

2024 CITIZEN SURVEY

PREPARED FOR THE CITY OF KELOWNA BY:
Ipsos
FINAL REPORT

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INTRODUCTION

1



Objectives and Methodology



This report presents the findings of the City of Kelowna's 2024 Citizen Survey. The main purpose of this survey is to determine how satisfied the public is with municipal programs and services, and to learn what citizens' service priorities are. Insights gained by this research help the City make important decisions regarding planning, budgeting, and service improvements. Ipsos has been conducting the City's Citizen Survey since 2012.



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 (n=74), V1Y (n=80), V1V (n=71), V1X/V1P (n=75).

The survey was conducted using numbers from both cellphones (78%) and landlines (22%). A screening question was included at the start of the survey to confirm residency in Kelowna.

The average time to complete the survey was 20 minutes.

All interviews were conducted between April 8 and 22, 2024.

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 2021 Census data.

Overall results based on a sample size of 300 are accurate to within $\pm 5.7\%$, 19 times out of 20. The margin of error will be larger for sample subgroups.



Notes to Reader



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.

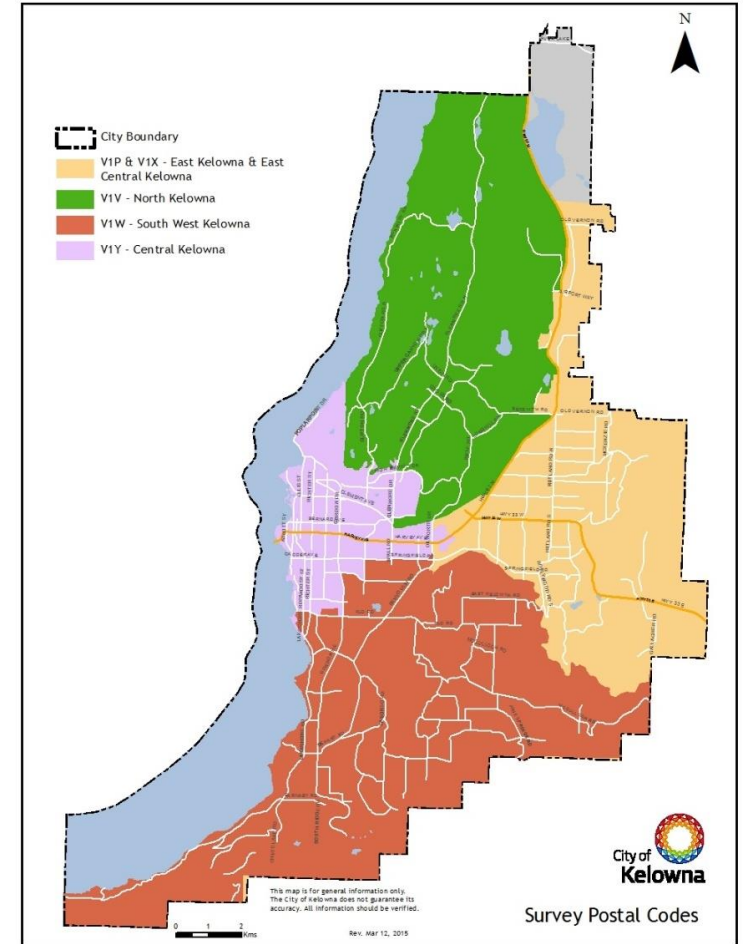
Analysis of some of the statistically significant demographic results is included where applicable. While a number of significant differences may appear in the cross-tabulation output, not all differences warrant discussion.

For the purposes of this 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, Padosy 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)

Where possible, this year's results have been compared to past City of Kelowna Citizen Surveys 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 (▲ ▼) are used to denote any significant differences between 2024 and 2022.

Where possible, 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 can evaluate its performance.



EXECUTIVE SUMMARY

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Executive Summary (page 1 of 2)



QUALITY OF LIFE

- Citizens identify a number of factors that contribute to making a city a good place to live, with good weather, a low crime rate, and affordable topping the list.
- Perceptions of overall quality of life in Kelowna are positive although lower than pre-pandemic years.
- Most feel the quality of life has worsened over the past three years, citing the rising cost of living and growing concerns over poverty and homelessness. Safety also plays a role.



IMPORTANT COMMUNITY ISSUES

- Social issues (particularly poverty/homelessness and housing/affordable housing) continue to dominate the public issue agenda.
- Transportation sits in distant second.
- Other issues include crime/public safety and growth and development.



COMMUNITY SAFETY

- Most describe Kelowna as a safe community overall. Overall perceptions of community safety are unchanged from 2022 although have declined notably over the past decade.



CITY SERVICES AND INFRASTRUCTURE

- Overall satisfaction with City services has rebounded after dipping in 2022 when residents may have noticed some changes to the City's service delivery due to COVID-19 restrictions.
- Satisfaction with specific services is mostly positive, with the overall highest satisfaction ratings going to fire services and parks and sports fields.
- City growth management and traffic flow management continue to be the least satisfactory services overall.
- The 2022 survey saw drops in satisfaction with a number of services, and this year's results suggest the City has made some progress in reversing these declines.
 - Satisfaction has statistically increased this year as compared to 2022 for snow clearing, adapting to the impacts of climate change on City operations and infrastructure, and road maintenance¹.
 - Directional increases are also seen for some other services, but these differences are not statistically significant.
- Conversely, residents are less satisfied with community cleanliness this year as compared to 2022.

¹Year-over-year comparisons for snow clearing and adapting to the impacts of climate change on City operations and infrastructure should be interpreted with caution due to slight differences in question wording.

Executive Summary (page 2 of 2)



CITY INCLUSIVENESS AND ACCEPTANCE

- Perceptions of City inclusiveness and acceptance have improved after dipping in 2022.



FINANCIAL PLANNING

- A majority of citizens say they receive good value for their municipal property tax dollars. Overall perceptions of value for taxes are statistically on par with 2022 although continue a gradual downward trend that has been ongoing the past several years.
- Citizens continue to prefer tax increases over service reductions, but the gap is narrowing. A softening in perceived value combined with high cost of living pressures may be impacting residents' tolerance for tax increases.



PRIORITY SETTING

- Just over half say they would prefer the City invest in renewing existing infrastructure over building new infrastructure.
- Citizens' number one priority for investment over the next four years is addressing social issues such as homelessness. Encouraging a diverse supply of housing options at different price points sits in second.
- Other important priorities include fire services, drinking water, police services, road maintenance, and traffic flow management.



CUSTOMER SERVICE

- Claimed contact with the City is sitting at an all-time low coming out of the pandemic, with slightly more than one-third saying they have contacted or dealt with the City in the last 12 months.
- Telephone or in-person interactions are the most common. In-person interactions fell during the pandemic but show signs of rebounding this year.
- Most of those who have contacted the City are satisfied with the service received.
 - Service highlights include staff's courteousness, staff's knowledge, the ease of reaching staff, and staff's helpfulness.
 - Slightly fewer but still a majority are satisfied with staff's ability to resolve issues, the speed and timeliness of service, and the ease of finding information online.
- Residents prioritize technology that enables access and efficiency most of all (includes anytime, anywhere access to select City services and information online and using technology to create operational efficiencies).
 - Slightly less emphasis is placed on receiving text or email notifications from the City instead of paper notifications.
 - Online chat-based customer service and support scores lowest overall.

QUALITY OF LIFE

City of Kelowna

kelowna.ca/neighbourhoods



3

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

(Coded Open-Ends, Multiple Responses Allowed)

Citizens identify a number of factors that contribute to making a city a good place to live, with good weather, a low crime rate, and affordable topping the list. When asked to describe their ideal city on an open-ended basis, the three most frequently mentioned characteristics are “good weather/climate” (19%), “low crime rate/safe” (14%), and “affordability/low cost of living” (11%). This is followed by “beautiful/natural setting” (10%), “good amenities/services” (10%), and “good recreational facilities/opportunities/activities” (10%).

Mentions of “good weather/climate” are up 15 percentage points this year as compared to 2022. However, year-over-year comparisons should be interpreted with caution due to changes in question wording (while the 2022 survey specifically asked people to think beyond the weather, this wording was removed in 2024 in recognition of the growing impact of climate change on weather patterns and communities).

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

(Coded Open-Ends, Multiple Responses Allowed)



2022 Top Mentions (n=300)	
Low crime rate/safe	14%
Good recreational facilities/opportunities/activities	10%
Good parks/green space	10%

Mentions <4% not shown.

Question wording updated in 2024 – interpret year-over-year comparisons with caution. Previous surveys asked respondents to assume that both family and weather were not factors. Weather was removed from this year’s survey in recognition of the growing impact of climate change on weather patterns and communities.

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 is not a factor, 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?

Quality of Life in Kelowna

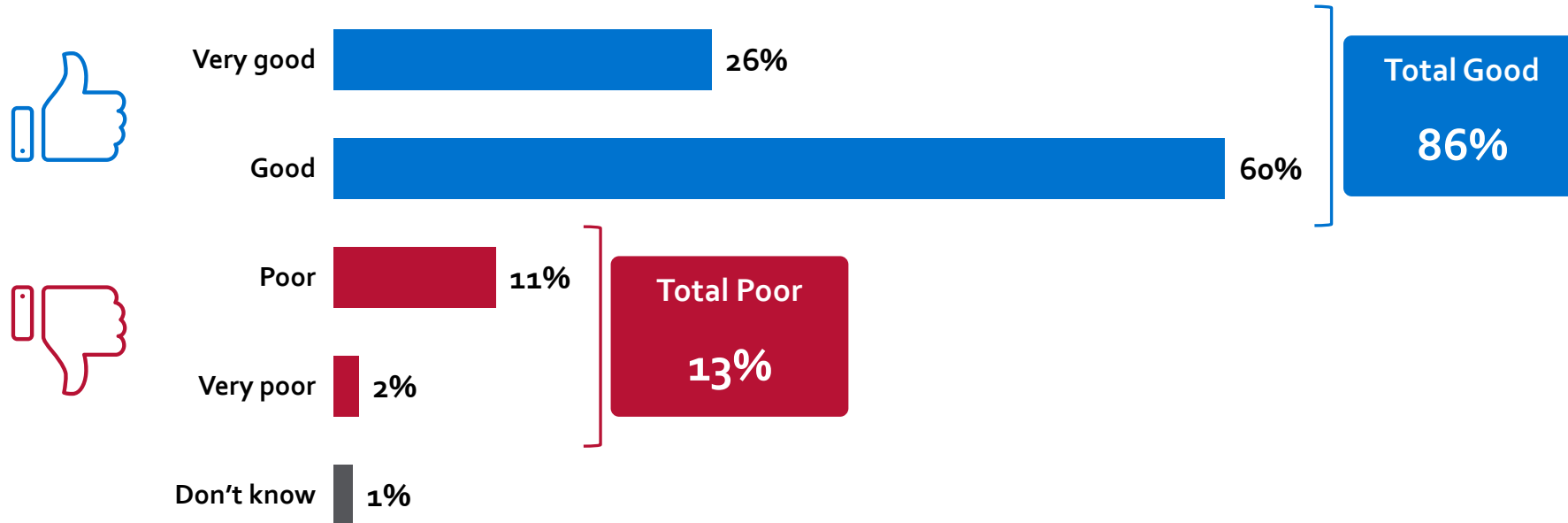
Perceptions of overall quality of life in Kelowna are positive although lower than pre-pandemic years. A total of 86% rate Kelowna's overall quality of life as 'very good' (26%) or 'good' (60%), statistically on par with 2022 but continuing a gradual downward trend that has been ongoing since 2020. Perceptions of quality of life in Kelowna are lower than the municipal norm, both overall (86% total good Kelowna versus 92% norm) and in intensity (26% 'very good' Kelowna versus 37% norm).

Most feel the quality of life has worsened over the past three years. More than six-in-ten (61%) say the quality of life in Kelowna has 'worsened' over the past three years. Another 24% say it has 'stayed the same' and only 11% say 'improved'. This yields a net momentum score of minus 50 points, similar to what was seen in 2022 when perceptions of a worsening quality of life spiked. In comparison, the municipal norm net score is minus 20.

