

Citizen Satisfaction Survey

Report

Municipality of North Cowichan

June 2026

FORUM RESEARCH

NORTH Cowichan

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Research Objectives

The key objectives of the 2026 Citizen Satisfaction survey are to...

1. Measure satisfaction with specific services provided by North Cowichan
2. Assess perceptions towards the quality of life in North Cowichan today and in the next two years
3. Identify the issues seen as most the most important challenges facing North Cowichan
4. Determine the incidence of resident interaction with North Cowichan and satisfaction level with those experiences
5. Identify preferred methods of receiving information from North Cowichan, and social media usage
6. Measure value for taxes / determine preferred funding options (tax increases, service cuts)

Methodology

Method	CATI (Computer Aided Telephone Interview)
Criteria for Participation	Residents of North Cowichan who are 18 years of age or older. None of the household members works for the Municipality of North Cowichan, or in marketing research or in media
Sample Size	N=400
Average Length	17 minutes
Margin or Error	±5%
Fieldwork Dates	May 4th – 18th, 2026
Additional Notes	CATI sample was drawn using random digit dialing (RDD) among North Cowichan residents and a mix of landline and cell phone sample was used (66% cellphone / 34% landline). CATI results throughout this report have been statistically weighted by age and gender to ensure that the sample reflects the target population according to 2021 Census data.

Interpreting the Report

TOP2 / BTM2

Top 2 (TOP2) / Top 4 (TOP4) and Bottom 2 (BTM2) / Bottom 4 (BTM4) reference the collected TOP2 positive and BTM2 negative or TOP4 positive and BTM4 negative responses, where applicable. For example, a TOP2 grouping referred to as "satisfied" may be the combined result of "very satisfied" and "somewhat satisfied," whereas a grouping of "not satisfied" (BTM2) may be the combined result of "not very satisfied" and "not at all satisfied."

Rounding

Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%. Similar logic applies to TOP2 and BTM2 or TOP4 and BTM4 groupings.

Multi-mentions

In some cases, more than one answer option is applicable to a respondent. Multiple mention questions allow respondents to select more than one answer category for a question. For questions that ask for multiple mentions (e.g., "In your opinion, what do you feel are the most important challenges facing North Cowichan?"), it is important to note that the percentages typically add to over 100%. This is because the total number of answer categories selected for a question can be greater than the number of respondents who answered the question. For example, respondents were able to select "climate change and the environment" and "community planning, development and zoning" as their answer.

Significance Testing

Throughout the report, statistically significant differences (at the 95% confidence level) between demographic segments have been stated under the related finding in the right text boxes.

Question Framework

The footnote on each page in the detailed findings indicates the related question from the survey questionnaire, the sample framework used in the analysis, and the sample size of the related data.

Key Findings

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Key Findings

84% of residents **rated positively** on quality of life

Reasons why quality of life is good include...

North Cowichan being a good place to live, and them enjoying their life there (28%), and

the good municipal and public services (24%).

About half of North Cowichan residents (51%) believe quality of life has stayed the same or improved over the past 2 years.

85% of residents **are satisfied** with the level and quality of services

Particularly...

Fire Protection Services
TOP2: 96%

Parks & Trails
TOP2: 95%

Recreation Sports & Facilities
TOP2: 93%

Room for Improvement...

Community Planning
TOP2: 53%

Development & Building Permits
TOP2: 43%

Key drivers analysis revealed that the **primary areas for improvement** are...

community planning, development and building permits, and bylaw enforcement.

Key Findings

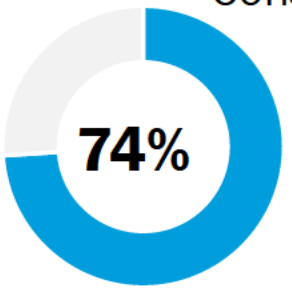
Top Issues Facing North Cowichan

Most mentioned issues by residents include...

- Homelessness (38%);
- taxes (17%); and
- community planning, development and zoning (13%).

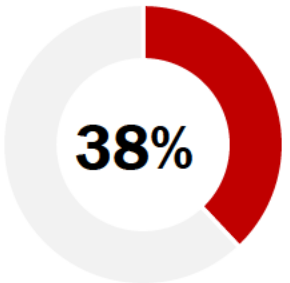
Homelessness and taxes remain the most important challenges facing North Cowichan since 2022.

Considering the programs and services provided by North Cowichan

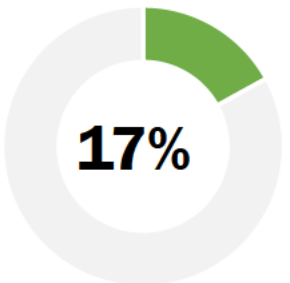


of residents said they received good value for their tax dollars

When asked about their preference when it comes to balancing taxation levels with service levels...



preferred to cut services to reduce or maintain current tax levels



preferred to expand or improve services by increasing taxes

Key Findings

Interaction with North Cowichan

47% of residents have **interacted with** North Cowichan

These interactions most commonly occurred in person (42%) or by phone (37%), while 12% took place via email.

78% (TOP2) of residents are satisfied with the overall service they received.

The most preferred ways to do business with North Cowichan are online (47%), and in-person (42%).

Information from North Cowichan

As for information usage and preferences...

Residents prefer info that...

- **Promotes transparency and accountability regarding decision-making** (22%)
- **Information on building projects and new developments** (18%)
- **Municipal planning** (16%)

Use sources such as...

- **Social media** (34%)
- **The local newspaper** (32%)
- **North Cowichan's website or engagement platform** (28%)

Prefer sources such as...

- **Social media** (24%)
- **Email subscription** (21%)
- **North Cowichan's website or engagement platform** (20%)

Detailed Findings

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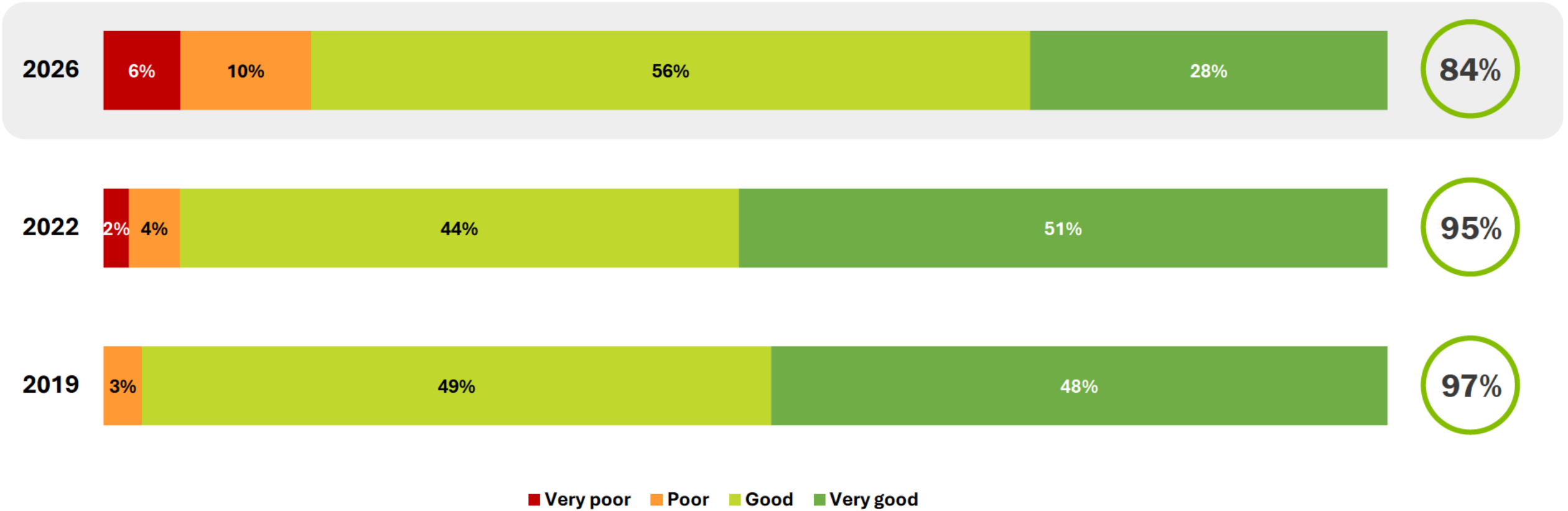
Quality of Life

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Quality of Life

Over four-fifths of residents (TOP2: 84%) rated their quality of life as either good or very good, down 11 percentage points from 2022 (TOP2: 95%)



Q4. How would you rate the overall quality of life in North Cowichan today? Is it...
Sample Size: 392
Base: All respondents, excluding "don't know" and "prefer not to say"
*Note: "Don't know/Refused" answers were excluded from the analysis when making comparisons to the 2019 results and results from other BC communities

Quality of Life

Residents that are significantly more likely to say their quality of life is <u>good/very good</u>:

- Residents that expect to stay in North Cowichan for more than 10 years (90%) compared to those who expect to stay 10 years or less (80%);
- Households that make $100K+ (88%) compared to households that make less than $60K (78%);
- Households with 2 (90%) or 4 (91%) members, compared to households with 1 (75%) or 3 (77%) members; and
- Residents that graduated college or university (88%) compared to residents that completed some high school or less (78%).

Residents that are significantly more likely to say their quality of life is <u>poor/very poor</u>:

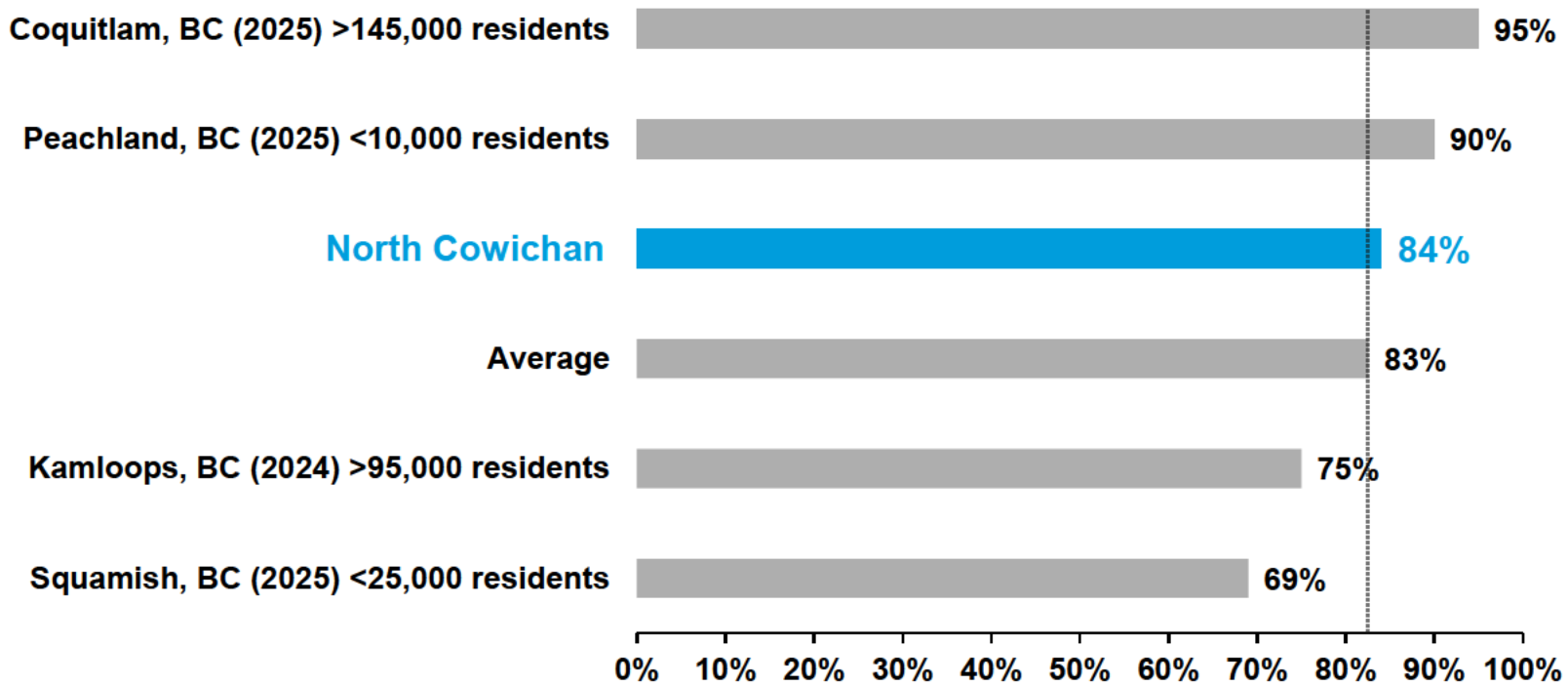
- Residents that expect to stay in North Cowichan for 10 years or less (20%) compared to those who expect to stay more than 10 years (10%);
- Households that make less than $60K (22%) compared to households that make $100K+ (12%);
- Households with 1 (25%) or 3 (23%) members, compared to households with 2 (10%) or 4 (9%) members; and
- Residents that completed some high school or less (22%), compared to residents that graduated college or university (12%) compared to residents.

Q4. How would you rate the overall quality of life in North Cowichan today? Is it...
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Quality of Life

Benchmark Comparison

84% (TOP2) of Residents rated their quality of life in North Cowichan today as either good or very good – which is consistent with the average benchmark score (TOP2: 83%).



**This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2024–2025. Comparisons for this question include 4 municipalities across British Columbia, with populations ranging from ~10,000 to ~145,000. Populations shown are rounded to the nearest 5,000 based on 2021 Census data. For reports that are publicly available online, the municipality has been identified. For those that are not publicly available, an anonymized identifier has been used.*

Quality of Life Benchmark Trends

Quality of life ratings have declined in some benchmark municipalities over time, although the trend is not universal. North Cowichan's 2026 result (84%) remains consistent with the benchmark average (83%) despite a 13-point decline since 2019.

