CITY OF VANCOUVER 2016 BUDGET AND SERVICE SATISFACTION SURVEY

Summary Results
November 2015

Purpose

To inform the 2016 Budget and Five Year Financial Plan, the City asked Vancouver residents and businesses what they thought of our services and the value they are receiving from the City.

The engagement process was designed to meet the following goals:

- To gather feedback from a sampling of residents and businesses that will provide another layer of information for staff in shaping the final budget report, and for Council during final decision-making in December. Specific feedback objectives were to:
  - Identify issues residents and businesses feel the City should give top priority to;
  - Gauge satisfaction with City services and infrastructure, overall and with respect to specific services;
  - Explore residents' and businesses' perceptions of and sensitivities to taxation levels and value for dollar of services; and
  - Examine residents' and businesses' preferred options for balancing the City budget and creating efficiencies in service provision.
- To provide opportunity for the public and advisory stakeholders in the community to enter into dialogue with Finance staff on budget challenges and directions.
- To build community knowledge about the services the City offers and the context within which spending decisions are made.

Consultation Overview

Feedback was primarily gathered through an online survey among residents and businesses (using the City's Talk Vancouver panel and a survey link on the City's website accessible to the general public), available in English and traditional Chinese.

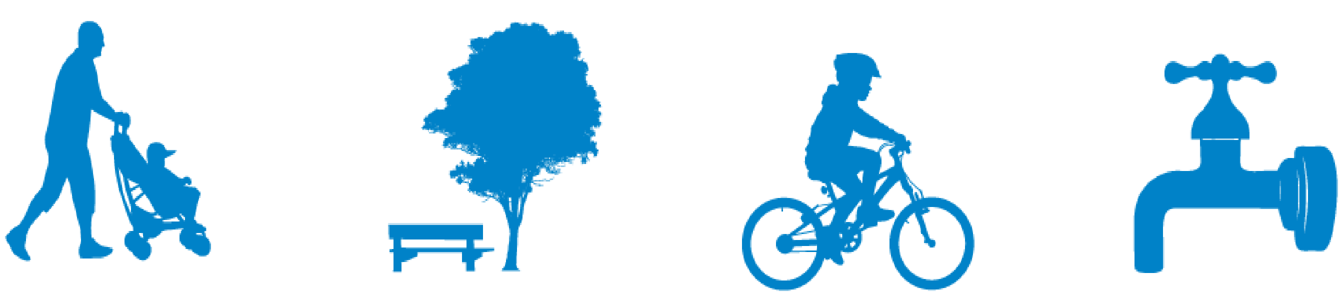
To expand the reach of the survey, a supplemental three-question survey was asked of residents who called the City's 3-1-1 service and in-person at local community centres and libraries with Pop-Up City Hall.

Method	Dates/Locations	Participants
Online questionnaire	• Oct 1, – Oct 25, 2015	**2,277** (106 in traditional Chinese)
In-person surveys – Doors Open and Pop-Up City Hall	• Doors Open, City Hall, Oct 2,3 • Renfrew Community Centre and Library, Oct 15 • Britannia Community Centre and Library, Oct 16 • Kerrisdale Community Centre and Library, Oct 22 • Iupii cafe, Champlain Cres., Oct. 23	**78** survey respondents, Over 350 interactions
Telephone survey (3-1-1)	• Random 3-1-1 callers from Oct 1 – Oct 25, 2015	**877**
Advisory workshop	• Oct 26	**16**
	Total engaged	**3,248**

Promotion activity
3-1-1 and Pop-Up Outreach team
Colour print ads in the Courier, Ming Pao, Sing Pao, Metro and 24 hours
Social media ads (organic and paid) – facebook, twitter
Info bulletin and COV homepage presence
Talk Vancouver member outreach (over 5000 members)
Email invitations to community organizations and stakeholder groups

1: Executive Summary

The following summary includes combined input from the three channels that feedback was gathered: online, in-person and on the phone through 3-1-1. Following the summary are in-depth results for each channel.



Overview: Important City Issues

What we learned about the issues that concern the public:

- Top concerns, while priority changes slightly, are fairly consistent across groups of respondents. Cost of living, infrastructure/transportation, and housing are the key issues on the minds of Vancouver residents and business owners.