Those saying the quality of life has improved mainly attribute this to growth and amenities. Among the few (n=33) citizens saying the quality of life has 'improved', 28% point to "more construction (housing/buildings)" and 13% mention "better/more amenities and services" (coded open-ends). Other reasons include "better/more accessible parks/outdoor spaces" (6%) and "more recreational facilities/services" (5%). However, these results should be interpreted with caution due to the small sample size.

The rising cost of living continues to drive perceptions of a worsening quality of life but concerns over poverty and homelessness are growing. Consistent with 2022, the number one reason for saying the quality of life has 'worsened' is the "rising cost of living" (29% coded open-ends). "Increased poverty/homelessness" sits in second, garnering 17% of mentions (up 9 points). Another 13% mention "safety concerns".

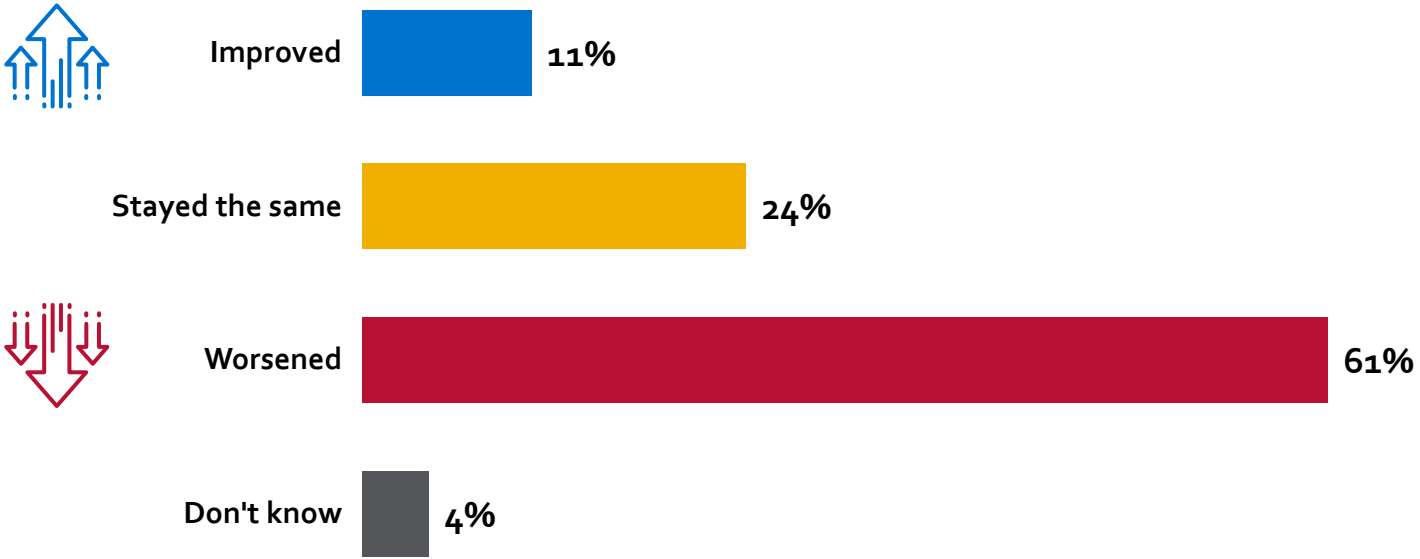
Overall Quality of Life



	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)	NORM
TOTAL GOOD	96%	95%	94%	94%	92%	90%	86%	92%
Very good	36%	40%	40%	36%	40%	29%	26%	37%

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

Change in Quality of Life Past Three Years




NET Score (2024)
Improved – Worsened

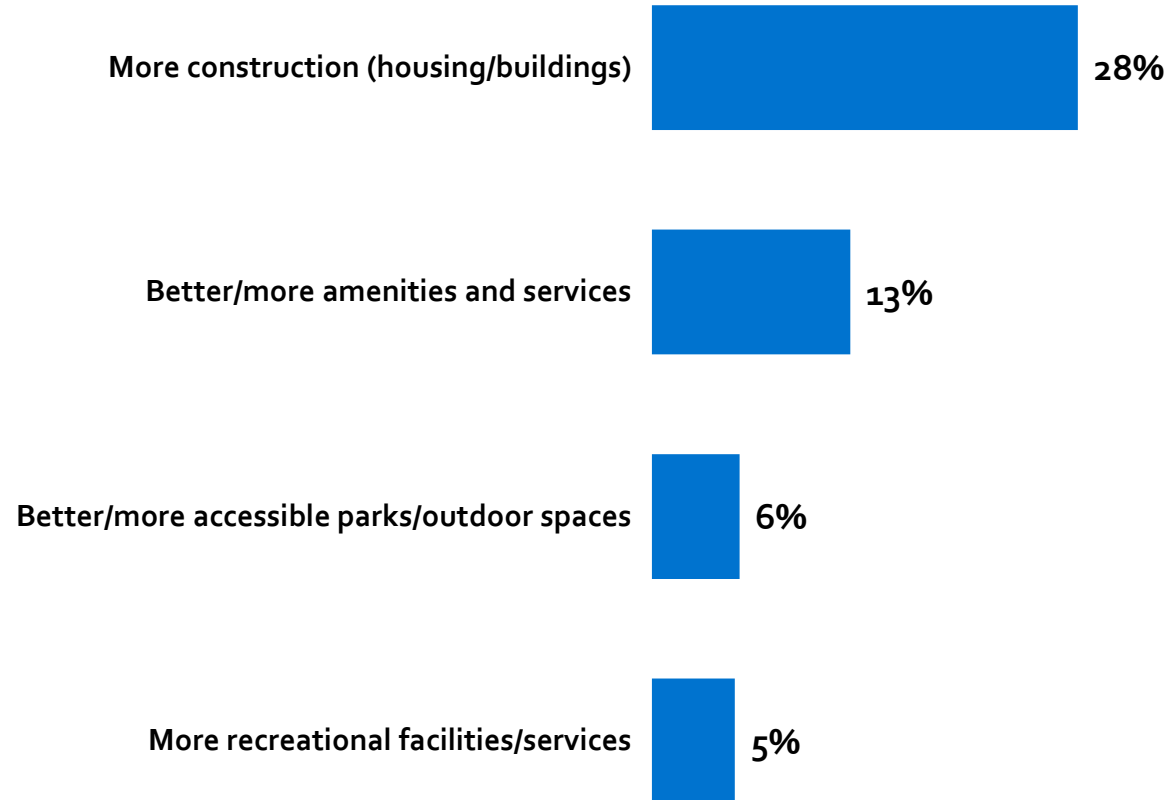
-50

	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)	NORM
NET SCORE	-5	+12	-11	-15	-13	-47	-50	-20

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?

Reasons Quality of Life has Improved

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



2022 Top Mentions (n=23)*	
Growing steadily	18%
Better/more accessible parks/outdoor spaces	10%
More recreational facilities/services	8%

Mentions <5% not shown.

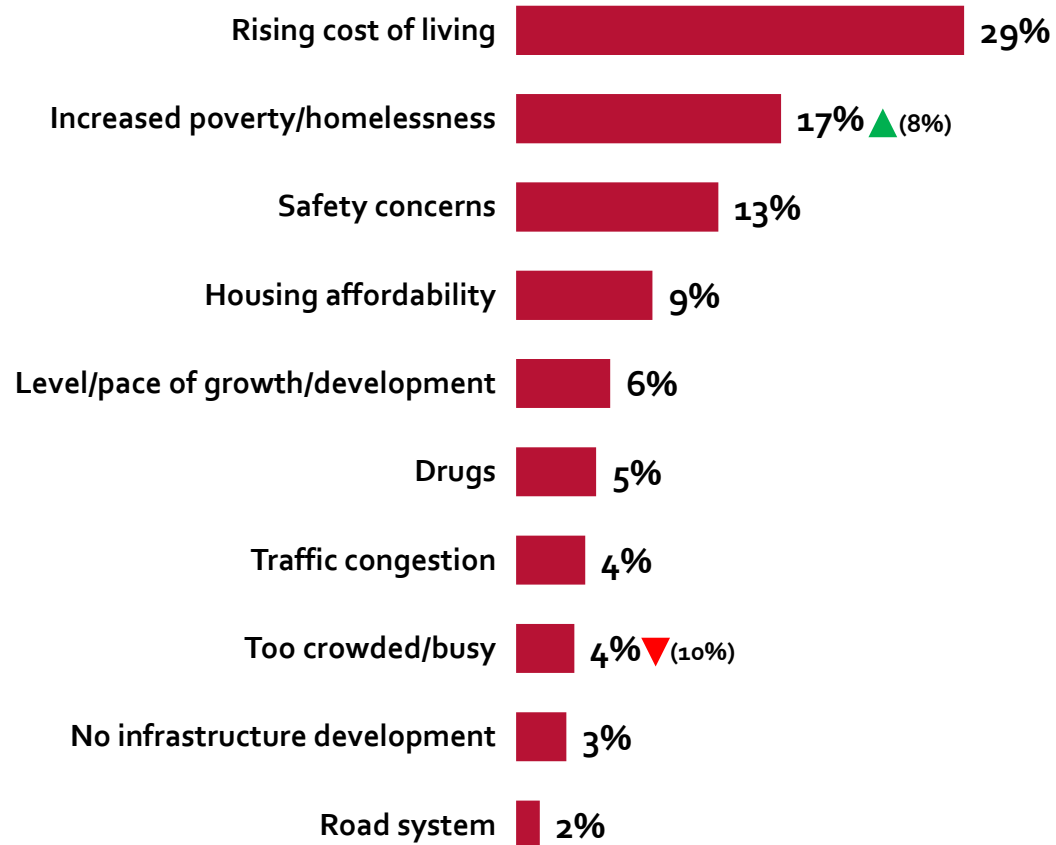
* Very small base size (n<50), interpret with extreme caution.

Base: Those saying the quality of life has improved (n=33)*

Q5. Why do you think the quality of life has improved?

Reasons Quality of Life has Worsened

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



2022 Top Mentions (n=169)	
Rising cost of living	21%
Safety concerns	14%
Housing affordability	11%

Mentions <2% not shown.

Base: Those saying the quality of life has worsened (n=182)

Q6. Why do you think the quality of life has worsened?

IMPORTANT COMMUNITY ISSUES

4



Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)

Social issues continue to dominate the public issue agenda. Nearly seven-in-ten (69%) citizens identify social issues as the most important issue facing the community on an open-ended basis, up 12 points from 2022. Social issues is predominately comprised of mentions related to “poverty/homelessness” (41%) and “housing/affordable housing” (26%). Other mentions include “drugs” (7%), “affordability/cost of living” (6%), “seniors issues” (1%), “mental health” (1%), “more daycare options/operators” (<1%), and “other social issues” (1%). Social issues also top the municipal norm although not to the extent seen in Kelowna (69% Kelowna versus 39% norm).