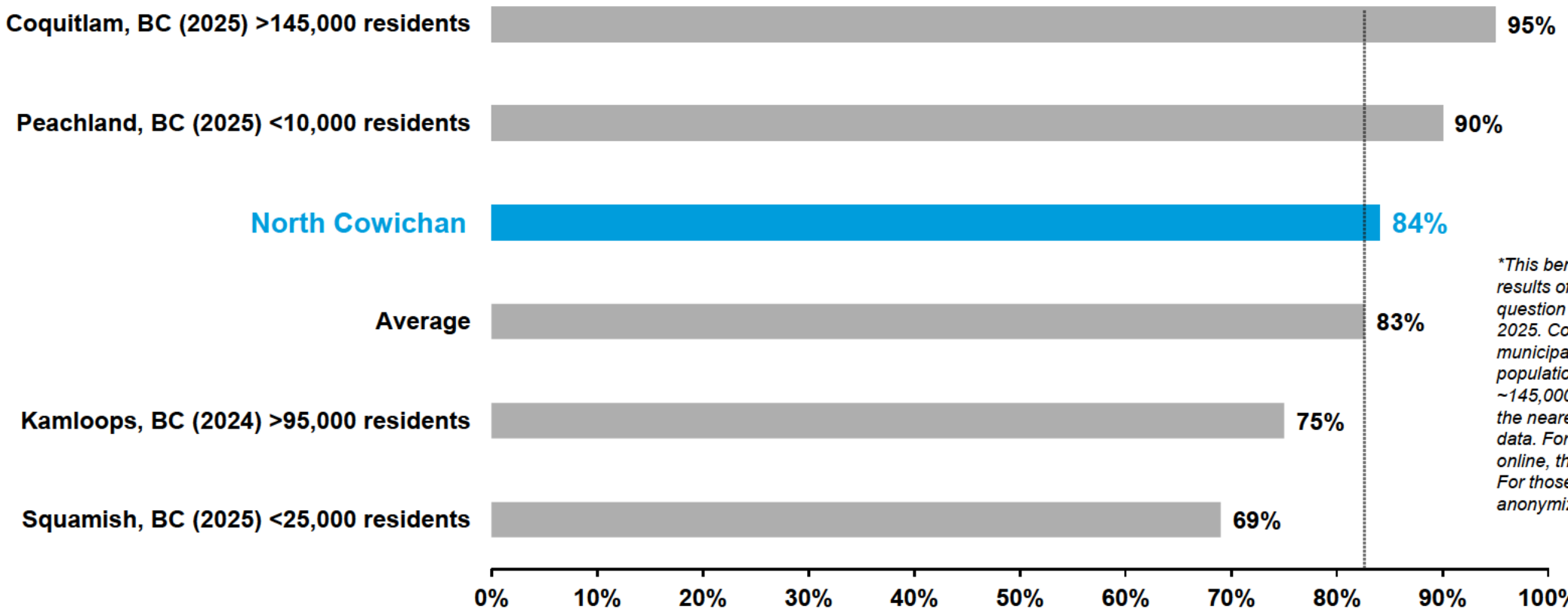
Municipality	2nd Most Recent	Most Recent	Percentage Point Change
North Cowichan	95% (2022)	84% (2026)	-11 ↓
Coquitlam	94% (2023)	95% (2025)	+1 ↑
Peachland	91% (2024)	90% (2025)	-1 ↓
Kamloops	83% (2022)	75% (2024)	-8 ↓
Squamish	69% (2025)	69% (2025)	N/A

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Quality of Life

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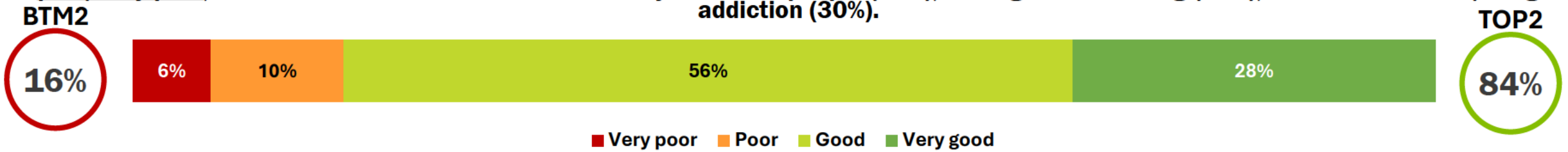


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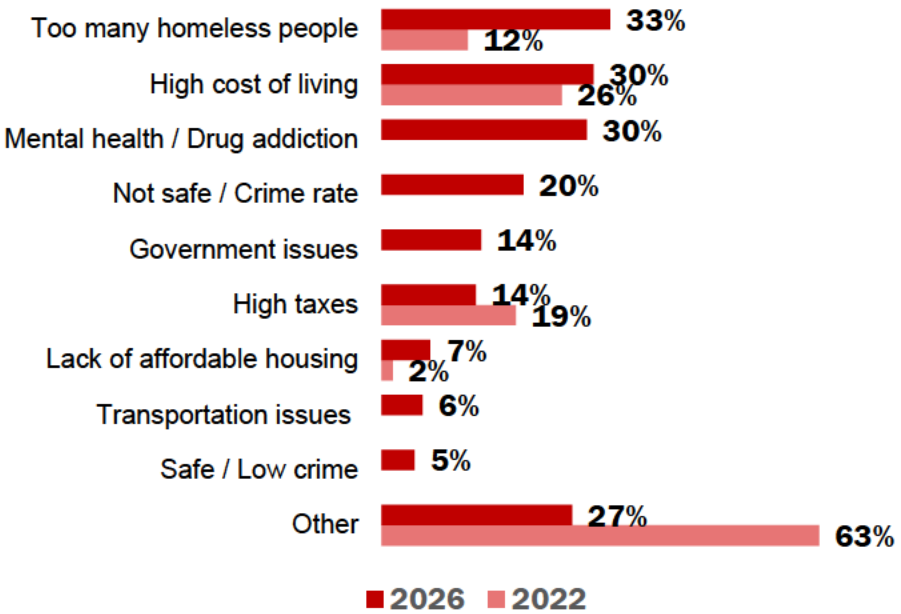
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Sample Size: 392
Base: All respondents, excluding "don't know" and "prefer not to say"
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Reasons for Quality of Life

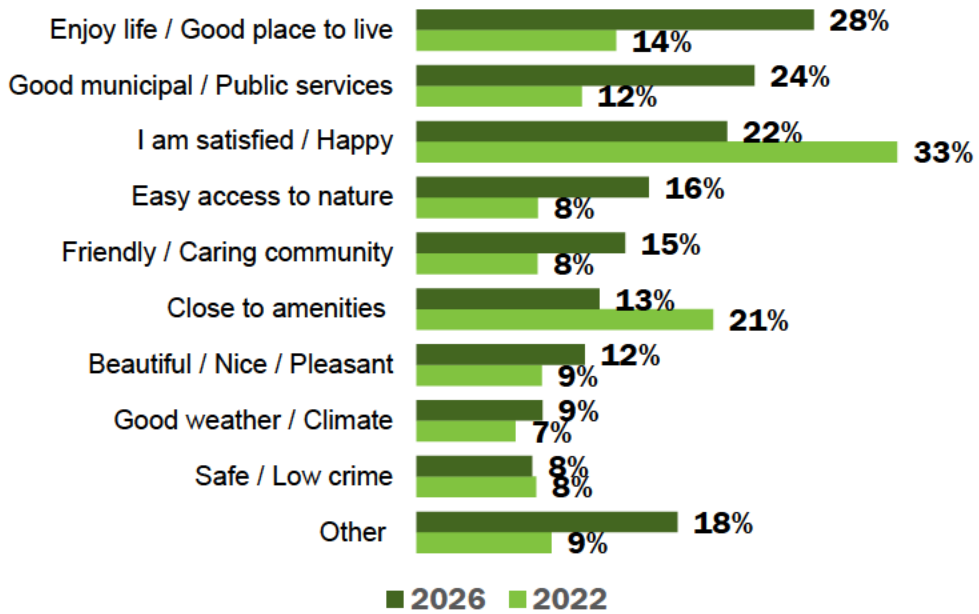
Among residents that say their quality of life is good/very good, the most common reasons are North Cowichan being a good place to live, and them enjoying their life there (28%), and the good municipal and public services (24%). As for those that say their quality of life is poor/very poor, the most common reasons are too many homeless people (33%), the high cost of living (30%), and mental health/drug addiction (30%).



Top 10 reasons quality of life is poor (BTM2)



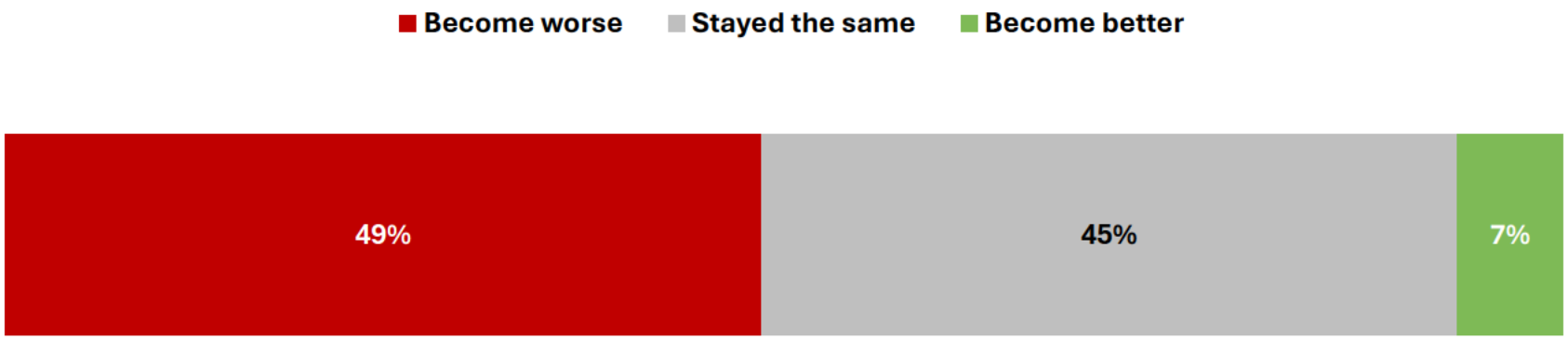
Top 10 reasons quality of life is good (TOP2)



Q5. Why do you say the overall quality of life in North Cowichan is [insert Q4 answer]?
Sample Size: N=61 / N=308
Base: Respondents that rated their quality of life as very poor, poor, good, or very good
*Note: "Don't know/Refused" answers were excluded from the analysis when making comparisons to the 2019 results and results from other BC communities

Quality of Life Within the Past 2 Years

Within the past two years, nearly half of North Cowichan residents (49%) believe quality of life has worsened. In contrast, 7% feel it has become better, while 45% say it has stayed the same.



Stayed the same / Become better

51%

The following groups are significantly more likely to say within the past two years, their quality of life has **worsened**:

- Residents ages 35 to 64 (53%) compared to residents ages 65+ (42%);
- Women (53%) compared to men (42%); and
- Residents that have lived in North Cowichan for 16+ years (50-61%) compared to residents that have lived in North Cowichan for 6 to 15 years (33%).

Municipal Average
% Become worse
53%

Municipal Average
% Stayed the same
34%

Municipal Average
% Become better
11%

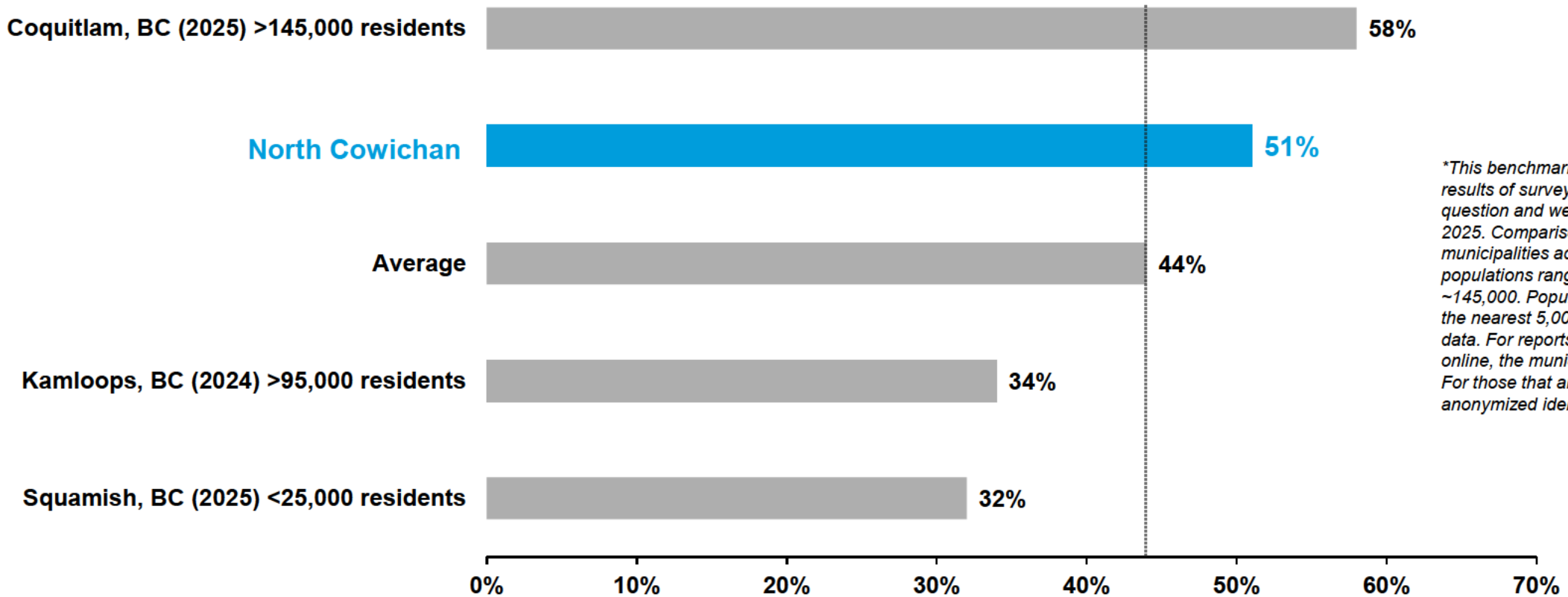
Municipal Average
% Stayed the same / Become better
44%

Q20a. In your opinion, within the past two years, has the quality of life in North Cowichan...
Sample Size: 388
Base: All respondents, excluding 'Don't know' and 'Prefer not to say'

Quality of Life Within the Past 2 Years

Benchmark Comparison

51% of North Cowichan residents stated the quality of life in North Cowichan has become better or stayed the same in the last 2 years – which is above the average benchmark score (44%).