Residents (Online)
Cost of living (46%)
Infrastructure/Transportation (44%)
Housing/accommodations (42%)
Social issues (34%)
Development (33%)

Businesses (Online)
Cost of living (44%)
Infrastructure/Transportation (41%)
Housing/Accommodations (29%)
Development (28%)
Social issues (26%)

3-1-1 Callers	Pop-Up City Hall Visitors
Cost of living/taxes (43%)	Housing (61%)
Housing/ Accommodation (35%)	Cost of living (42%)
Infrastructure/Transportation (31%)	Infrastructure/Transportation (33%)
Crime/Criminal Activity (15%) and Social issues/Social services (15%)	Social issues/Social services (29%)
Education (12%)	Development (18%)

Overview: Important City Issues Trend

- Top concerns are also consistent over time - cost of living, housing and infrastructure and transportation remain he most common themes across all groups (note: in-person intercept surveys were conducted starting with the 2015 Budget survey.)

Residents (online): Top Three Issues	
2015 Budget Survey	**2014 Budget Survey**
Cost of living (38%)	Infrastructure/ Transportation (61%)
Housing (36%)	Housing (44%)
Social issues/Social services (33%)	Social issues/Social services (36%)

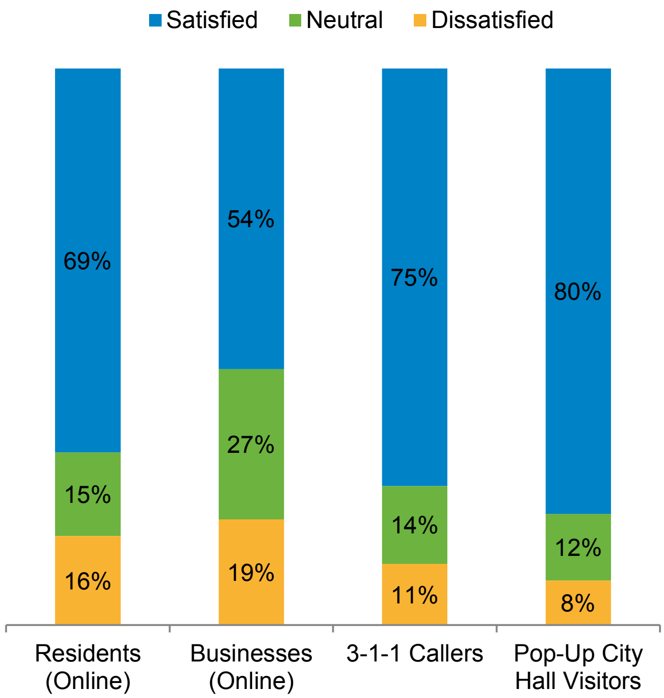
Businesses (online): Top Three Issues	
2015 Budget Survey	**2014 Budget Survey**
Cost of living (40%)	Infrastructure/ Transportation (56%)
Infrastructure/ Transportation (29%)	Cost of living (34%)
Social issues/Social services (27%)	Housing (21%)