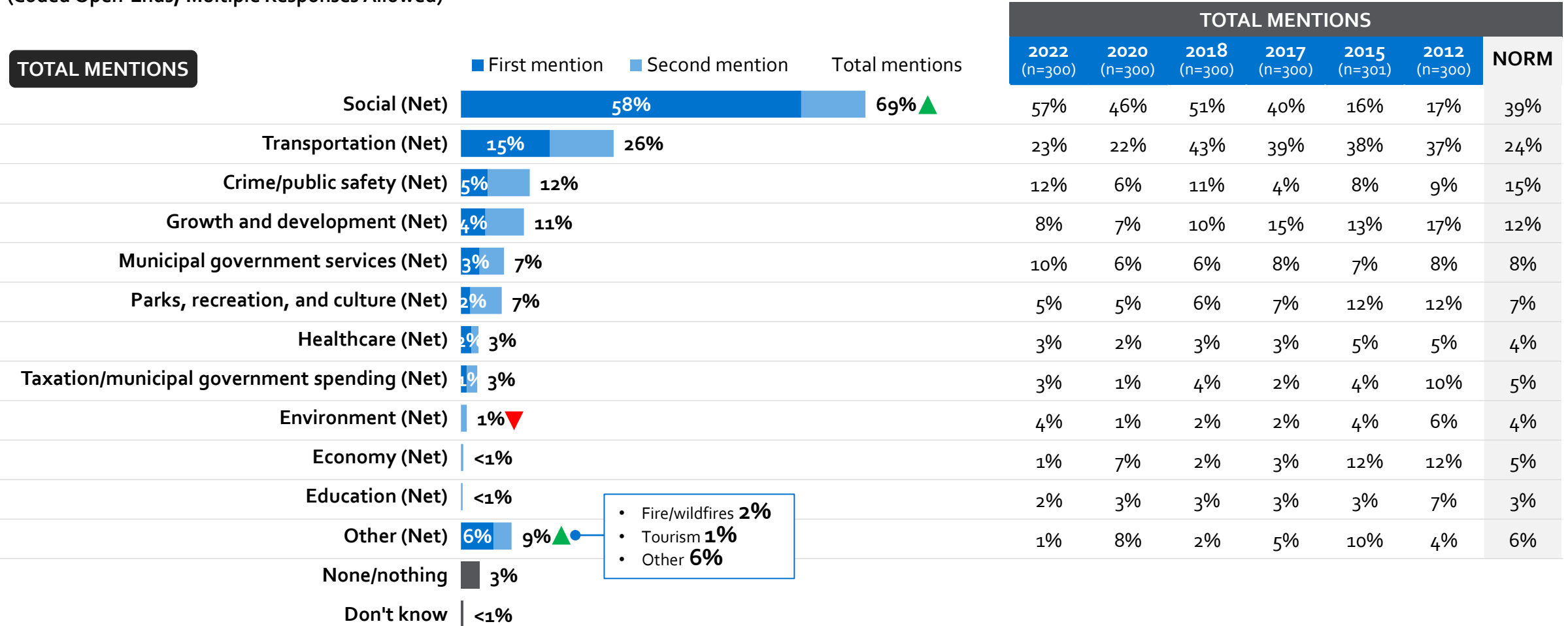
Transportation sits in distant second. Overall, 26% of citizens identify transportation as an important community issue, citing concerns around “traffic congestion” (10%), “public transportation” (7%), “condition of roads/streets/highways” (2%), “transportation (general)” (2%), “parking” (2%), “safety of streets (including speeding)” (1%), “bicycle paths/lanes” (1%), and “other transportation issues” (3%). Transportation mentions this year are on par with both 2022 and the municipal norm.

Other issues include crime/public safety and growth and development. A total of 12% mention crime/public safety and 11% mention growth and development, both of which are on par with 2022 and the municipal norm. All other issues are mentioned by fewer than one-in-ten residents.

- Crime/public safety includes mentions of “crime (general)” (8%), “public safety” (3%), “policing/law enforcement” (1%), and “other crime/public safety issues” (<1%).
- Growth and development includes mentions of “growth and development (general)” (4%), “too many high-rise buildings” (2%), “city planning/development” (2%), “overdevelopment” (1%), “downtown development/planning” (<1%), “zoning” (<1%), and “other growth and development issues” (2%).

Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)



Pandemic/COVID-19 removed this year. Mentions peaked at 8% in 2020.

Base: All respondents (n=300)

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?

COMMUNITY SAFETY

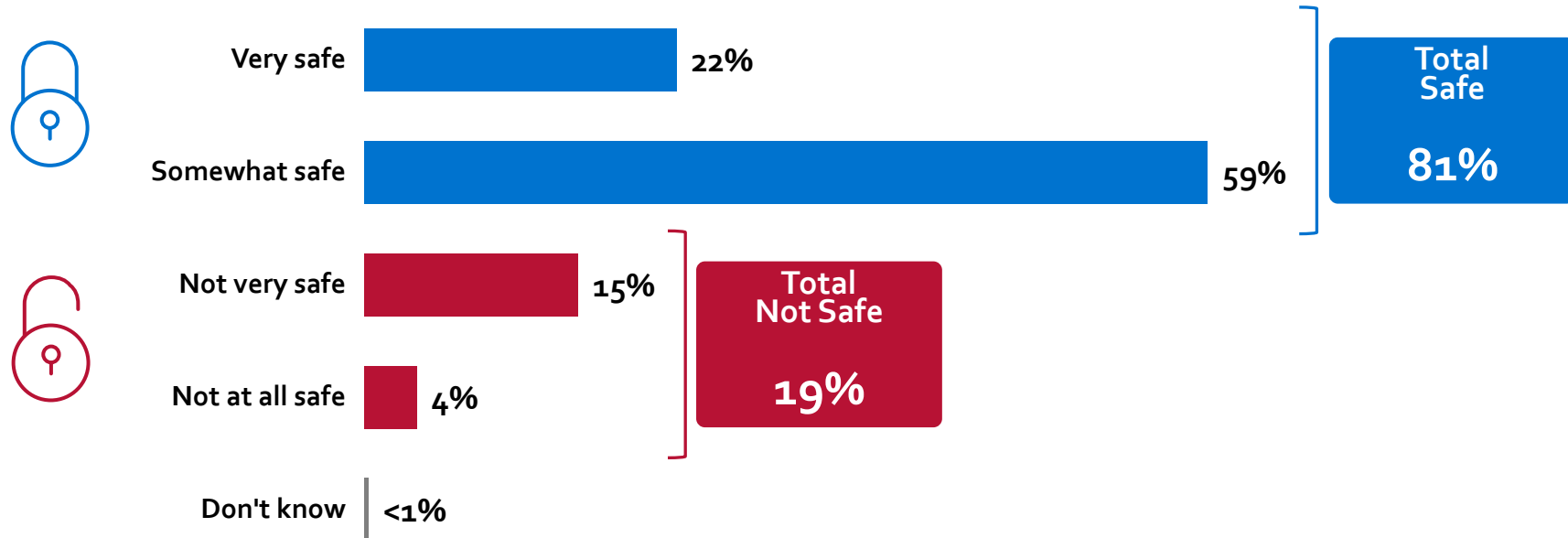
5



Overall Community Safety

Most describe Kelowna as a safe community overall. Just over eight-in-ten (81%) say they would describe Kelowna as a safe community overall, including 22% saying 'very safe' and 59% saying 'somewhat safe'. Overall perceptions (combined 'very/somewhat safe' responses) of community safety are unchanged from 2022 although have declined notably over the past decade. This year's results are also lower than the municipal norm (81% total safe Kelowna versus 88% norm).

Overall Community Safety



	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)	NORM
TOTAL SAFE	94%	90%	87%	87%	81%	81%	88%
Very safe	32%	29%	24%	20%	18%	22%	25%

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?

CITY SERVICES AND INFRASTRUCTURE

6



Satisfaction with City Services

Overall satisfaction with City services has rebounded. In total, 86% of citizens say they are satisfied with the *overall level and quality of services provided by the City of Kelowna*, including 22% saying 'very satisfied' and 64% saying 'somewhat satisfied'. Overall satisfaction (combined 'very/somewhat satisfied' responses) is up 6 points this year after dipping in 2022 when residents may have noticed some changes to the City's service delivery due to COVID-19 restrictions. Overall satisfaction this year is now on par with the municipal norm although the percentage saying they are 'very satisfied' remains lower in Kelowna (22% Kelowna versus 29% norm).

Satisfaction with specific services is mostly positive, with several services showing improved satisfaction ratings this year. City growth management and traffic flow management continue to be the least satisfactory services overall. All 15 evaluated services are rated satisfactory (combined 'very/somewhat satisfied' responses) by 50% or more of citizens; there are no services where a majority of citizens are dissatisfied.

Services receiving the highest satisfaction ratings (90% or more) are *fire services* (95%) and *parks and sports fields* (90%).

Strong satisfaction ratings (80% or more) are also seen for *drinking water quality* (88%), *recreational facilities and programs* (86%), *cultural facilities and programs* (85%), *snow clearing* (83%), *road maintenance* (82%), and *police services* (80%).

While slightly lower, the majority of citizens are also satisfied with *bylaw services* (77%), *community cleanliness* (75%), *bike lanes and pedestrian sidewalks* (74%), *adapting to the impacts of climate change on City operations and infrastructure* (68%), and *public transit* (61%).

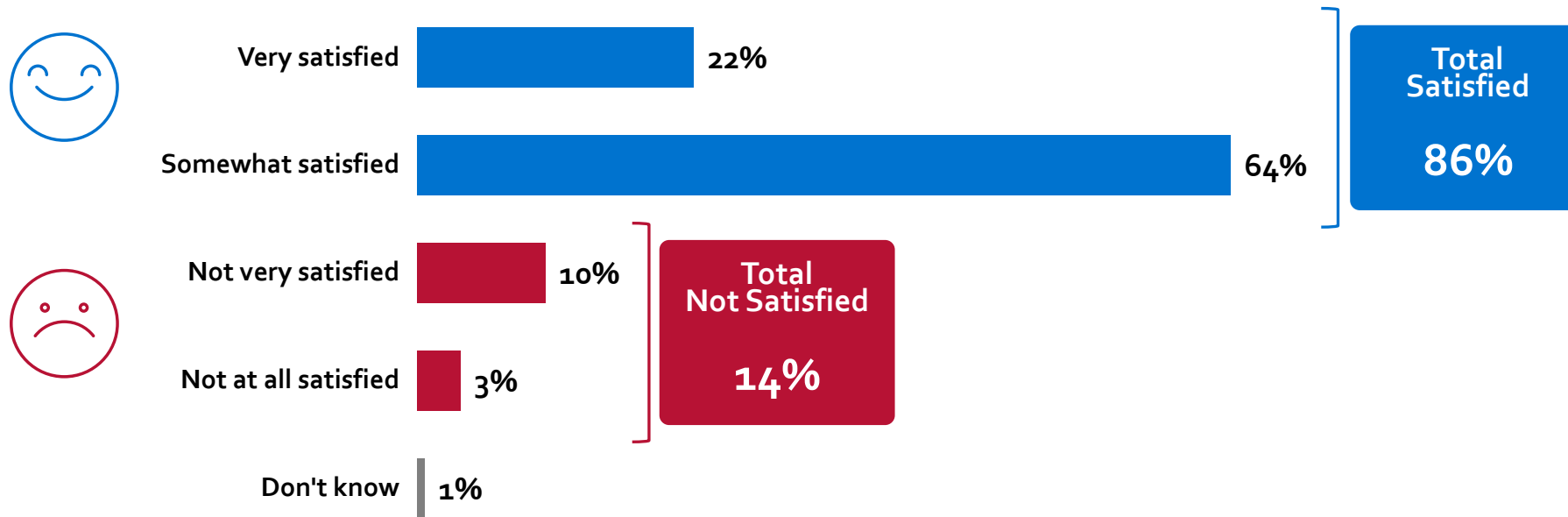
The two lowest scoring services are *traffic flow management* (51%) and *City growth management* (50%).

The 2022 survey saw drops in satisfaction with a number of services, and this year's results suggest the City has made some progress in reversing these declines. Specifically, satisfaction with the following services has statistically increased this year as compared to 2022, although some year-over-year comparisons should be interpreted with caution due to differences in question wording: *snow clearing* (up 13 points), *adapting to the impacts of climate change on City operations and infrastructure* (up 13 points), and *road maintenance* (up 9 points). Directional increases are also seen for some other services, but these differences are not statistically significant.

Conversely, satisfaction with *community cleanliness* has dropped this year (down 9 points).

Compared to the municipal norm, Kelowna residents are more satisfied with *snow clearing* (83% Kelowna versus 74% norm). However, Kelowna residents are less satisfied with *community cleanliness* (75% Kelowna versus 86% norm), *public transit* (61% Kelowna versus 75% norm), *traffic flow management* (51% Kelowna versus 59% norm), and *City growth management* (50% Kelowna versus 66% norm).