**This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2024–2025. Comparisons for this question include 3 municipalities across British Columbia, with populations ranging from ~25,000 to ~145,000. Populations shown are rounded to the nearest 5,000 based on 2021 Census data. For reports that are publicly available online, the municipality has been identified. For those that are not publicly available, an anonymized identifier has been used.*

Q20a. In your opinion, within the past two years, has the quality of life in North Cowichan North Cowichan...
Sample Size: 388
Base: All respondents, excluding 'Don't know' and 'Prefer not to say'

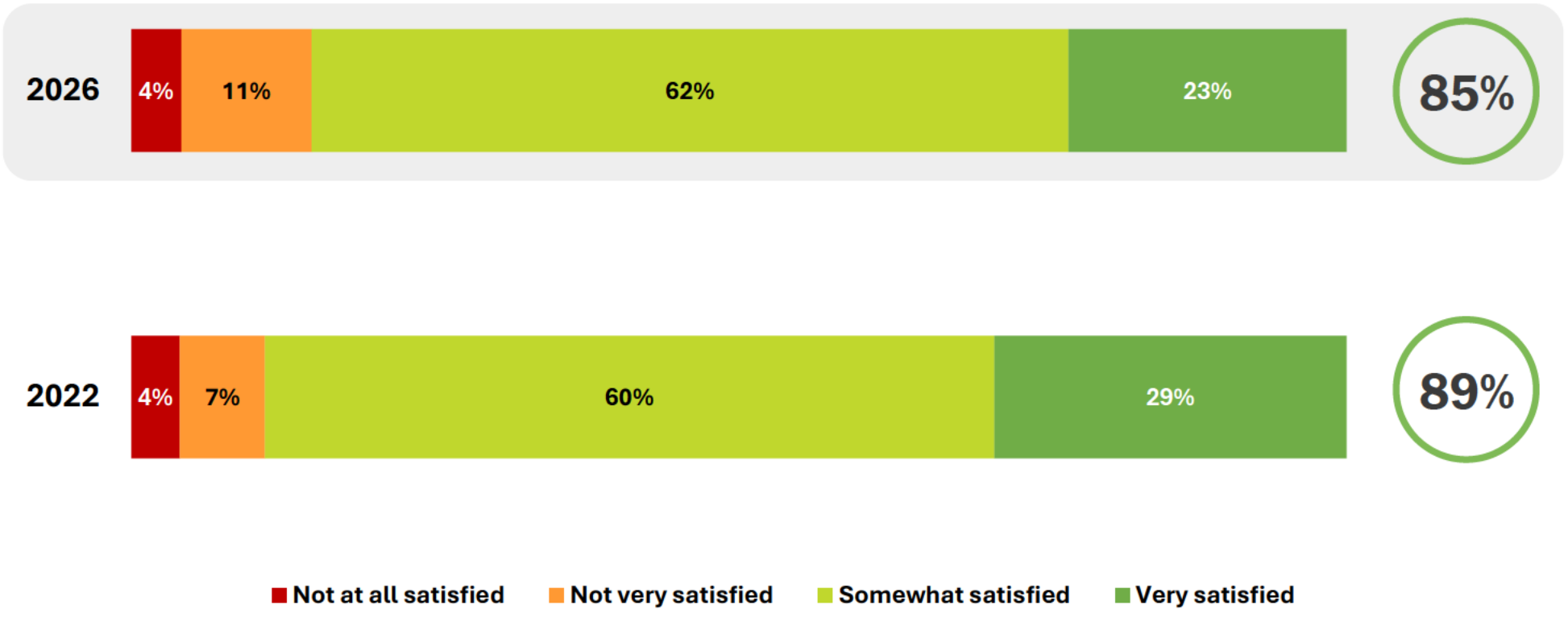
Satisfaction with Services

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Overall Satisfaction with Level and Quality of Services

The majority of residents (TOP2: 85%) are satisfied with the overall level and quality of services provided by North Cowichan.



The following groups are significantly more likely to say they are **satisfied with the overall level and quality of services (TOP2):**

- Residents ages 18 to 34 (93%) compared to residents ages 35 to 64 (81%);

As for **very satisfied**:

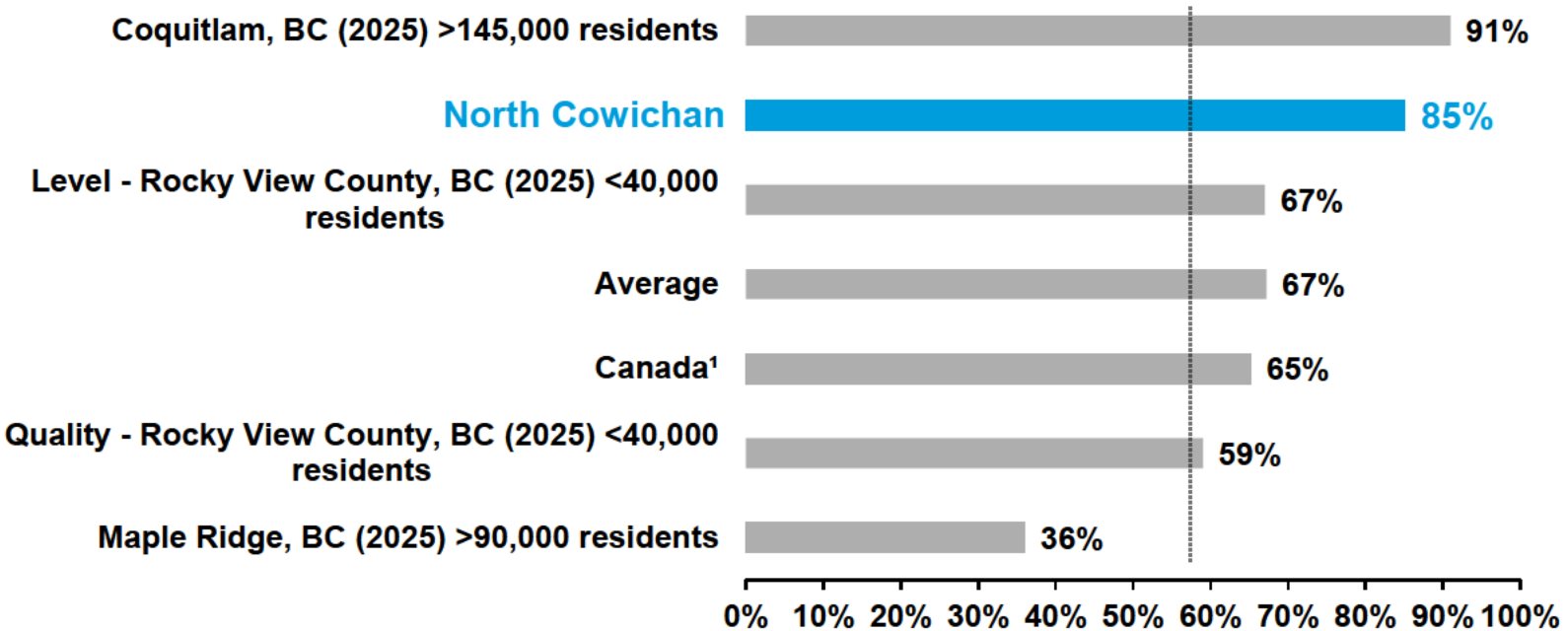
- Residents ages 65+ (30%) compared to residents ages 35 to 64 (17%);
- Residents that have lived in North Cowichan for 1 to 15 years (30-32%) compared to residents that have lived in North Cowichan for 16 to 30 years (13%);
- Residents that expect to stay in North Cowichan for more than 10 years (27%) compared to residents that expect to stay 10 years or less (17%);
- Residents that are not employed (students, retired, unemployed, etc.) (29%) compared to residents that are employed (18%); and
- Renters (32%) compared to homeowners (19%).

Q6. How satisfied are you with the overall level and quality of services provided by North Cowichan? Would you say...
Sample Size: 391
Base: All respondents

Overall Satisfaction with Level and Quality of Services

Benchmark Comparison

85% of residents (TOP2) are satisfied with the overall level and quality of services provided by North Cowichan – which is above the average benchmark score (67%).



**This benchmark analysis is based on the results of surveys that asked this same question and were conducted in 2025. Comparisons for this question include 4 municipalities across British Columbia, with populations ranging from ~40,000 to ~145,000. Populations shown are rounded to the nearest 5,000 based on 2021 Census data. For reports that are publicly available online, the municipality has been identified. For those that are not publicly available, an anonymized identifier has been used.*

¹Results are based on a national benchmark from a nationally representative online survey conducted by Forum Research in May 2026.

Service Satisfaction Benchmark Trends

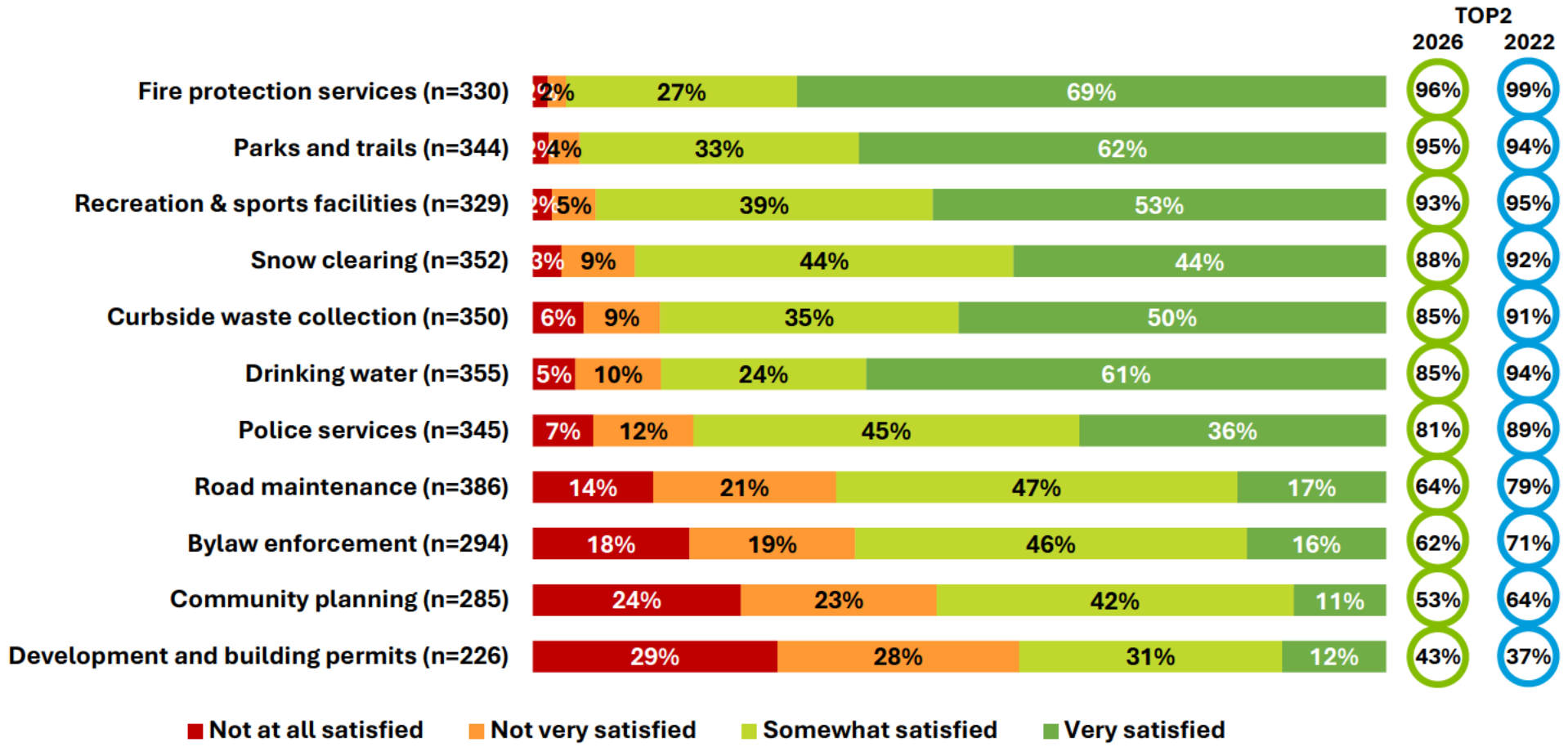
Trends vary across benchmark municipalities, with some communities experiencing declines in satisfaction over time, while others have remained stable or improved. North Cowichan has seen a modest decrease since 2022 (89% to 85%).

Municipality	2nd Most Recent	Most Recent	Percentage Point Change
North Cowichan	89% (2022)	85% (2026)	-4 ↓
Coquitlam	93% (2023)	91% (2025)	-2 ↓
Rocky View County (Level)	64% (2024)	67% (2025)	+3 ↑
Rocky View County (Quality)	50% (2024)	59% (2025)	+9 ↑
Maple Ridge	44% (2024)	36% (2025)	-8 ↓

Q6. How satisfied are you with the overall level and quality of services provided by North Cowichan? Would you say...
Sample Size: 391
Base: All respondents

Satisfaction with Services

The vast majority of residents are satisfied with North Cowichan's fire protection services (TOP2: 96%), parks and trails (TOP2: 95%), and recreation sports and facilities (TOP2: 93%).



