



# 2017 Citizen Survey

Prepared for the City of Kelowna by:

**Ipsos Public Affairs**

Final Report

October 31, 2017

# Content

02

Introduction

07

Executive Summary

14

Quality of Life

23

Issue Agenda

27

Community Safety

39

City Services and Infrastructure

51

Financial Planning

56

Priority Setting

65

Customer Service

71

Weighted Sample Characteristics

# INTRODUCTION

## Background and Objectives



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

Specific research objectives for the 2017 Citizen Survey included:

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

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

# Methodology



Ipsos conducted a total of 300 telephone interviews with a randomly selected representative sample of Kelowna residents aged 18 years or older, broken out by FSA (first three postal code digits) as follows:

- V1W (n75), V1Y (n75), V1V (n75), V1X/V1P (n75).

A dual frame cell phone/landline sampling methodology was used, with the final sample split 60% cell phones and 40% landlines. A screening question was included at the start of the survey to confirm residency in Kelowna.

All interviews were conducted between September 11 and 20, 2017.

Overall results are accurate to within  $\pm 5.7$  percentage points, nineteen times out of twenty. The margin of error will be larger for sample subgroups.

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

## Tracking to Previous Surveys

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

## Normative Comparisons

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



# Interpreting and Viewing the Results



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

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

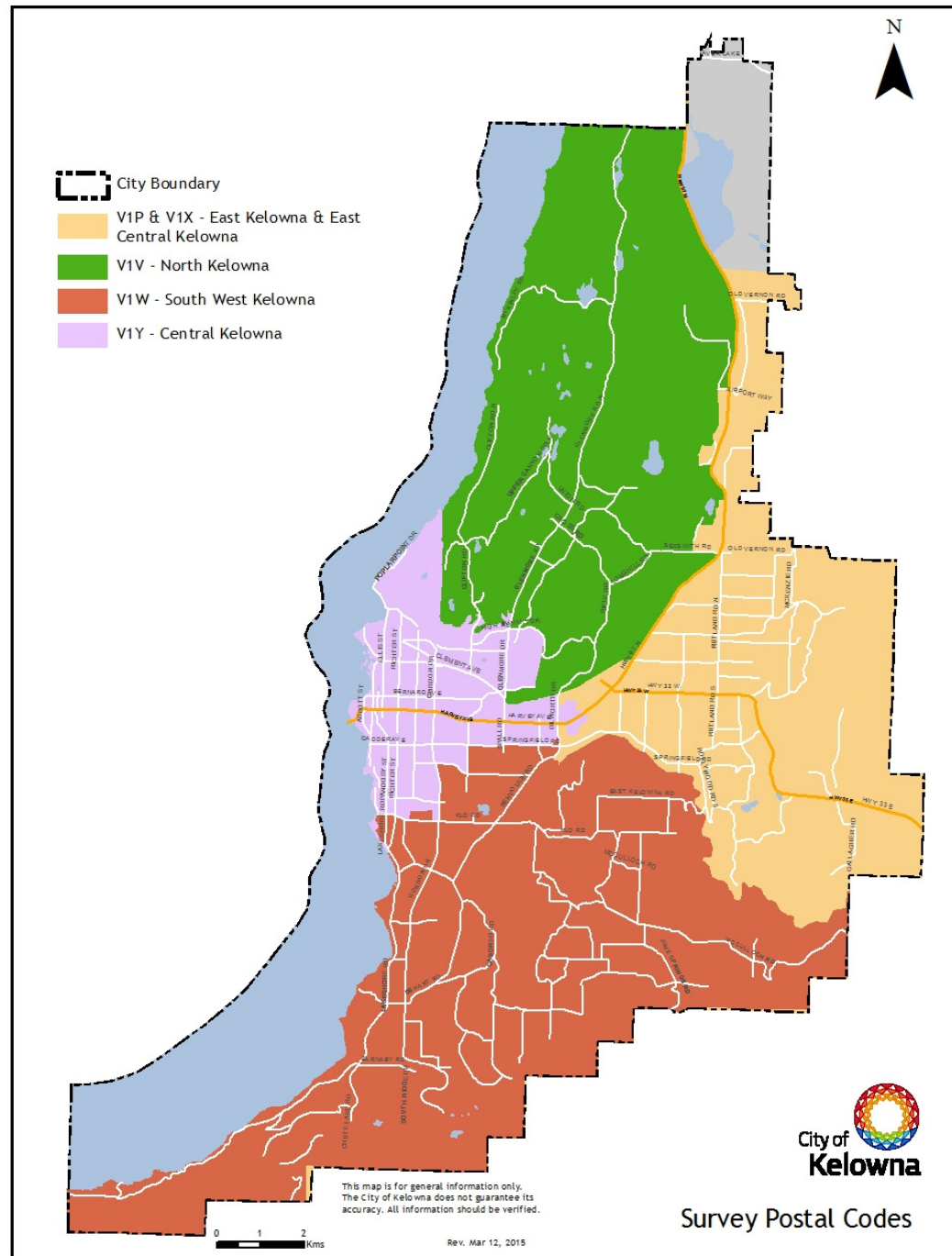
## Neighbourhood Comparisons

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

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

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

# FSA Zones



# EXECUTIVE SUMMARY



# Executive Summary



## QUALITY OF LIFE

**Citizens identify a variety of qualities and characteristics that make a city a good place to live.** No single factor stands out from the rest, with the top five responses (coded open-ends) being “good recreational facilities/opportunities/activities” (14%), “low crime rate/safe” (14%), “convenient location/accessible to everything” (12%), “employment/job opportunities (including well paying jobs)” (11%), and “good weather/climate” (11%). These same general themes were also among the top mentions in 2015.

**Citizens remain decidedly positive about the quality of life in Kelowna.** Nearly all (94%) citizens rate the overall quality of life in Kelowna today as ‘very good/good’, on par with 2015.

**However, perceptions of the direction that quality of life is taking have deteriorated.** When asked how the quality of life in Kelowna has changed over the past three years, more residents say this has ‘worsened’ (33%) than ‘improved’ (22%), resulting in a net momentum score of -11 percentage points. This year’s results are a reversal of 2015 when quality of life had positive momentum (+12 percentage points).

- More than four-in-ten (41%) of those who think the quality of life has ‘worsened’ attribute this to some form of financial insecurity, mentioning factors (coded open-ends) such as “rising cost of living” (18%), “housing affordability” (12%), and “increased poverty/homelessness” (11%). Other responses include “traffic congestion” (14%), “drugs” (14%), and “too crowded/busy” (13%).

# Executive Summary



## ISSUE AGENDA

**Social issues (40%) and transportation (39%) dominate the public issue agenda this year.** Mentions of social issues have increased significantly from 2015 (up 24 percentage points). Transportation mentions this year are on par with 2015.

- Social issues primarily consists of responses (coded open-ends) related to “housing/affordable housing” (19%) and “poverty/homelessness” (18%). Other responses included under the social net are “drugs” (7%), “seniors issues” (2%), and “other social issues” (2%).
- Transportation includes responses (coded open-ends) of “traffic congestion” (15%), “transportation (general)” (9%), “condition of roads/highways” (7%), “parking” (2%), “bicycle paths/lanes” (2%), “safety of streets (including speeding)” (2%), “traffic lights” (1%), “public transportation” (1%), and “other transportation issues” (2%).

**In comparison to social and transportation, all other issues are deemed a distant second in priority.** Of these, the leading second-tier issue is growth and development (15%). Mentions of growth and development this year are on par with 2015.

- Growth and development includes responses (coded open-ends) of “growth and development (general)” (6%), “city planning/development” (3%), “too many high rises” (2%), “zoning” (1%), “downtown development/planning” (1%), and “other growth and development issues” (1%).

# Executive Summary



## COMMUNITY SAFETY

**Few citizens mention crime as a top-of-mind community issue.** In total, only 4% of citizens identify crime as an important community issue on an open-ended basis (down 4 percentage points from 2015).

**Kelowna continues to be seen as a safe community overall.** Nine-in-ten (90%) residents describe the city as 'very/somewhat safe', on par with 2015.

**However, perceptions of community safety are declining.** When asked how community safety in Kelowna has changed over the past three years, residents are more than three times as likely to say this has 'worsened' (37%) than 'improved' (11%), resulting in a net momentum score of -26 percentage points. This year's net score is down significantly from 2015 (+2 percentage points).

- "More homelessness/poverty" is the leading reason (coded open-ends) behind perceptions of deteriorating community safety, mentioned by 24% of those saying community safety has 'worsened' over the past three years. Other responses include "drugs" (17%), "break-ins/theft" (15%), "increase in crime" (13%), and "city/population growth" (11%).

## DOWNTOWN KELOWNA

**Most residents visit downtown Kelowna at least once a month.** In total, 83% of residents say they visit downtown Kelowna at least once a month, including 15% saying 'daily', 41% saying 'at least once a week but not every day', and 27% saying 'at least once a month but not every week'.

**While seen as less safe than Kelowna as a whole, most residents still describe downtown as safe.** Overall, 80% of residents describe downtown Kelowna as 'very/somewhat safe' (compared to 90% describing the city as a whole as safe). Among the two-in-ten (19%) describing downtown as unsafe:

- Specific areas of concern (coded open-ends) are "Leon Avenue" (43%) and "City Park" (42%). Other responses include "Lawrence Avenue" (21%) and "Downtown Area" (20%).
- The main reasons (coded open-ends) for feeling unsafe in these areas of downtown Kelowna are "drugs" (55%) and "homelessness/poverty" (46%).

# Executive Summary



## CITY SERVICES AND INFRASTRUCTURE

**Overall satisfaction with City services remains high.** A large majority (90%) of citizens say they are satisfied with the overall level and quality of services provided by the City of Kelowna, on par with 2015.

**Satisfaction also extends to the delivery of specific services – exception is traffic flow management.** Of the 13 tested services, 12 receive satisfaction scores of 60% or higher. Traffic flow management is the only service rated dissatisfactory by a majority of residents (41% satisfied, 59% not satisfied). Compared to 2015, there has been a significant increase in satisfaction with drinking water quality (up 6 percentage points) and decrease in satisfaction with public transit (down 8 percentage points).

**All of the tested services are important to citizens.** Importance scores range from a high of 99% for fire services, drinking water quality, police services, and community cleanliness to a low of 71% for public transit. Compared to 2015, the importance of police services has increased (up 3 percentage points) while the importance of City-operated recreational facilities and programs has decreased (down 6 percentage points).

**Analyzing the perceived value (importance) versus performance (satisfaction) of each individual service helps identify the City's perceived strengths and areas for improvement.**

- **Primary Strengths:** fire services, parks, community cleanliness, drinking water quality, police services.
- **Secondary Strengths:** City-operated recreational facilities and programs, sports fields, City-operated cultural facilities and programs.
- **Primary Areas for Improvement:** traffic flow management, city growth management, road maintenance.
- **Secondary Areas for Improvement:** public transit, bike lanes and pedestrian sidewalks.

# Executive Summary



## FINANCIAL PLANNING

**Perceptions of the City's value for taxes remain high.** Overall, 84% of residents say they receive 'very/fairly good value' for their municipal tax dollars, consistent with 2015.

**Citizens continue to prefer tax increases over service reductions.** When given a choice between increased taxes or service reductions, more than six-in-ten (62%) choose increased taxes compared to three-in-ten (30%) opting for service reductions. This year's results are not significantly different from 2015.

## PRIORITY SETTING

**Overall, residents prioritize renewing existing infrastructure (56%) over building new infrastructure (41%).** However, with renewal leading by only a slight majority, it is clear there is also an appetite for some new infrastructure.

**Paired Choice Analysis helps identify investment priorities for the next four years.** Residents' top five priorities for investment are encouraging a diverse supply of housing at different price points (chosen 71% of the time), traffic flow management (66%), drinking water (65%), police services (61%), and fire services (60%).

**The single biggest transportation investment priority is improving traffic flow by adding vehicle lanes.** In total, 55% of residents say this should be the greatest priority for the City.

## CUSTOMER SERVICE

**Half of all citizens say they contacted or dealt with the City of Kelowna in the last 12 months.** Claimed contact with the City has increased steadily over the past five years. While this year's results (50%) are not significantly different from 2015 (43%), they are notably higher than 2012 (38%). Among those who contacted the City, the two most common contact methods (coded open-ends) are "telephone" (38%) and "in-person" (37%). These were also the main stated methods of contacting the City in 2015.

**The City continues to provide good customer service.** Among those who contacted the City, nearly eight-in-ten (78%) say they are satisfied with the overall service received, on par with 2015. Satisfaction extends to the six tested customer service elements, with staff's courteousness standing out as a highlight (93% satisfied).

# Executive Summary



## Key Takeaways

1. Overall, citizens demonstrate predominately positive views of the community and City.
2. While perceptions of overall quality of life remain high, there is a sense this has deteriorated over the past three years.
3. Kelowna continues to be seen as a safe community although residents feel less safe now as compared to three years ago. Perceptions of downtown safety are slightly lower but still high overall.
4. Social issues have become notably more relevant. In addition to topping this year's issue agenda, social issues are also driving deteriorating perceptions of quality of life and community safety. While the greatest emphasis is on financial insecurity (housing affordability, poverty/homelessness), drugs are also a reoccurring theme. Residents' number one priority for municipal investment over the next four years is encouraging a diverse supply of housing options at different price points.
5. Transportation issues persist. Traffic flow consistently surfaces as the key transportation priority.
6. While less so than social and transportation, growth and development is also on citizens' minds this year. City growth management is identified as a primary area for improvement.
7. Overall satisfaction with City services remains high. Satisfaction with drinking water quality has increased significantly this year while satisfaction with public transit has gone down.
8. Key financial metrics hold steady. Residents continue to say they receive good value for their taxes and prefer tax increases over service reductions.
9. Overall, residents prioritize renewing existing infrastructure over building new infrastructure although there is appetite for both.
10. The City continues to provide good customer service, with staff's courteousness identified as a service highlight.



# QUALITY OF LIFE

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

(Coded Open-Ends, Multiple Responses Allowed)



Citizens identify a variety of qualities and characteristics that make a city a good place to live. No single factor stands out from the rest, with the top five responses (coded open-ends) being “good recreational facilities/opportunities/activities” (14%), “low crime rate/safe” (14%), “convenient location/accessible to everything” (12%), “employment/job opportunities (including well paying jobs)” (11%), and “good weather/climate” (11%).

- These same general themes were also among the top mentions in 2015.

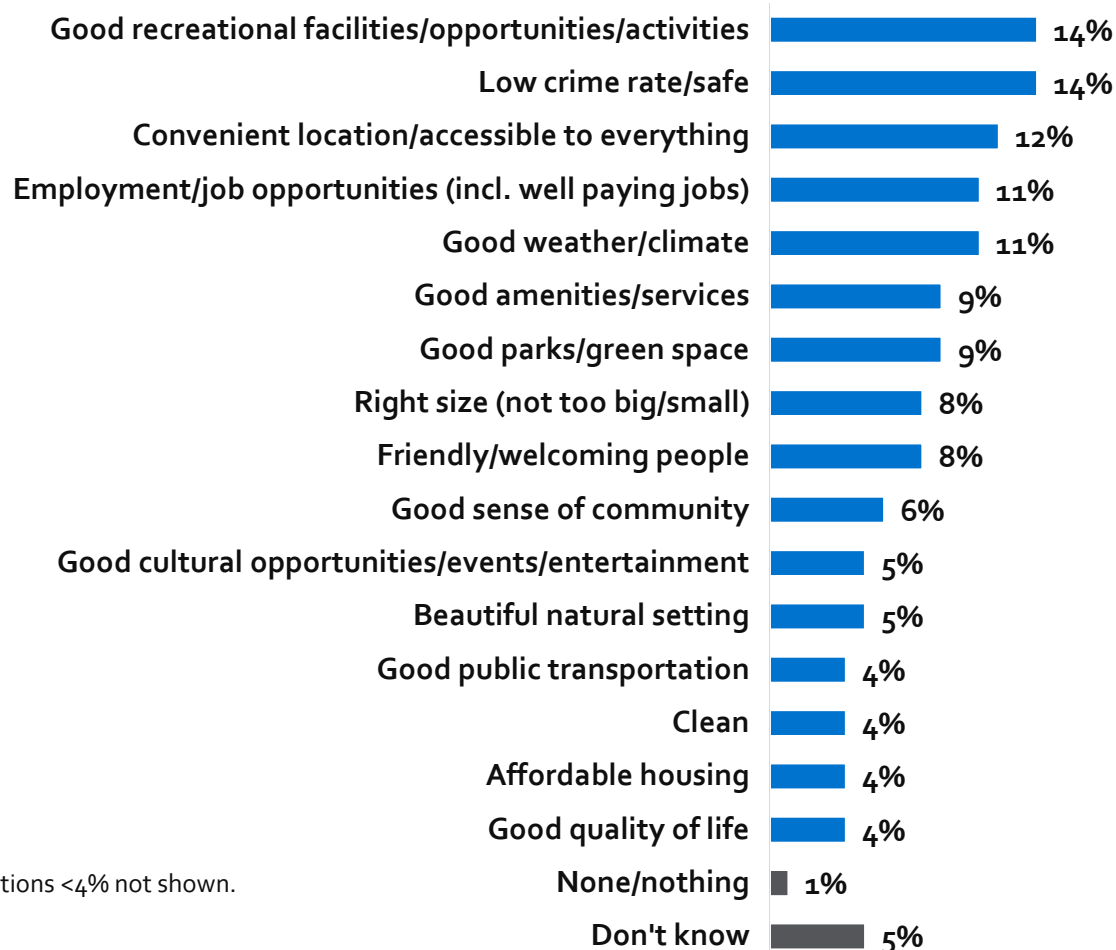
## ***Analysis by Demographic Subgroup***

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

- Mentions of “good recreational facilities/opportunities/activities” are higher among those with household incomes of \$100k+ (20% vs. 7% of \$60k-<\$100k, 15% of <\$60k).
- Mentions of “low crime rate/safe” are higher among those living in households with children under the age of 18 (24% vs. 10% of those without children at home).
- Mentions of “convenient location/accessible to everything” are higher among those living in South West Kelowna (20% vs. 8% in North Kelowna, 8% in East Central Kelowna/East Kelowna, 12% in Central Kelowna).
- Mentions of “good weather/climate” are higher among those with household incomes of <\$100k (includes 14% of <\$60k and 15% of \$60k-<\$100k vs. 4% of \$100k+).