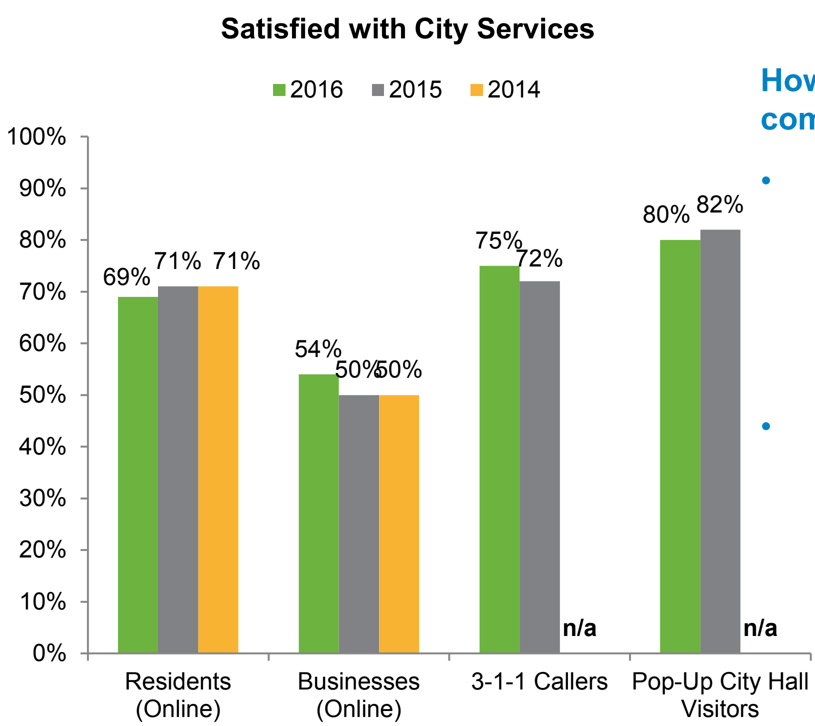
Top Three Issues		
3-1-1 Callers		**Pop-Up City Hall Visitors**
2015 Budget Survey	**2014 Budget Survey**	**2015 Budget Survey**
Cost of living (39%)	Transportation: bike lanes, traffic, parking	Housing (40%)
Infrastructure/ Transportation (29%)	Housing and homelessness	Cost of living (35%)
Housing (27%)	Garbage and clean streets	Social issues/Social services (29%)

Overview: Satisfaction

What we learned about the public's overall satisfaction:

- Levels of satisfaction are high across all groups, and on average, three-quarters of residents are satisfied with City services (across all methodologies). But, 3-1-1 callers and in-person respondents tend to be more satisfied than other groups
- Business owners in Vancouver, show relatively lower satisfaction, with City services. Just over half report they are somewhat or very satisfied with the services their business receives.





How the public's overall satisfaction compares over time:

- The average levels of satisfaction among residents (online, 3-1-1-, in-person), has been stable over the last several years, at or above 70% of those surveyed.
- Among businesses, satisfaction has also been stable, with a small increase in the percentage who say they are satisfied ('very' or 'somewhat' satisfied) with City services to 54%, from 50% in previous years.

Overview: Service Perceptions

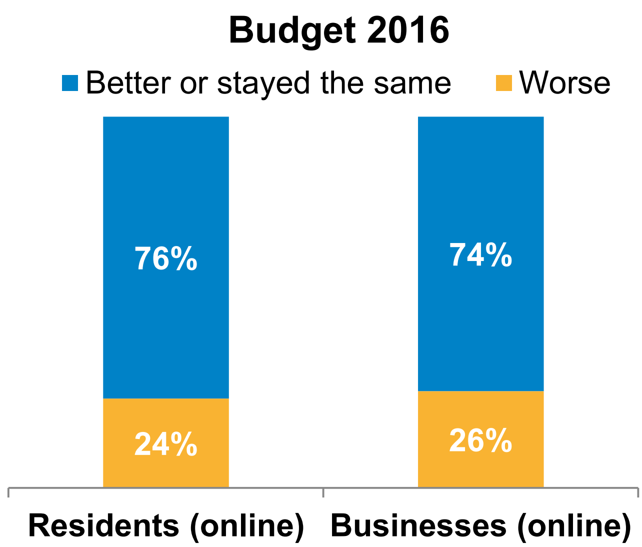
What we learned about the public's perceptions of service (online only)

From our residents and businesses who completed the longer online questionnaire we learned:

- The City receives the **strongest satisfaction ratings** for its provision of basic **services** (sewer, water, drainage), **fire prevention and responding to medical calls** and **garbage collection, composting and recycling.**

- Satisfaction levels for most City services is higher among residents than businesses in Vancouver.

- Over the last few years, a majority of both residents and businesses consistently believe the quality of services provided by the City have either stayed the same or gotten better. Businesses in particular are showing large improvements in their perceptions of the stability and enhancement of City services.