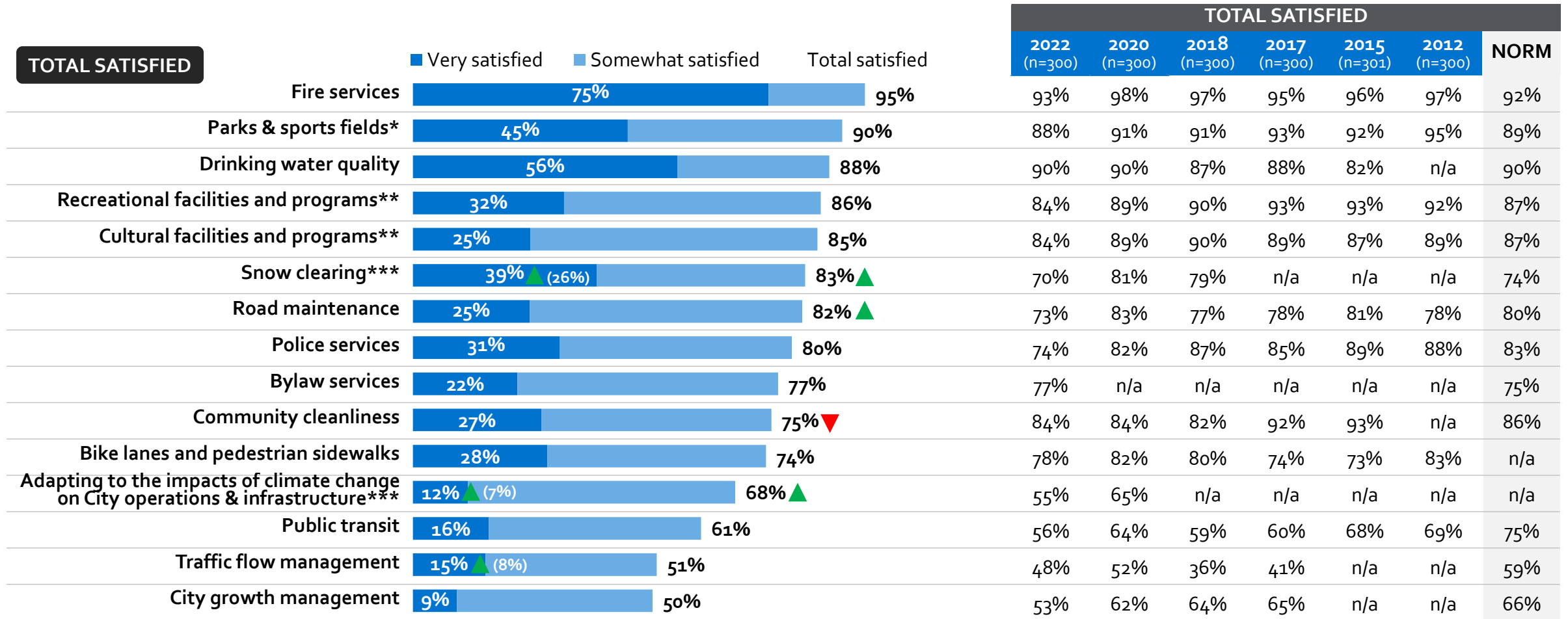
Overall Satisfaction with City Services



	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)	NORM
TOTAL SATISFIED	94%	94%	90%	87%	91%	80%	86%▲	88%
Very satisfied	23%	29%	26%	23%	29%	21%	22%	29%

Base: All respondents (n=300)
Q7a. How satisfied are you with the overall level and quality of services provided by the City of Kelowna?

Satisfaction with City Services



* Prior to 2018, respondents were asked about parks and sports fields separately. The yearly and normative ratings reported here are the average of these services.
 ** In 2018, 2020, and 2022, recreational and cultural facilities and programs were combined into a single category – interpret year-over-year comparisons with caution.
 *** Item wording updated in 2024 – interpret year-over-year comparisons with caution.

Base: All respondents (n=300)

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

Importance of City Services

All the evaluated services are important to citizens. Parks/sports fields and recreation have grown in importance while bike lanes/sidewalks and culture have declined. A majority of citizens say all the 15 evaluated services are important (combined 'very/somewhat important' responses), with many describing these as 'very important'.

The overall most important (combined 'very/somewhat important' responses) services are *fire services* (99%), *drinking water quality* (98%), *community cleanliness* (98%), *police services* (98%), *road maintenance* (98%), *traffic flow management* (96%), *snow clearing* (96%), *parks and sports fields* (95%), *recreational facilities and programs* (94%), and *City growth management* (90%).

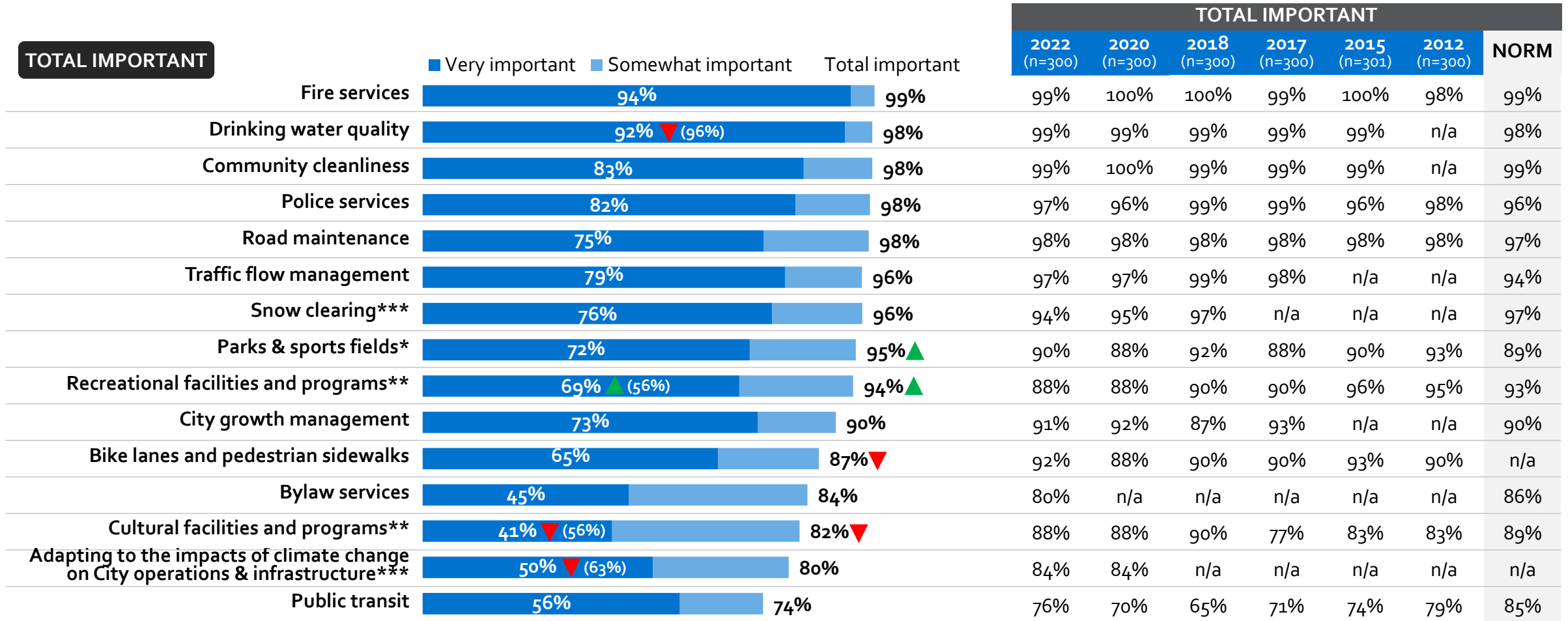
Other important services include *bike lanes and pedestrian sidewalks* (87%), *bylaw services* (84%), *cultural facilities and programs* (82%), *adapting to the impacts of climate change on City operations and infrastructure* (80%), and *public transit* (74%).

Compared to 2022, this year sees a greater emphasis placed on *recreational facilities and programs* (up 6 points) and *parks and sports fields* (up 5 points). However, year-over-year comparisons for *recreational facilities and programs* should be interpreted with caution due to differences in question wording (in 2022, *recreational and cultural facilities and programs* were combined into a single category).

Conversely, services that have dropped in importance are *cultural facilities and programs* (down 6 points) and *bike lanes and pedestrian sidewalks* (down 5 points). Again, year-over-year comparisons for *cultural facilities and programs* should be interpreted with caution due to differences in question wording.

Compared to the municipal norm, Kelowna residents attach greater importance to *parks and sports fields* (95% Kelowna versus 89% norm). However, Kelowna residents are less likely to prioritize *cultural facilities and programs* (82% Kelowna versus 89% norm) and *public transit* (74% Kelowna versus 85% norm).

Importance of City Services



* Prior to 2018, respondents were asked about parks and sports fields separately. The yearly and normative ratings reported here are the average of these services.
 ** In 2018, 2020, and 2022, recreational and cultural facilities and programs were combined into a single category – interpret year-over-year comparisons with caution.
 *** Item wording updated in 2024 – interpret year-over-year comparisons with caution.

Base: All respondents (n=300)

Q7. How important is ... to you personally? (Scale: very important, somewhat important, not very important, not at all important)

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 and priorities, the City may or may not decide to make a targeted 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 has seven Primary Strengths this year. These are *fire services, parks and sports fields, drinking water quality, recreational facilities and programs, snow clearing, road maintenance, and police services.*

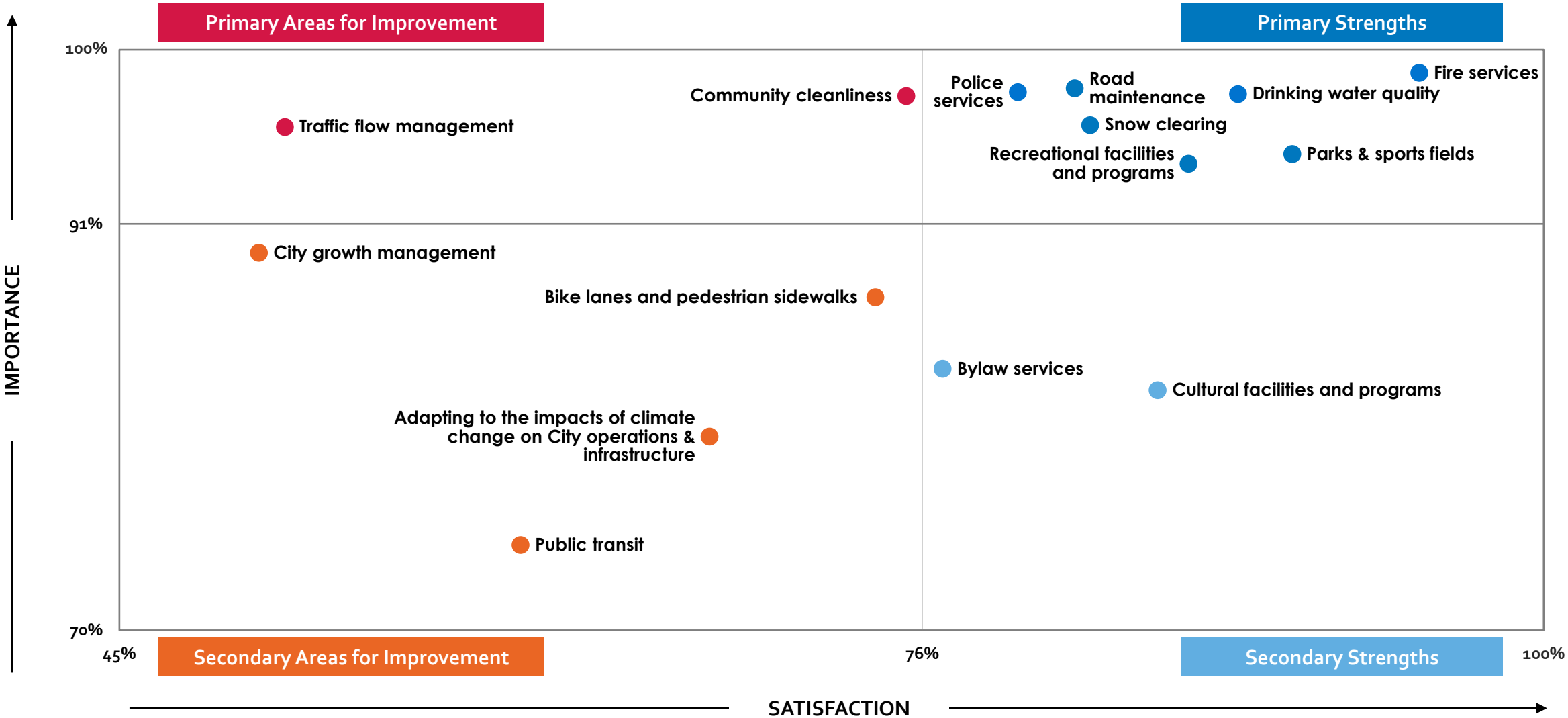
The City also has two Secondary Strengths: *cultural facilities and programs* and *bylaw services.*

