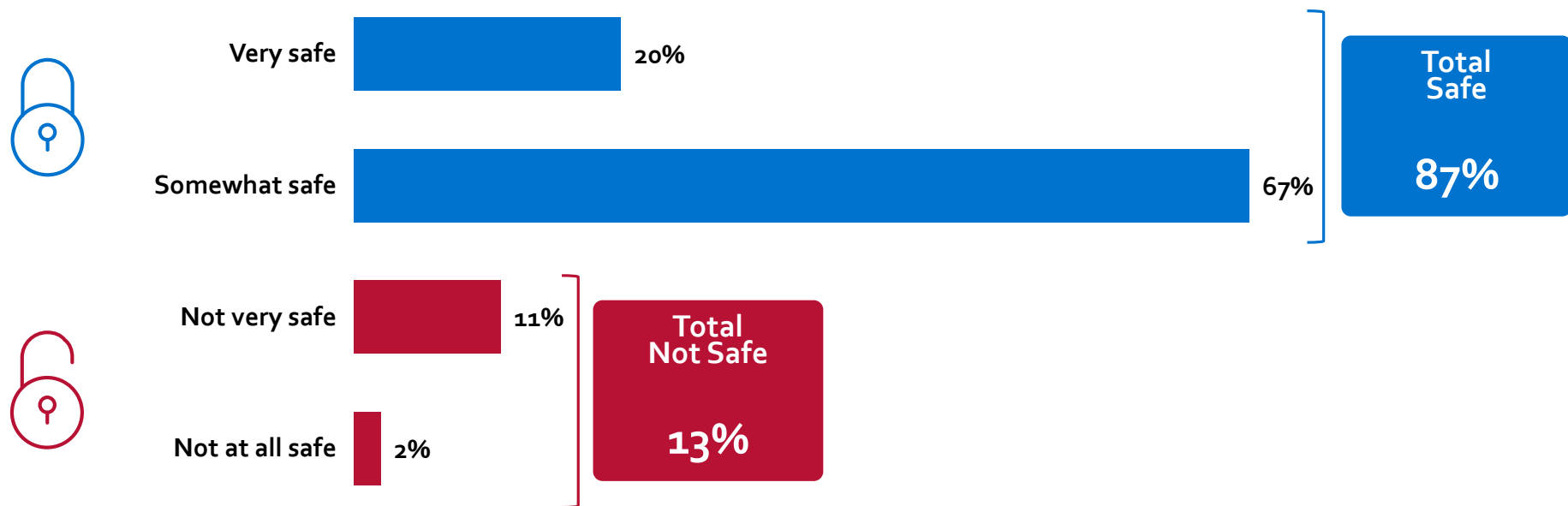| 2018 Top Mentions (n=108)	
Traffic congestion	21%
Increased poverty/homelessness	16%
Safety concerns	14%
Rising cost of living	14%

▲▼ Significantly higher/lower than 2018.

ISSUE AGENDA

Social issues continue to dominate the public issue agenda. Transportation mentions are down significantly.

TOTAL MENTIONS

■ First mention ■ Second mention   Total mentions

	Chart		Norm	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)
Social (NET)	38%	46%	23%	17%	16%	40%	51%	46%
Transportation (NET)	15%	22%	35%	37%	38%	39%	43%	22% ▼
Pandemic/COVID-19 (NET)	6%	8%	n/a	n/a	n/a	n/a	n/a	8% ▲
Growth and development (NET)	6%	7%	16%	17%	13%	15%	10%	7%
Economy (NET)	4%	7%	4%	12%	12%	3%	2%	7% ▲
Municipal government services (NET)	5%	6%	10%	8%	7%	8%	6%	6%
Crime (NET)		6%	12%	9%	8%	4%	11%	6% ▼
Parks, recreation, and culture (NET)		5%	8%	12%	12%	7%	6%	5%
Education (NET)		3%	7%	7%	3%	3%	3%	3%
Healthcare (NET)		2%	4%	5%	5%	3%	3%	2%
Taxation/municipal government spending (NET)		1%	7%	10%	4%	2%	4%	1% ▼
Environment (NET)		1%	4%	6%	4%	2%	2%	1%
Other (NET)	5%	8%	7%	4%	10%	5%	2%	8% ▲
Nothing		12%						
Don't know		2%						

Note: Data <4% not labelled.
Base: All respondents (n=300)
Q1. In answering the remainder of the survey, please think of the City of Kelowna during more normal times, that is, before COVID-19. 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?

▲▼ Significantly higher/lower than 2018.

COMMUNITY SAFETY

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Overall perceptions of community safety continue to be positive.

Very safe ▮ 20%

Somewhat safe ▮ 67%

Total Safe 87%

Not very safe ▮ 11%

Not at all safe ▮ 2%

Total Not Safe 13%

	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	NORM
TOTAL SAFE	94%	90%	87%	87%	91%
Very Safe	32%	29%	24%	20%	31%

Base: All respondents (n=300)
Q17. Overall, would you describe the City of Kelowna as a very safe, somewhat safe, not very safe, or not at all safe community?

Significantly higher/lower than 2018.

CITY SERVICES AND INFRASTRUCTURE

Overall satisfaction with City services remains high.