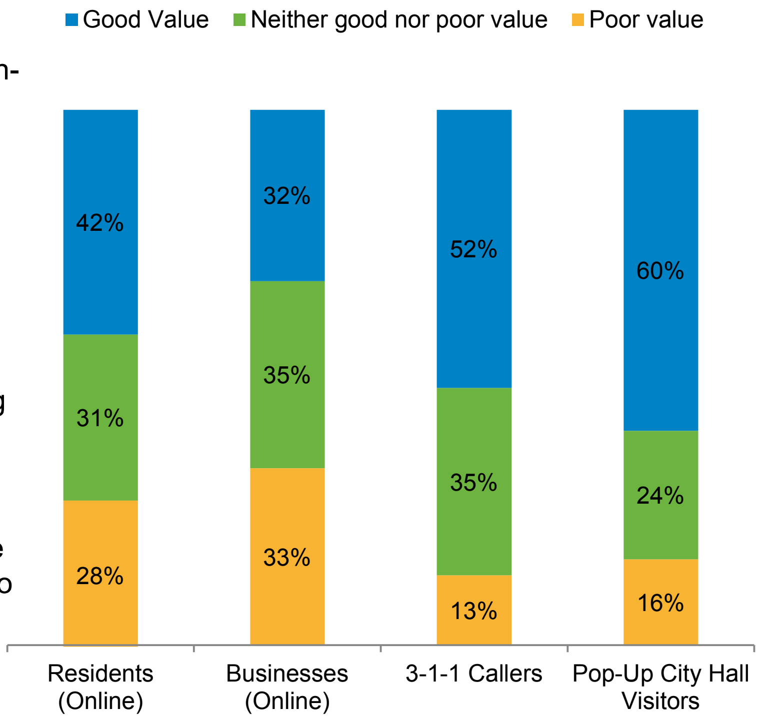
	Residents		Businesses	
	Budget 2015	Budget 2014	Budget 2015	Budget 2014
Better or stayed the same	73%	76%	66%	60%
Worse	26%	24%	34%	41%

Overview: Value for Tax Dollar

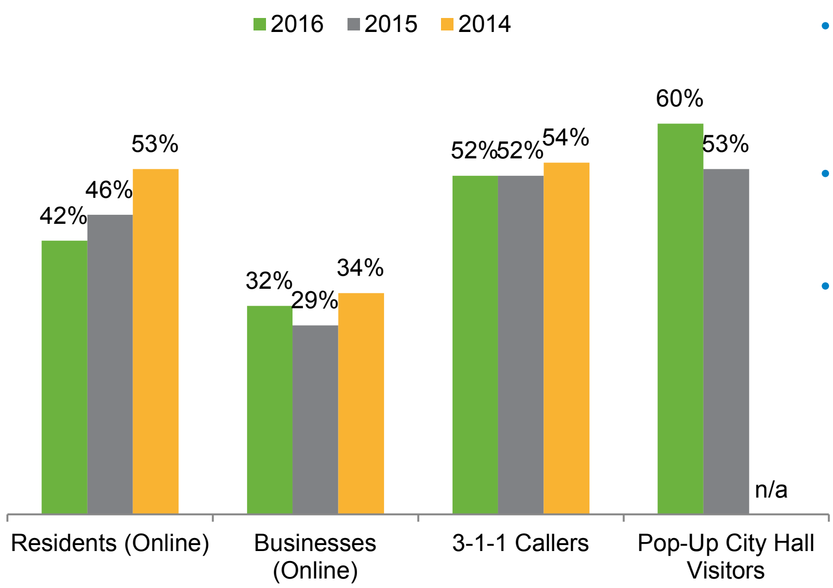
What we learned about the public's perceptions of tax value

- Across all residents (online, 3-1-1 and in-person), 51% believe they are receiving good value for their tax dollar. As with perceived changes in the quality of services, phone and in-person respondents tend to have more positive views.

- Residents are more likely than businesses to believe they are receiving good value for their tax dollar.
  - Perceptions among businesses are split, with about a third believing they receive good value for their tax dollar, and a third who think they do not.