AREAS FOR IMPROVEMENT

The City's two Primary Areas for Improvement are *traffic flow management* and *community cleanliness.*

Four Secondary Areas for Improvement are *City growth management, public transit, adapting to the impacts of climate change on City operations and infrastructure, and bike lanes and pedestrian sidewalks.*

Action Grid



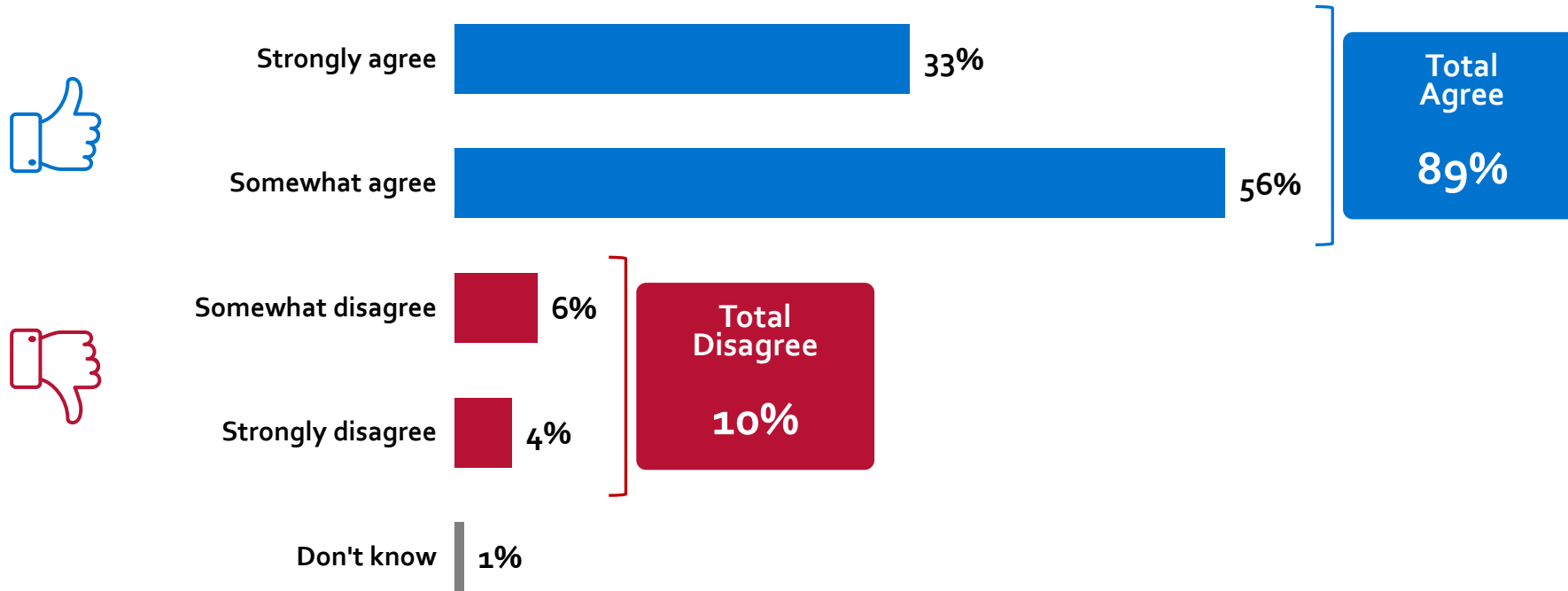
CITY INCLUSIVENESS AND ACCEPTANCE

7

City Inclusiveness and Acceptance

Perceptions of City inclusiveness and acceptance have improved after dipping in 2022. Nearly nine-in-ten (89%) agree that *the City of Kelowna municipal government fosters a city that is inclusive and accepting of all through its services and programs*, including 33% saying 'strongly agree' and 56% saying 'somewhat agree'. Overall agreement (combined 'strongly/ somewhat agree' responses) is up 9 points from the low reported in 2022.

City Inclusiveness and Acceptance



	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)
TOTAL AGREE	90%	89%	80%	89% ▲
Strongly agree	37%	32%	26%	33%

Base: All respondents (n=300)

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.

FINANCIAL PLANNING

8



Value for Taxes and Balancing Taxation/Service Delivery Levels

A majority of citizens say they receive good value for their municipal property tax dollars. More than seven-in-ten (73%) say they receive good value for their municipal tax dollars, including 19% saying 'very good value' and 53% saying 'fairly good value'. Overall perceptions (combined 'very/fairly good value') of value for taxes are statistically on par with 2022 although continue a gradual downward trend that has been ongoing the past several years. Overall perceptions this year are lower than the municipal norm (73% total good value Kelowna versus 82% norm).

Citizens continue to prefer tax increases over service reductions, but the gap is narrowing. When given a choice between increased taxes or reduced services, 49% of citizens opt for tax increases while 37% say they would prefer service reductions. A total of 14% are unable to say which of these options they would prefer. While statistically on par with 2022, this is the first time that fewer than half say they would prefer a tax increase. A softening in perceived value combined with high cost of living pressures may be impacting residents' tolerance for tax increases. A preference for tax increases over service reductions is consistent with the municipal norm.

Value for Taxes



Very good value 19%

Fairly good value 53%

Total Good Value

73%



Fairly poor value 17%

Very poor value 9%

Total Poor Value

26%

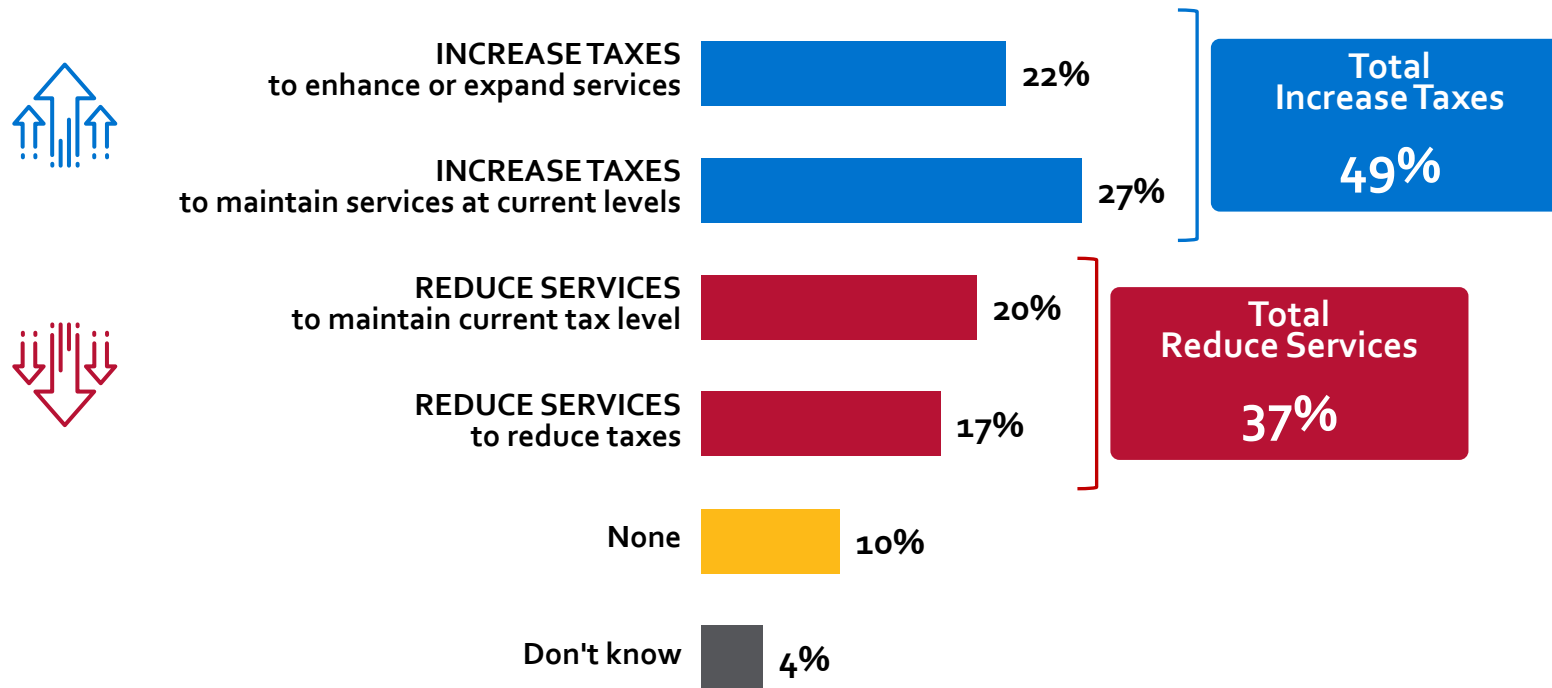
Don't know 1%

	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)	NORM
TOTAL GOOD VALUE	81%	84%	84%	79%	79%	75%	73%	82%
Very good value	16%	23%	18%	16%	17%	19%	19%	20%

Base: All respondents (n=300)

Q9. Your property tax dollars are divided between the City and the Province, with approximately 60% 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?

Balancing Taxation and Service Delivery Levels



	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)	NORM
TOTAL INCREASE TAXES	57%	56%	62%	55%	53%	53%	49%	55%
TOTAL REDUCE SERVICES	34%	31%	30%	33%	37%	36%	37%	33%

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?

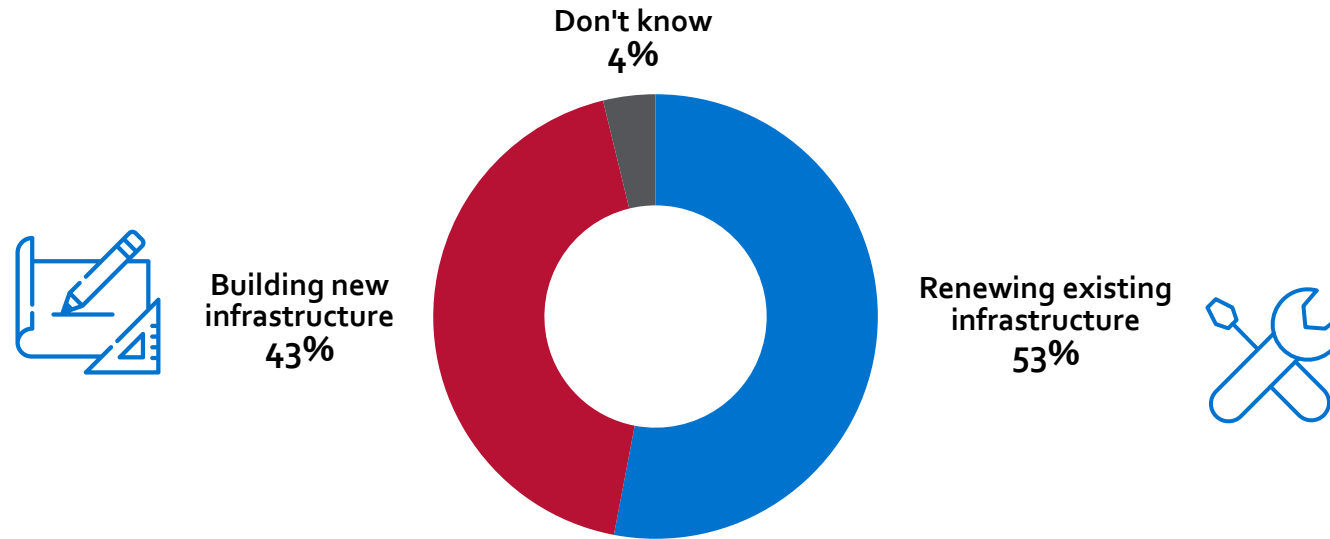
PRIORITY SETTING



Renewing versus Building Infrastructure

Just over half say they would prefer the City invest in renewing existing infrastructure over building new infrastructure. Overall, 53% of citizens say the City should prioritize *renewing existing infrastructure* compared to 43% saying the priority should be *building new infrastructure*. This year's results are on par with 2022.