Very satisfied — 29%

Somewhat satisfied — 62%

Total Satisfied 91%

Not very satisfied — 7%

Not at all satisfied — 1%

Total Not Satisfied 8%

Don't know — 1%
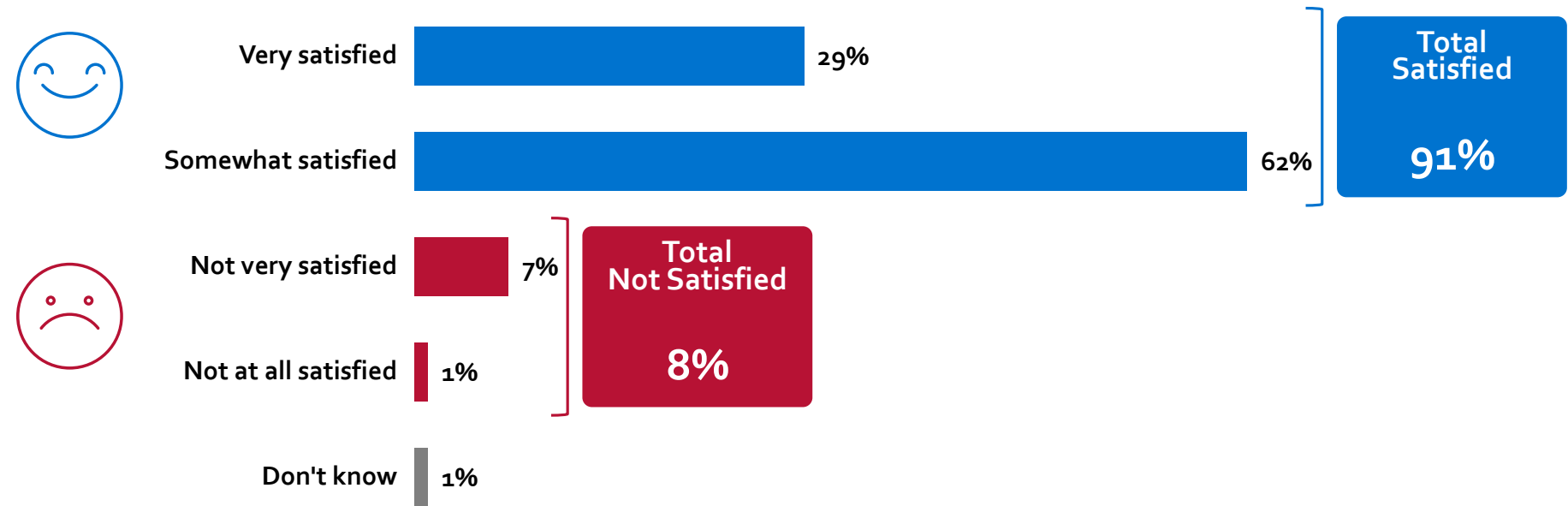
	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	NORM
TOTAL SATISFIED	94%	94%	90%	87%	91%	93%
Very Satisfied	23%	29%	26%	23%	29%	35%

Base: All respondents (n=300)
Q7a. Just a reminder, in answering the following questions, please think of the City of Kelowna's service delivery during more normal times, that is, before COVID-19. How satisfied are you with the overall level and quality of services provided by the City of Kelowna?
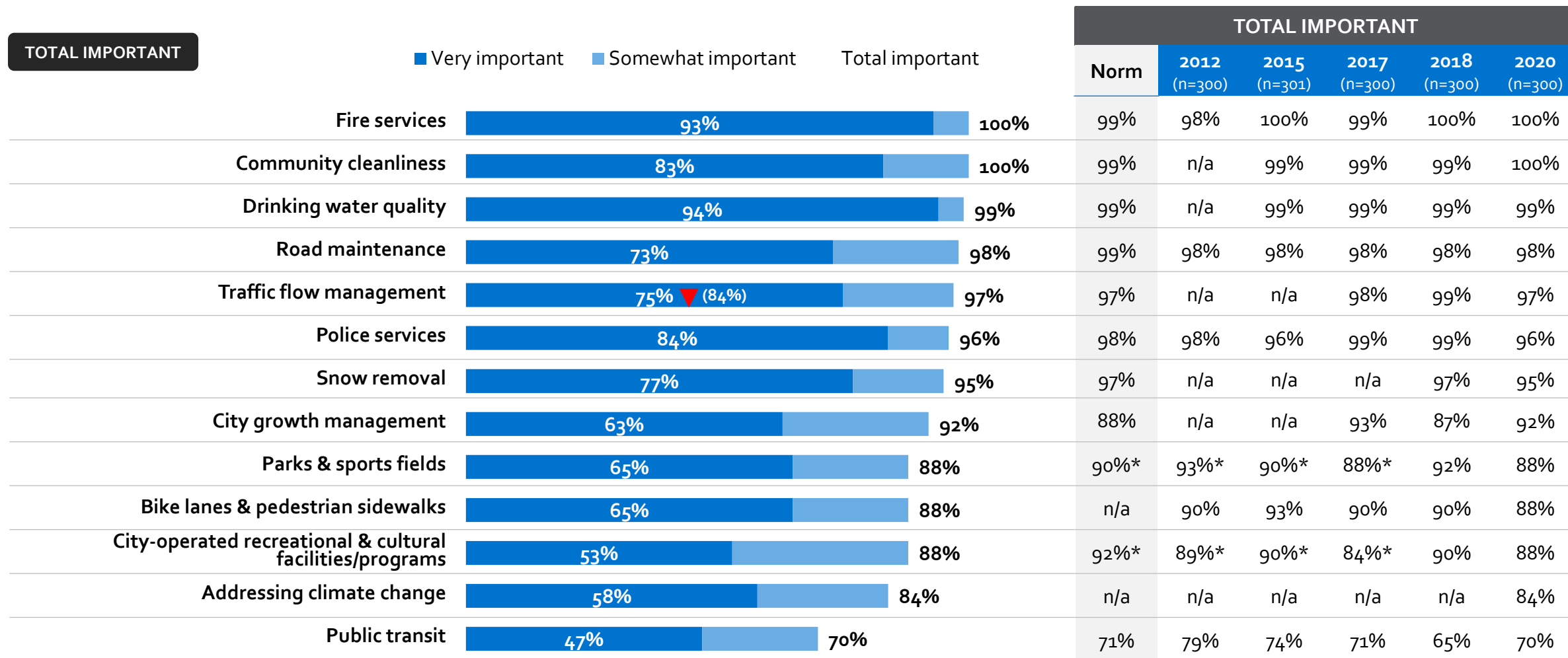
Significantly higher/lower than 2018.