Receive good value for tax dollar

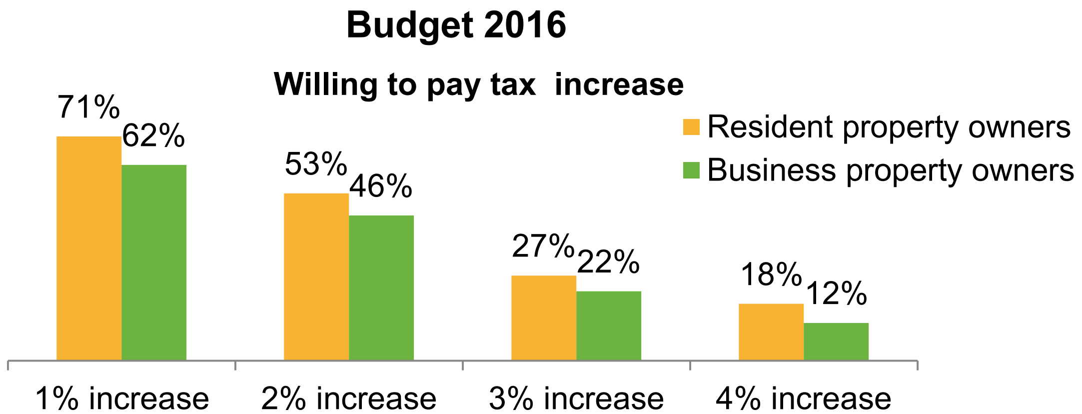


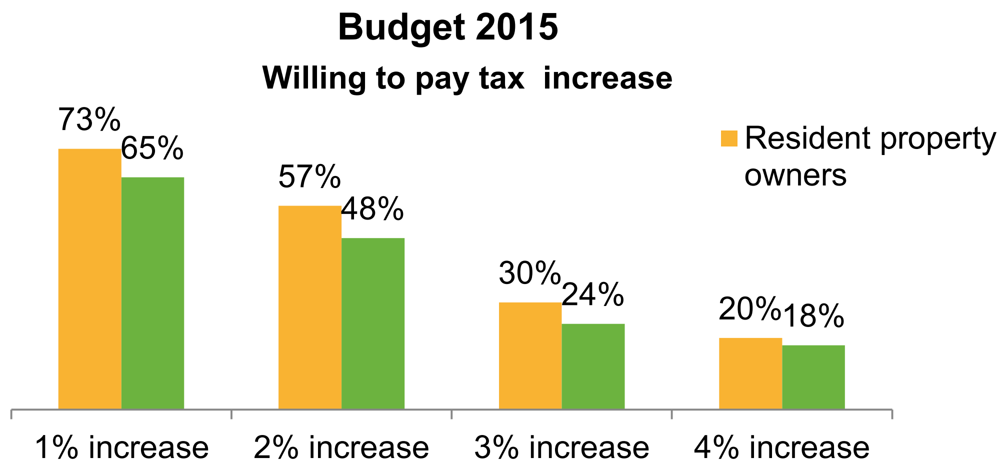
- Compared to last year, overall, residents' perceptions of the value they receive for their tax dollar remain steady.
- Businesses also show similar ratings of value over time, lower than residents.
- Over the last few years, residents responding online have become somewhat less likely to report that they receive good value for their tax dollar.

Overview Tax Tolerance - Owners

What we learned about the public's tax tolerance (online only):

- The majority of resident and business property owners are wiling to pay a 1% tax increase, on average 67% are willing to pay such an increase
- Additionally, half are also willing to pay a 2% tax increase (although resident owners are somewhat more willing in this case).
- Levels of tax tolerance remain similar to last year, with some small incremental drops in the willingness to support tax increases across taxation levels for both residents and businesses.