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

(Coded Open-Ends, Multiple Responses Allowed)



Mentions <4% not shown.

2015 Top Mentions	
Good recreational facilities/opportunities	20%
Convenient location/accessible to everything	15%
Beautiful natural setting	13%
Employment/job opportunities (incl. well paying jobs)	12%
Good amenities and services	12%
Low crime rate/safe	11%
Right size (not too big/small)	11%
Good weather/climate	10%

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

Base: All respondents (n=300)

# Overall Quality of Life



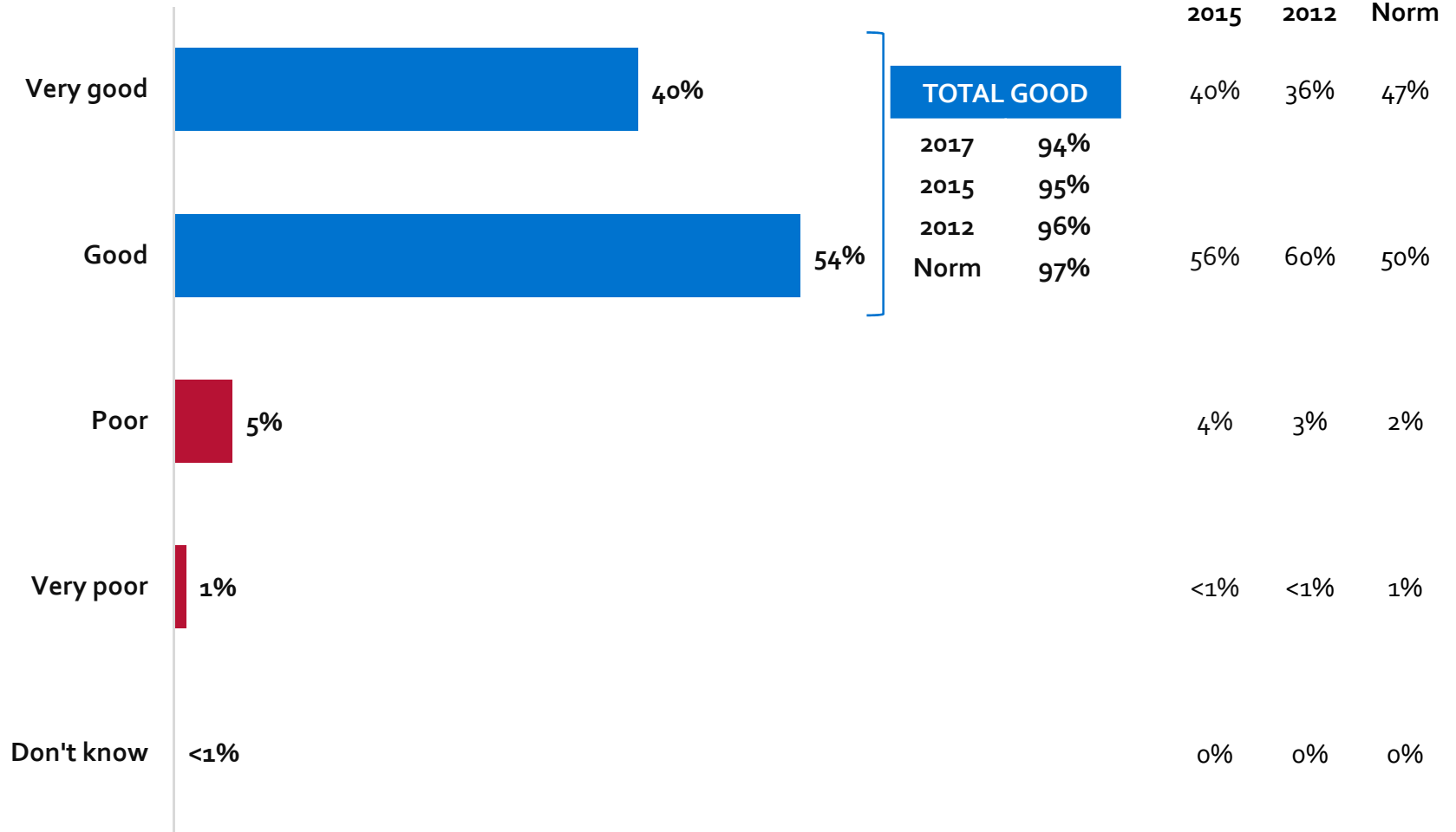
Citizens are decidedly positive about the quality of life in Kelowna today, with 94% rating the overall quality of life as either 'very good' (40%) or 'good' (54%).

- Analysis of year-over-year tracking data shows that residents have consistently rated the quality of life in Kelowna highly and this year's results are not significantly different from 2015.
- Overall perceptions (combined 'very good/good' responses) of the quality of life in Kelowna are on par with the provincial norm. However, the intensity of ratings is lower in Kelowna (40% 'very good' in Kelowna vs. 47% 'very good' provincial norm).

## ***Analysis by Demographic Subgroup***

Younger and older residents are significantly more likely than middle-aged residents to rate Kelowna's overall quality of life as 'very good/good' (97% of 18-34 years and 96% of 55+ years vs. 89% of 35-54 years).

# Overall Quality of Life



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

## Change in Quality of Life Past Three Years



When asked how the quality of life in Kelowna has changed over the past three years, more residents say this has 'worsened' (33%) than 'improved' (22%), resulting in a net momentum score of -11 percentage points. Another 43% say the quality of life has 'stayed the same'.

- This year's results are a reversal of 2015 when quality of life had positive momentum (net score of +12 in 2015 vs. -11 in 2017). This year's net score is the lowest that has been recorded since the City began tracking this measure in 2012.
- Kelowna residents are nearly twice as likely as the provincial norm to report a worsening quality of life (33% in Kelowna vs. 18% provincial norm).

Residents who think the quality of life has 'improved' attribute this to a number of different factors, with the top responses (coded open-ends) being "improved roads" (11%) and "better/more amenities and services" (10%).

- This is different from 2015 when the top responses were "nice place to live" (13%) and "downtown revitalization/improvement" (12%).

Conversely, more than four-in-ten (41%) of those who think the quality of life has 'worsened' point to some form of financial insecurity, mentioning factors (coded open-ends) such as "rising cost of living" (18%), "housing affordability" (12%), and "increased poverty/homelessness" (11%). Other responses include "traffic congestion" (14%), "drugs" (14%), and "too crowded/busy" (13%).

- In 2015, the leading response was "rising cost of living" (21%), followed by "unemployment/lack of jobs" (17%).

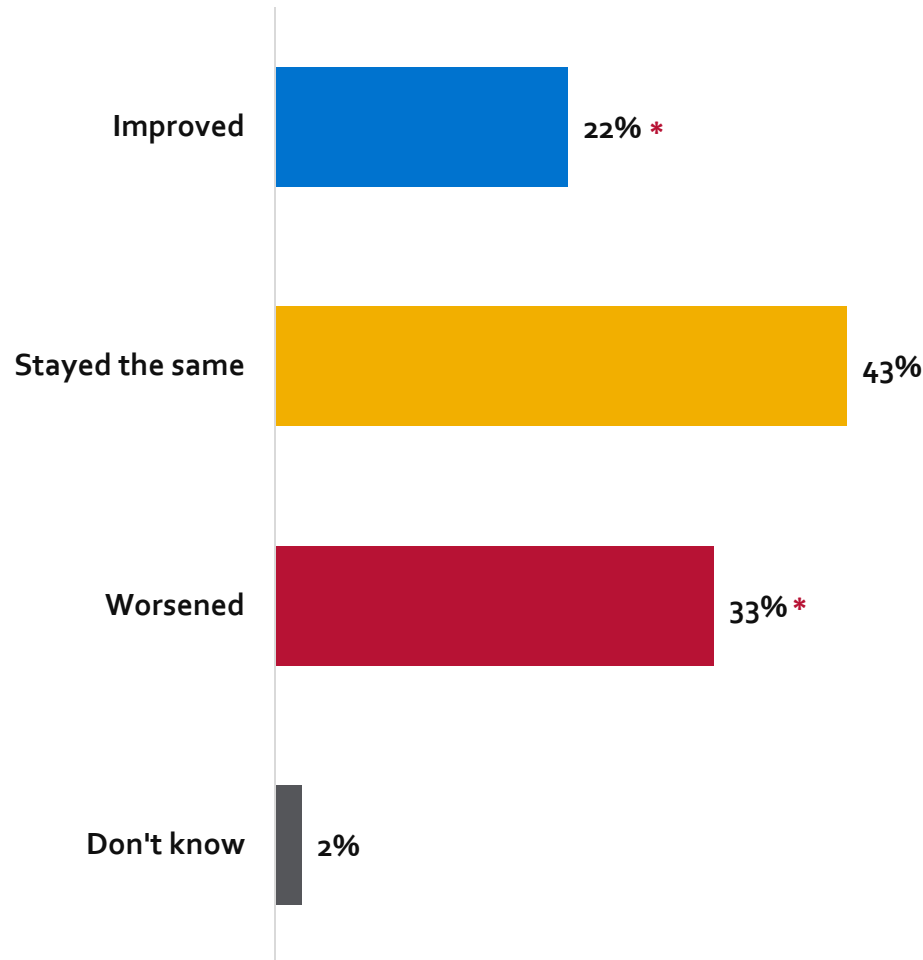
### ***Analysis by Demographic Subgroup***

Younger residents are significantly more likely to say the quality of life has 'improved' (33% of 18-34 years vs. 18% of 35+ years).

Perceptions of a 'worsened' quality of life are significantly higher among women (41% vs. 24% of men) and those who have lived in Kelowna for more than 15 years (39% vs. 25% of 15 years or less).



# Change in Quality of Life Past Three Years



NET SCORE	
2017	-11 *
2015	+12
2012	-5
Norm	+7

	2015	2012	Norm
Improved	30%	20%	24%
Stayed the same	49%	55%	56%
Worsened	18%	25%	17%
Don't know	4%	0%	3%

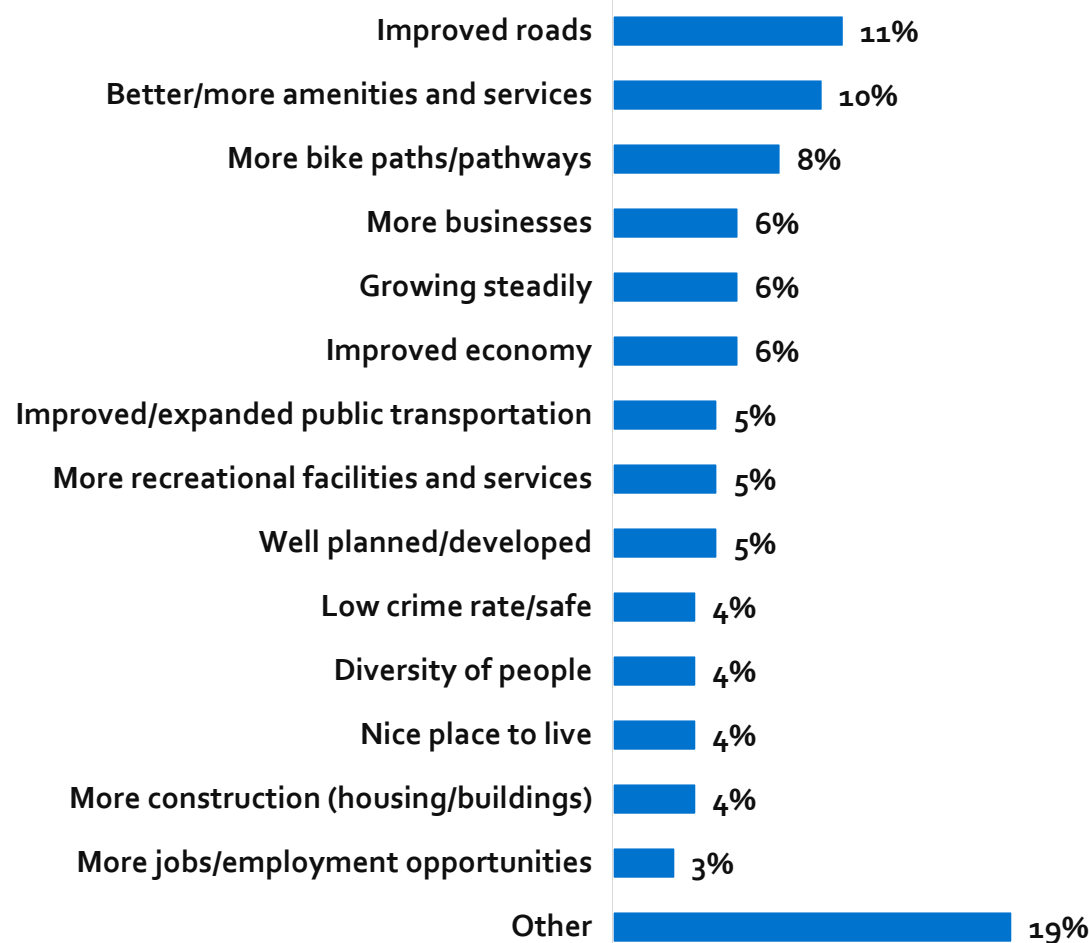
Q4. And, do you feel that the quality of life in the City of Kelowna in the past three years has improved, stayed the same, or worsened?

Base: All respondents (n=300)

\* = statistically significant change from 2015

# Reasons Quality of Life has Improved

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



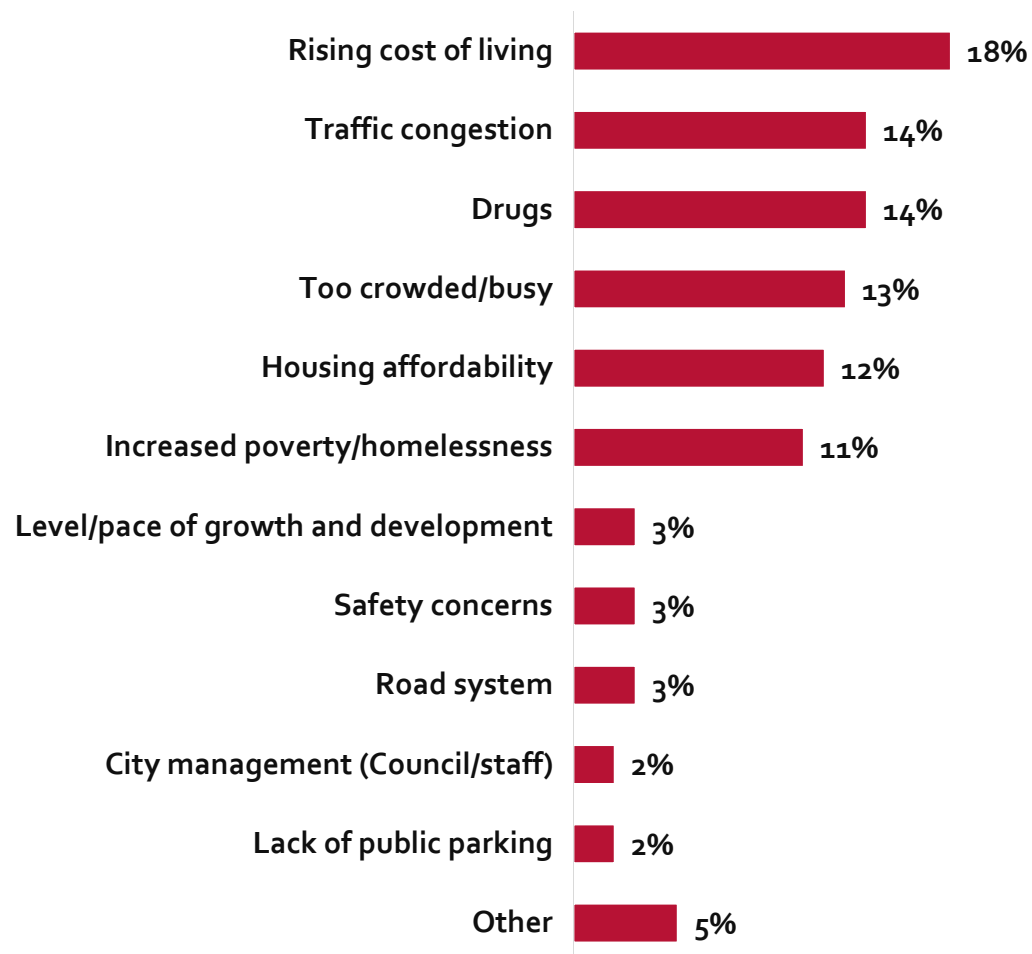
2015 Top Mentions	
Nice place to live	13%
Downtown revitalization/ improvement	12%
Growing steadily	11%
More recreational facilities and services	10%
Well planned/developed	10%

Q5. Why do you think the quality of life has improved?  
Base: Those saying the quality of life has improved (n=65)

Small base size, interpret with caution.