Renewing versus Building Infrastructure



	2017 (n=300)	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)
Renewing existing infrastructure	56%	58%	64%	55%	53%
Building new infrastructure	41%	40%	34%	41%	43%

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 2025?

Priorities for Investment Over the Next Four Years

Paired Choice Analysis

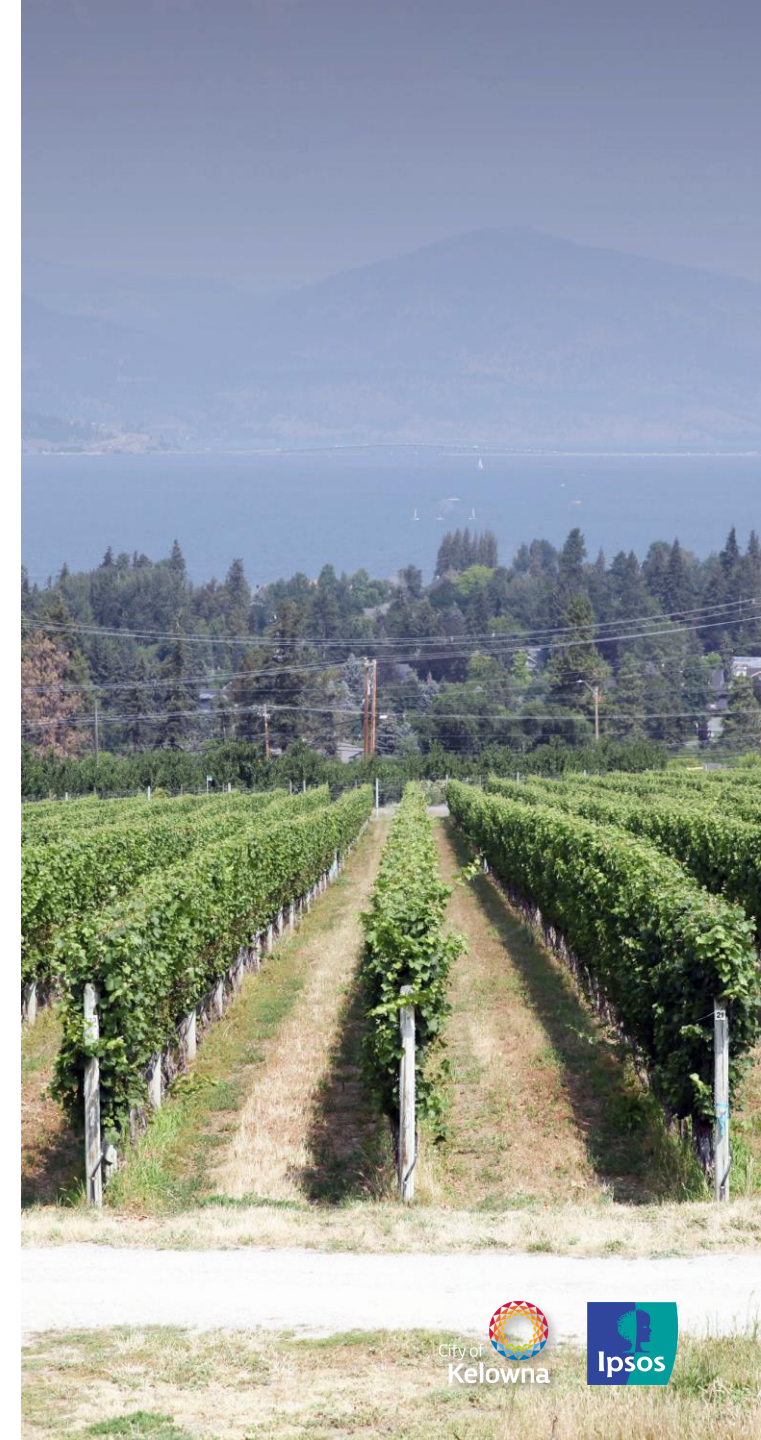
While questions around local issues and municipal services provide some insight into citizens' priorities, Paired Choice Analysis provides a more refined appreciation for the priority that citizens place on a given set of items.

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 2024 Citizen Survey, a total of 18 items were considered, resulting in a total of 153 possible combinations. Each respondent was randomly presented with 9 different pairs, with controls in place to ensure that all respondents saw all 18 items and that each item was asked an equal number of times. Due to differences in question/item wording, this year's results are not comparable to 2022.

The 18 items included in this year's survey were:

1. Addressing social issues such as homelessness
2. Road maintenance
3. Public transit
4. Traffic flow management
5. Bike lanes and pedestrian sidewalks
6. Recreational facilities and programs
7. Cultural facilities and programs
8. Parks
9. Snow clearing
10. Drinking water
11. Police services
12. Fire services
13. Community events and celebrations
14. Encouraging a diverse supply of housing options at different price points
15. Business and economic development
16. Recognition and preservation of historic places
17. Community cleanliness
18. Adapting to the impacts of climate change on City infrastructure and operations



Priorities for Investment Over the Next Four Years

(Paired Choice Analysis)

Citizens' number one priority for investment over the next four years is addressing social issues such as homelessness. Encouraging a diverse supply of housing options at different price points sits in second. Overall, *addressing social issues such as homelessness* is selected 81% of the time when presented alongside other priorities. *Encouraging a diverse supply of housing options at different price points* is selected 71% of the time. These results are in line with what residents see as the issues most in need of attention from local leaders.

Other important priorities (selected a majority of the time when presented alongside other priorities) are:

- *Fire services* (66%)
- *Drinking water* (65%)
- *Police services* (58%)
- *Road maintenance* (54%)
- *Traffic flow management* (54%)

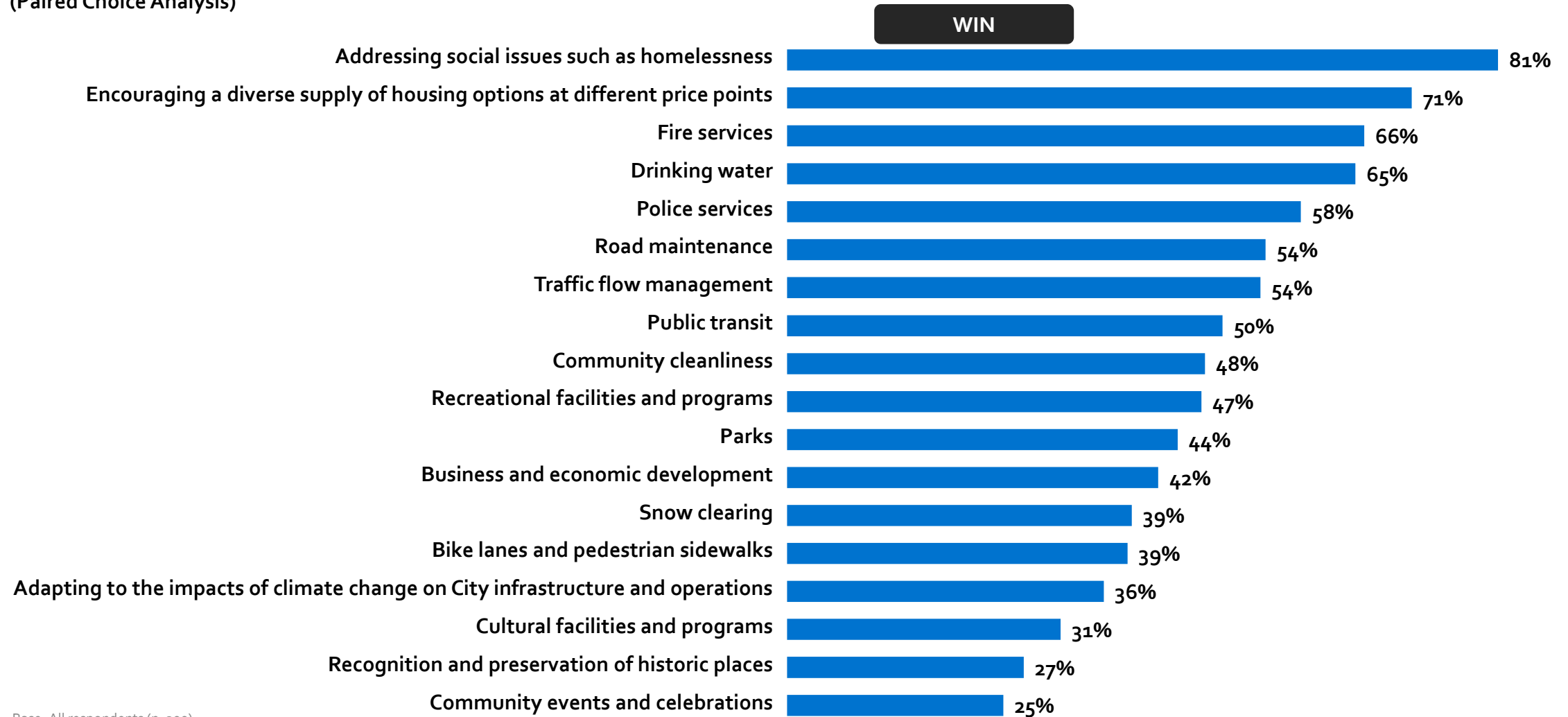
Opinion is mixed on *public transit*, which is identified as a priority 50% of the time.

Items that are selected only a minority of the time include:

- *Community cleanliness* (48%)
- *Recreational facilities and programs* (47%)
- *Parks* (44%)
- *Business and economic development* (42%)
- *Snow clearing* (39%)
- *Bike lanes and pedestrian sidewalks* (39%)
- *Adapting to the impacts of climate change on City infrastructure and operations* (36%)
- *Cultural facilities and programs* (31%)
- *Recognition and preservation of historic places* (27%)
- *Community events and celebrations* (25%)

Priorities for Investment Over the Next Four Years

(Paired Choice Analysis)



Base: All respondents (n=300)

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

10

CITY HALL

City Contact and Customer Service

Slightly more than one-third say they have contacted or dealt with the City in the last 12 months. Overall, 35% of citizens say they personally contacted or dealt with the City of Kelowna or one of its employees in the last 12 months. While not statistically significant, claimed contact is down slightly from 2022 to sit at an all-time low coming out of the pandemic. Claimed contact in Kelowna is also lower than the municipal norm (35% Kelowna versus 41% norm).

Telephone or in-person interactions are the most common. Among those who contacted or dealt with the City in the last 12 months, 37% say this occurred via the “telephone” and 35% “in-person”. Another 14% reached out via “email”. “In-person” interactions fell during the pandemic but show signs of rebounding this year although this change is not statistically significant.