The following groups are significantly more likely to say they are satisfied with **fire protection services (TOP2)**:

- Households with 5+ residents (100%) compared to households with 2 (97%) or 3 (90%) residents; and
- Residents with some college or university (100%) compared to residents with some high school or less (94%) or graduated college or university (96%).

As for **parks and trails (TOP2)**:

- Residents that expect to stay in North Cowichan for more than 10 years (98%) compared to residents that expect to stay in North Cowichan for 10 years or less (89%); and
- Households with 2 (98%) or 5+ (97%) residents compared to households with 1 resident (86%).

Q7. Please tell me how satisfied you are with each of the following services provided by North Cowichan. If you have no experience with a particular service, simply say "not applicable" and I'll move on to the next item.
Sample Size: Shown in chart above
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Satisfaction with Services

Fire protection services remain the highest-rated municipal service, while parks and trails have risen from fourth to second place. Overall, satisfaction has declined across nine services, with the largest decrease in road maintenance (down 15 percentage points). In contrast, satisfaction with development and building permits increased by 6 percentage points.

Services	2022 %	2022 Rank	2026 %	2026 Rank	Percentage Point Difference
Fire protection services	**99%**	1st	**96%**	1st	**-3** ↓
Parks and trails	**94%**	4th	**95%**	2nd	**+1** ↑
Recreation & sports facilities	**95%**	2nd	**93%**	3rd	**-2** ↓
Snow clearing	**92%**	5th	**88%**	4th	**-4** ↓
Curbside waste collection	**91%**	6th	**85%**	5th	**-6** ↓
Drinking water	**94%**	3rd	**85%**	6th	**-9** ↓
Police services	**89%**	7th	**81%**	7th	**-8** ↓
Road maintenance	**79%**	8th	**64%**	8th	**-15** ↓
Bylaw enforcement	**71%**	9th	**62%**	9th	**-9** ↓
Community planning	**64%**	10th	**53%**	10th	**-11** ↓
Development and building permits	**37%**	11th	**43%**	11th	**+6** ↑

Q7. Please tell me how satisfied you are with each of the following services provided by North Cowichan. If you have no experience with a particular service, simply say "not applicable" and I'll move on to the next item.
Sample Size: Shown in chart above
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Key Drivers Analysis

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Key Drivers Analysis

A key drivers analysis is a regression-based method that shows the difference between how satisfied residents are with each service provided by the Municipality and the impact the services have on residents' overall satisfaction with services.

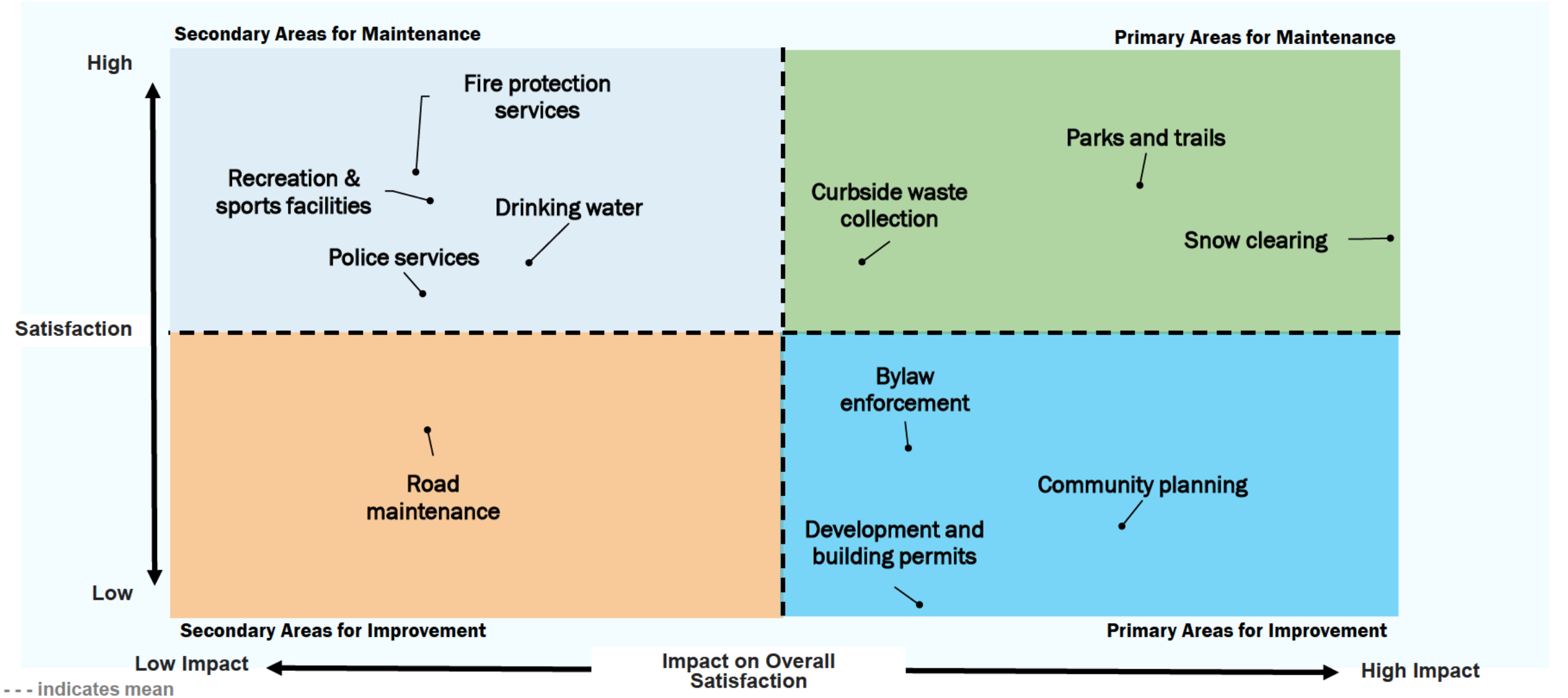
- Satisfaction scores are plotted vertically (along the Y-axis). They represent the stated satisfaction (TOP2%) with each individual service provided by North Cowichan (Q7).
- Impact on overall satisfaction scores are plotted horizontally (along the X-axis). They are based on a statistical method called a multiple linear regression that determines how a specific service (often called an "independent variable") contributes to residents' overall satisfaction with the services ("often called the "dependent variable"). Impact on overall satisfaction can also be referred to as perceived importance.
- The following variables were used in the regression model:
    - Dependent variable: Q6. How satisfied are you with the overall level and quality of services provided by North Cowichan?
    - Independent variables: Q7A-K. How satisfied are you with each of the following services provided by North Cowichan?

Key Drivers Analysis

As a result of the analysis, each service provided by the Municipality are distributed among four quadrants.

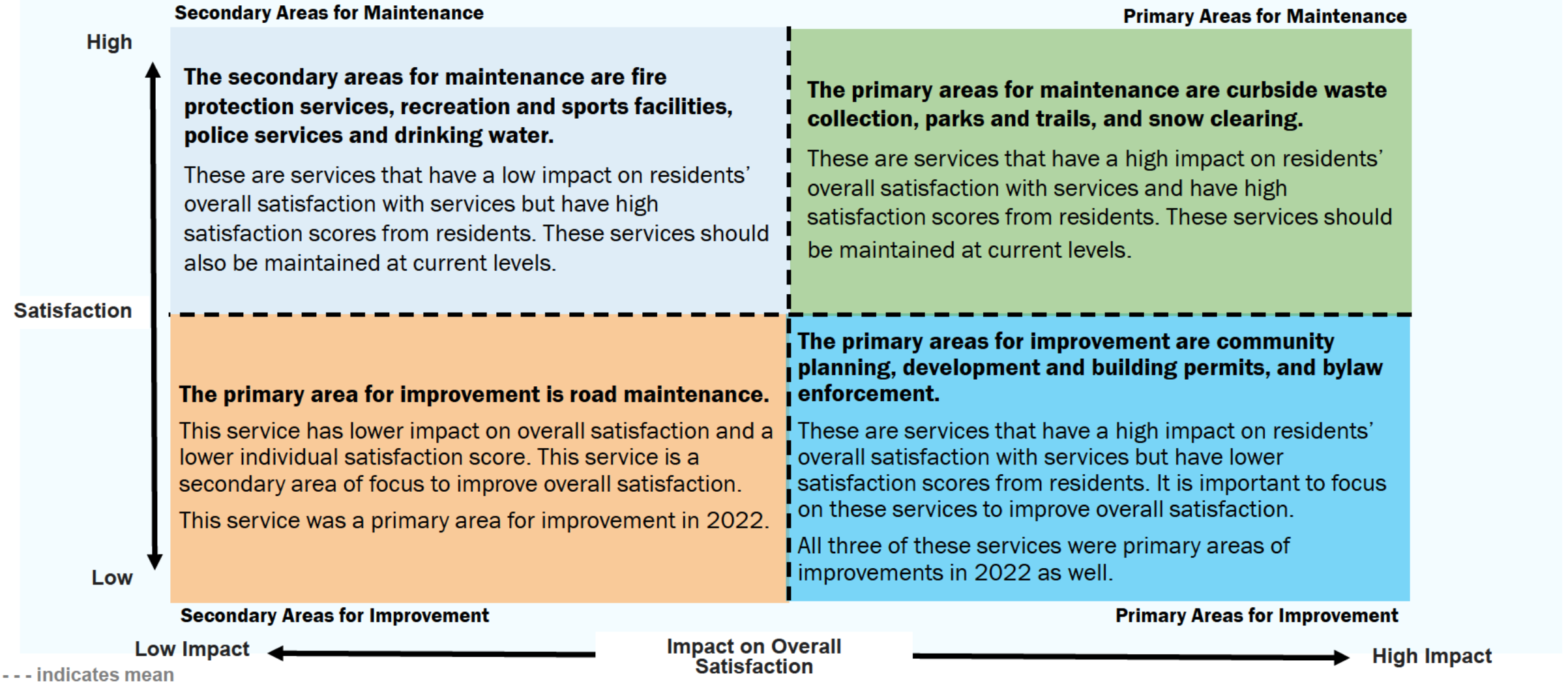
1. **Primary Areas for Improvement:**
   - Services that have the highest impact on overall satisfaction, but with lower individual satisfaction scores. These services should be the primary areas of focus. Increase in satisfaction with these services will have the largest impact on overall satisfaction with services provided by the Municipality.
2. **Secondary Areas for Improvement:**
   - Services that have lower impact on overall satisfaction and lower individual satisfaction scores. These services are secondary areas of focus to improve overall satisfaction.
3. **Primary Areas for Maintenance:**
   - Services that have high impact on overall satisfaction and high individual satisfaction scores. The focus here is on maintaining the current levels of service and satisfaction.
4. **Secondary Areas for Maintenance:**
   - Services that have lower impact on overall satisfaction but high individual satisfaction scores. The focus here is on maintaining the current levels of service and satisfaction.

Key Drivers Analysis



- - - indicates mean

Key Drivers Analysis



Key Drivers Analysis

Services	Area 2022	Area 2026	Change in Ranking
Bylaw enforcement	1st area for improvement	1st area for improvement	**No change**
Community planning	1st area for improvement	1st area for improvement	**No change**
Development and building permits	1st area for improvement	1st area for improvement	**No change**
Road maintenance	1st area for improvement	2nd area for improvement	↓
Parks and trails	2nd area for maintenance	1st area for maintenance	↑
Snow clearing	2nd area for maintenance	1st area for maintenance	↑
Curbside waste collection	1st area for maintenance	1st area for maintenance	**No change**
Fire protection services	2nd area for maintenance	2nd area for maintenance	**No change**
Recreation & sports facilities	2nd area for maintenance	2nd area for maintenance	**No change**
Drinking water	2nd area for maintenance	2nd area for maintenance	**No change**
Police services	1st area for maintenance	2nd area for maintenance	↓

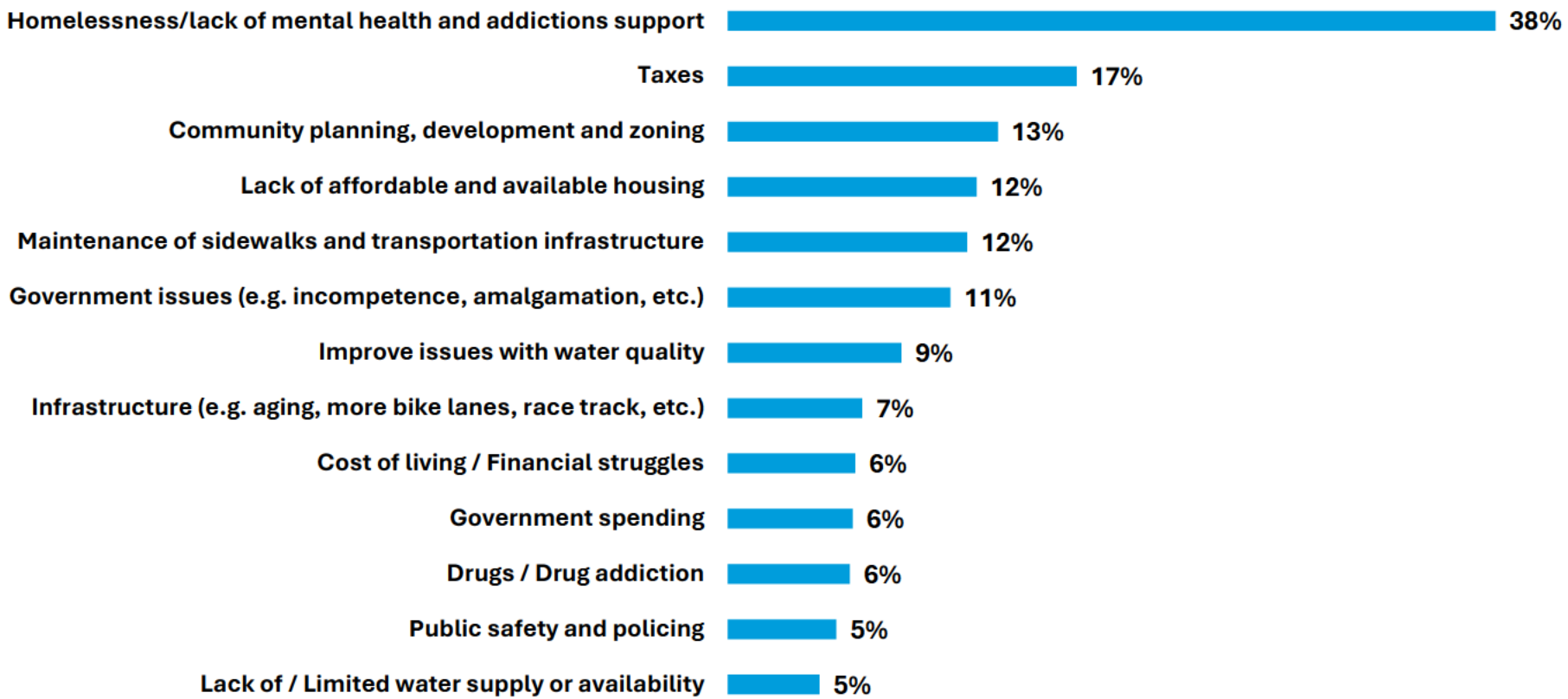
Issue Agenda

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NORTH Cowichan

Challenges Facing North Cowichan

Homelessness (38%) was the most mentioned issue facing North Cowichan, followed by taxes (17%) and community planning, development and zoning (13%).