# Reasons Quality of Life has Worsened

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



2015 Top Mentions	
Rising cost of living	21%
Unemployment/lack of jobs	17%
Traffic congestion	13%
Too crowded/busy	12%
Negative mentions of staff and Council	10%
Safety concerns	10%
Too much growth/development	10%

Q6. Why do you think the quality of life has worsened?  
Base: Those saying the quality of life has worsened (n=97)

Small base size, interpret with caution.

# ISSUE AGENDA

# Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)



**Social issues** (40%) and **transportation** (39%) dominate the public issue agenda.

- Social issues primarily consists of responses (coded open-ends) related to “housing/affordable housing” (19%) and “poverty/homelessness” (18%). Other responses included under the social net are “drugs” (7%), “seniors issues” (2%), and “other social issues” (2%).
  - Mentions of social issues have increased significantly from 2015 (up 24 percentage points). Mentions of social issues this year are more than double what has been reported any other year.
  - Mentions of social issues in Kelowna (40%) are also significantly higher than the provincial norm (13%).
- Transportation includes responses (coded open-ends) of “traffic congestion” (15%), “transportation (general)” (9%), “condition of roads/highways” (7%), “parking” (2%), “bicycle paths/lanes” (2%), “safety of streets (including speeding)” (2%), “traffic lights” (1%), “public transportation” (1%), and “other transportation issues” (2%).
  - Transportation mentions this year are on par with 2015.
  - Mentions of transportation in Kelowna (39%) continue to be higher than the provincial norm (32%).

In comparison to social and transportation, all other issues are deemed a distant second in priority. Of these, the leading second-tier issue is **growth and development** (15%), which includes responses (coded open-ends) of “growth and development (general)” (6%), “city planning/development” (3%), “too many high rises” (2%), “zoning” (1%), “downtown development/planning” (1%), and “other growth and development issues” (1%).

- Mentions of growth and development this year are on par with both 2015 and the provincial norm.

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

# Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)



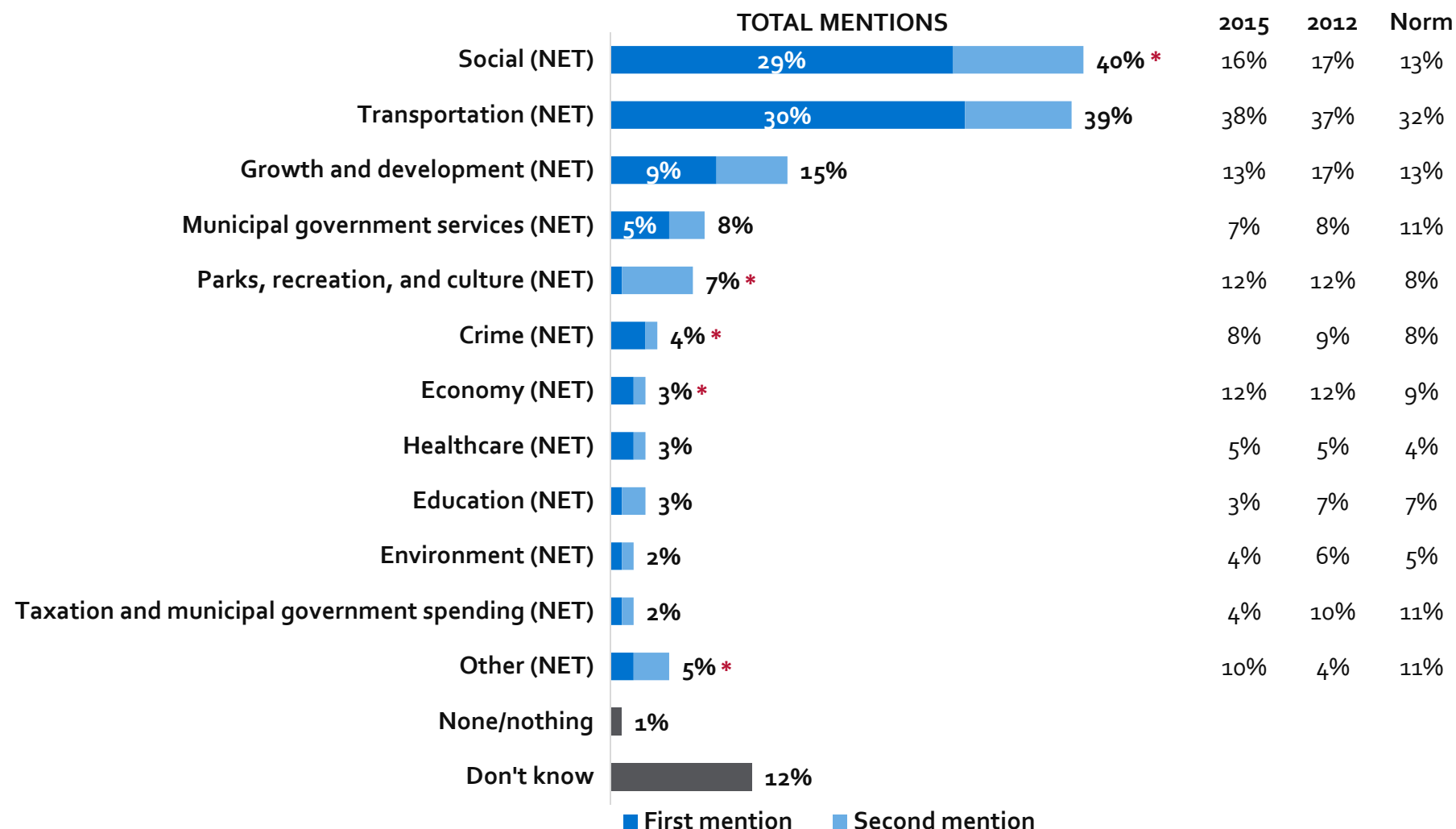
Analysis by demographic subgroup shows some significant differences – highlights include:

- **Social** is mentioned more often by women (50% vs. 29% of men) and those living in Central Kelowna (51% vs. 29% in South West Kelowna, 37% in North Kelowna, 42% in East Central Kelowna/East Kelowna). Mentions of social issues do not significantly vary by household income (46% of <\$60k, 39% of \$60k-<\$100k, 36% of \$100k+).
- **Transportation** is mentioned more often by those living in South West Kelowna (45% vs. 29% in Central Kelowna, 38% in North Kelowna, 44% in East Central Kelowna/East Kelowna).
- **Growth and development** is mentioned more often by those who are 35+ years of age (includes 14% of 35-54 years and 22% of 55+ years vs. 3% of 18-34 years) and those living in South West Kelowna and North Kelowna (21% and 18% vs. 6% in East Central Kelowna/East Kelowna, 16% in Central Kelowna). Mentions of growth and development do not significantly vary by gender (17% of men, 13% of women) or household income (11% of <\$60k, 17% of \$60k-<\$100k, 19% of \$100k+).



# Important Community Issues

(Coded Open-Ends, Multiple Responses Allowed)



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

Base: All respondents (n=300)

\* = statistically significant change from 2015

# COMMUNITY SAFETY

# Overall Community Safety



Kelowna is largely seen as a safe community, with nine-in-ten (90%) residents describing the city as either 'very safe' (29%) or 'somewhat safe' (61%).

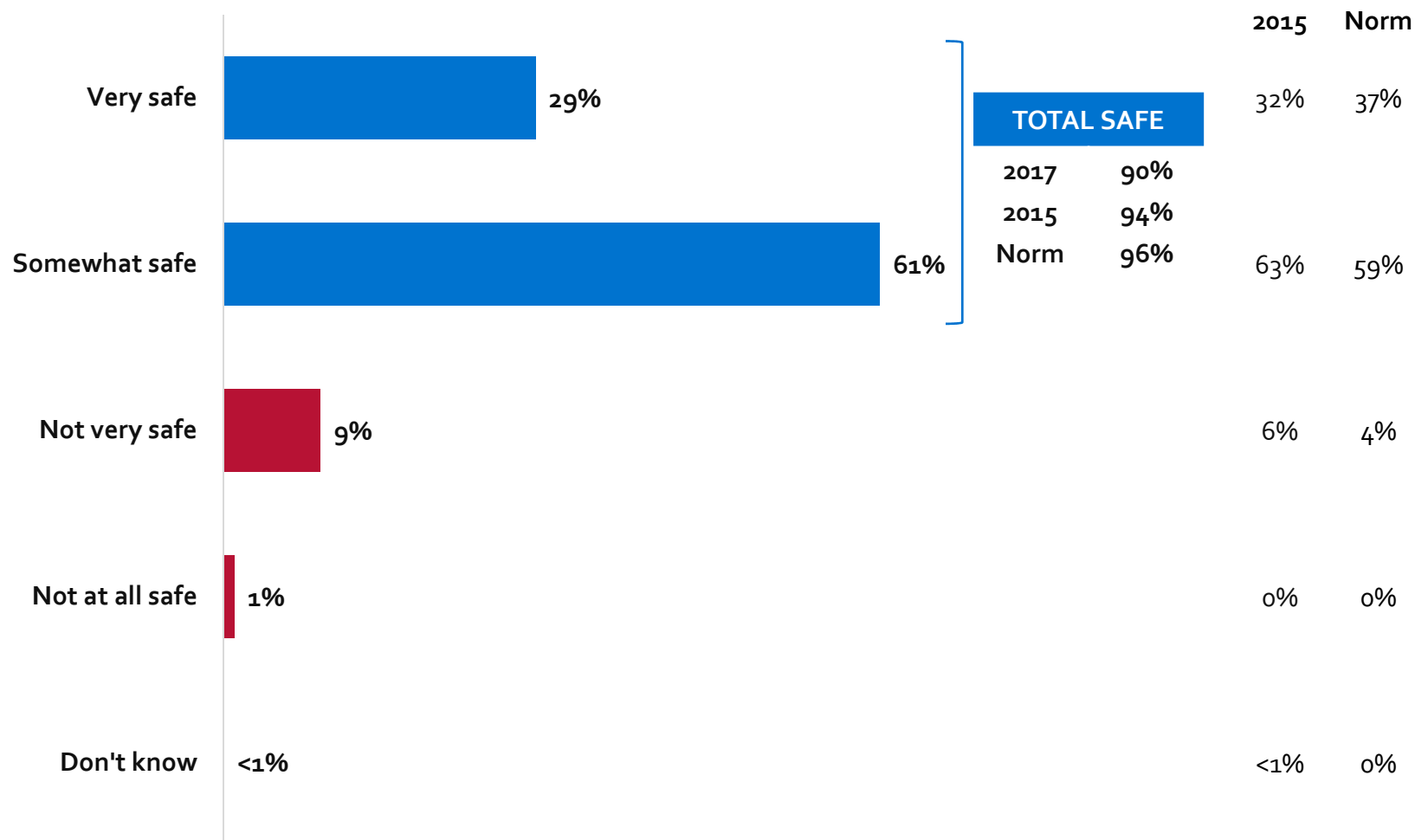
- This year's results are on par with 2015.
- However, perceptions of community safety in Kelowna are lower than the provincial norm, both overall (90% 'very/somewhat safe' in Kelowna vs. 96% provincial norm) and in intensity (29% 'very safe' in Kelowna vs. 37% 'very safe' provincial norm).

## ***Analysis by Demographic Subgroup***

Overall perceptions (combined 'very/somewhat safe' responses) of community safety are consistent across all key demographic subgroups, including gender (91% of men, 89% of women) and length of time living in Kelowna (88% of 15 years or less, 91% of more than 15 years).

However, there are significant differences in the intensity of ratings, with those living in South West Kelowna the most likely to describe Kelowna as 'very safe' (36% vs. 20% in East Central Kelowna/East Kelowna, 29% in Central Kelowna, 32% in North Kelowna).

# Overall Community Safety



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



When asked how community safety in Kelowna has changed over the past three years, residents are more than three times as likely to say this has 'worsened' (37%) than 'improved' (11%), resulting in a net momentum score of -26 percentage points. Another 51% say community safety has 'stayed the same'.

- This year's net score (-26) is down significantly from 2015 (+2).
- Normative comparisons are unavailable for this question.

Residents who say community safety has 'improved' attribute this primarily to "more policing/law enforcement" (32% of coded open-ended responses), although these results should be interpreted with caution due to small sample sizes (n<50).

- In 2015, the top responses were "decreased crime rate" (25%) and "more policing/law enforcement" (20%).

Among those saying community safety has 'worsened', one-quarter (24%) point to "more homelessness/poverty" (coded open-ended responses). Other responses include "drugs" (17%), "break-ins/theft" (15%), "increase in crime" (13%), and "city/population growth" (11%).

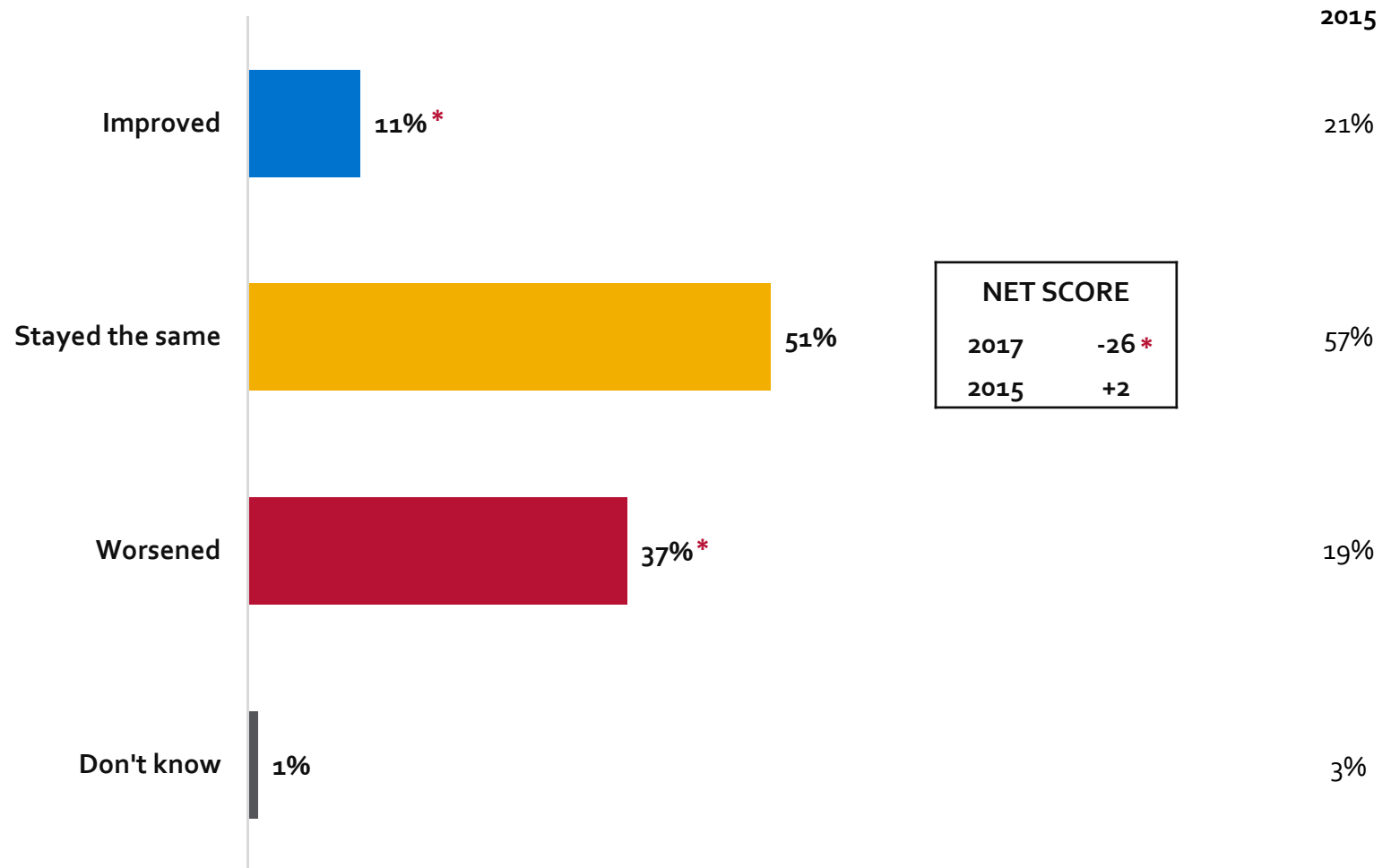
- In 2015, the top response was "increase in crime" (28%).

### ***Analysis by Demographic Subgroup***

Perceptions of 'improved' community safety are significantly higher among younger residents (21% of 18-34 years vs. 5% of 35-54 years, 9% of 55+ years) and those with household incomes of <\$60k (18% vs. 8% of \$60k+). No significant differences are seen by gender (13% of men and 9% of women say 'improved').

Perceptions of 'worsened' community safety are significantly higher among those who are 35+ years of age (includes 42% of 35-54 years and 41% of 55+ years vs. 25% of 18-34 years) and those who have lived in Kelowna for more than 15 years (43% vs. 29% of 15 years or less). No significant differences are seen by gender (35% of men and 39% of women say 'worsened').