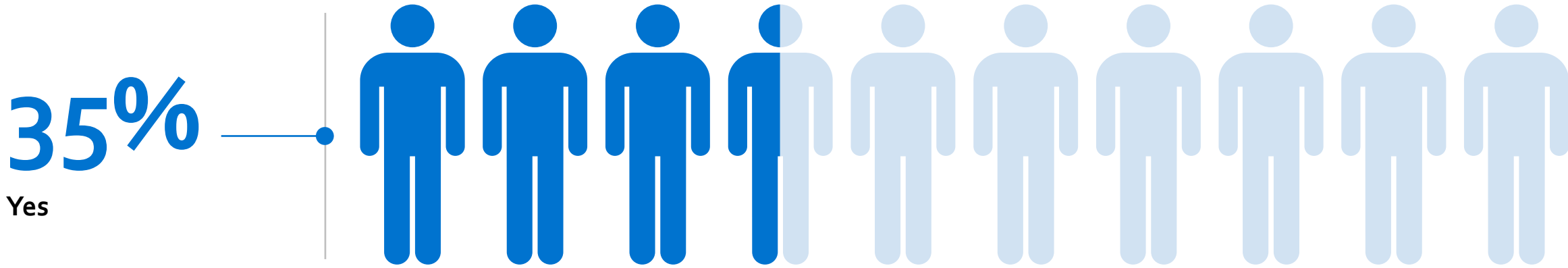
Most of those who have contacted the City are satisfied with the service received. Overall, 79% of those who contacted or dealt with the City in the last 12 months say they are satisfied (combined ‘very/somewhat satisfied’ responses) with the *overall service received*.

Service highlights include *staff’s courteousness* (88% satisfied), *staff’s knowledge* (88%), *the ease of reaching staff* (85%), and *staff’s helpfulness* (84%).

Slightly fewer (but still a majority) say they are satisfied with *staff’s ability to resolve your issue* (78%), *the speed and timeliness of service* (78%), and *the ease of finding information online* (72%).

Satisfaction with all measures is on par with both 2022 and the municipal norm.

Claimed Contact with City Last 12 Months

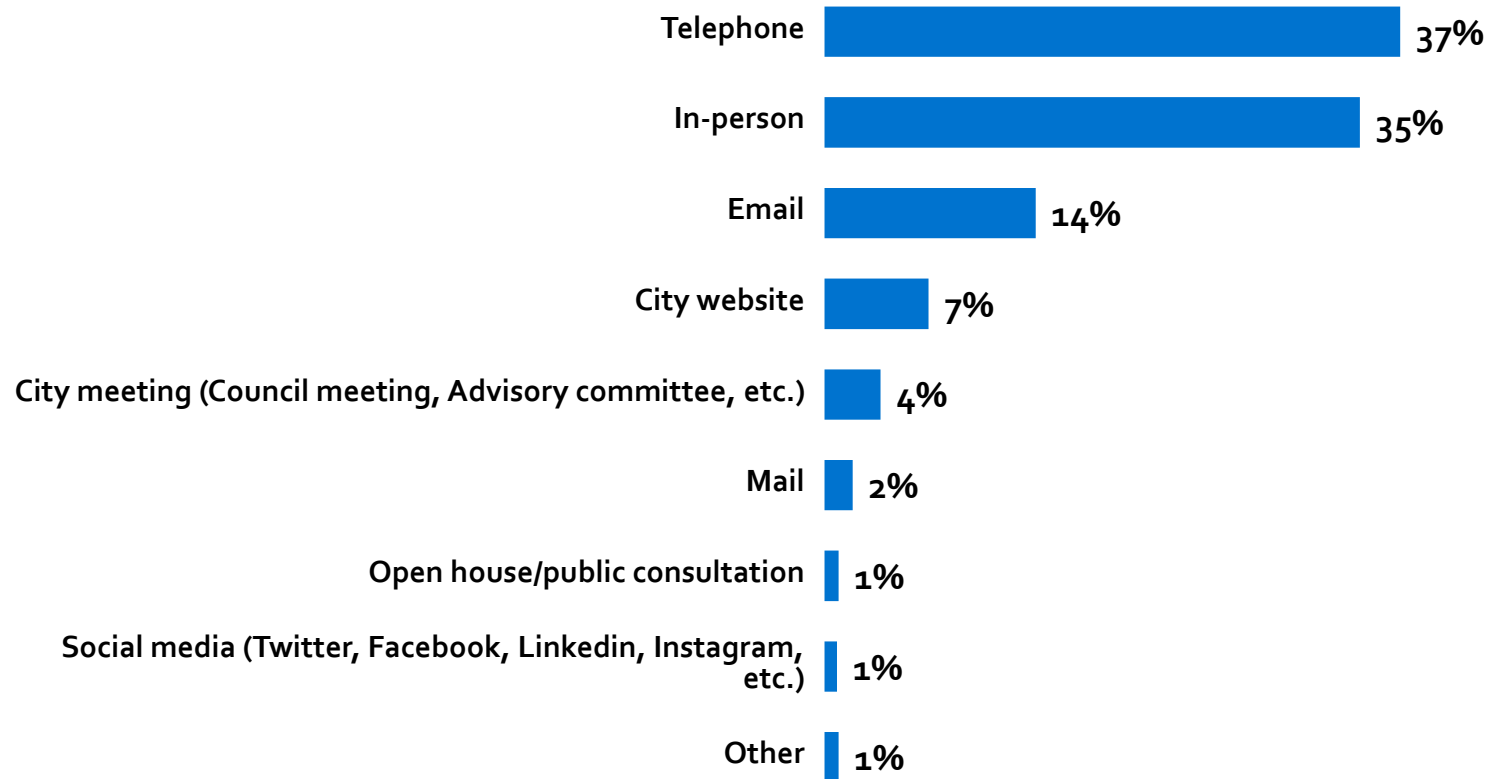


	2012 (n=300)	2015 (n=301)	2017 (n=300)	2018 (n=300)	2020 (n=300)	2022 (n=300)	2024 (n=300)	NORM
Yes	38%	43%	50%	49%	43%	38%	35%	41%

Base: All respondents (n=300)
Q14. In the last 12 months, have you personally contacted or dealt with the City of Kelowna or one of its employees?

Contact Method

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



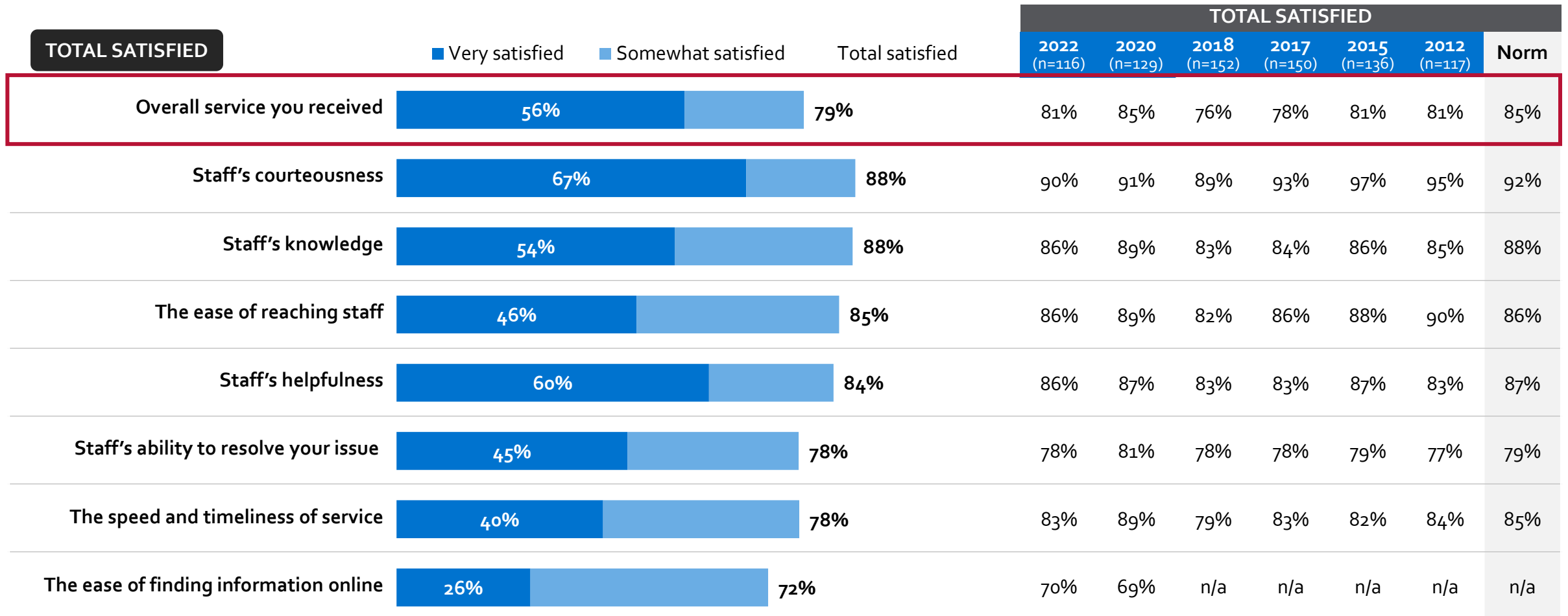
2022 Top Mentions (n=116)	
Telephone	48%
In-person	25%
Email	13%

Base: Those saying they contacted or dealt with the City in the last 12 months (n=109)

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?

Satisfaction with Customer Service

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



Base: Those saying they contacted or dealt with the City in the last 12 months (n=109)
 Q16. How satisfied are you with the ...? (Scale: very satisfied, somewhat satisfied, not very satisfied, not at all satisfied)

Importance of Technology and Digital Services

New Question
Added in 2024

Residents prioritize technology that enables access and efficiency most of all. When it comes to technology and digital services, more than eight-in-ten say it is important (combined 'very/somewhat important' responses) that the City prioritize *anytime, anywhere access to select City services and information online* (87%) and *using technology to create operational efficiencies* (85%).

In comparison, slightly less emphasis is placed on *receiving text or email notifications from the City instead of paper notifications*, although this is still important to more than seven-in-ten (73%) citizens.

Online chat-based customer service and support scores lowest overall, with only 57% saying this should be a priority for the City's technology and digital services.

Importance of Technology and Digital Services

New Question
Added in 2024

TOTAL IMPORTANT

■ Very important ■ Somewhat important Total important

Anytime, anywhere access to select City services and information online



Using technology to create operational efficiencies



Receiving text or email notifications from the City instead of paper notifications



Online chat-based customer service and support



Base: All respondents (n=300)

Q16a. Technology continues to change at a rapid pace and the City is working to maximize how technology can make municipal services and quality of life better. How important is it to you personally that the City makes each of the following items a priority when it comes to technology and digital services? (Scale: very important, somewhat important, not very important, not at all important)

DEMOGRAPHIC TRENDS

111



Demographic Trends



BY AGE

- **Quality of Life:** Those who are <55 years are more likely to mention “affordability/low cost of living” when asked to describe their ideal city on an open-ended basis (includes 16% of 18-34 years and 15% of 35-54 years versus 5% of 55+ years). Perceptions of the quality of life in Kelowna, however, are statistically similar across all age groups.
- **Important Community Issues:** Those who are 35-54 years are more likely to identify crime/public safety as an important community issue on a top-of-mind basis (17% versus 5% of 18-34 years, 13% of 55+ years). Mentions of growth/development are higher among those who are 55+ years (18% versus 3% of 18-34 years, 8% of 35-54 years).
- **Community Safety:** Overall perceptions of community safety are higher among those who are 55+ years (88% total safe versus 75% of 18-34 years, 77% of 35-54 years).
- **City Services and Infrastructure:** Overall satisfaction with City services is statistically similar across all age groups. However, older citizens (55+ years) are more likely to say they are satisfied with a number of specific services, including:
 - *Recreational facilities and programs* (92% versus 78% of 18-34 years, 86% of 35-54 years)
 - *Snow clearing* (92% versus 74% of 18-34 years, 78% of 35-54 years)
 - *Road maintenance* (86% versus 75% of 35-54 years, 84% of 18-34 years)
 - *Police services* (86% versus 73% of 18-34 years, 77% of 35-54 years)
 - *Community cleanliness* (85% versus 68% of 18-34 years, 69% of 35-54 years)

There are also some statistically significant differences by age in the importance attached to specific services. Notably:

- *Bike lanes and pedestrian sidewalks* are more important to those who are 18-34 years (94% versus 84% of 55+ years, 85% of 35-54 years)
- *Bylaw services* are more important to those who are 35+ years (includes 89% of 35-54 years and 87% of 55+ years versus 74% of 18-34 years)
- *Public transit* is more important to those who are 18-34 years (83% versus 68% of 55+ years, 75% of 35-54 years)
- **City Inclusiveness and Acceptance:** Older citizens (55+ years) are more likely to agree that *the City of Kelowna municipal government fosters a city that is inclusive and accepting of all through its services and programs* (93% total agree versus 83% of 18-34 years, 89% of 35-54 years).
- **Financial Planning:** Overall perceptions of value for taxes are higher among those who are 35+ years (includes 78% total good value of 55+ years and 76% of 35-54 years versus 61% of 18-34 years). Those who are 35-54 years are more likely to opt for an increase in taxes (59% versus 39% of 18-34 years, 49% of 55+ years).