Satisfaction extends to the delivery of specific services.

TOTAL SATISFIED

■ Very satisfied ■ Somewhat satisfied Total satisfied

		TOTAL SATISFIED					
	Norm	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)
Fire services — 82% / 98%	95%	97%	96%	95%	97%	98%
Parks & sports fields — 48% / 91%	92%*	95%*	92%*	93%*	91%	91%
Drinking water quality — 50% / 90%	88%	n/a	82%	88%	87%	90%
City-operated recreational & cultural facilities/programs — 34% / 89%	90%*	91%*	90%*	91%*	90%	89%
Community cleanliness — 29% / 84%	89%	n/a	93%	92%	82%	84%
Road maintenance — 25% / 83%	79%	78%	81%	78%	77%	83%
Police services — 36% ▼ (47%) / 82%	90%	88%	89%	85%	87%	82%
Bike lanes and pedestrian sidewalks — 26% / 82%	n/a	83%	73%	74%	80%	82%
Snow removal — 32% / 81%	83%	n/a	n/a	n/a	79%	81%
Addressing climate change — 7% / 65%	n/a	n/a	n/a	n/a	n/a	65%
Public transit — 19% / 64%	55%	69%	68%	60%	59%	64%
City growth management — 11% / 62%	69%	n/a	n/a	65%	64%	62%
Traffic flow management — 11% ▲ (6%) / 52%	52%	n/a	n/a	41%	36%	52% ▲

Base: Total-300
Q8. And now how satisfied are you with…? (Scale: very satisfied, somewhat satisfied, not very satisfied, not at all satisfied)

* Prior to 2018, respondents were asked about parks, sports fields, recreational facilities and programs, and cultural facilities and programs separately. The yearly and normative ratings reported here are the average of these services.

▲▼ Significantly higher/lower than 2018.

All the evaluated services are important to citizens.

TOTAL IMPORTANT

■ Very important ■ Somewhat important Total important

Fire services	93%	100%
Community cleanliness	83%	100%
Drinking water quality	94%	99%
Road maintenance	73%	98%
Traffic flow management	75% ▼ (84%)	97%
Police services	84%	96%
Snow removal	77%	95%
City growth management	63%	92%
Parks & sports fields	65%	88%
Bike lanes & pedestrian sidewalks	65%	88%
City-operated recreational & cultural facilities/programs	53%	88%
Addressing climate change	58%	84%
Public transit	47%	70%