Responses with <5% responses not shown in the chart above.

The following groups are significantly more likely to say that **homelessness/ a lack of mental health and addictions support** is the top challenge facing North Cowichan today:

- Renters (52%) compared to homeowners (34%); and
- Daily users of social media North Cowichan is on (46%) compared to non-users (27%).

As for **taxes**...

- Residents ages 35+ (18-21%) compared to residents ages 18 to 34 (5%);
- Residents that have lived in North Cowichan for 31+ years 25-27%) compared to those who have lived here for 6 – 15 years (12%); and
- Homeowners (22%) compared to renters (5%).

Q1. In your opinion, what do you feel are the most important challenges facing North Cowichan?
Sample Size: 368
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Challenges Facing North Cowichan

Trending

Homelessness and taxes remain the most important challenges facing North Cowichan. Community planning, development, and zoning has risen in priority, moving into 3rd place, while lack of affordable housing has declined to 4th. Overall, these issues were also the top four priorities in 2022, indicating stability in the core set of concerns facing the community, with only shifts in relative ranking between them.

Key Issues	2022 %	2022 Rank	2026 %	2026 Rank	Change in Ranking
Homelessness/lack of mental health and addictions support	**40%**	1st	**38%**	1st	**No change**
Taxes	**24%**	2nd	**17%**	2nd	**No change**
Community planning, development and zoning	**17%**	4th	**13%**	3rd	**+1 ↑**
Lack of affordable and available housing	**19%**	3rd	**12%**	4th	**-1 ↓**
Maintenance of sidewalks and transportation infrastructure	**12%**	5th	**12%**	5th	**No change**
Government issues (e.g. incompetence, amalgamation, etc.)	**2%**	14th	**11%**	6th	**+8 ↑**
Improve issues with water quality	**8%**	7th	**9%**	7th	**No change**
Infrastructure (e.g. aging, more bike lanes, race track, etc.)	**1%**	18th	**7%**	8th	**+10 ↑**
Cost of living / Financial struggles	**n/a**	n/a	**6%**	9th	n/a
Government spending	**6%**	9th	**6%**	10th	**-1 ↓**
Drugs / Drug addiction	**1%**	17th	**6%**	11th	**+6**
Public safety and policing	**7%**	8th	**5%**	12th	**-4 ↓**
Lack of / Limited water supply or availability	**2%**	13th	**5%**	13th	**No change**

Q1. In your opinion, what do you feel are the most important challenges facing North Cowichan?
Sample Size: 368
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

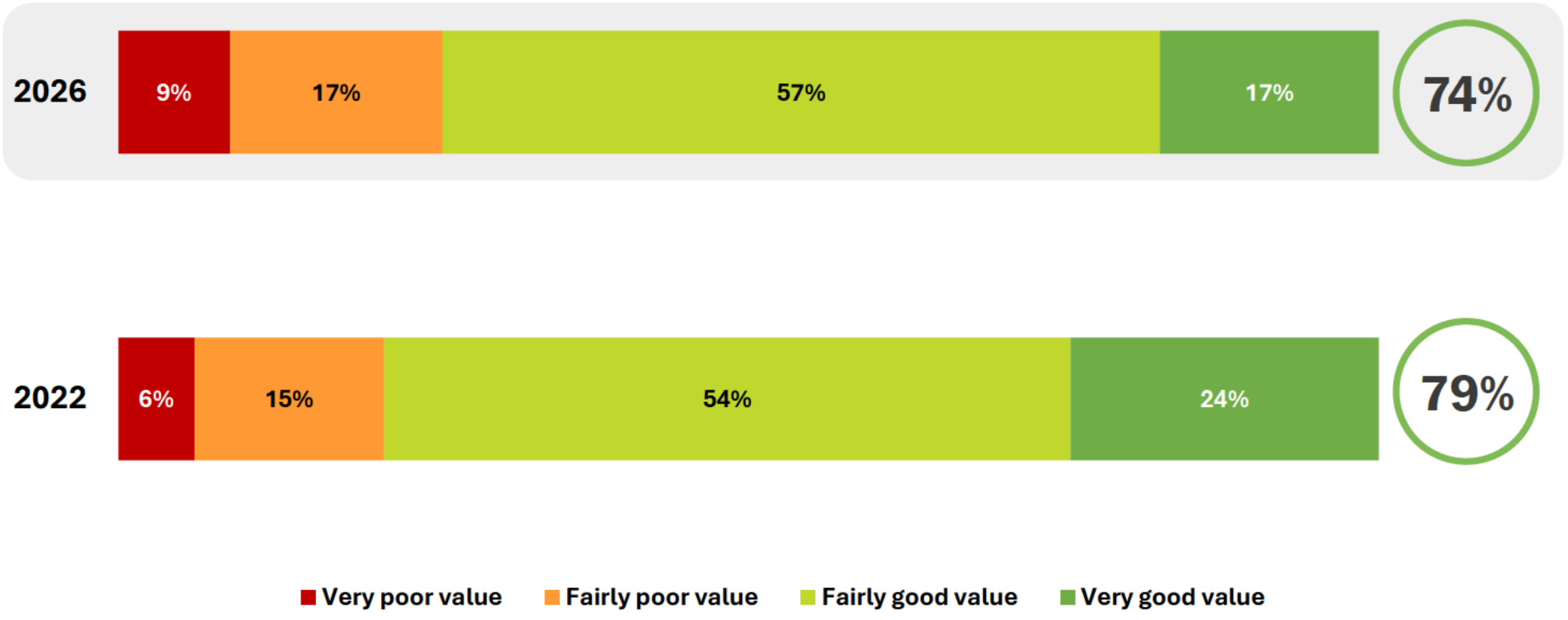
Taxation

FORUM RESEARCH

NORTH Cowichan

Value for Tax Dollar

Thinking about the programs and services received from North Cowichan, about three-fourths of residents (TOP2: 74%) say they received a good value for their tax dollars.



The following groups are significantly more likely to say they receive a good value for their tax dollars (TOP2):

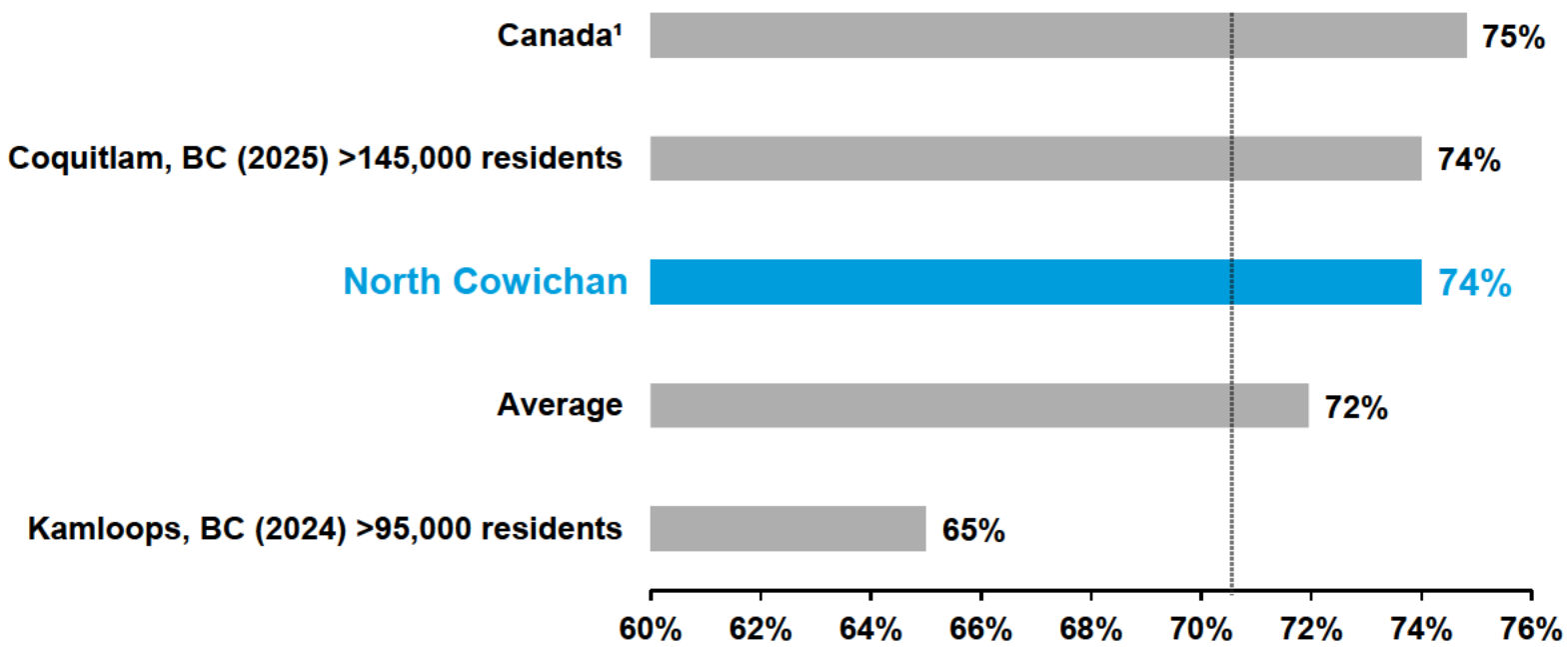
- Residents ages 18 to 34 (86%) and 65+ (82%) compared to residents ages 35 to 64 (65%);
- Households that make less than $60K (82%) compared to households that make $100K+ (71%); and
- Residents that are not employed (82%) compared to residents that are employed (68%).

Q8. Thinking about all the programs and services you receive from North Cowichan, would you say that overall you receive good value or poor value for your tax dollars?
Sample Size: 379
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Value for Tax Dollar

Benchmark Comparison

74% of residents (TOP2) say they receive a good value for their tax dollars – which is consistent with the average benchmark score (TOP2: 72%).



Value for Tax Dollars Benchmark Trends

Value for tax dollars ratings have declined across all benchmark municipalities with available trend data. North Cowichan has seen a modest decrease since 2022 (79% to 74%), while Coquitlam and Kamloops have experienced similar declines over similar periods.

Municipality	2nd Most Recent	Most Recent	Percentage Point Change
North Cowichan	79% (2022)	74% (2026)	-5 ↓
Coquitlam	80% (2023)	74% (2025)	-6 ↓
Kamloops	71% (2024)	65% (2024)	-6 ↓

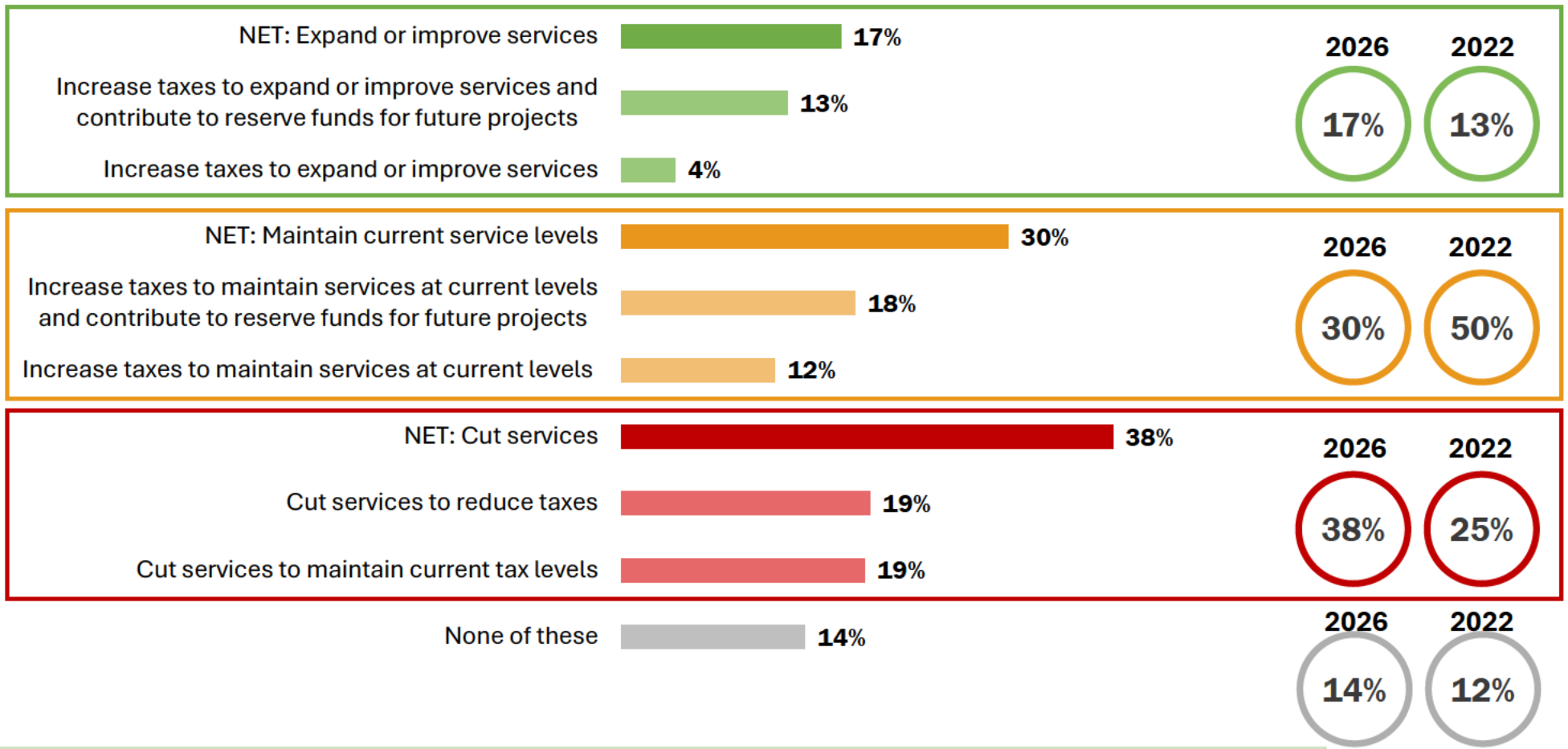
**This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2024–2025. Comparisons for this question include 3 municipalities across British Columbia, with populations ranging from ~95,000 to ~145,000. Populations shown are rounded to the nearest 5,000 based on 2021 Census data. For reports that are publicly available online, the municipality has been identified. For those that are not publicly available, an anonymized identifier has been used.*

¹Results are based on a national benchmark from a nationally representative online survey conducted by Forum Research in May 2026.