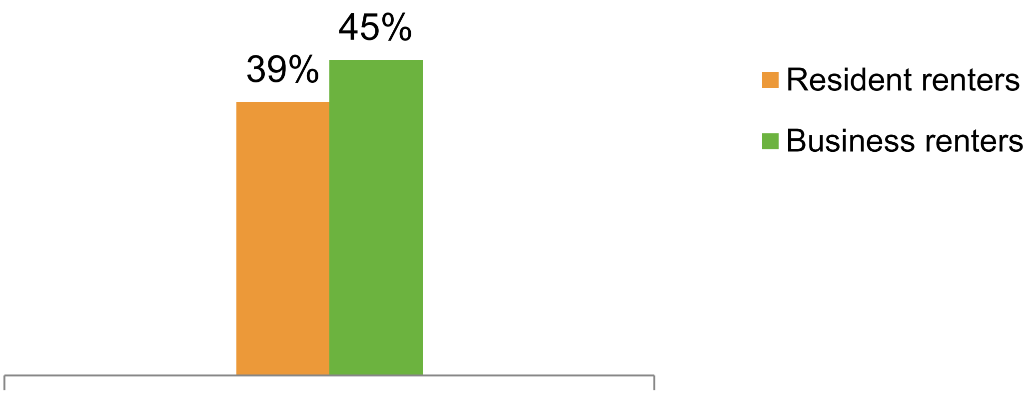




Overview: Tax Tolerance - Renters

- Less than half of residential and business property renters are willing to pay higher rent to maintain current service levels (as a result of a tax increase passed onto them by their property owner).
- They are less willing overall, than property owners to tolerate the impact of tax increases. But business renters have a relatively higher tax tolerance than residential renters.

Willing to pay increased rent



- In the past, respondents renting properties were asked about their willingness to pay a $5/month increase in rent to maintain services. This year they were asked about their willingness to pay up to a 2% increase in rent/month (if their property owner passed on a their full property tax increase to them).

- Willingness to pay increased rent was higher among resident renters for Budget 2015 than Budget 2016, possibly due to the phrasing of the question (71% vs. 39%). In the Budget 2016 phrasing of the question, the exact size of the increase cannot be known. However, this did not seem to impact business property renters, as they were somewhat more willing to pay a rent increase in Budget 2016 (45%) vs. Budget 2015 (39%).

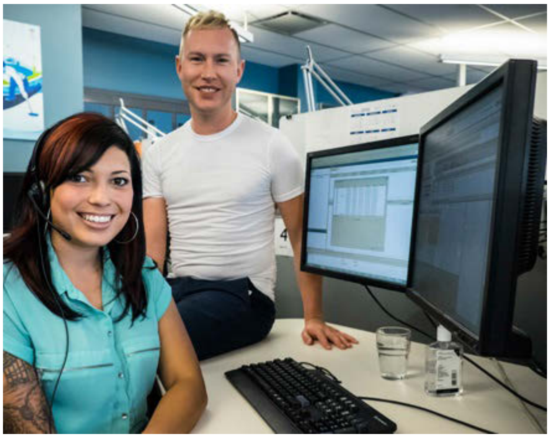
Overview: Cost Efficiencies

What we learned about the public's feedback on cost efficiencies (online only):

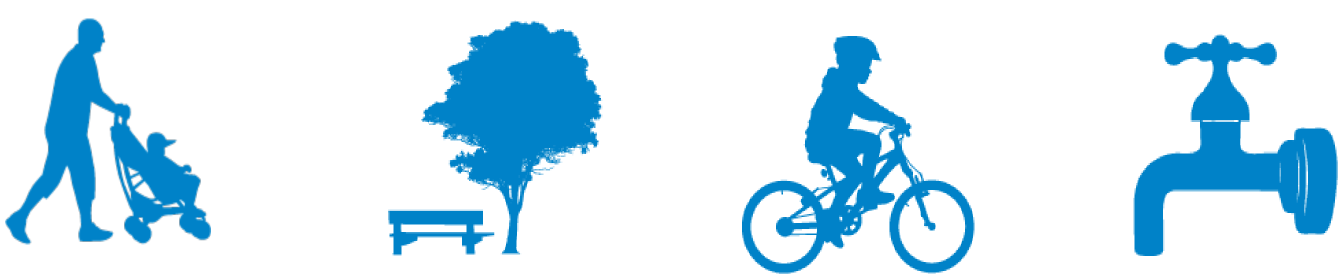
- The public is open to a variety of tools to balance the City's budget, so no one measure presented was supported by a majority of residents or businesses. Respondents were most likely to support the following measures (on average):
  - Introduce new user fees for some City services that currently have no fees (45%);
  - Increase user fees for City services that currently have fees (41%); and
  - Reduce level of staff/personnel providing services (40%)

- When probed deeper, respondents said they were personally willing to pay more in users fees for services they or their business use (on average 70% are willing among residents and businesses)

- The use of online options for services and engagement, as well as green techniques receive the most support for finding efficiencies in service provision, Respondents were most likely to support the following measures (on average) ,across residents and businesses.
  - Offer more opportunities to access services online rather than in-person (88%);
  - Use new green techniques to transform how the City manages its green spaces (77%);
  - Make more use of online engagement tools to reduce time & resources spent on in-person consultation (71%);and
  - Prioritize enforcement of by-laws to emphasize safety issues vs. nuisance issues (68%)