# Change in Community Safety Past Three Years



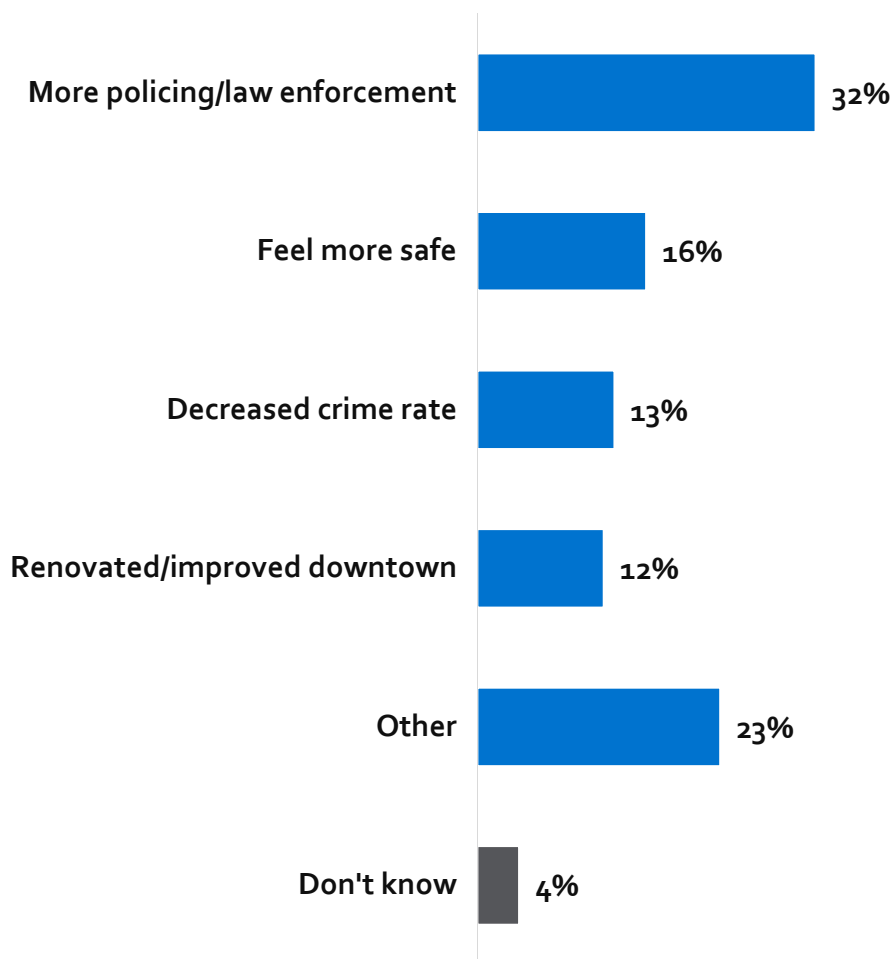
Q18. Do you feel community safety in Kelowna has improved, stayed the same, or worsened over the past three years?

Base: All respondents (n=300)

\* = statistically significant change from 2015

# Reasons Community Safety has Improved

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



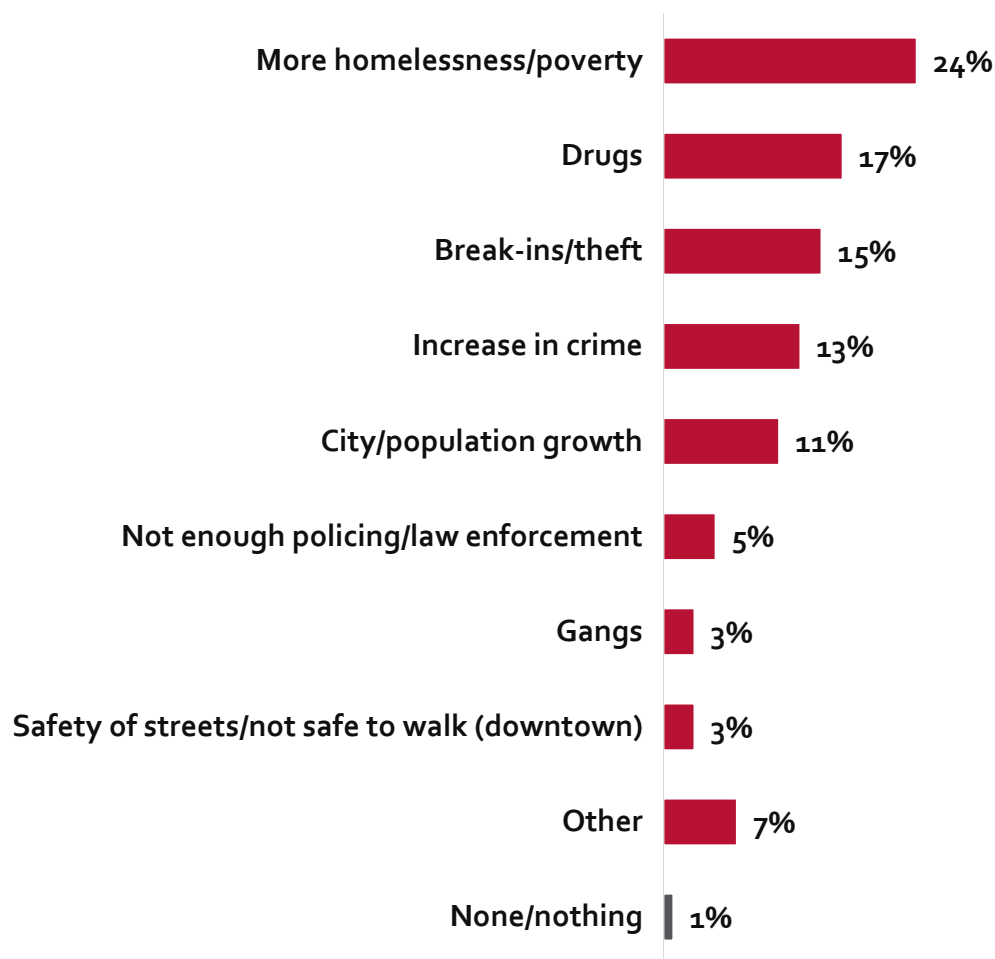
2015 Top Mentions	
Decreased crime rate	25%
More policing/law enforcement	20%
News reports (fewer crime reports in the news)	15%
Public awareness/education	10%

Q19. Why do you feel community safety has improved?  
Base: Those saying community safety has improved (n=31)

Small base size, interpret with caution.

# Reasons Community Safety has Worsened

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



2015 Top Mentions	
Increase in crime	28%
More homelessness/poverty	19%
Break-ins/theft	18%
More drug dealings	16%
Not enough policing/law enforcement	15%
Safety of streets/not safe to walk (downtown)	12%
Street gangs	10%

Q20. Why do you feel community safety has worsened?  
Base: Those saying community safety has worsened (n=111)



## Downtown Kelowna Visitation and Safety



In total, 83% of residents say they visit downtown Kelowna at least once a month. This includes 15% saying 'daily', 41% saying 'at least once a week but not every day', and 27% saying 'at least once a month but not every week'.

The majority (80%) of residents describe downtown Kelowna as safe, including 21% saying 'very safe' and 59% saying 'somewhat safe'. Two-in-ten (19%) describe downtown Kelowna as unsafe (16% 'not very safe', 3% 'not at all safe').

When those describing downtown Kelowna as unsafe are asked to specifically identify unsafe downtown areas, 43% mention "Leon Avenue" and 42% mention "City Park" (coded open-ends). Other responses include "Lawrence Avenue" (21%) and "Downtown Area" (20%), among others.

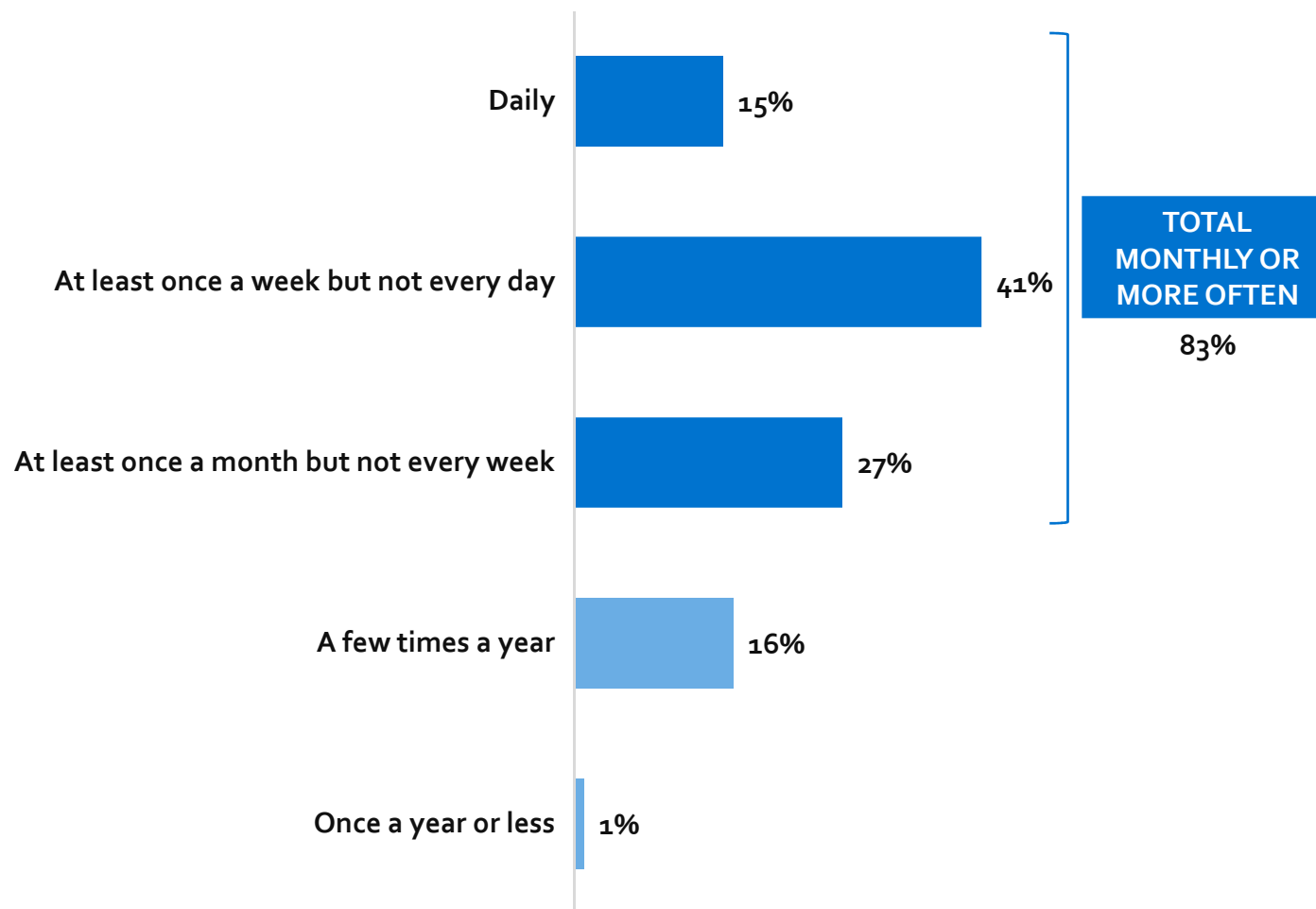
The main reasons (coded open-ends) for feeling unsafe in these areas of downtown Kelowna are "drugs" (55%) and "homelessness/poverty" (46%).

### ***Analysis by Demographic Subgroup***

Residents who are significantly more likely to say they visit downtown Kelowna at least once a month include men (89% vs. 77% of women), younger residents (98% of 18-34 years vs. 73% of 55+ years, 82% of 35-54 years), those living in Central Kelowna (95% vs. 73% in East Central Kelowna/East Kelowna, 78% in North Kelowna, 85% in South West Kelowna), those who have lived in Kelowna for 15 years or less (88% vs. 78% of more than 15 years), and those with household incomes of \$100k+ (94% vs. 76% of <\$60k, 81% of \$60k-<\$100k).

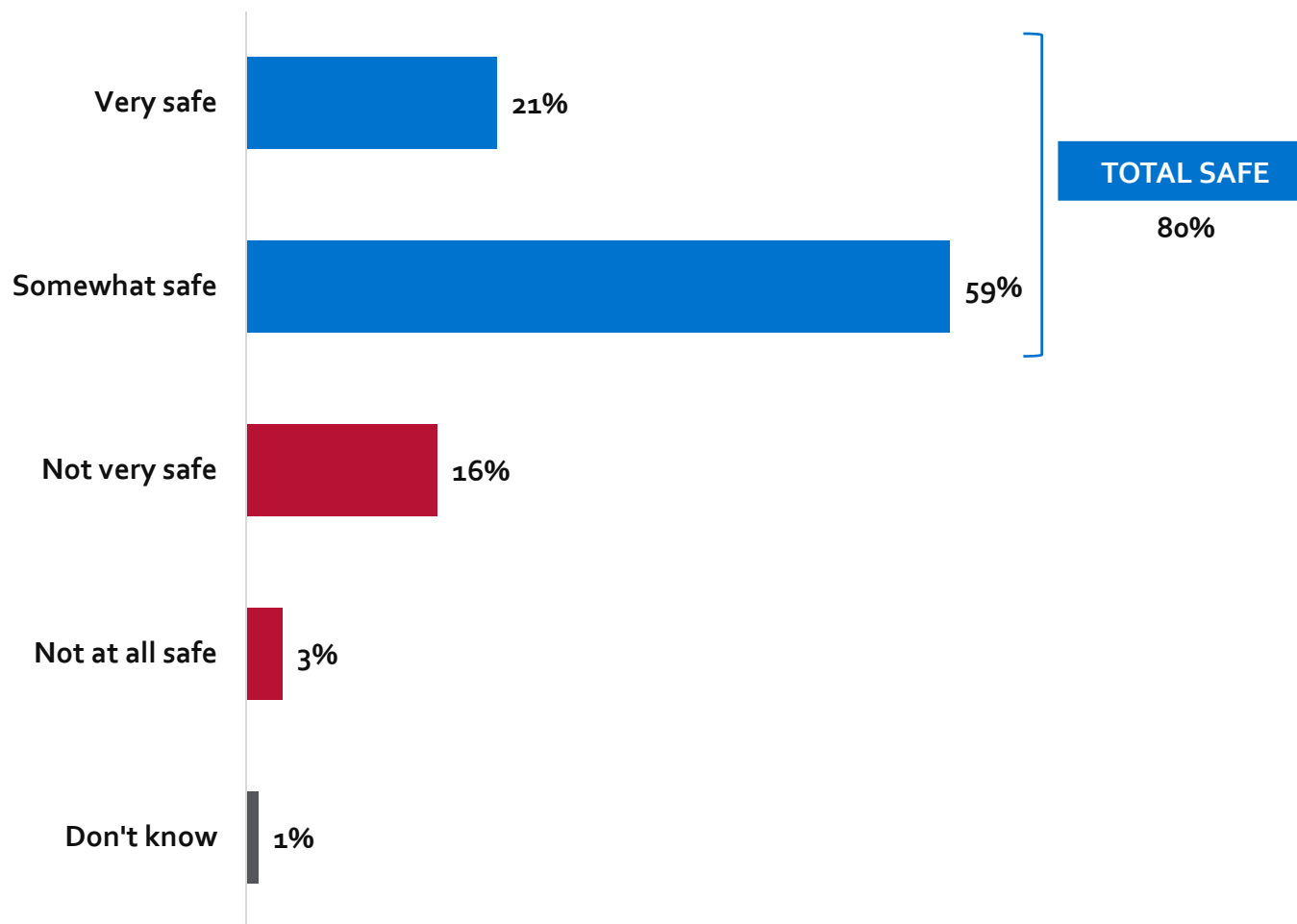
Those living in East Central Kelowna/East Kelowna are significantly more likely to describe downtown Kelowna as unsafe (combined 'not very/not at all safe' responses) (26% vs. 11% in North Kelowna, 13% in Central Kelowna, 19% in South West Kelowna). No significant differences are seen by gender (20% of men and 17% of women describe downtown as unsafe).