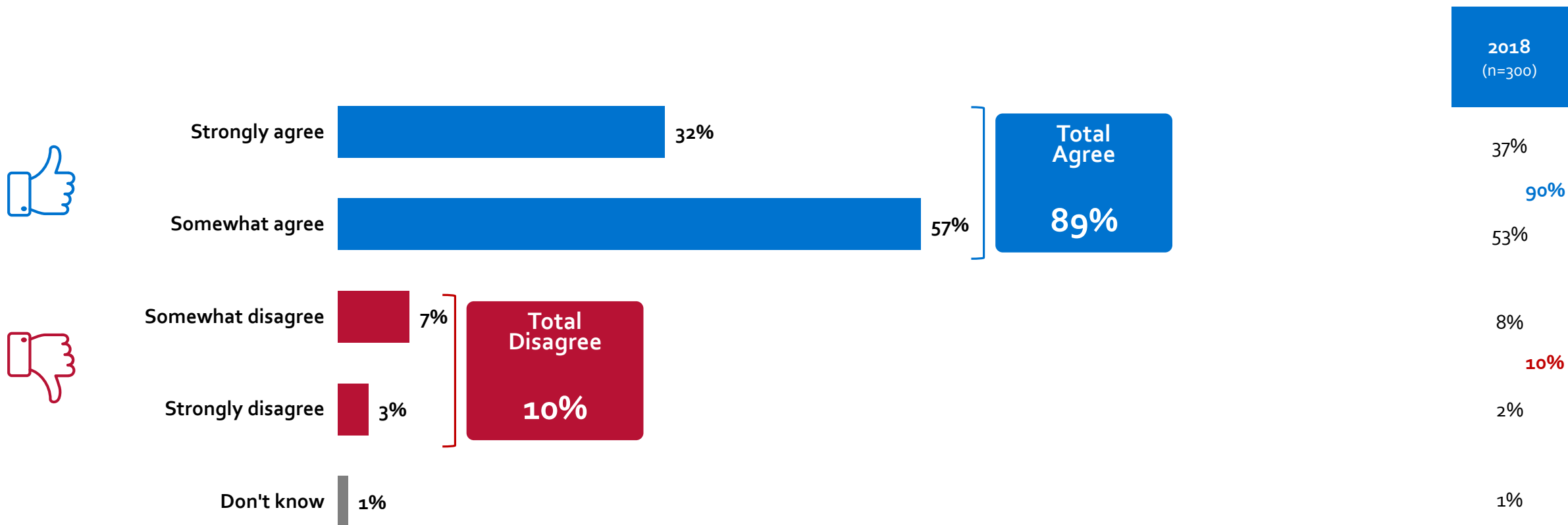|	TOTAL IMPORTANT					
	Norm	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)
Fire services	99%	98%	100%	99%	100%	100%
Community cleanliness	99%	n/a	99%	99%	99%	100%
Drinking water quality	99%	n/a	99%	99%	99%	99%
Road maintenance	99%	98%	98%	98%	98%	98%
Traffic flow management	97%	n/a	n/a	98%	99%	97%
Police services	98%	98%	96%	99%	99%	96%
Snow removal	97%	n/a	n/a	n/a	97%	95%
City growth management	88%	n/a	n/a	93%	87%	92%
Parks & sports fields	90%*	93%*	90%*	88%*	92%	88%
Bike lanes & pedestrian sidewalks	n/a	90%	93%	90%	90%	88%
City-operated recreational & cultural facilities/programs	92%*	89%*	90%*	84%*	90%	88%
Addressing climate change	n/a	n/a	n/a	n/a	n/a	84%
Public transit	71%	79%	74%	71%	65%	70%

Base: All respondents (n=300)
Q7. How important is…to you personally? (Scale: very important, somewhat important, not very important, not at all important)

* Prior to 2018, respondents were asked about parks, sports fields, recreational facilities and programs, and cultural facilities and programs separately. The yearly and normative ratings reported here are the average of these services.

21 – © Ipsos

▲▼ Significantly higher/lower than 2018.

The City has six Primary Strengths and one Primary Area for Improvement.

IMPORTANCE

SATISFACTION

Primary Areas for Improvement

Primary Strengths

Secondary Areas for Improvement

Secondary Strengths

100%
92%
65%

50%
79%
100%

Traffic flow management

City growth management

Community cleanliness

Road maintenance

Drinking water quality

Police services

Snow removal

Fire services

City-operated recreational/cultural facilities/programs

Bike lanes and pedestrian sidewalks

Parks & sports fields

Addressing climate change

Public transit

Perceptions of City inclusiveness and acceptance remain favourable.

2018
(n=300)

Strongly agree — 32%
37%

Total Agree
89%
90%

Somewhat agree — 57%
53%

Somewhat disagree — 7%
8%

Total Disagree
10%
10%

Strongly disagree — 3%
2%

Don't know — 1%
1%

▲▼ Significantly higher/lower than 2018.

FINANCIAL PLANNING

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Perceptions of the City's value for taxes remain high.

Very good value — 17%

Fairly good value — 63%

Total Good Value 79%

Fairly poor value — 13%

Very poor value — 4%

Total Poor Value 17%

Don't know — 4%
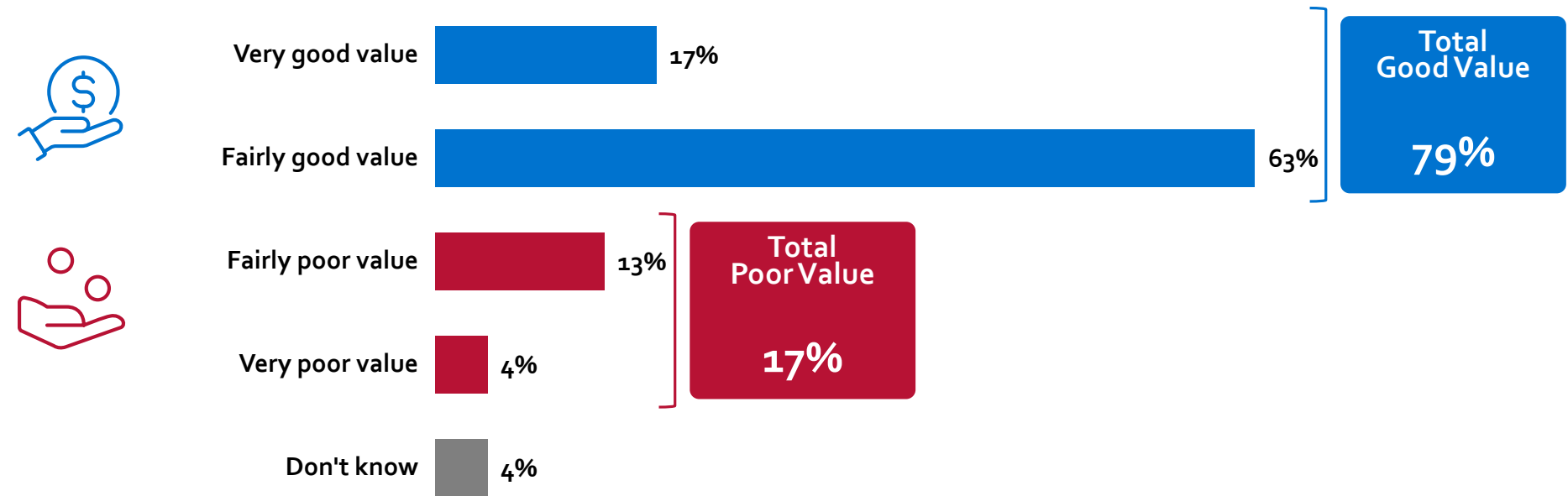
	2012* (n=300)	2015* (n=301)	2017* (n=300)	2018 (n=300)	2020 (n=300)	NORM
TOTAL GOOD VALUE	81%	84%	84%	79%	79%	84%
Very Good Value	16%	23%	18%	16%	17%	22%