Q8. Thinking about all the programs and services you receive from North Cowichan, would you say that overall you receive good value or poor value for your tax dollars?
Sample Size: 379
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Balance of Services and Taxation

Nearly half of residents (47%) would like North Cowichan to either maintain (30%) current service levels, or increase (17%) service levels.



The following groups are significantly more likely to say they would like North Cowichan to **cut services to reduce taxes**:

- Residents ages 35 to 64 (22%) compared to residents ages 65+ (13%); and
- Residents that have lived in North Cowichan for 46+ years (24%) compared to residents that have lived in North Cowichan for 1 to 5 years (9%).

As for **cut services to maintain current tax levels**:

- Households with 2 (20%) or 3 (26%) residents compared to households with 5+ residents (8%);
- Residents that are not employed (23%) compared to residents that are employed (15%);
- Residents with some high school or less (25%) compared to residents who completed post-graduate (11%); and
- Non-users of social media North Cowichan is on (32%) compared to daily (17%) and moderate-to-low (14%) users.

Q9. Property taxes are the primary way to pay for services provided by North Cowichan, and the costs of maintaining infrastructure and delivering services are increasing. This means that North Cowichan must balance taxation levels with the service level and infrastructure that it provides. Which one of the following approaches would you most like North Cowichan to pursue?
Sample Size: 352
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Customer Service and Communication

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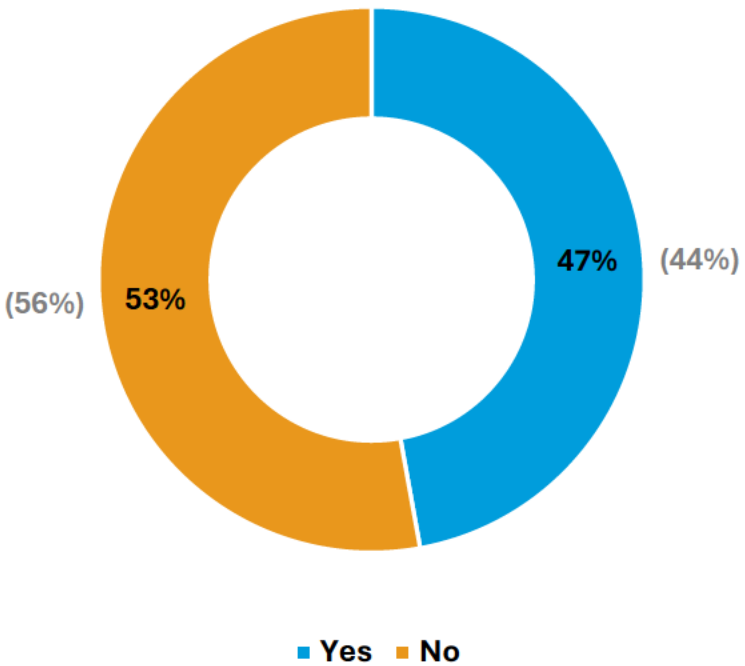
NORTH Cowichan

Interaction with North Cowichan

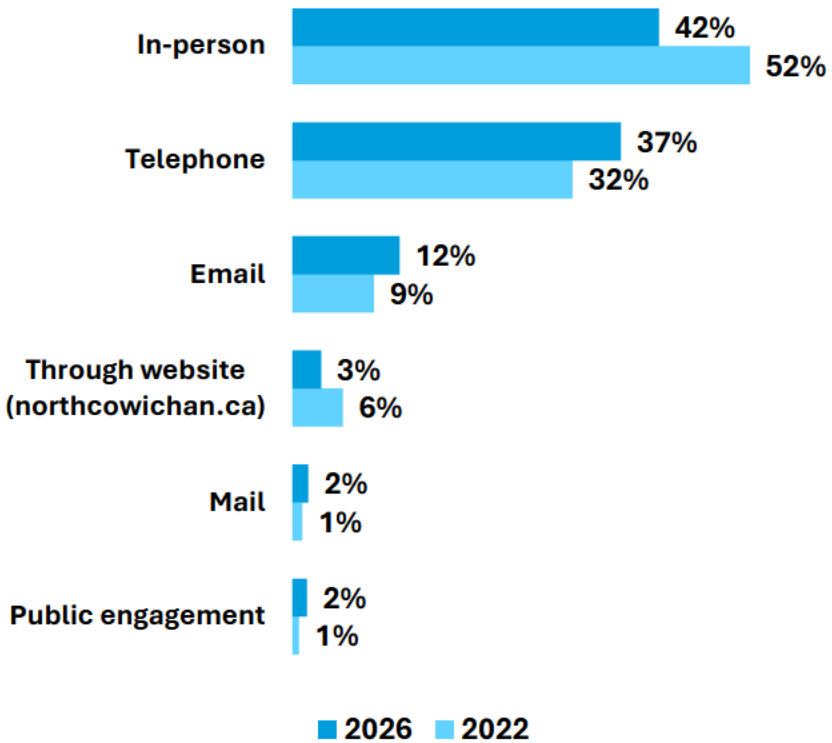
Nearly half of residents (47%) contacted or interacted with a North Cowichan employee within the past 12 months. These interactions most commonly occurred in person (42%) or by phone (37%), while 12% took place via email.

Interaction with North Cowichan Within the Past 12 Months

(2022 results)



Method of Interaction



Responses with <2% responses not shown in the chart above.

The following groups are significantly more likely to have contacted North Cowichan **over the phone**:

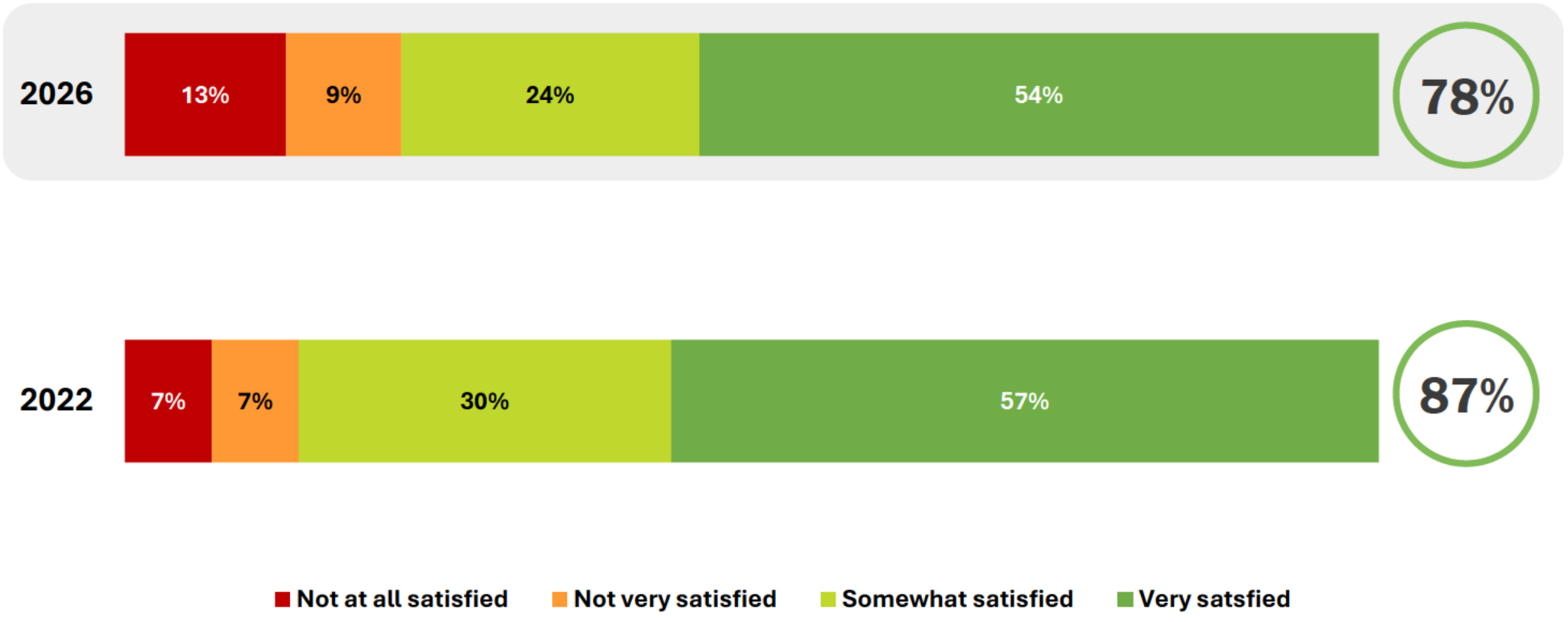
- Residents that have lived in North Cowichan for 6 to 15 years (46%) compared to residents that have lived in North Cowichan for 1 to 5 years (22%) or 31 to 45 years (24%);
- Households with 2 (36%) or 4 (45%) residents compared to households with 5+ residents (13%); and
- Moderate-to-low users of social media North Cowichan is on (50%) compared to daily users (29%).

Q10. Have you personally contacted or interacted with a North Cowichan employee within the past 12 months?
Sample Size: 395
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Q11. How did this contact occur? Was it...
Sample Size: 184
Base: Respondents who have personally contacted or interacted with a North Cowichan employee within the past 12 months

Satisfaction with Overall Service Received

Nearly four-fifths of residents (TOP2: 78%) that have personally contacted or interacted with a North Cowichan employee within the past 12 months are satisfied with the overall service they received, down 9 percentage points from 2022 (TOP2: 87%).



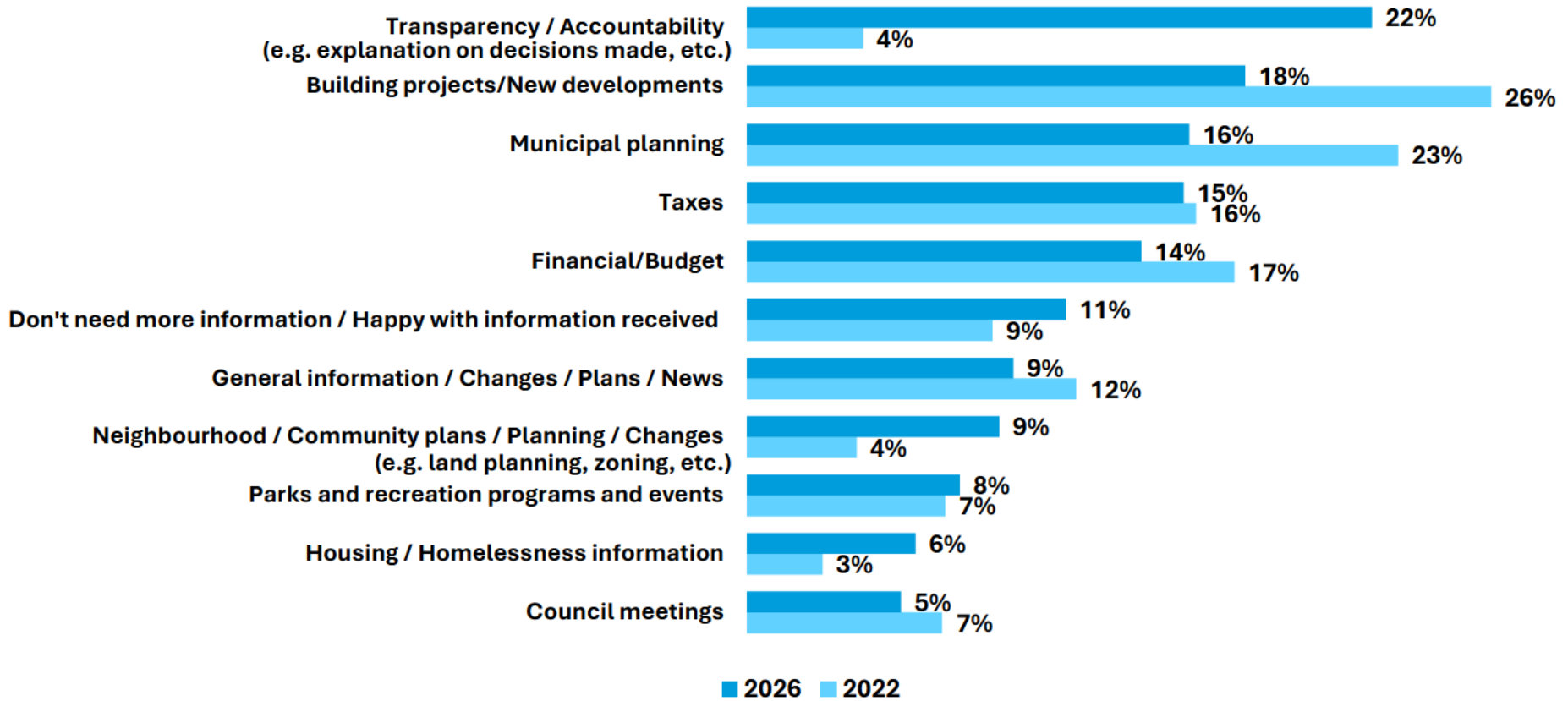
The following groups are significantly more likely to be satisfied with the overall service received (TOP2):

- Residents ages 18 to 34 (93%) compared to residents ages 35 to 64 (74%);
- Residents with children (88%) compared to residents without children (73%);
- Households with 5+ residents (94%) compared to households with 2 residents (75%); and
- Daily users of social media North Cowichan is on (89%) compared to moderate-to-low users (68%) and non-users (66%).