## Frequency of Visiting Downtown Kelowna



Q21. How often do you visit downtown Kelowna?  
Base: All respondents (n=300)

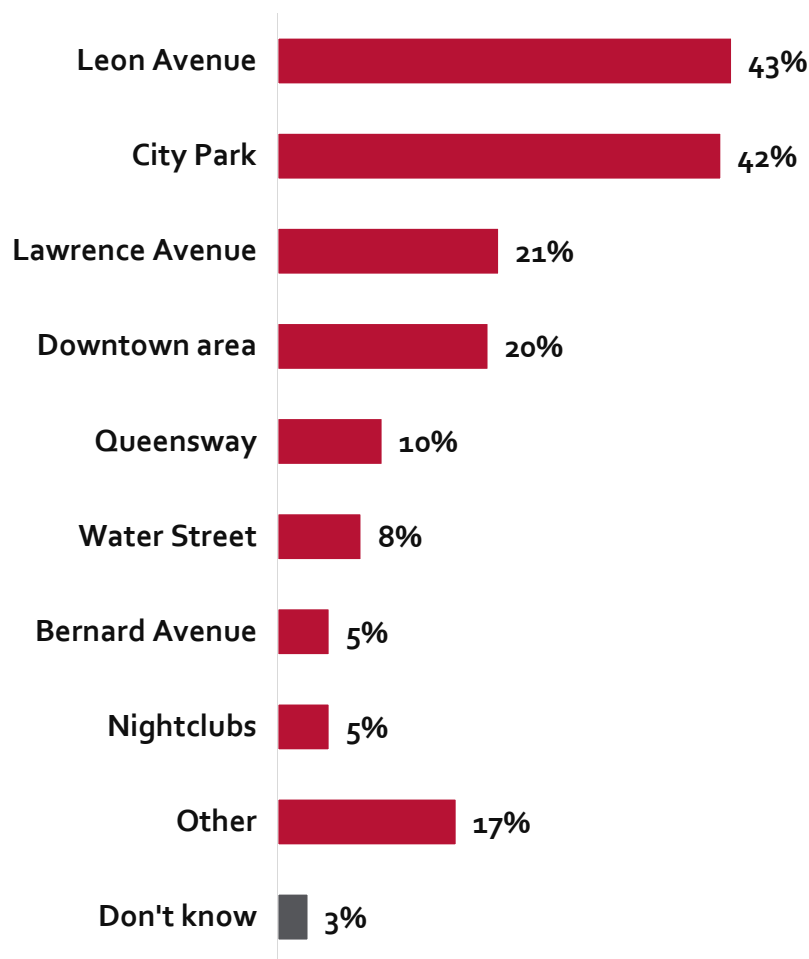
## Downtown Kelowna Safety



Q22. Overall, would you describe downtown Kelowna as very safe, somewhat safe, not very safe, or not at all safe?  
Base: All respondents (n=300)

## Unsafe Areas in Downtown Kelowna

(Among those saying downtown is unsafe) (Coded Open-Ends, Multiple Responses Allowed)



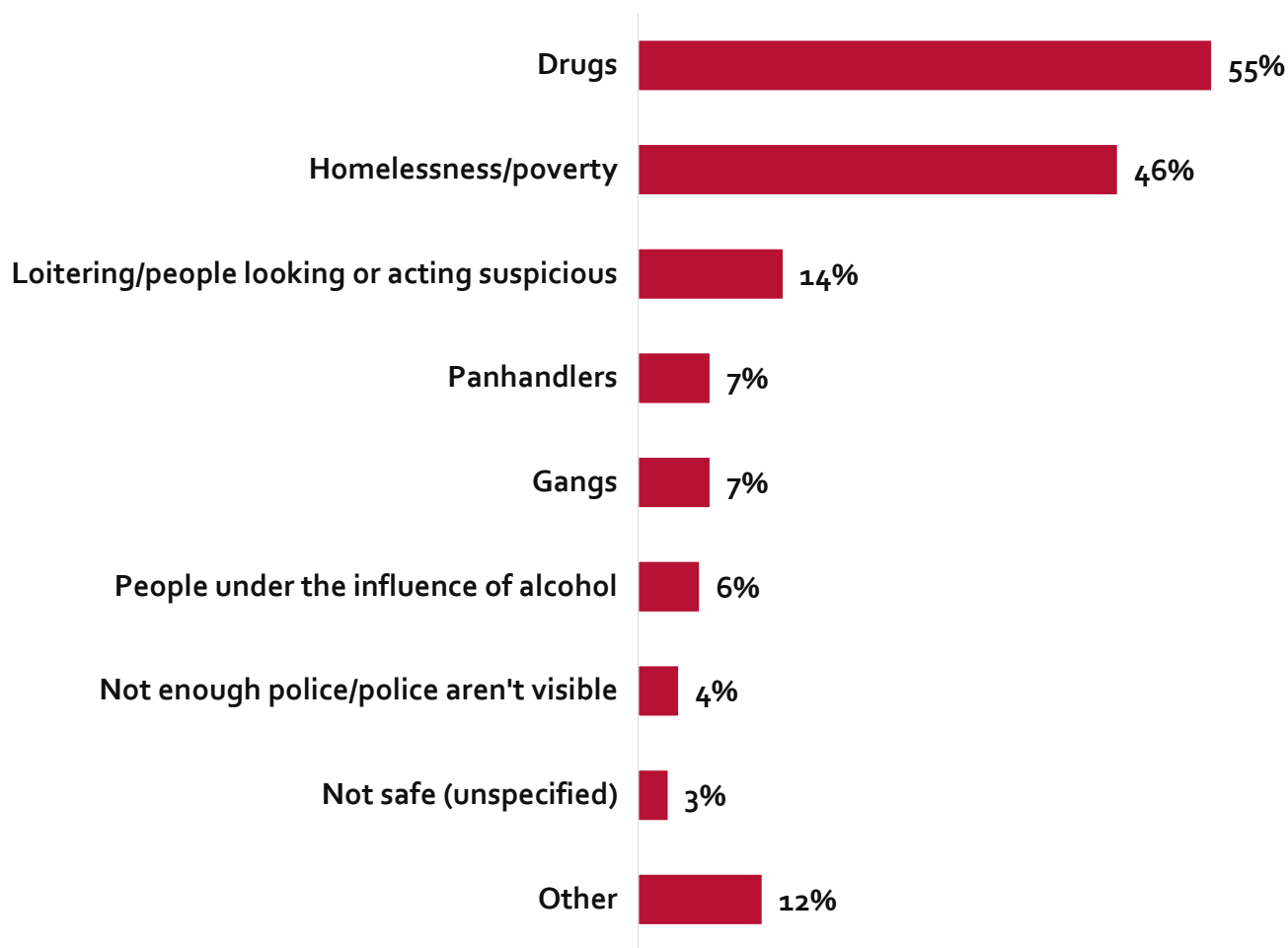
Q23. What specific areas of downtown Kelowna do you feel are unsafe? Any others?

Base: Those saying downtown is unsafe (n=52)

Small base size, interpret with caution.

## Reasons for Feeling Unsafe in Areas of Downtown Kelowna

(Among those saying downtown is unsafe) (Coded Open-Ends, Multiple Responses Allowed)



Q24. Why do you feel unsafe in these areas of downtown Kelowna?

Base: Those saying downtown is unsafe (n=52)

Small base size, interpret with caution.

# **CITY SERVICES AND INFRASTRUCTURE**

# Satisfaction with Overall Level and Quality of Services



Satisfaction with City services is high, with 90% of citizens saying they are either 'very satisfied' (26%) or 'somewhat satisfied' (64%) with the overall level and quality of services provided by the City of Kelowna.

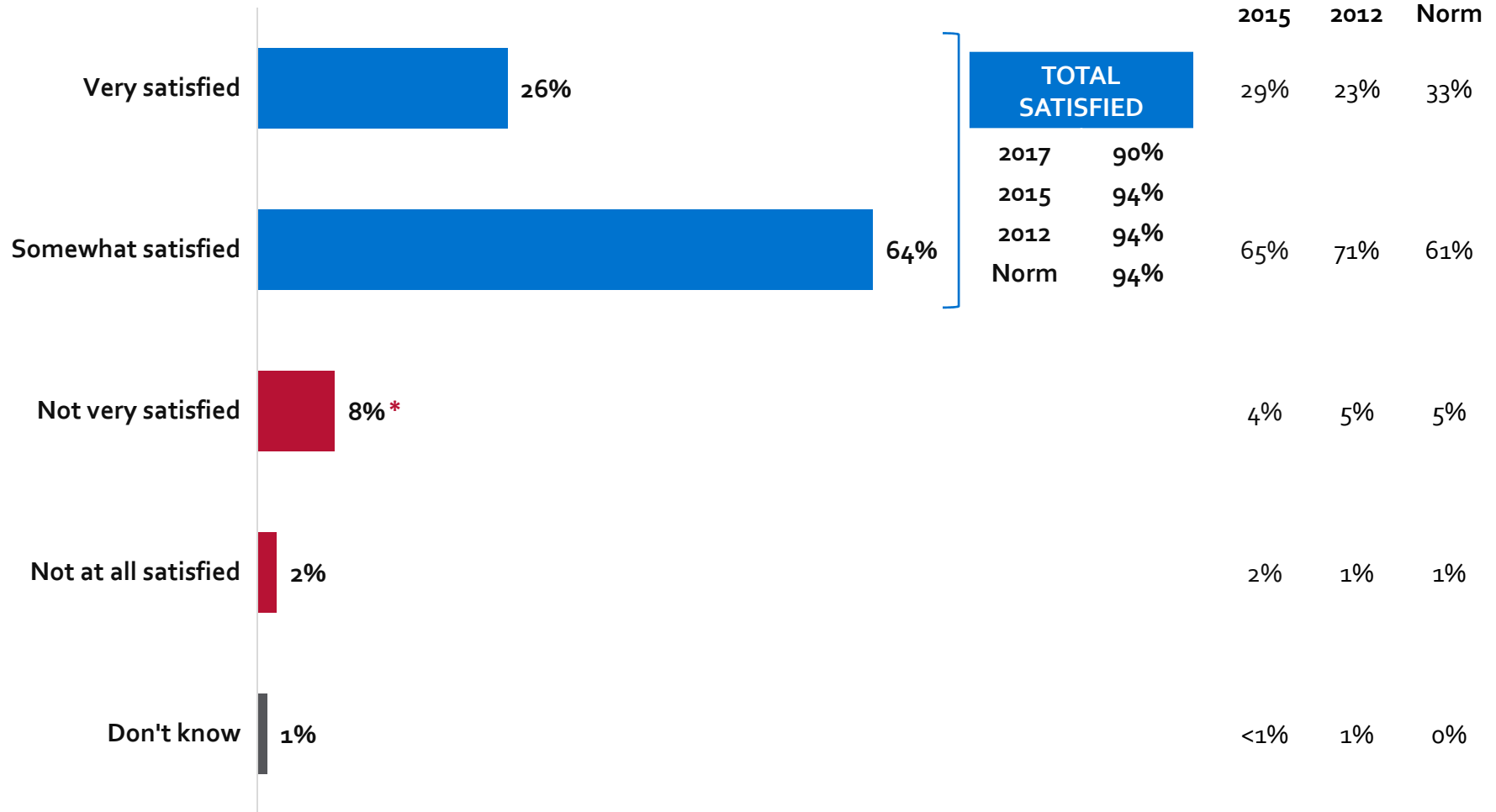
- Satisfaction with City services this year is not significantly different from 2015.
- Overall satisfaction (combined 'very/somewhat satisfied' responses) with City services in Kelowna is on par with the provincial norm. However, the intensity of satisfaction is notably lower in Kelowna (26% 'very satisfied' in Kelowna vs. 33% 'very satisfied' provincial norm).

## ***Analysis by Demographic Subgroup***

Overall satisfaction (combined 'very/somewhat satisfied' responses) is significantly higher among those living in households with children under the age of 18 (97% vs. 87% of those without children at home).

There are also significant differences in the intensity of satisfaction, with the highest 'very satisfied' scores reported by men (33% vs. 19% of women) and those living in North Kelowna (39% vs. 21% in East Central Kelowna/East Kelowna, 24% in Central Kelowna, 26% in South West Kelowna).

# Satisfaction with Overall Level and Quality of Services



Q7A. How satisfied are you with the overall level and quality of services provided by the City of Kelowna?

Base: All respondents (n=300)

\* = statistically significant change from 2015



## Satisfaction with Specific Services



Satisfaction also extends to the delivery of specific services.

Of the tested services, citizens are the most satisfied (combined 'very/somewhat satisfied' responses) with:

- **Fire services** (95%);
- **Parks** (94%);
- **City-operated recreational facilities and programs** (93%);
- **Sports fields** (92%); and,
- **Community cleanliness** (92%).

The next most satisfactory services are:

- **City-operated cultural facilities and programs** (89%);
- **Drinking water quality** (88%);
- **Police services** (85%);
- **Road maintenance** (78%);
- **Bike lanes and pedestrian sidewalks** (74%);
- **City growth management** (65%); and,
- **Public transit** (60%).

Residents are considerably less likely to say they are satisfied with **traffic flow management** (41%). Rather, the majority (59%) say they are dissatisfied with this service.

Compared to 2015, there has been a significant increase in satisfaction with **drinking water quality** (up 6 percentage points) and decrease in satisfaction with **public transit** (down 8 percentage points).

Kelowna residents are more satisfied than the provincial norm with **City-operated recreational facilities and programs** (93% vs. 88%) but less satisfied with **police services** (85% vs. 92%).

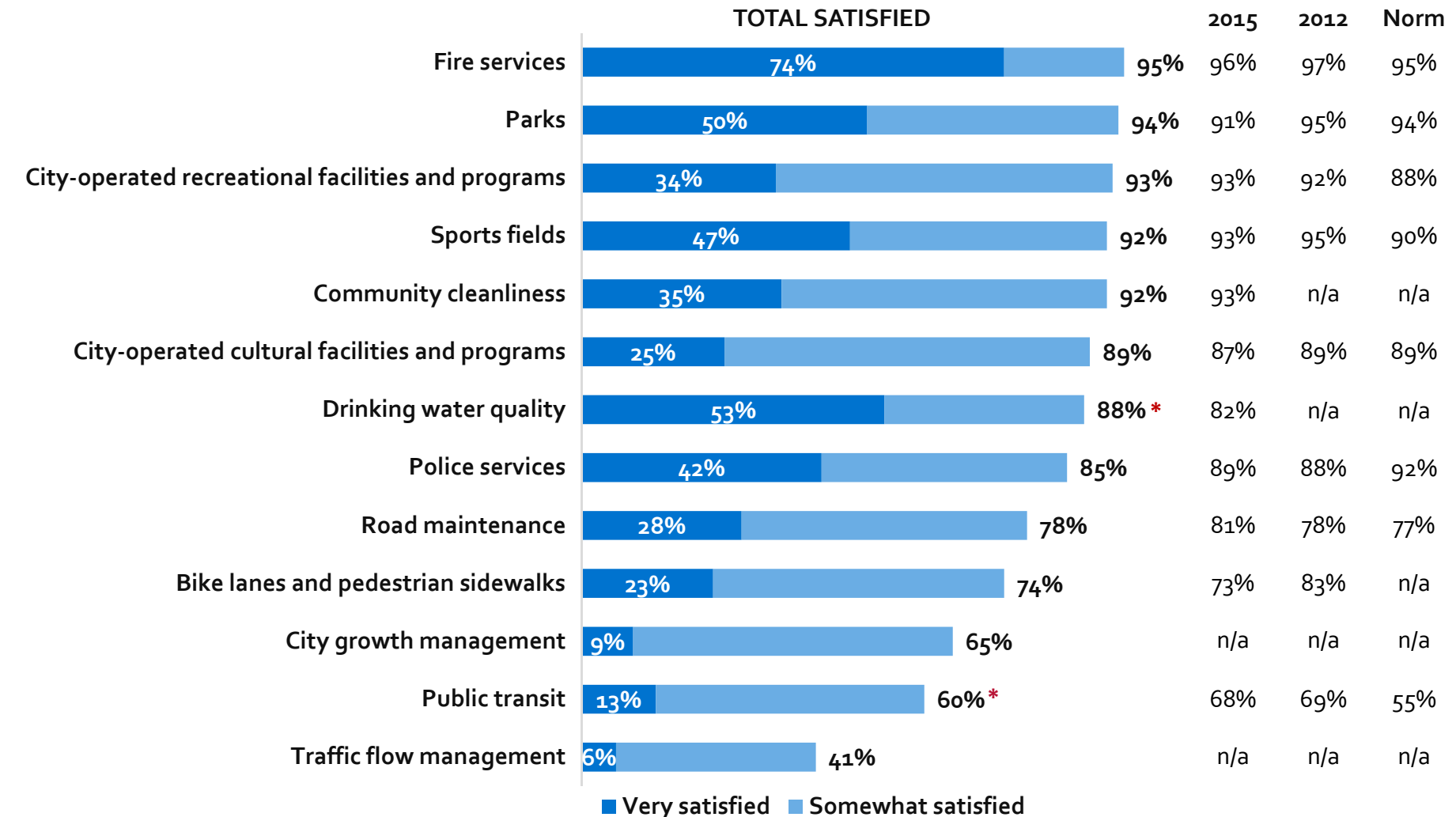
# Satisfaction with Specific Services



Analysis by demographic subgroup shows the following significant differences:

- Satisfaction with **fire services** is higher among those with household incomes of <\$100k (includes 99% of <\$60k and 98% of \$60k-<\$100k vs. 87% of \$100k+).
- Satisfaction with **City-operated recreational facilities and programs** is higher among those with household incomes of \$60k-<\$100k (97% vs. 87% of <\$60k, 95% of \$100k+).
- Satisfaction with **City-operated cultural facilities and programs** is higher among those living in South West Kelowna (95% vs. 84% in North Kelowna, 87% in Central Kelowna, 87% in East Central Kelowna/East Kelowna) and those with household incomes of \$100k+ (94% vs. 84% of \$60k-<\$100k, 89% of <\$60k).
- Satisfaction with **bike lanes and pedestrian sidewalks** is higher among those with household incomes of \$60k-<\$100k (80% vs. 66% of \$100k+, 72% of <\$60k).
- Satisfaction with **City growth management** is higher among older and younger residents (includes 75% of 18-34 years and 67% of 55+ years vs. 54% of 35-54 years), those living in North Kelowna and Central Kelowna (78% and 77% vs. 51% in South West Kelowna, 63% in East Central Kelowna/East Kelowna), and those with household incomes of \$60k-<\$100k (76% vs. 55% of \$100k+, 69% of <\$60k).
- Satisfaction with **public transit** is higher among older residents (66% of 55+ years vs. 51% of 18-34 years, 61% of 35-54 years) and those with household incomes of <\$60k (70% vs. 51% of \$100k+, 62% of \$60k-<\$100k).
- Satisfaction with **traffic flow management** is higher among those living in North Kelowna (52% vs. 35% in East Central Kelowna/East Kelowna, 40% in South West Kelowna, 41% in Central Kelowna) and those who have lived in Kelowna for 15 years or less (49% vs. 35% of more than 15 years).

# Satisfaction with Specific Services



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)

\* = statistically significant change from 2015

# Importance of Specific Services



All of the tested services are important to citizens, with the highest 'very/somewhat important' scores going to:

- **Fire services** (99%);
- **Drinking water quality** (99%);
- **Police services** (99%);
- **Community cleanliness** (99%);
- **Traffic flow management** (98%);
- **Road maintenance** (98%);
- **Parks** (97%);
- **City growth management** (93%);
- **Bike lanes and pedestrian sidewalks** (90%); and,
- **City-operated recreational facilities and programs** (90%).

In comparison, the following three services receive relatively lower importance scores:

- **Sports fields** (79%);
- **City-operated cultural facilities and programs** (77%); and,
- **Public transit** (71%).

Services related to public health and safety (**fire, drinking water, police**) are the most likely to be rated as 'very important'. **Traffic flow management** also receives one of the highest 'very important' scores.