* Slightly different question wording

Base: All respondents (n=300)
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?

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Significantly higher/lower than 2018.

City of Kelowna

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Citizens continue to prefer tax increases over service reductions.

INCREASE TAXES
to enhance or expand services — 22%

INCREASE TAXES
to maintain services at current levels — 31%

Total Increase Taxes
53%

REDUCE SERVICES
to maintain current tax level — 27%

REDUCE SERVICES
to reduce taxes — 10%

Total Reduce Services
37%

None — 8%

Don't know — 2%
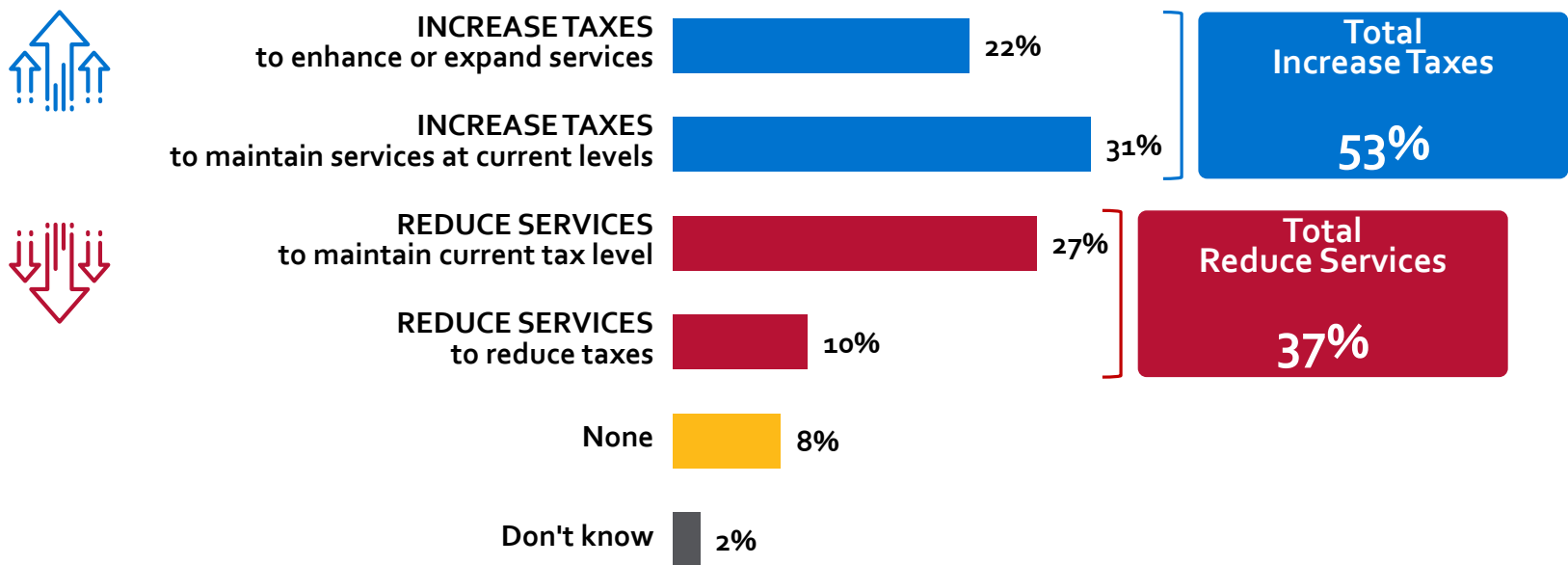
	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	NORM
TOTAL INCREASE TAXES	57%	56%	62%	55%	53%	56%
TOTAL REDUCE SERVICES	34%	31%	30%	33%	37%	32%

Base: All respondents (n=300)
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?

Significantly higher/lower than 2018.

PRIORITY SETTING

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Citizens prioritize infrastructure renewal over building new by a margin of nearly 2:1.