Demographic Trends



BY AGE (CONT.)

- **Priority Setting:** The preference for renewing existing infrastructure versus building new infrastructure is statistically similar by age. However, there are some differences in priorities for investment over the next four years. Highlights include:
 - *Encouraging a diverse supply of housing options at different price points* is chosen more often by those who are 18-34 years (82% versus 65% of 55+ years, 69% of 35-54 years)
 - *Police services* are chosen more often by those who are 55+ years (66% versus 50% of 18-34 years, 55% of 35-54 years)
 - *Road maintenance* is chosen more often by those who are 55+ years (62% versus 45% of 18-34 years, 53% of 35-54 years)
 - *Traffic flow management* is chosen more often by those who are 35+ years (includes 60% of 35-54 years and 58% of 55+ years versus 41% of 18-34 years)
 - *Public transit* is chosen more often by those who are 18-34 years (60% versus 40% of 55+ years, 53% of 35-54 years)
 - *Community cleanliness* is chosen more often by those who are 18-34 years of age (57% versus 40% of 55+ years, 50% of 35-54 years)
 - *Recognition and preservation of historic places* is chosen more often by those who are 18-34 years of age (37% versus 18% of 35-54 years, 27% of 55+ years)
- **Customer Service:** Those who are 35+ years are more likely to say they have contacted or dealt with the City in the last 12 months (includes 45% of 55+ years and 37% of 35-54 years versus 19% of 18-34 years). When it comes to investing in technology and digital services, younger residents (18-34 years) are more likely to prioritize *using technology to create operational efficiencies* (92% total important versus 80% of 35-54 years, 84% of 55+ years) and *online chat-based customer service and support* (73% total important versus 50% of 35-54 years, 51% of 55+ years).

Demographic Trends



BY NEIGHBOURHOOD

- **Quality of Life:** Those living in North Kelowna are more likely to mention “low crime rate/safe” when asked to describe their ideal city on an open-ended basis (24% versus 10% of Central Kelowna, 11% of South West Kelowna, 13% of East Central/East Kelowna). Conversely, mentions of “affordability/low cost of living” are higher among those in East Central/East Kelowna (23% versus 5% of South West Kelowna, 5% of Central Kelowna, 10% of North Kelowna). Overall perceptions of quality of life in Kelowna are higher among those in North Kelowna (94% total good versus 82% of Central Kelowna, 83% of East Central/East Kelowna, 87% of South West Kelowna).
- **Important Community Issues:** While social issues are the number one issue identified by residents in all areas of the city, mentions are highest in Central Kelowna and East Central/East Kelowna (76% and 75% versus 59% of South West Kelowna, 64% of North Kelowna). Other statistically significant differences include:
 - Transportation is mentioned often by those in North Kelowna and East Central/East Kelowna (33% and 32% versus 16% of Central Kelowna, 25% of South West Kelowna)
 - Crime/public safety is mentioned more often by those in South West Kelowna (18% versus 7% of Central Kelowna, 10% of East Central/East Kelowna, 13% of North Kelowna)
 - Growth/development is mentioned more often by those in South West Kelowna (16% versus 5% of East Central/East Kelowna, 10% of North Kelowna, 13% of Central Kelowna)
- **Community Safety:** Overall perceptions of community safety are higher among those in South West Kelowna (92% total safe versus 73% of Central Kelowna, 75% of East Central/East Kelowna, 84% of North Kelowna).
- **City Services and Infrastructure:** Overall satisfaction with City services is statistically similar across all areas of the city. Satisfaction with specific services is also largely consistent by neighbourhood, with two exceptions:
 - Satisfaction with *recreational facilities and programs* is higher in South West Kelowna (93% versus 82% of East Central/East Kelowna, 85% of Central Kelowna, 85% of North Kelowna)
 - Satisfaction with *community cleanliness* is higher in South West Kelowna and North Kelowna (87% and 83% versus 64% of East Central/East Kelowna, 69% of Central Kelowna)
- **City Inclusiveness and Acceptance:** Those living in South West Kelowna and North Kelowna are more likely to agree that *the City of Kelowna municipal government fosters a city that is inclusive and accepting of all through its services and programs* (94% and 93% versus 83% of East Central/East Kelowna, 88% of Central Kelowna).
- **Financial Planning:** There are no statistically significant differences by neighbourhood when it comes to the perceived value for taxes or balancing taxation and service delivery levels.

Demographic Trends



BY NEIGHBOURHOOD (CONT.)

- **Priority Setting:** The preference for renewing existing infrastructure versus building new infrastructure is statistically similar by area of the city. However, there are some differences in priorities for investment over the next four years. Highlights include:
 - *Addressing social issues such as homelessness* is chosen more often by those in South West Kelowna and Central Kelowna (both 86% versus 70% of North Kelowna, 79% of East Central/East Kelowna)
 - *Encouraging a diverse supply of housing options at different price points* is chosen more often by those in Central Kelowna (84% versus 61% of South West Kelowna, 67% of North Kelowna, 72% of East Central/East Kelowna)
 - *Police services* are chosen more often by those in South West Kelowna, North Kelowna, and Central Kelowna (66%, 65%, and 62% versus 44% of East Central/East Kelowna)
 - *Traffic flow management* is chosen more often by those in North Kelowna, East Central/East Kelowna, and South West Kelowna (67%, 65%, and 51% versus 33% of Central Kelowna)
 - *Adapting to the impacts of climate change on City infrastructure and operations* is chosen more often by those in North Kelowna (49% versus 32% of Central Kelowna, 33% of South West Kelowna, 33% of East Central/East Kelowna)
 - *Cultural facilities and programs* are chosen more often by those in Central Kelowna (41% versus 21% of North Kelowna, 29% of South West Kelowna, 31% of East Central/East Kelowna)
 - *Recognition and preservation of historic places* is chosen more often by those in East Central/East Kelowna (37% versus 14% of South West Kelowna, 27% of North Kelowna, 28% of Central Kelowna)
- **Customer Service:** Claimed contact with the City is statistically similar by neighbourhood. When it comes to investing in technology and digital services, those living in East Central/East Kelowna are more likely to prioritize *anytime, anywhere access to select City services and information online* (92% total important versus 81% of South West Kelowna, 85% of North Kelowna, 89% of Central Kelowna).

Demographic Trends



BY GENDER

- **Quality of Life:** Perceptions of quality of life are statistically similar among women and men.
- **Important Community Issues:** Men are more likely than women to mention growth and development as an important community issue on a top-of-mind basis (16% versus 6%).
- **Community Safety:** Overall perceptions of community safety are statistically similar among women and men.
- **City Services and Infrastructure:** Overall satisfaction with City services is statistically similar by gender. Satisfaction with specific services is also largely consistent by gender, with some exceptions. Specifically, men are more likely than women to say they are satisfied with:
 - *Snow clearing* (88% versus 77%)
 - *Community cleanliness* (81% versus 70%)

When it comes to the importance of specific services, *cultural facilities and programs* are more important to women than men (89% versus 76%).

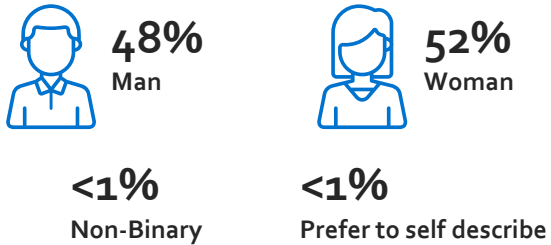
- **City Inclusiveness and Acceptance:** Perceptions of City inclusiveness and acceptance are statistically similar among women and men.
- **Financial Planning:** There are no statistically significant differences by gender when it comes to the perceived value for taxes or balancing taxation and service delivery levels.
- **Priority Setting:** The preference for renewing existing infrastructure versus building new infrastructure is statistically similar by gender. Priorities for investment over the next four years are also largely similar, with two exceptions:
 - *Business and economic development* is chosen more often by men (49% versus 36% of women)
 - *Cultural facilities and programs* are chosen more often by women (39% versus 23% of men)
- **Customer Service:** There are no statistically significant differences by gender when it comes to the City's customer service.

WEIGHTED SAMPLE CHARACTERISTICS

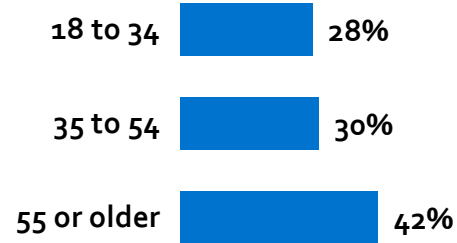
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Weighted Sample Characteristics

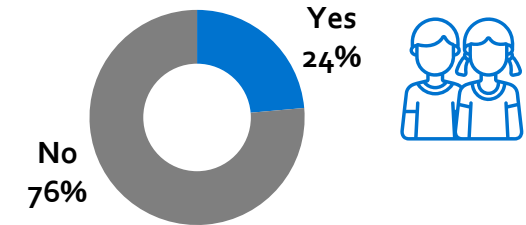
GENDER



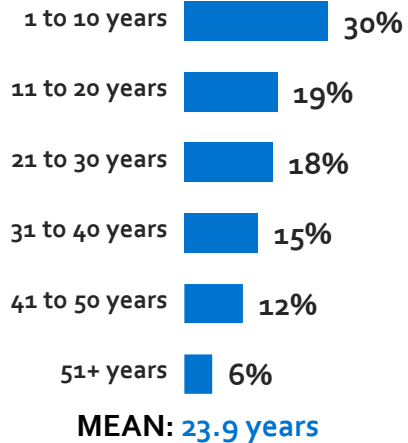
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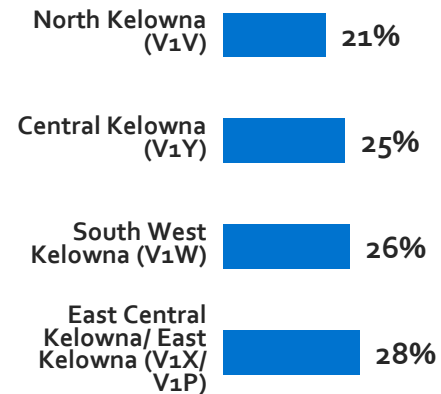
CHILDREN UNDER 18 IN HH



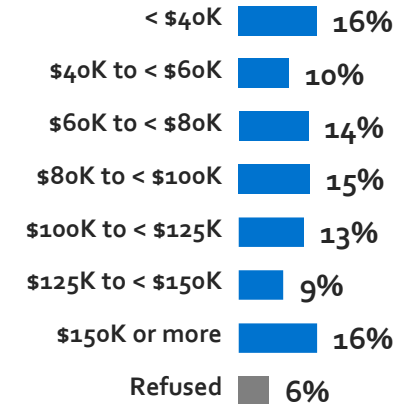
YEARS LIVING IN KELOWNA



AREA OF CITY



INCOME



Base: All respondents (n=300)

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