Compared to 2015, the importance of **police services** has increased (up 3 percentage points) while the importance of **City-operated recreational facilities and programs** has decreased (down 6 percentage points).

Kelowna residents are less likely than the provincial norm to say **recreational facilities and programs** (90% vs. 95%), **cultural facilities and programs** (77% vs. 84%), and **public transit** (71% vs. 80%) are important.

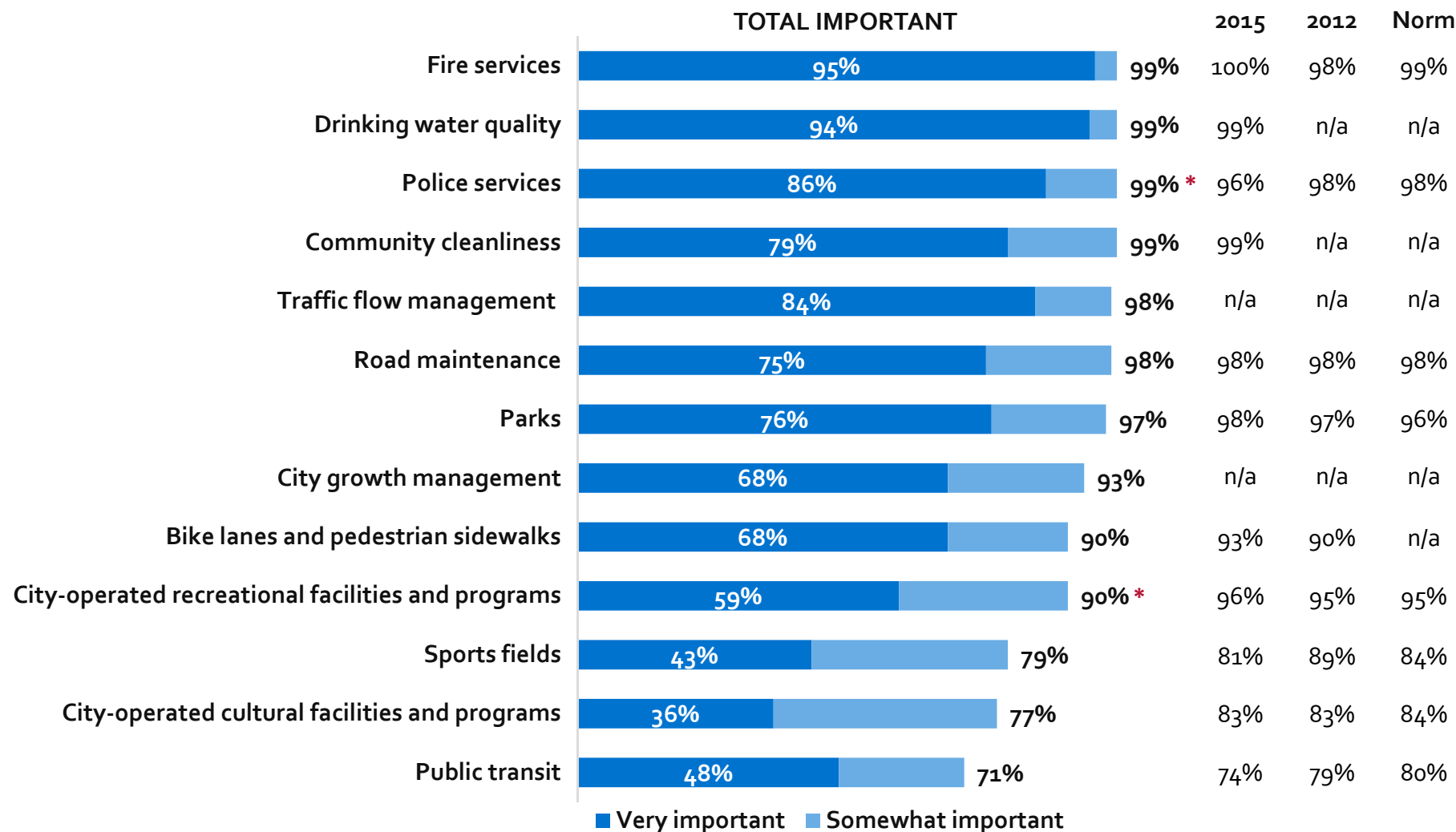
# Importance of Specific Services



Analysis by demographic subgroup shows the following significant differences:

- **Parks** are more important to those living in Central Kelowna and South West Kelowna (100% and 99% vs. 89% in North Kelowna, 96% in East Central Kelowna/East Kelowna).
- **City growth management** is more important to older residents (96% of 55+ years vs. 86% of 18-34 years, 93% of 35-54 years) and those with household incomes of \$60k+ (includes 96% of \$60k-<\$100k and 99% of \$100k+ vs. 86% of <\$60k).
- **Bike lanes and pedestrian sidewalks** are more important to younger residents (99% of 18-34 years vs. 84% of 55+ years, 89% of 35-54 years).
- **City-operated recreational facilities and programs** are more important to those who are 35-54 years of age (97% vs. 86% of 55+ years, 87% of 18-34 years), those living in South West Kelowna (93% vs. 82% in North Kelowna, 90% in East Central Kelowna/East Kelowna, 91% in Central Kelowna), those living in households with children under the age of 18 (96% vs. 87% of those without children at home), and those with household incomes of \$60k+ (includes 93% of \$60k-<\$100k and 95% of \$100k+ vs. 82% of <\$60k).
- **Sports fields** are more important to those who have lived in Kelowna for 15 years or less (87% vs. 73% of more than 15 years) and those with household incomes of \$100k+ (87% vs. 74% of \$60k-<\$100k, 81% of <\$60k).
- **City-operated cultural facilities and programs** are more important to those with household incomes of \$100k+ (88% vs. 69% of <\$60k, 75% of \$60k-<\$100k).
- **Public transit** is more important to those with household incomes of \$60k-<\$100k (78% vs. 63% of \$100k+, 75% of <\$60k). No significant differences are seen by age (77% of 18-34 years, 71% of 35-54 years, 68% of 55+ years) or neighbourhood (79% in Central Kelowna, 74% in North Kelowna, 68% in South West Kelowna, 67% in East Central Kelowna/East Kelowna).

# Importance of Specific 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)

\* = statistically significant change from 2015

# Action Grid

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

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

Individual services would fall into one of four categories:

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

# Action Grid



## STRENGTHS

The City of Kelowna has five **primary strengths**:

- Fire services
- Parks
- Community cleanliness
- Drinking water quality
- Police services

The City also has three **secondary strengths**:

- City-operated recreational facilities and programs
- Sports fields
- City-operated cultural facilities and programs

## AREAS FOR IMPROVEMENT

The City of Kelowna has three **primary areas for improvement**:

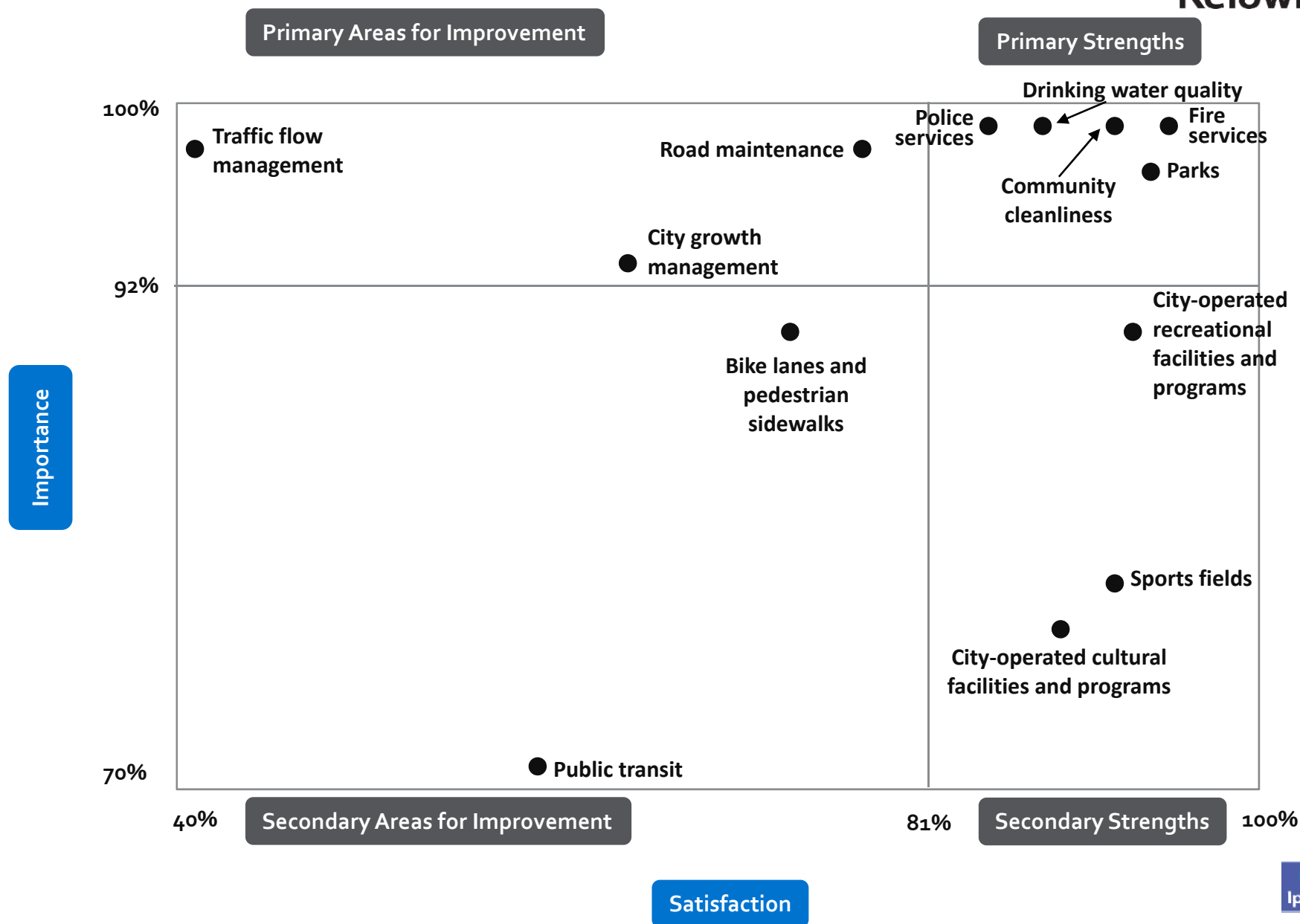
- Traffic flow management
- City growth management
- Road maintenance

The City also has two **secondary areas for improvement**:

- Public transit
- Bike lanes and pedestrian sidewalks



# Action Grid



# FINANCIAL PLANNING

# Value for Taxes



A large majority (84%) of residents say they receive good value for their municipal tax dollars. This includes 18% saying 'very good value' and 66% saying 'fairly good value'.

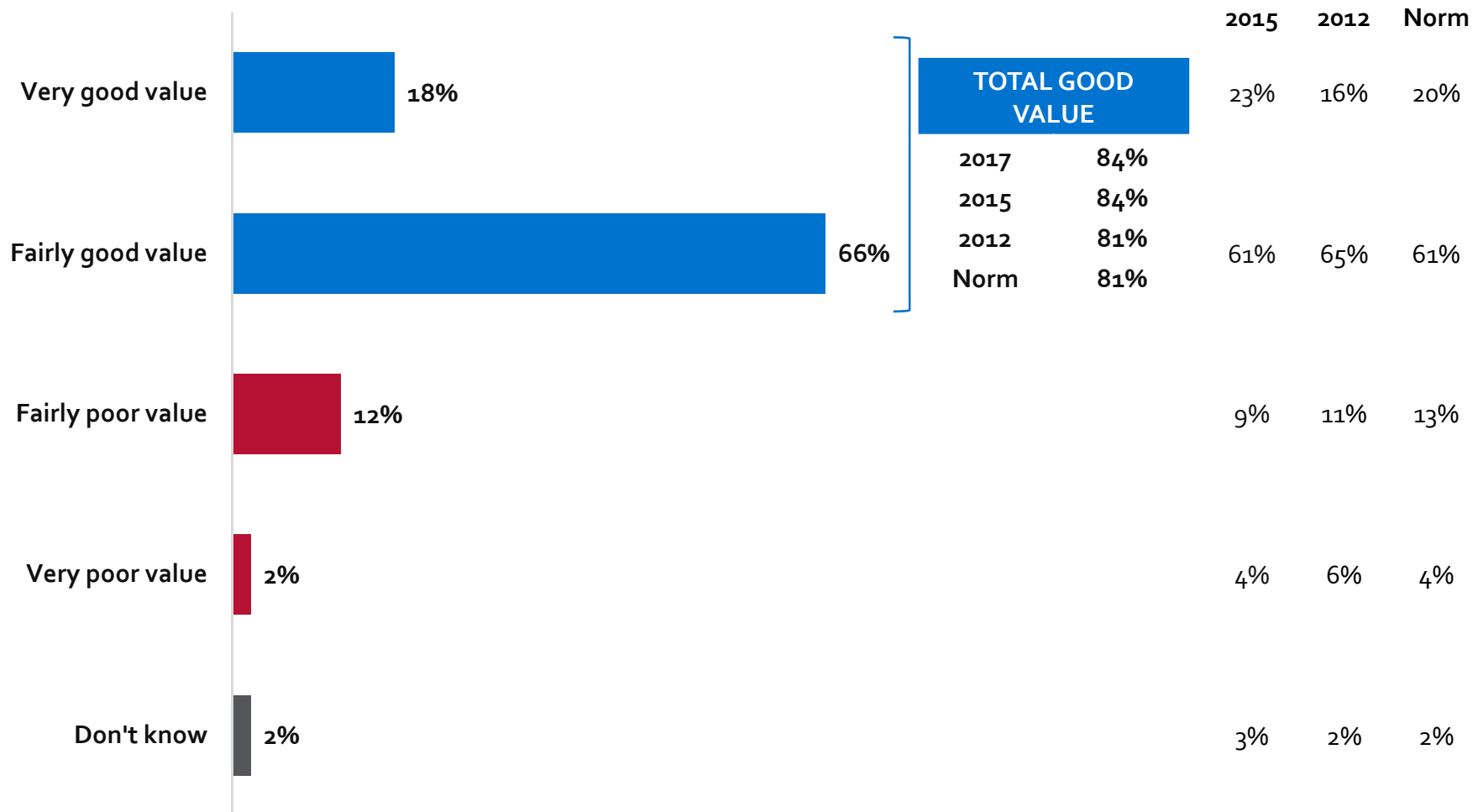
- This year's results are consistent with 2015.
- The perceived value for taxes in Kelowna is similar to the provincial norm.

## ***Analysis by Demographic Subgroup***

Residents who have lived in Kelowna for more than 15 years are significantly more likely to say they receive good value (combined 'very/fairly good value' responses) for their tax dollars (88% vs. 79% of 15 years or less).

There are also significant differences in the intensity of ratings, with those living in East Central Kelowna/East Kelowna the LEAST likely to say they receive 'very good value' (8% vs. 25% in Central Kelowna, 23% in North Kelowna, 22% in South West Kelowna).

# Value for Taxes



Q9. 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



When asked about balancing taxation and service delivery levels, citizens are more than twice as likely to opt for tax increases (62%) over service reductions (30%).

- Looking at tax increases specifically shows that 33% of citizens would prefer the City 'increase taxes to maintain services at current levels' while 29% say 'increase taxes to enhance or expand services'.
- Preference for service reductions is predominately driven by a desire to maintain rather than reduce taxes (21% say 'reduce services to maintain current tax level', 9% say 'reduce services to reduce taxes').

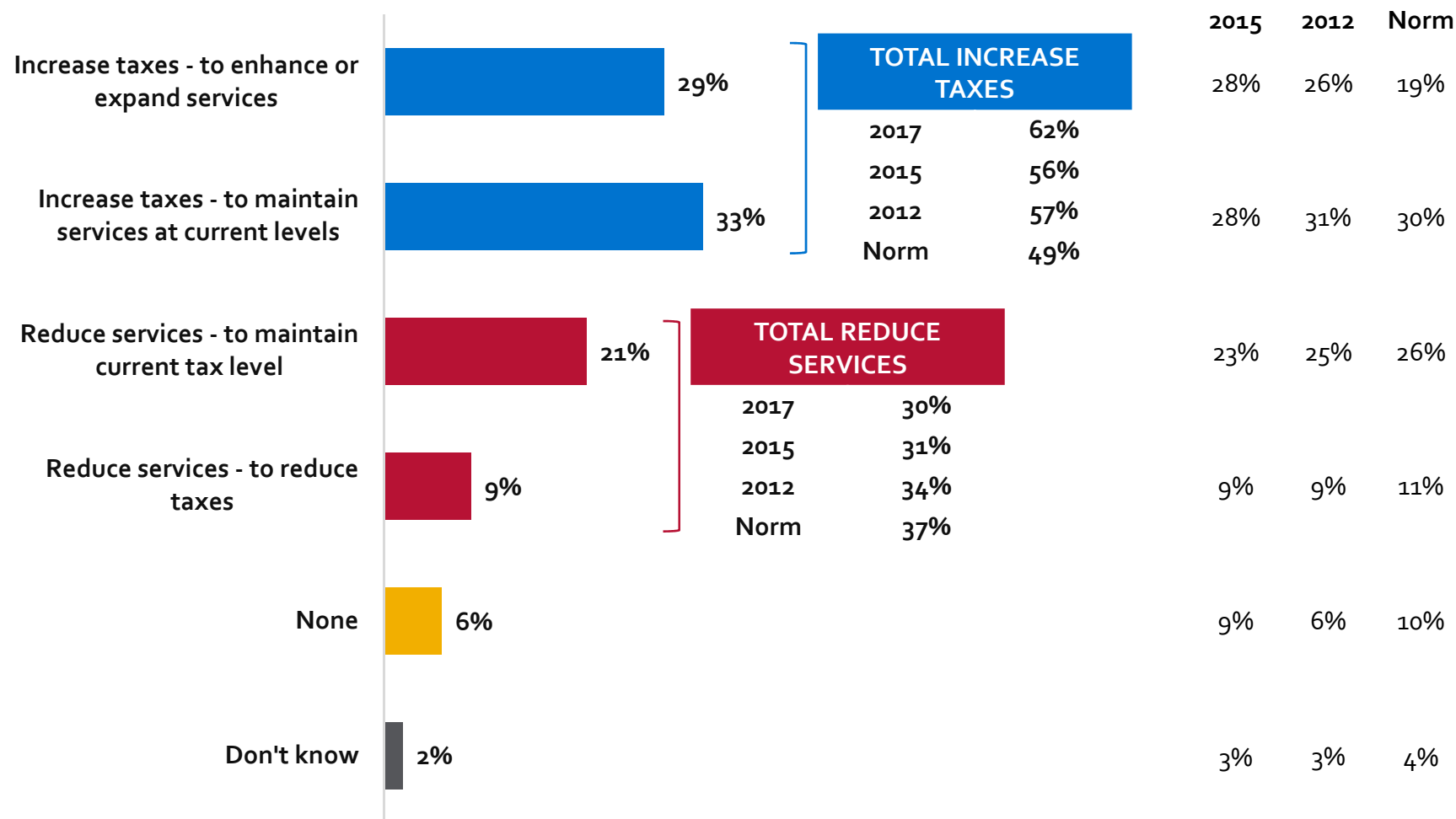
This year's results are not significantly different from 2015.