Don't know
2%

Building new infrastructure
34%

Renewing existing infrastructure
64%
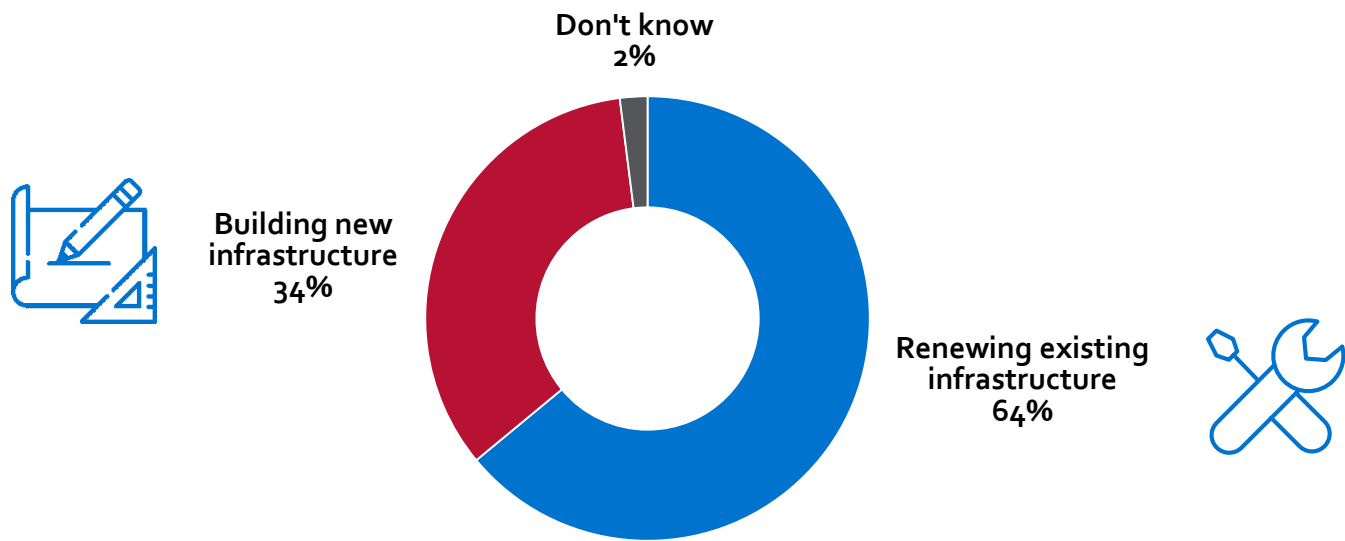
	2017* (n=300)	2018 (n=300)	2020 (n=300)
Renewing existing infrastructure	56%	58%	64%
Building new infrastructure	41%	40%	34%

* Slightly different question wording

Base: All respondents (n=300)
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 2021?

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▲▼ Significantly higher/lower than 2018.

Social issues are citizens' number one priority for investment.

WIN

Priority	Percentage
Addressing social issues such as homelessness, mental health and addiction	79%
Encouraging a diverse supply of housing options at different price points	67%
Drinking water	65%
Fire services	56%
Police services	56%
Traffic flow management	50%
Business and economic development	49%
Community cleanliness	48%
Snow removal	48%
Road maintenance	47%
City-operated recreational facilities and programs	43%
Public transit	42%
Bike lanes and pedestrian sidewalks	38%
Parks	37%
Preservation of historic places	28%
City-operated cultural facilities and programs	26%

CUSTOMER SERVICE

More than two-in-five say they contacted or dealt with the City in the last 12 months.

43%

Yes
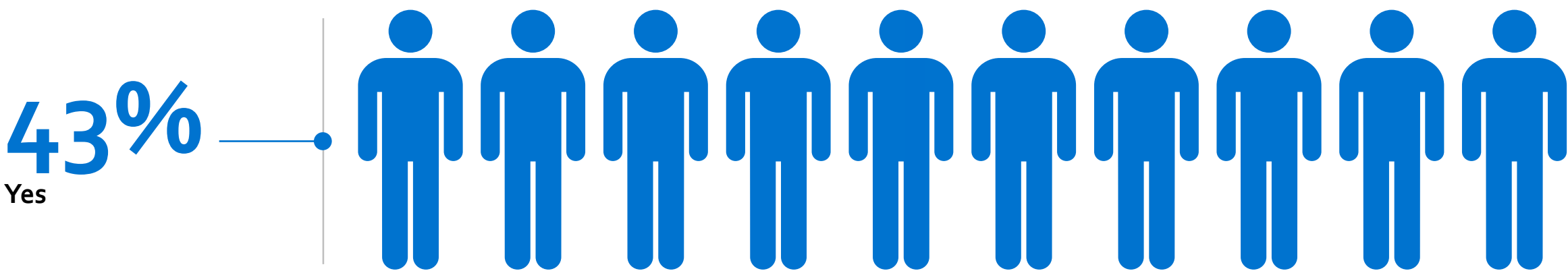
	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	NORM
Yes	38%	43%	50%	49%	43%	48%

Significantly higher/lower than 2018.

Most contacts occurred via the telephone or in-person.