2: Summary of Feedback from Online Questionnaire



Online Survey Methodology

- The 2016 Budget and Service Satisfaction survey was conducted on the City's Talk Vancouver questionnaire platform from October 1 until October 25, 2015.
- The City collected feedback from residents of Vancouver and business owners/operators whose business is located in the city. We heard from,
  - **1,816 residents**
  - **461 businesses**
- To ensure the questionnaire sample is reflective of the overall Vancouver population, the City monitored demographic representation and set targets where needed.
  - For resident respondents, targets were set for the five geographic regions of the city: downtown, the Northeast (North of 16th Avenue and East of Main Street), the Northwest, the Southeast and the Southwest.
  - For businesses, the City collected input from owners/operators of businesses of varying size (by employee count) to represent small, medium and large businesses in the City.
- The tables on the following slides provide a profile of respondents across various demographic variables for residents, and business size for business owners. The corresponding proportions in the Vancouver population from Census data are also shown. Participants were encouraged to participate through the City's Talk Vancouver panel membership, through online and paper advertisements to the general public and through supplements from our research firm's local forum.

Type of Respondent	Total	Talk Vancouver panel members	COV website, ads and social media	Research firm local forum
Resident	1816	907	624	285
Business	461	201	132	128
Total	2277	1108	756	413

- Weighting was used as needed to ensure the data matched the most recent Census data for age and residential zone for residents. Business respondents were weighted based on business size - number of employees.*
  - The weights applied were minimal (final weighting efficiency was 93% for both the resident and business sample which is considered excellent).

***Please see the Appendix for the demographic profile of business owners.**

Profile of Respondents

Demographic group	Survey Sample - Residents	Vancouver population (Census data)
Gender		
Male	45%	49%
Female	50%	51%
Transgender	1%	n/a
None of the above	1%	n/a
Prefer not to say	3%	n/a
Age* (weighting applied)		
18-39 **	40%	42%
40-49	20%	19%
50-59	19%	16%
60 and over	21%	23%
Residential Zone* (weighting applied)		
Downtown	20%	22%
Northwest	23%	17%
Northeast	20%	16%
Southwest	17%	19%
Southeast	18%	26%

*** Weights were applied to achieve a representative sample among residents. Weights were minimal (final weighting efficiency was 93%); ** 15-39 in Talk Vancouver**

Profile of Respondents

Demographic group	Survey Sample - Residents
Ethnicity	
North American	**45%**
Canadian	43%
First Nations (or Aboriginal Band)	1%
American	4%
Europe	**40%**
British Isles (e.g. English, Scottish, Irish, Welsh)	25%
Eastern European (e.g. Russian, Ukrainian, Croatian, etc.)	7%
German	
French	5%
Other European (e.g. Greek, Italian, Swedish etc.)	2%
	9%
Asia	**17%**
Chinese	14%
South Asian (e.g. Punjabi, Indian, Tamil, Pakistani,	2%
Bangladeshi, etc.)	
Japanese	1%
Other Asian (e.g. . Filipino, Thai, Vietnamese etc.)	2%
Latin/South American	**1%**
Africa	**<1%**
Other regions (e.g. Middle Eastern, Oceania, Caribbean)	**2%**
Home Ownership	
Rent	39%
Own	54%
Other (e.g. live with parents, rent free but not owner)	7%