Kelowna residents' tolerance for tax increases is notably higher than the provincial norm (62% increase taxes in Kelowna vs. 49% provincial norm).

## ***Analysis by Demographic Subgroup***

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

# Balancing Taxation and Service Delivery Levels



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



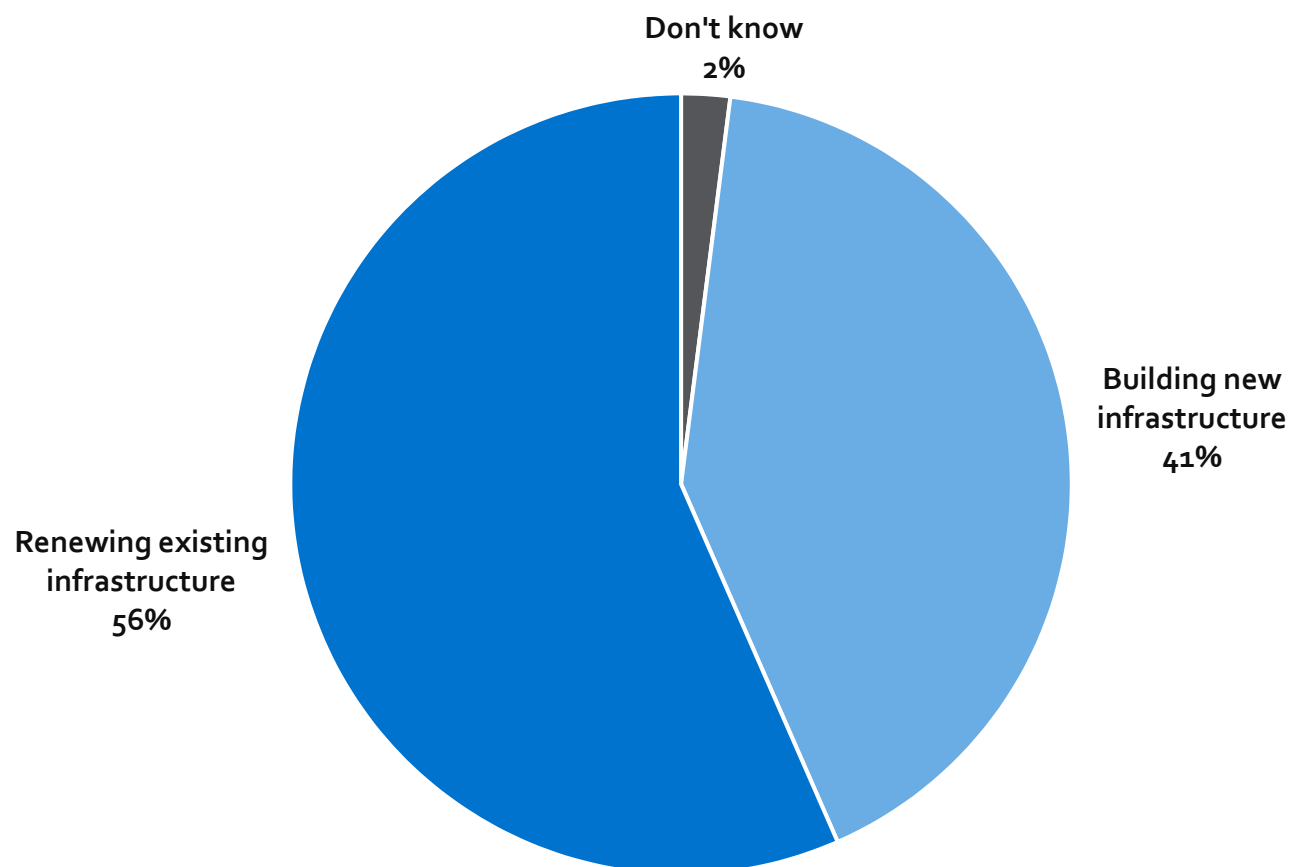
Overall, residents prioritize renewing existing infrastructure (56%) over building new infrastructure (41%). However, with renewal leading by only a slight majority, it is clear there is also an appetite for some new infrastructure.

### ***Analysis by Demographic Subgroup***

Younger residents are significantly more likely to opt for building new infrastructure (51% of 18-34 years vs. 34% of 55+ years, 42% of 35-54 years).



## Renewing versus Building Infrastructure



Q11. Each year, the City is challenged with allocating capital dollars. In your opinion, which of the following should be the greater priority for investment for the City in 2018?

Base: All respondents (n=300)

# 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 2017 Citizen Survey, a total of 16 items were considered, resulting in a total of 120 possible combinations. Each respondent was randomly presented with 8 different pairs, with controls in place to ensure that all respondents saw all 16 items and that each item was asked an equal number of times.

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

- Road maintenance
- Public transit
- Traffic flow management
- Bike lanes and pedestrian sidewalks
- City-operated recreational facilities and programs
- City-operated cultural facilities and programs
- Parks
- Drinking water
- Sewage facilities
- Police services
- Fire services
- Encouraging a diverse supply of housing options at different price points
- Business and economic development
- Enhancing the natural environment
- Preservation of historic places
- Community cleanliness

# Priorities for Investment Over the Next Four Years

(Paired Choice Analysis)



Paired Choice Analysis shows that residents' top five priorities for investment are:

- **Encouraging a diverse supply of housing at different price points** (chosen 71% of the time);
- **Traffic flow management** (66%);
- **Drinking water** (65%);
- **Police services** (61%); and,
- **Fire services** (60%).

Other priorities include **road maintenance** (57%), **public transit** (50%), **bike lanes and pedestrian sidewalks** (48%), **business and economic development** (47%), **sewage facilities** (46%), **enhancing the natural environment** (44%), **City-operated recreational facilities and programs** (42%), **parks** (40%), and **community cleanliness** (38%).

Citizens' lowest priorities for investment are **City-operated cultural facilities and programs** (25%) and **preservation of historic places** (24%).

# Priorities for Investment Over the Next Four Years

## (Paired Choice Analysis)

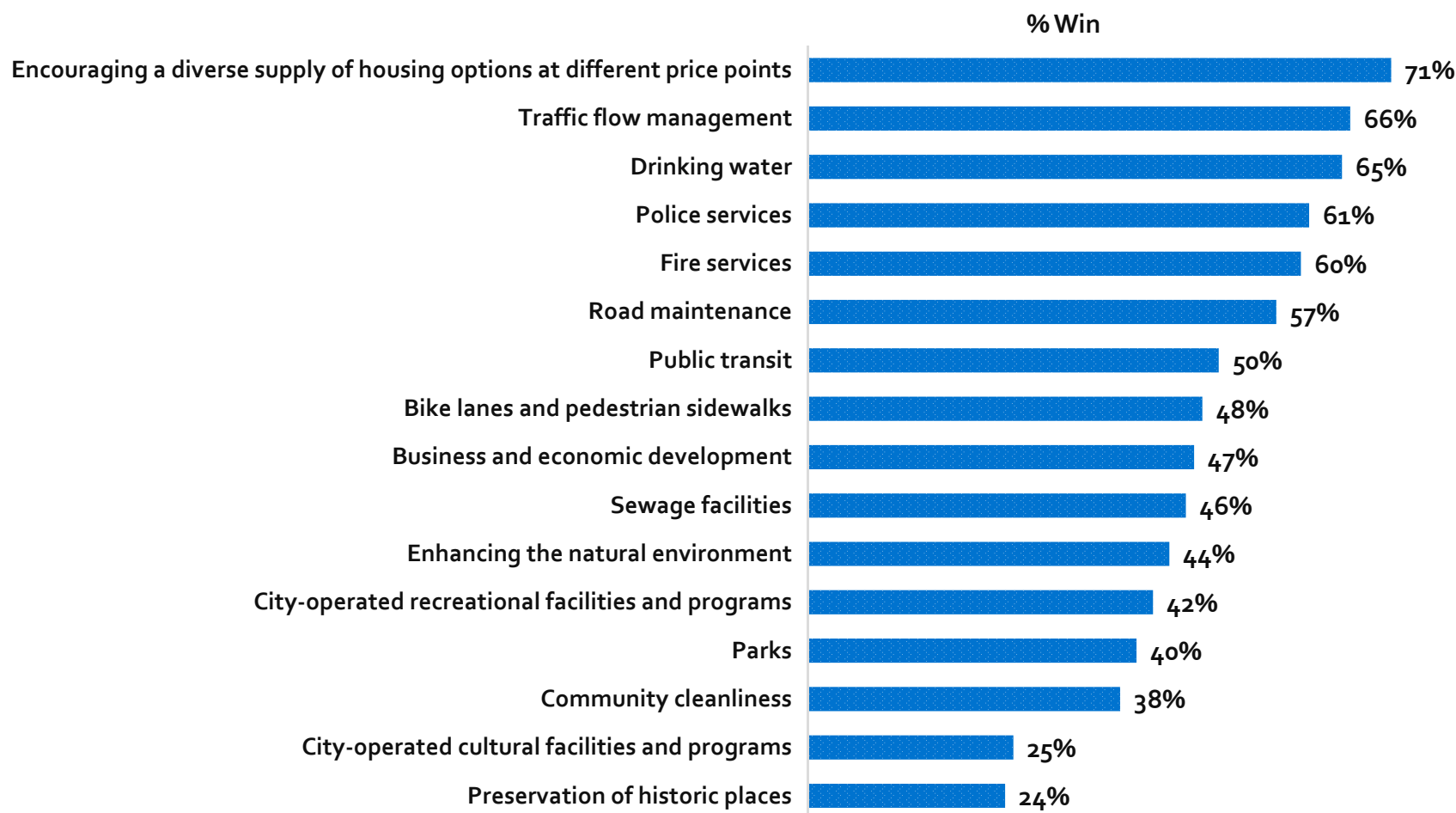


Analysis by demographic subgroup shows the following significant differences:

- **Encouraging a diverse supply of housing options at different price points** is chosen more often by women (78% vs. 64% of men) and those who are 35-54 years of age (78% vs. 63% of 55+ years, 76% of 18-34 years). No significant differences are seen by household income (69% of <\$60k, 76% of \$60k-<\$100k, 67% of \$100k+).
- **Traffic flow management** is chosen more often by those with household incomes of \$100k+ (77% vs. 62% of <\$60k, 63% of \$60k-<\$100k). No significant differences are seen by neighbourhood (71% in South West Kelowna, 69% in North Kelowna, 68% in Central Kelowna, 58% in East Central Kelowna/East Kelowna).
- **Drinking water** is chosen more often by those living in East Central Kelowna/East Kelowna (72% vs. 53% in Central Kelowna, 66% in South West Kelowna, 66% in North Kelowna).
- **Police services** are chosen more often by those who have lived in Kelowna for more than 15 years (66% vs. 53% of 15 years or less).
- **Fire services** are chosen more often by women (66% vs. 54% of men) and those who are 35-54 years of age (67% vs. 51% of 18-34 years, 61% of 55+ years).
- **Public transit** is chosen more often by younger residents (66% of 18-34 years vs. 44% of 35+ years) and those living in Central Kelowna (65% vs. 39% in North Kelowna, 45% in South West Kelowna, 47% in East Central Kelowna/East Kelowna).
- **Bike lanes and pedestrian sidewalks** are chosen more often by women (54% vs. 42% of men) and those living in Central Kelowna (56% vs. 39% in North Kelowna, 42% in East Central Kelowna/East Kelowna, 53% in South West Kelowna).
- **City-operated cultural facilities and programs** are chosen more often by those who have lived in Kelowna for 15 years or less (33% vs. 19% of more than 15 years).
- **Preservation of historic places** is chosen more often by those living in North Kelowna and East Central Kelowna/East Kelowna (30% and 28% vs. 15% in Central Kelowna, 26% in South West Kelowna).

# 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.

Base: All respondents (n=300)

# Transportation Investment Priorities



Respondents were presented with a list of six specific transportation improvements and asked which one(s) should be the greatest investment priority for the City.

Overall, the single biggest transportation investment priority is **improving traffic flow by adding vehicle lanes**, garnering 55% of total mentions.

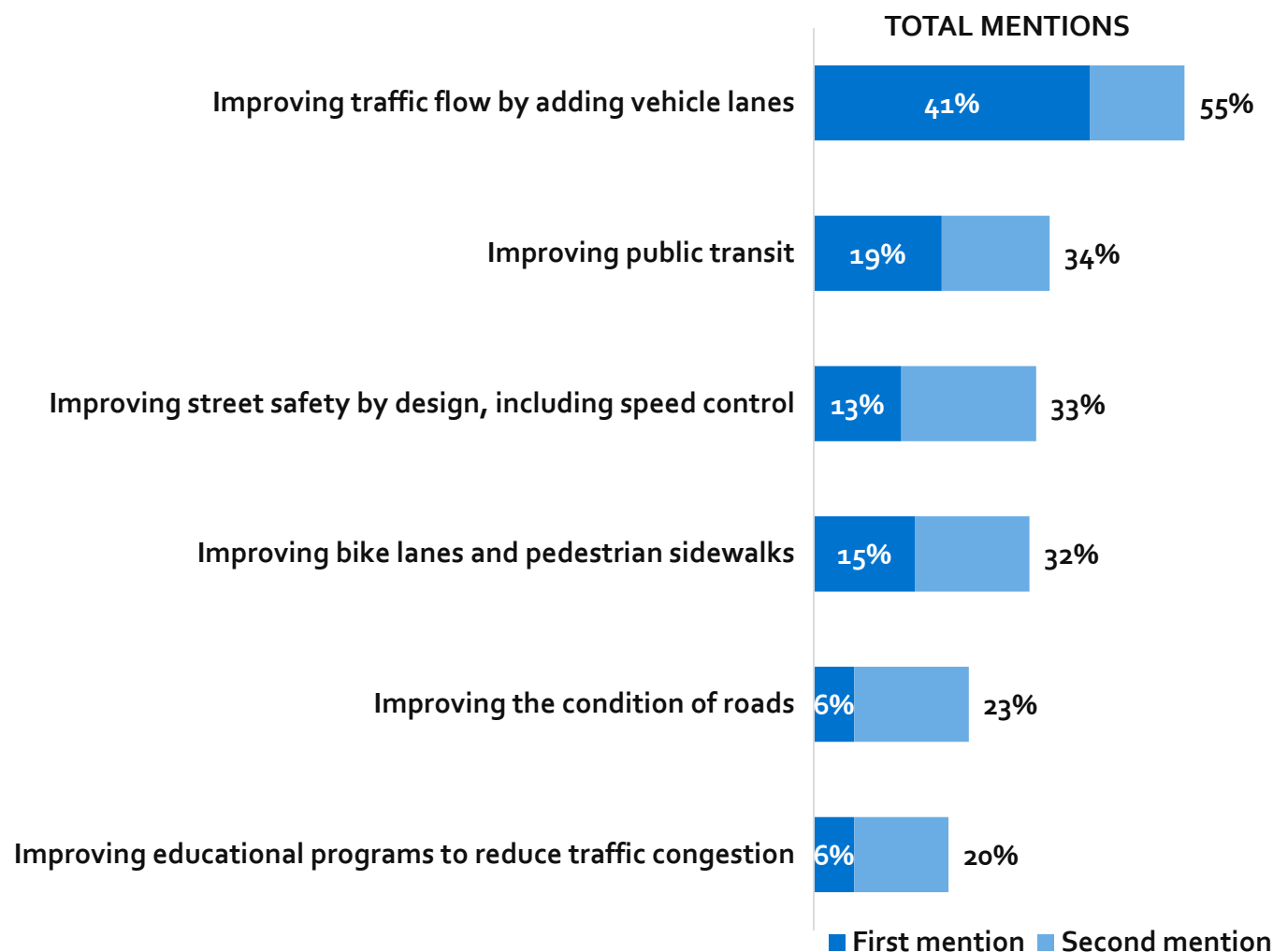
This is followed by **improving public transit** (34%), **improving street safety by design, including speed control** (33%), **improving bike lanes and pedestrian sidewalks** (32%), **improving the condition of roads** (23%), and **improving educational programs to reduce traffic congestion** (20%).