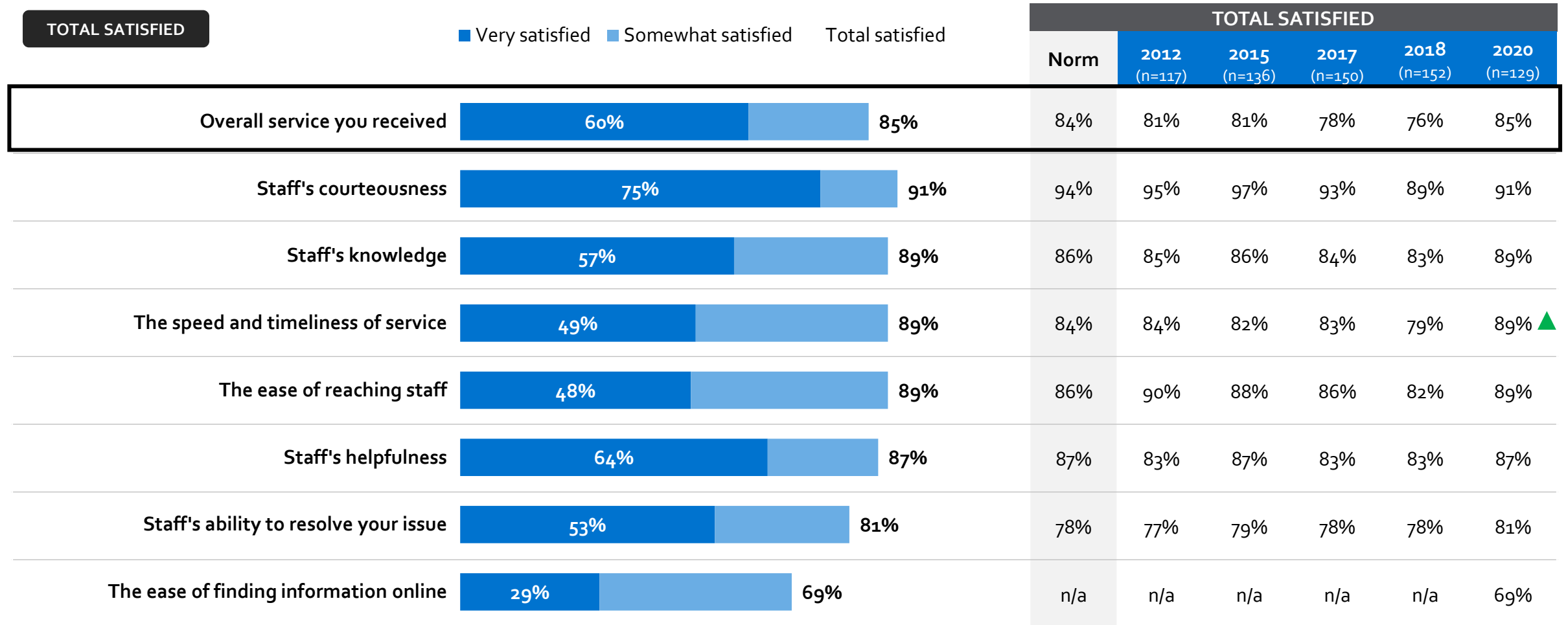**(Among those saying they contacted or dealt with the City in the last 12 months)**

Channel	Percentage
Telephone	46%
In-person	38%
Email	10%
City website	1%
Mail	1%
City meeting (Council meeting, Advisory committee, etc.)	1%
Other	3%
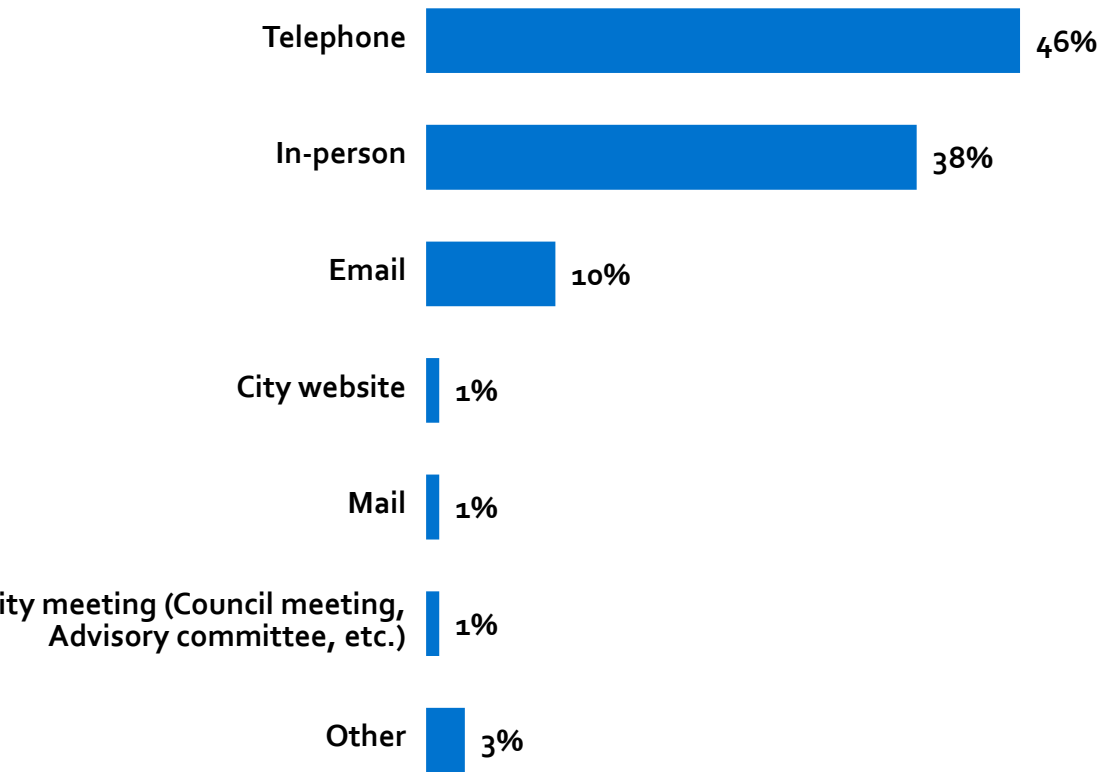
2018 Top Mentions (n=152)	
In-person	40%
Telephone	38%
Email	7%

Base: Among those saying they contacted or dealt with the City in the last 12 months (n=129)
Q15. For the next few questions, please think about the last time you contacted or dealt with the City of Kelowna or one of its employees. How did this contact occur?