Q12. And how satisfied were you with the overall service you received? Please tell us if you were not at all satisfied, not very satisfied, somewhat satisfied, or very satisfied.
Sample Size: 185
Base: Respondents who have personally contacted or interacted with a North Cowichan employee within the past 12 months

Information Preferred from North Cowichan

When thinking about their information needs, residents most often want information from North Cowichan that promotes transparency and accountability regarding decision-making (22%). More specifically, residents seek information on building projects and new developments (18%) and municipal planning (16%).



Responses with <5% responses not shown in the chart above.

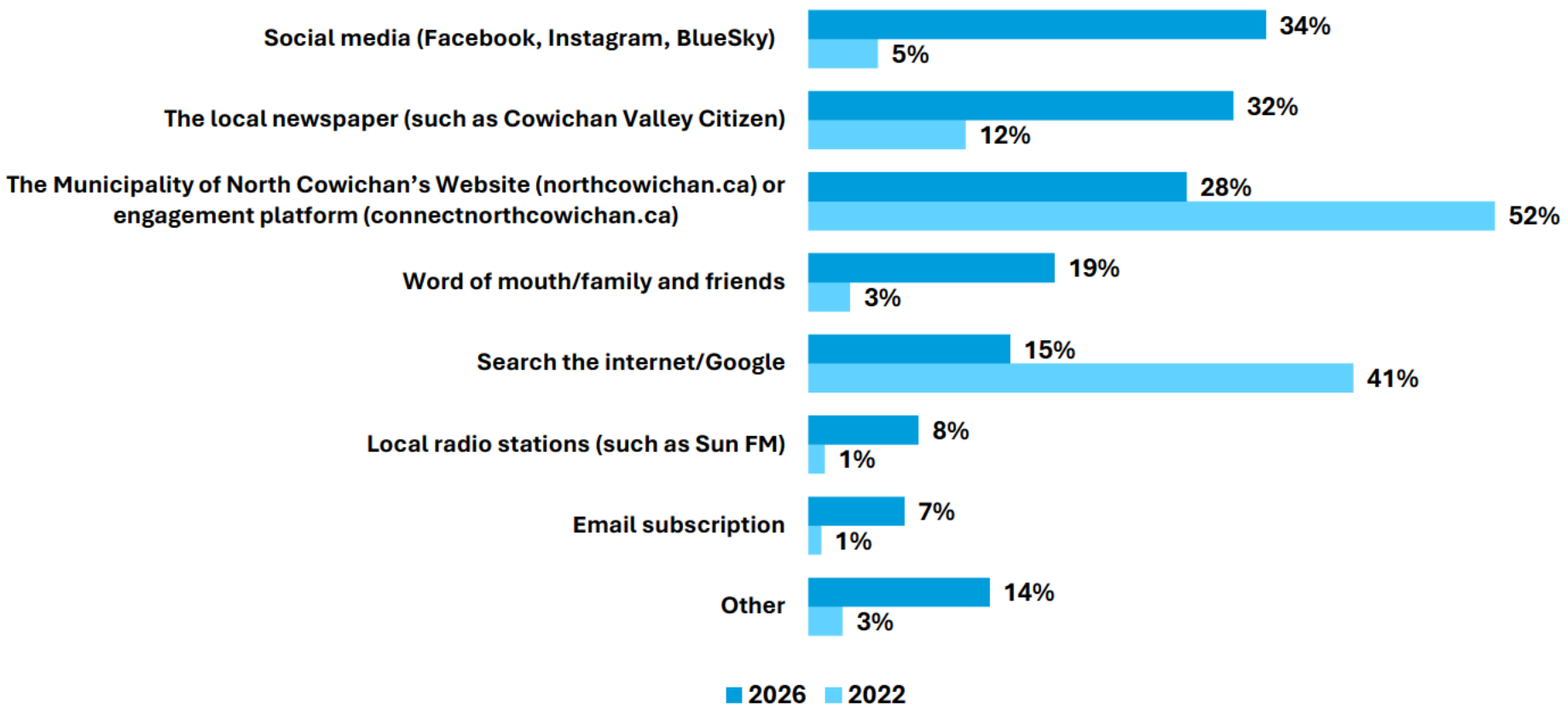
The following groups are significantly more likely to mention **transparency and accountability**:

- Residents ages 35 to 64 (27%) compared to residents ages 65+ (15%);
- Residents that have lived in North Cowichan for 16 to 30 years (32%) compared to residents who have lived in North Cowichan for 1 to 5 years (12%);
- Households that make $100K+ (31%) compared to households that make less than $60K (16%);
- Households with 2 residents (26%) compared to households with 1 resident (11%); and
- Employed residents (28%) compared to not employed residents (15%).

Q14. Thinking about your information needs, what kinds of information do you want North Cowichan to provide you with? Anything else? [multi-select, DNR]
Sample Size: 259
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Sources of Information Used

To get updates or information about what's happening in North Cowichan, residents currently use social media (34%), the local newspaper (32%), and North Cowichan's website or engagement platform (28%).



Responses with <7% responses not shown in the chart above.

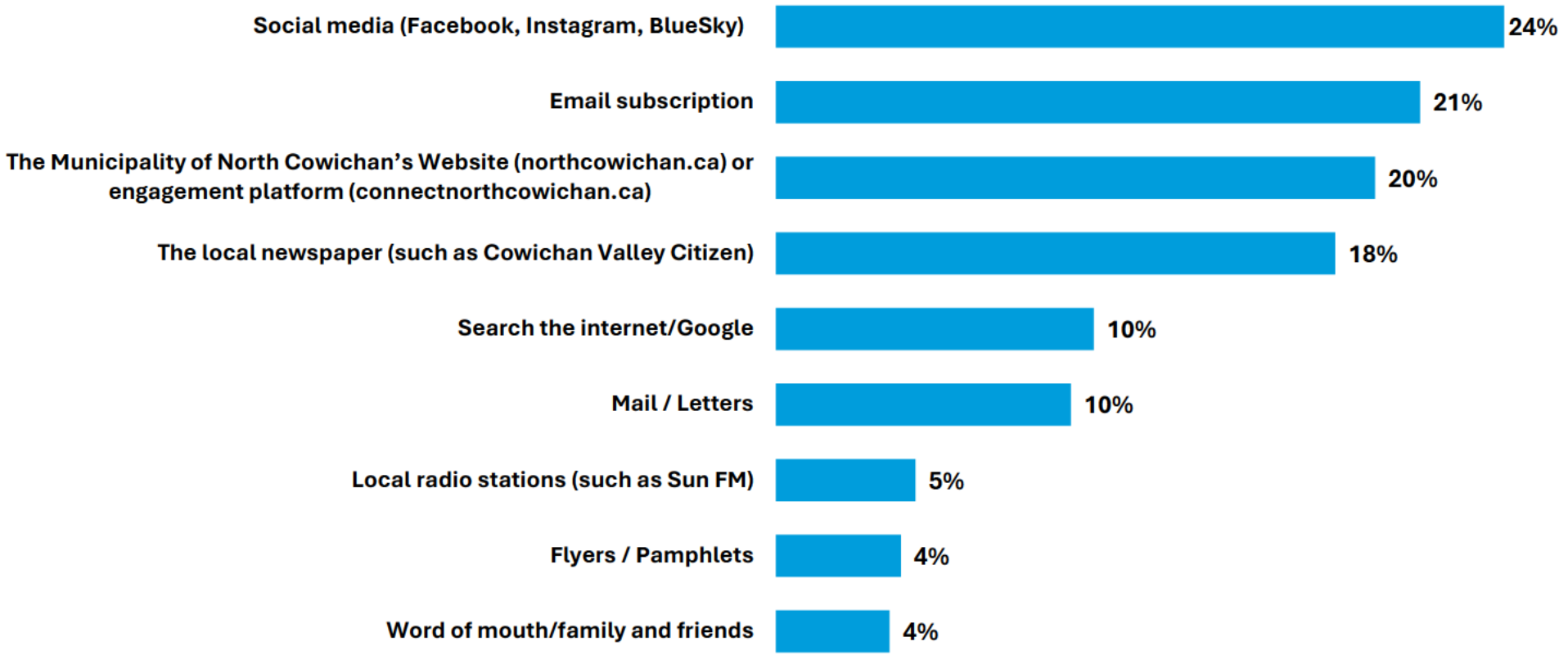
The following groups are significantly more likely to use social media to get updates or information:

- Residents ages 35 to 64 (47%) compared to residents ages 18 to 34 (28%) or 65+ (22%);
- Residents that have lived in North Cowichan for 1 to 5 years (46%) compared to residents that have lived in North Cowichan for 46+ years (26%);
- Residents with children (45%) compared to residents without children (32%);
- Employed residents (39%) compared to not employed residents (29%);
- Daily (52%) or moderate-to-low (32%) users of social media North Cowichan is on compared to non-users (5%); and
- Daily (52%) users of social media North Cowichan is on compared to moderate-to-low users (32%).

Q15. What sources, if any, do you use to get updates or information about what's happening in North Cowichan? [multi-select, DNR]
Sample Size: 376
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Preferred Sources of Information

To get updates or information about what's happening in North Cowichan, residents would prefer to use social media (24%), an email subscription (21%), and North Cowichan's website or engagement platform (20%).



Responses with <4% responses not shown in the chart above.

Currently, social media and North Cowichan's website or engagement platform are the primary sources residents use to stay informed about local news and developments. While email subscriptions are not widely used at present, they represent a communication channel that many residents would like to receive information through.

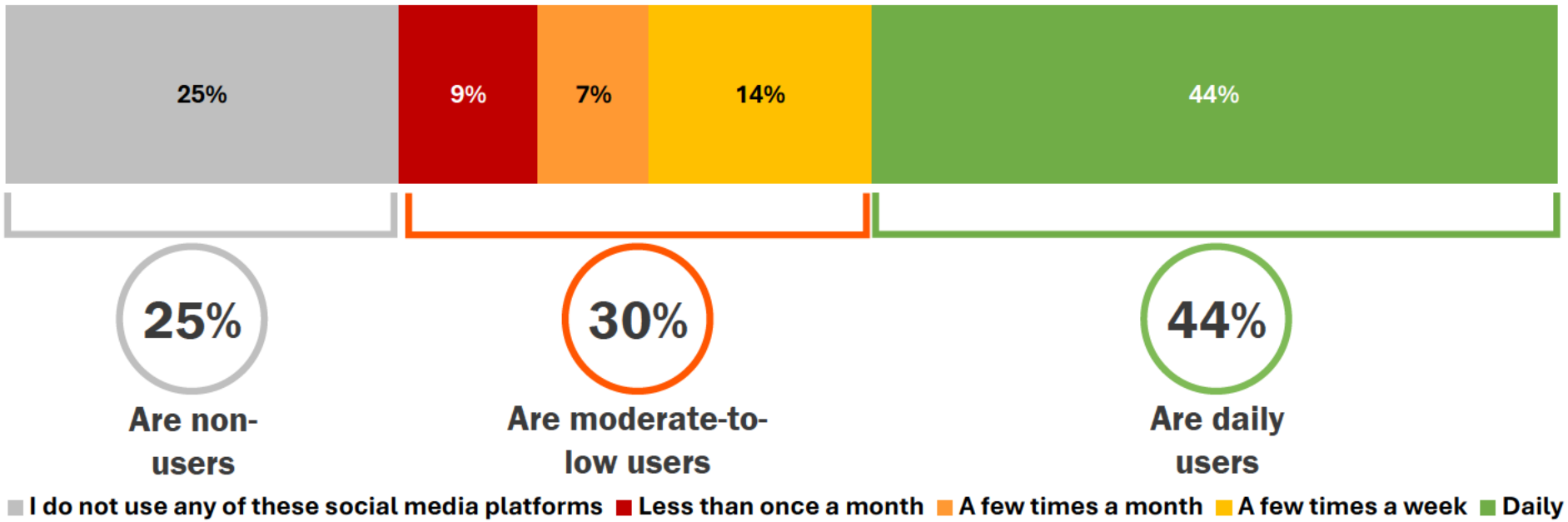
The following groups are significantly more likely to prefer an **email subscription:**

- Residents that expect to stay in North Cowichan for more than 10 years (27%) compared to residents that expect to stay in North Cowichan for 10 years or less (12%);
- Residents without children (27%) compared to residents with children (17%);
- Households with 2 residents (31%) compared to households with 1 (8%) or 4 (16%) residents; and
- Homeowners (26%) compared to renters (8%).

Q16. What sources, if any, would you prefer to use to get updates or information about what's happening in North Cowichan? [multi-select, DNR]
Sample Size: 370
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Social Media Usage

Looking at usage of social media platforms North Cowichan is active on, over two-fifths of residents (44%) are daily users, whereas 30% are moderate-to-low users, and 25% are non-users.