## *Analysis by Demographic Subgroup*

Analysis by demographic subgroup shows the following significant differences (total mentions):

- **Improving traffic flow** is selected more often by those who have lived in Kelowna for more than 15 years (60% vs. 48% of 15 years or less). No significant differences are seen by neighbourhood (61% in North Kelowna, 56% in South West Kelowna, 53% in Central Kelowna, 52% in East Central Kelowna/East Kelowna).
- **Improving public transit** is selected more often by younger residents (48% of 18-34 years vs. 28% of 55+ years, 31% of 35-54 years).
- **Improving street safety by design** is selected more often by those who have lived in Kelowna for 15 years or less (40% vs. 28% of more than 15 years).
- **Improving the condition of roads** is selected more often by those living in North Kelowna and East Central Kelowna/East Kelowna (30% and 29% vs. 13% in Central Kelowna, 22% in South West Kelowna).
- **Improving educational programs** is selected more often by those with household incomes of <\$60k (27% vs. 14% of \$100k+, 19% of \$60k-<\$100k).

# Transportation Investment Priorities



Q13. When it comes to investing in transportation other than highway 97 or highway 33, which one of the following six items do you think should be the greatest priority for the City? Which one should be the next greatest priority?

Base: All respondents (n=300)

# CUSTOMER SERVICE



## Contact with City (Last 12 Months)



Half (50%) of all citizens say they personally contacted or dealt with the City of Kelowna or one of its employees in the last 12 months.

- Year-over-year analysis shows that contact with the City has increased steadily over the past five years. While this year's results (50%) are not significantly different from 2015 (43%), they are notably higher than 2012 (38%).
- Claimed contact in Kelowna this year is on par with the provincial norm.

Among those who contacted the City, the two most common contact methods (coded open-ends) are "telephone" (38%) and "in-person" (37%).

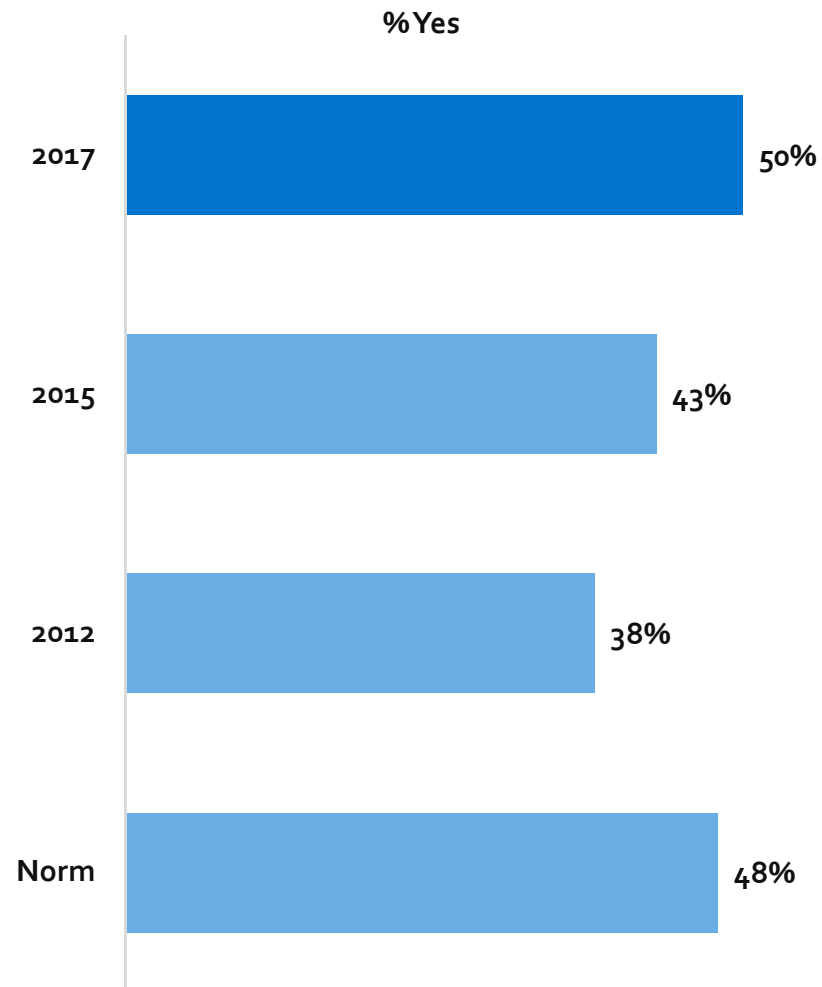
- These were also the main stated methods of contacting the City in 2015.

### ***Analysis by Demographic Subgroup***

Claimed contact with the City is significantly higher among:

- Those who are 55+ years of age (55% vs. 38% of 18-34 years, 52% of 35-54 years); and,
- Those with household incomes of \$100k+ (64% vs. 41% of \$60k-<\$100k, 45% of <\$60k).

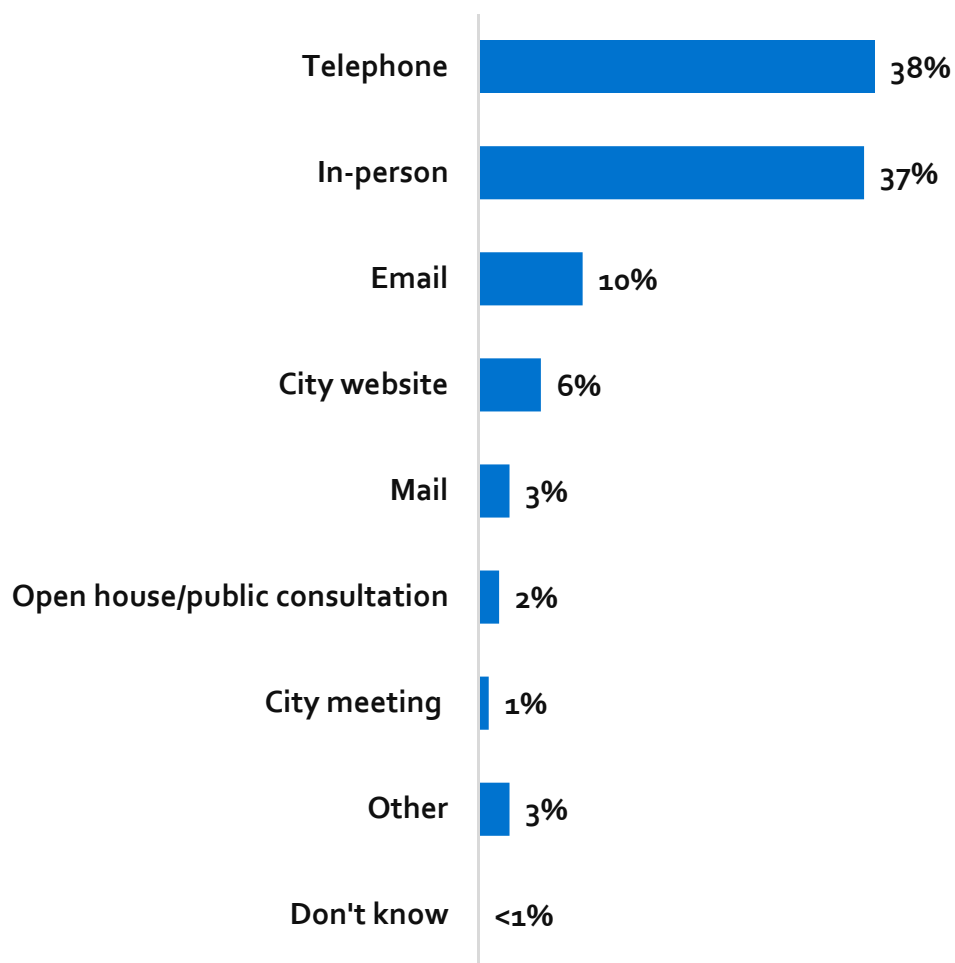
## Contact with City (Last 12 Months)



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

## Contact Method

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



### 2015 Top Mentions

Telephone	44%
In-person	37%
Email	7%

Q15. How did this contact occur?

Base: Those saying they contacted the City in the last 12 months (n=150)

## Satisfaction with Customer Service

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

In total, 78% of those who contacted the City say they are satisfied with the **overall service received** (includes 54% 'very satisfied'). Just over two-in-ten (22%) report being dissatisfied.

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

- 93% say they are satisfied with **staff's courteousness**;
- 86% say they are satisfied with **the ease of reaching staff**;
- 84% say they are satisfied with **staff's knowledge**;
- 83% say they are satisfied with **staff's helpfulness**;
- 83% say they are satisfied with **the speed and timeliness of service**; and,
- 78% say they are satisfied with **staff's ability to resolve your issue**.

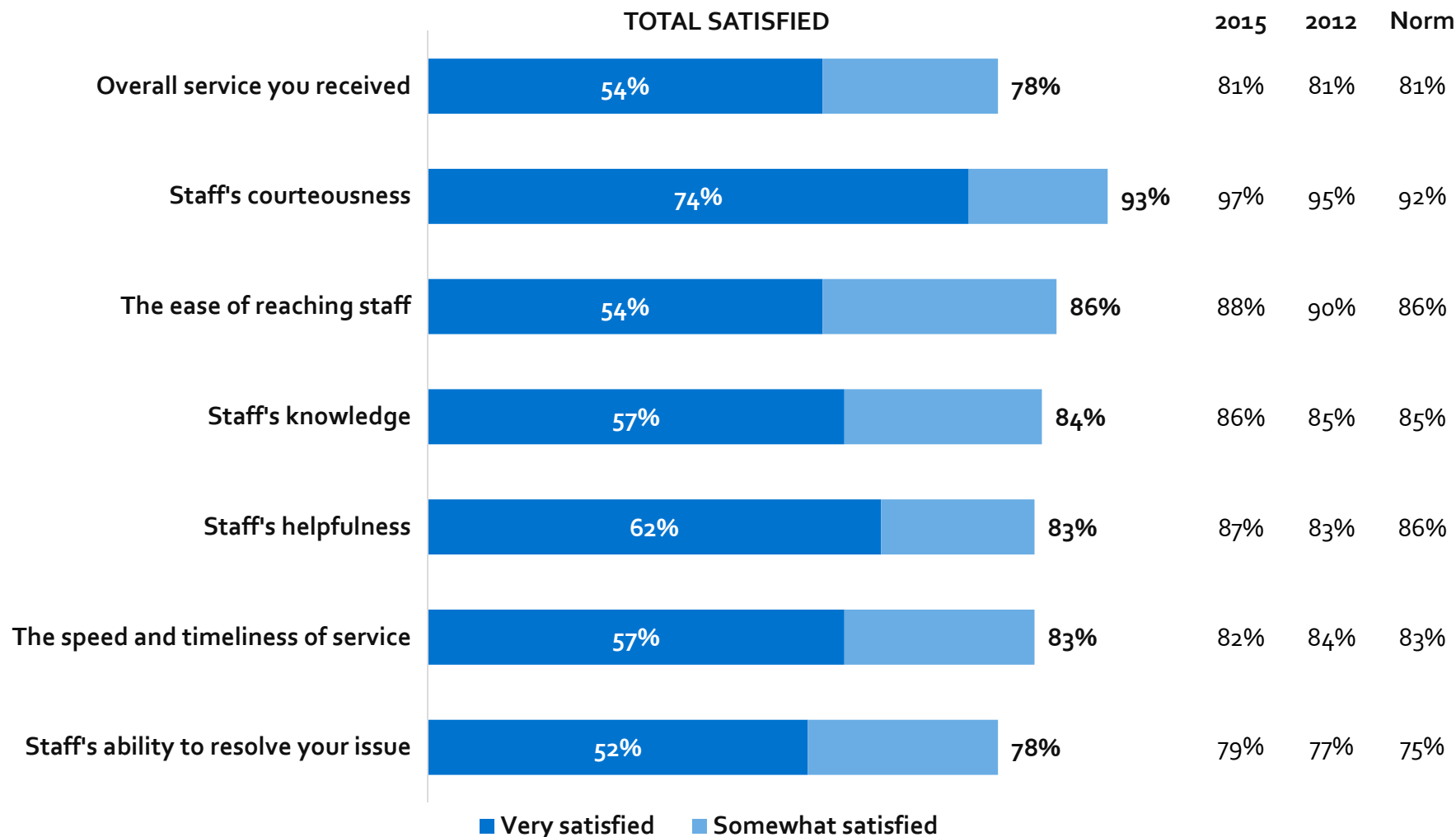
Satisfaction with the City's customer service is not significantly different from 2015 and is also on par with the provincial norm.

### *Analysis by Demographic Subgroup*

Satisfaction (combined 'very/somewhat satisfied' responses) with the **overall service received** is significantly higher among those living in East Central Kelowna/East Kelowna (88% vs. 69% in South West Kelowna, 75% in North Kelowna, 83% in Central Kelowna).

# Satisfaction with Customer Service

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



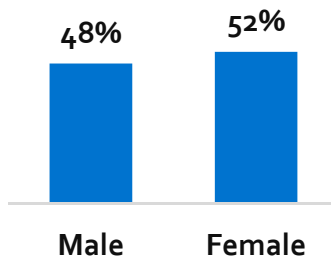
Q16. How satisfied are you with the...? Would you say very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied?

Base: Those saying they contacted the City in the last 12 months (n=150)

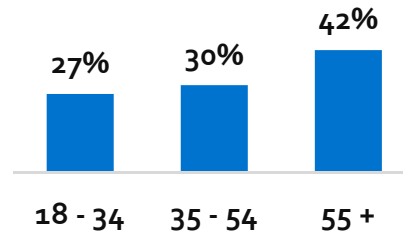
# WEIGHTED SAMPLE CHARACTERISTICS

# Weighted Sample Characteristics

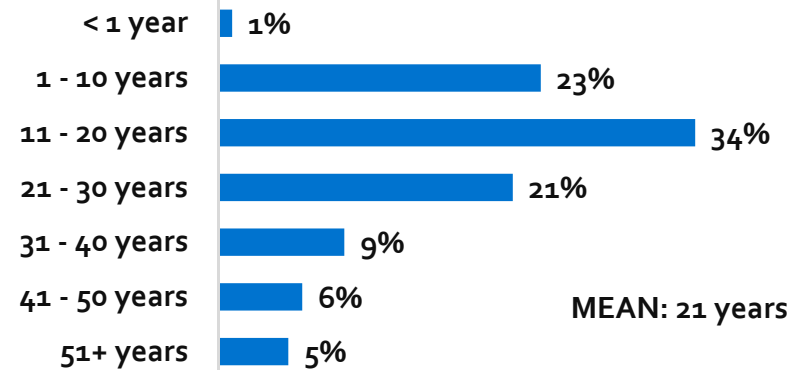
## GENDER



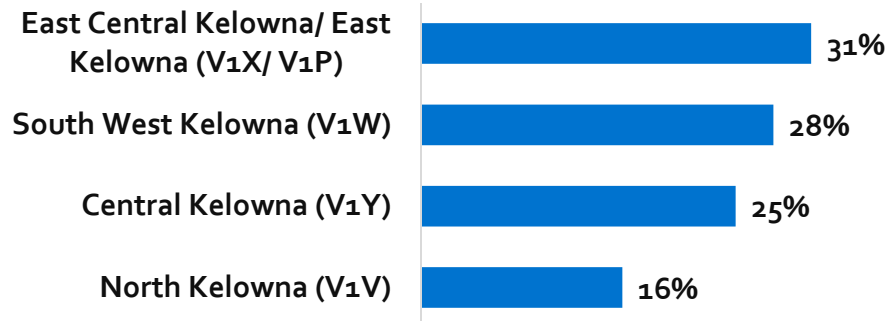
## AGE



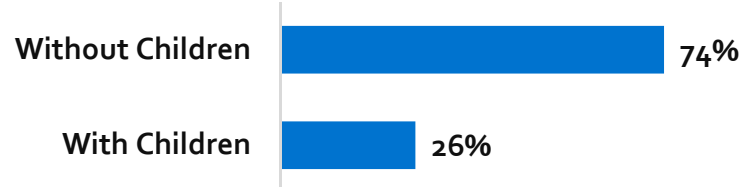
## LENGTH OF RESIDENCY



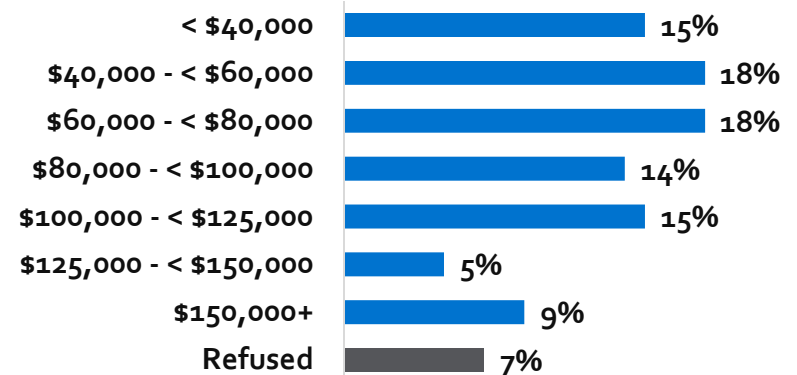
## AREA OF CITY



## CHILDREN IN HOUSEHOLD



## HOUSEHOLD INCOME



## Contacts

**Catherine Knaus**

*Director, Canada, Ipsos Public Affairs*

1285 West Pender Street, Suite 200

Vancouver, BC V6E 4B1

Direct: +778.373.5131