Significantly higher/lower than 2018.

Satisfaction with the City's customer service remains high.

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

TOTAL SATISFIED

■ Very satisfied ■ Somewhat satisfied Total satisfied

		TOTAL SATISFIED				
	Norm	2012 (n=117)	2015 (n=136)	2017 (n=150)	2018 (n=152)	2020 (n=129)
Overall service you received — 60% — 85%	84%	81%	81%	78%	76%	85%
Staff's courteousness — 75% — 91%	94%	95%	97%	93%	89%	91%
Staff's knowledge — 57% — 89%	86%	85%	86%	84%	83%	89%
The speed and timeliness of service — 49% — 89%	84%	84%	82%	83%	79%	89% ▲
The ease of reaching staff — 48% — 89%	86%	90%	88%	86%	82%	89%
Staff's helpfulness — 64% — 87%	87%	83%	87%	83%	83%	87%
Staff's ability to resolve your issue — 53% — 81%	78%	77%	79%	78%	78%	81%
The ease of finding information online — 29% — 69%	n/a	n/a	n/a	n/a	n/a	69%

Base: Among those saying they contacted or dealt with the City in the last 12 months (n=129)
Q16. How satisfied are you with the...? (Scale: very satisfied, somewhat satisfied, not very satisfied, not at all satisfied)
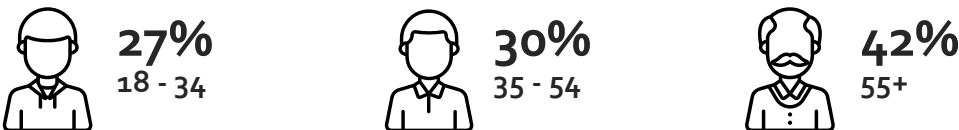
▲▼ Significantly higher/lower than 2018.

Q&A

WEIGHTED SAMPLE CHARACTERISTICS

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Weighted Sample Characteristics

GENDER

48% Male

52% Female

AGE

27% 18 - 34

30% 35 - 54

42% 55+

CHILDREN UNDER 18 IN HH

Yes 29%

No 71%

YEARS LIVING IN KELOWNA

1 to 10 years 32%

11 to 20 years 24%

21 to 30 years 22%

31 to 40 years 11%

41 to 50 years 6%

51+ years 4%
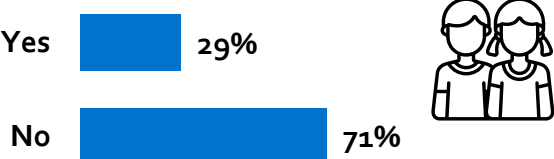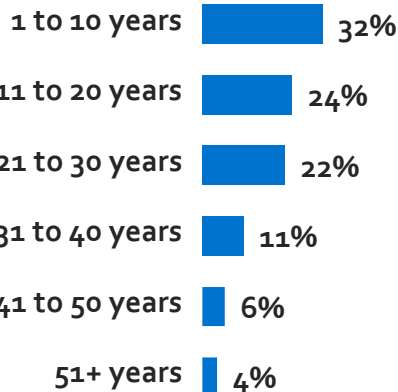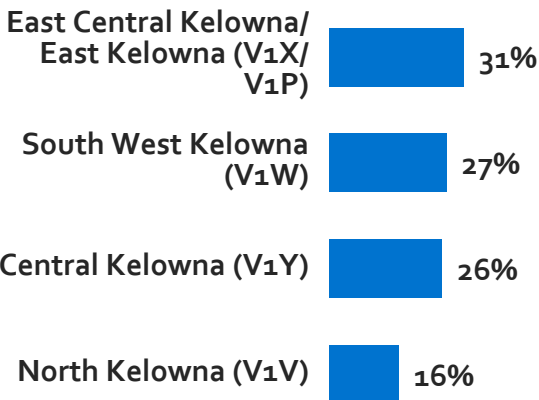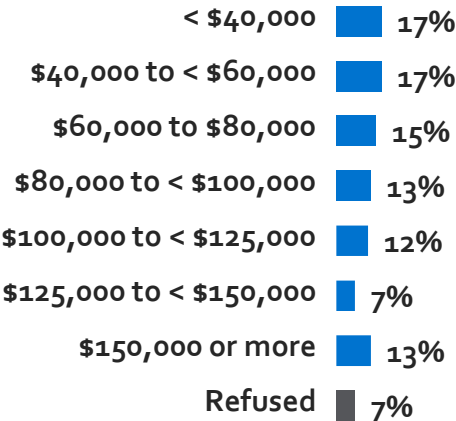
MEAN: 20.9 years

Base: All respondents (n=300)

AREA OF CITY

East Central Kelowna/ East Kelowna (V1X/ V1P) 31%

South West Kelowna (V1W) 27%

Central Kelowna (V1Y) 26%

North Kelowna (V1V) 16%

INCOME

< $40,000 17%

$40,000 to < $60,000 17%

$60,000 to $80,000 15%

$80,000 to < $100,000 13%

$100,000 to < $125,000 12%

$125,000 to < $150,000 7%

$150,000 or more 13%

Refused 7%