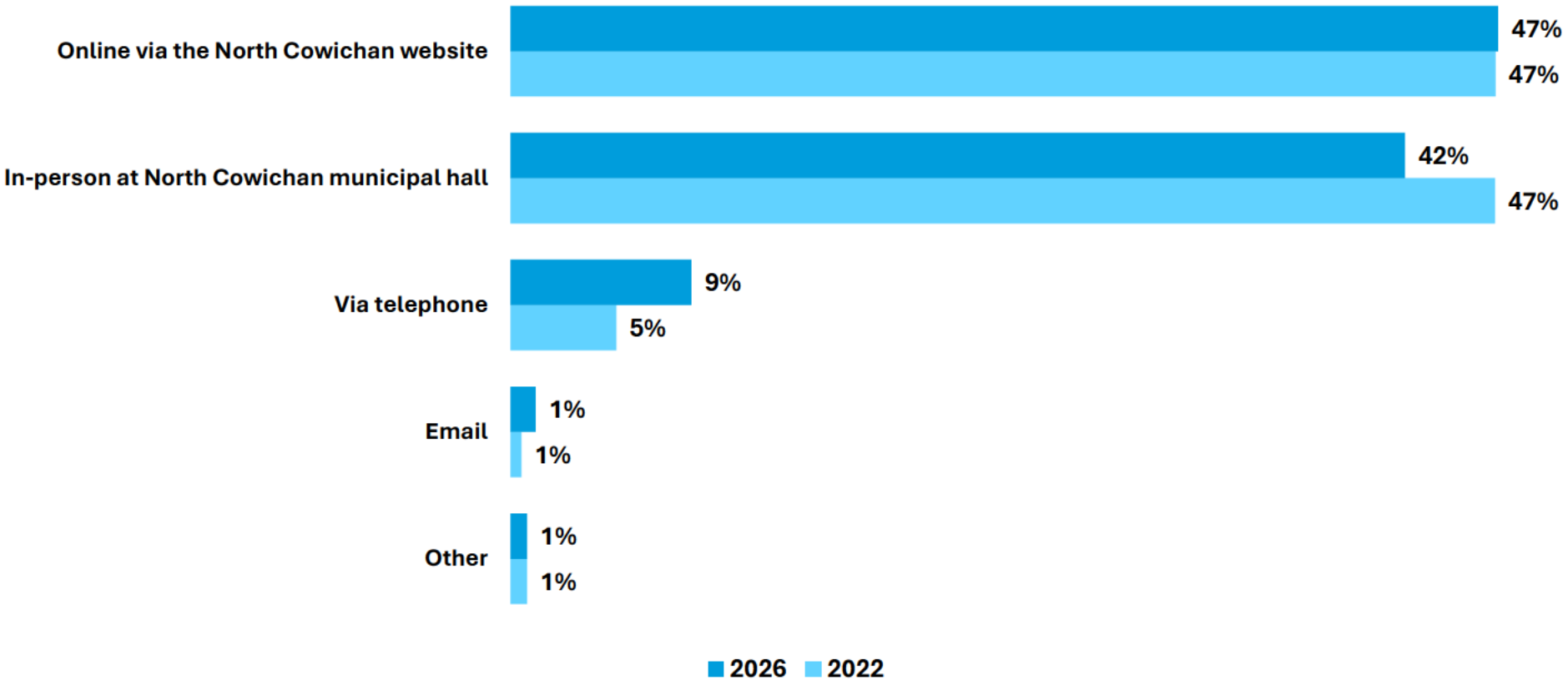
The following groups are significantly more likely to be **daily users of social media**:

- Residents ages 18 to 64 (52%) compared to residents ages 65+ (30%);
- Residents that have lived in North Cowichan for 6 to 15 years (55%) or 31 to 45 years (53%) compared to residents that have lived in North Cowichana for 46+ years (34%);
- Households that make $100K+ (57%) compared to households that make less than $60K (40%);
- Residents with children (59%) compared to residents without children (45%);
- Households with 2 (47%), 3 (55%), or 5+ (58%) residents compared to households with 1 resident (31%);
- Employed residents (49%) compared to not employed residents (39%); and
- Renters (54%) compared to homeowners (41%).

Q22. North Cowichan is active on Facebook, Instagram, and Bluesky. How often, if at all, do you or someone in your household use any of these social media platforms?
Sample Size: 390
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Preferred Method of Business

The most preferred ways to do business with North Cowichan are online via the North Cowichan website (47%), and in-person at the North Cowichan municipal hall (42%).



Responses with <1% responses not shown in the chart above.

The following groups are significantly more likely to say they prefer to conduct business **online via the North Cowichan website**:

- Residents ages 18 to 64 (50-60%) compared to residents ages 65+ (38%);
- Residents that have lived in North Cowichan for 1 to 5 years (66%) compared to residents that have lived in North Cowichan for 16+ years (35-47%);
- Households that make $60K+ (49-54%) compared to households that make less than $60K (33%);
- Households with 2 (52%), or 4 (56%) residents compared to households with 1 resident (28%); and
- Employed residents (53%) compared to not employed residents (40%).

Q18. If you need to access municipal services from North Cowichan, for instance, paying a bill, purchasing a dog licence, or submitting a permit application, what is your preferred way to do this?
Sample Size: 377
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

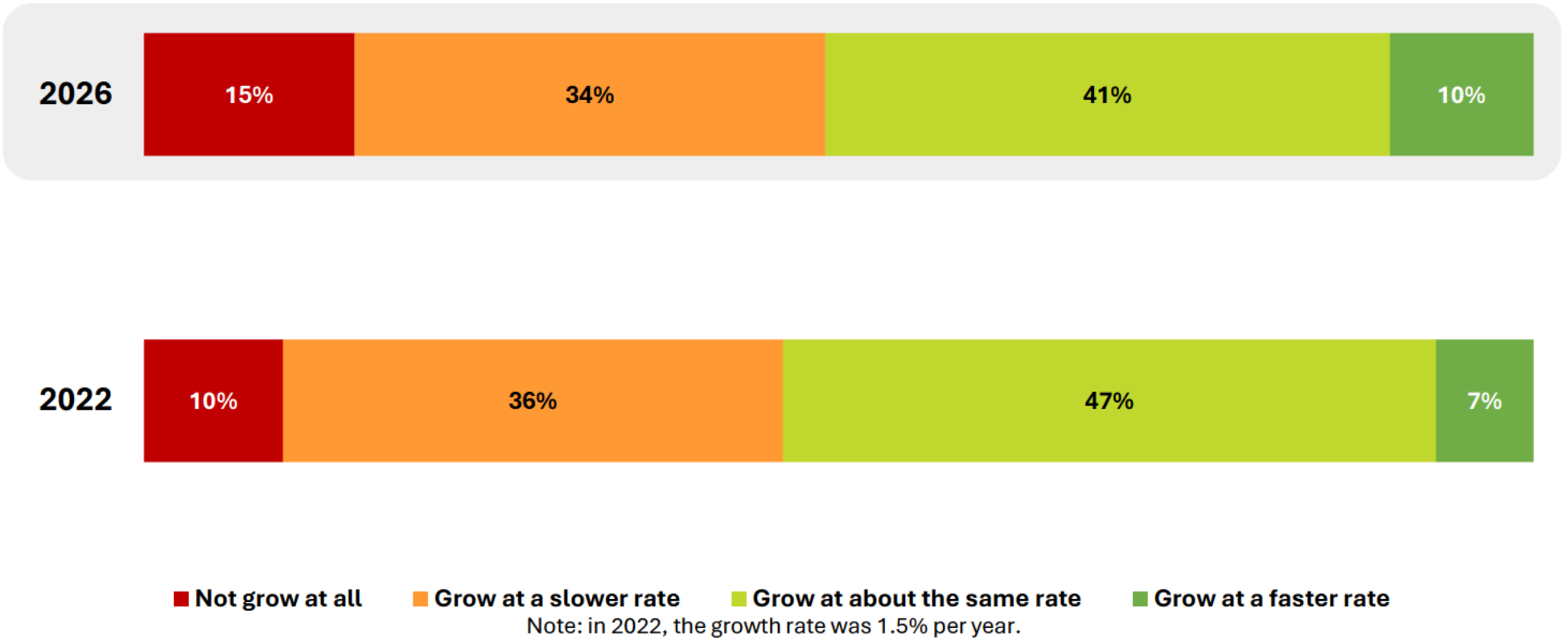
Planning for the Future

FORUM RESEARCH

NORTH Cowichan

Growth Rate of North Cowichan

About two-fifths of residents (41%) prefer to see North Cowichan grow at the current population growth rate (about 1.37% per year), and just over one-third (34%) would like to see it grow at a slower rate.



Note: in 2022, the growth rate was 1.5% per year.

The following groups are significantly more likely to say they want to see North Cowichan continue to **grow at the same rate**:

- Residents that have lived in North Cowichan for 6 to15 years (45%) compared to residents that have lived in North Cowichan for 46+ years (29%); and
- Households with 5+ residents (59%) compared to households with 1 to 3 residents (31-35%).

Q21. North Cowichan´s population has been growing by about 500 people (1.37%) per year. Would you prefer to see North Cowichan...
Sample Size: 378
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Growth Rate of North Cowichan

Residents that are significantly more likely to prefer to see North Cowichan…

Grow at a Faster Rate

- Male (14%) compared to female (7%) residents;
- Residents that have lived in NC for 16 to 30 years (12%) or 46+ years (14%) compared to residents that have lived in NC for 31 to 45 years (3%);
- Employed (14%) compared to unemployed (7%) residents; and
- Renters (18%) compared to homeowners (8%).

Grow at About the Same Rate

- Residents that have lived in NC for 6 to 15 years (45%) compared to 46+ years (29%); and
- Households with 5+ residents (59%) compared to households with 1 to 3 residents (31-38%).

Grow at a Slower Rate

- Female (40%) compared to male (28%) residents;
- Households that make less than $100K (42%) compared to households that make $100K+ (27%); and
- Residents that graduated college or university (43%) compared to residents that have some college or university (29%) or a post-graduate degree (25%).

Not Grow at All

- Residents ages 35+ (16-17%) compared to residents ages 18 to 34 (3%); and
- Residents that have lived in NC for 31 to 45 years (24%) compared to residents that have lived in NC for 6 to 15 years (11%).

Q21. North Cowichan´s population has been growing by about 500 people (1.37%) per year. Would you prefer to see North Cowichan…
Sample Size: 378
Base: All respondents, excluding "don't know", "not applicable", and "prefer not to say"

Respondent Profiles

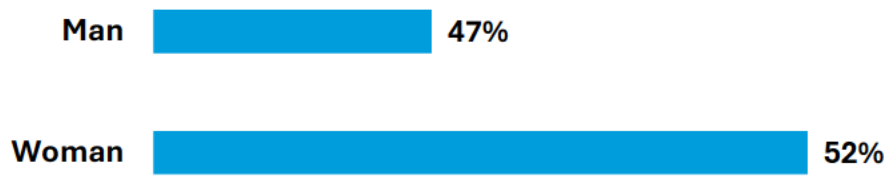
FORUM RESEARCH

NORTH Cowichan

Respondent Profiles

Results have been weighted by age and gender to align with 2021 Statistics Canada Census data for North Cowichan. The table below presents the 2021 Census distributions alongside the weighted and unweighted survey results for comparison.

Gender



Weighted Results

GENDER	StatsCan	Weighted	Unweighted
Man	48%	47%	47%
Woman	52%	52%	52%

Age



Weighted Results

AGE	StatsCan	Weighted	Unweighted
18 to 34	16%	17%	11%
35 to 44	14%	13%	11%
45 to 54	14%	14%	13%
55 to 64	20%	21%	19%
65 to 74	21%	21%	23%
75+	14%	14%	24%

Demographics

HOUSEHOLD SIZE	Weighted	Unweighted
1	19%	22%
2	37%	40%
3	16%	14%
4	15%	13%
5	7%	6%
6	2%	2%
7	2%	2%
8	1%	1%
9	<1%	<1%
10+	1%	1%
CHILDREN	**Weighted**	**Unweighted**
Yes	31%	28%
No	69%	72%
HOMEOWNERSHIP	**Weighted**	**Unweighted**
Own	73%	76%
Rent	26%	23%

YEARS LIVED IN NC	Weighted	Unweighted
0	1%	1%
1 – 5	12%	11%
6 – 15	26%	25%
16 – 30	27%	27%
31 – 45	17%	17%
46+	17%	20%
HOW MANY MORE YEARS IN NC	**Weighted**	**Unweighted**
Less than 2 years	7%	7%
2 – 5 years	12%	11%
6 – 10 years	13%	14%
More than 10 years	68%	68%
EMPLOYMENT	**Weighted**	**Unweighted**
Full-time	34%	28%
Part-time	5%	5%
Self-employed	13%	12%
Student	2%	2%
Retired	36%	46%
Not currently working	9%	8%

Demographics

EDUCATION	Weighted	Unweighted
Some high school	7%	8%
Graduated high school	23%	22%
Some college or university	23%	23%
Graduated college or university	36%	36%
Post-graduate	11%	12%
INCOME	**Weighted**	**Unweighted**
Less than $20,000	5%	5%
$20,000 to less than $40,000	18%	18%
$40,000 to less than $60,000	13%	15%
$60,000 to less than $80,000	14%	14%
$80,000 to less than $100,000	14%	14%
$100,000 to less than $150,000	21%	20%
$150,000 or over	15%	14%
INDIGENOUS	**Weighted**	**Unweighted**
No	88%	89%
Yes, First Nations	8%	7%
Yes, Métis	3%	3%
Yes, Inuk (Inuit)	1%	1%

ETHNIC BACKGROUND	Weighted	Unweighted
European (White)	93%	94%
South Asian	2%	2%
Chinese	<1%	<1%
Black	<1%	<1%
Filipino	1%	1%
Latin American	<1%	<1%
Southeast Asian	<1%	<1%
Japanese	<1%	<1%
Other	4%	5%