Profile of Respondents

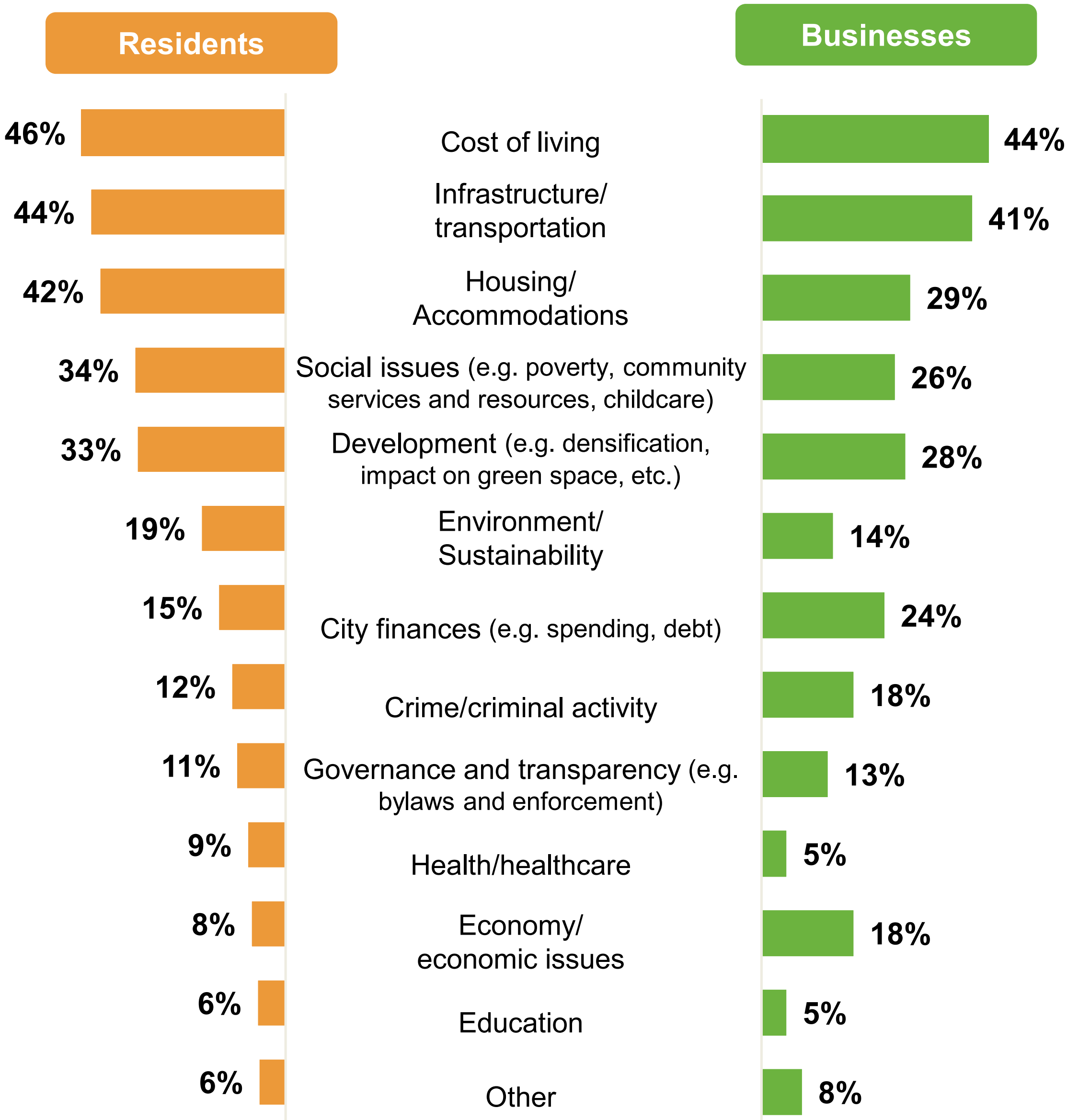
Demographic group	Survey Sample - Businesses	Vancouver Business Size* (Statistics Canada)
Business Size *(weighting applied).		
0 employees (i.e. you are self-employed with no other employees)	39%	58%
1-3 employees	28%	
4-9 employees	12%	18%
10-24 employees	10%	22%
25-99 employees	6%	
100 or more employees	5%	2%

Business Register Division, Statistics Canada, 2012.

Weights were applied to achieve a representative sample based on business size among business owners. Weights were minimal (weighting efficiency was 93%);

Most Important Local Issues

- Top concerns, while priority changes slightly, are fairly consistent across groups of respondents and over time. Cost of living, infrastructure/transportation, and housing are the key issues on the minds of Vancouver residents and business owners.



Base: Resident respondents (n=1,816) and Business respondents (n=461)

From your perspective as a resident/business owner, what are the most important local issues facing the City at the present time? (Select up to three).

Other Important Local Issues

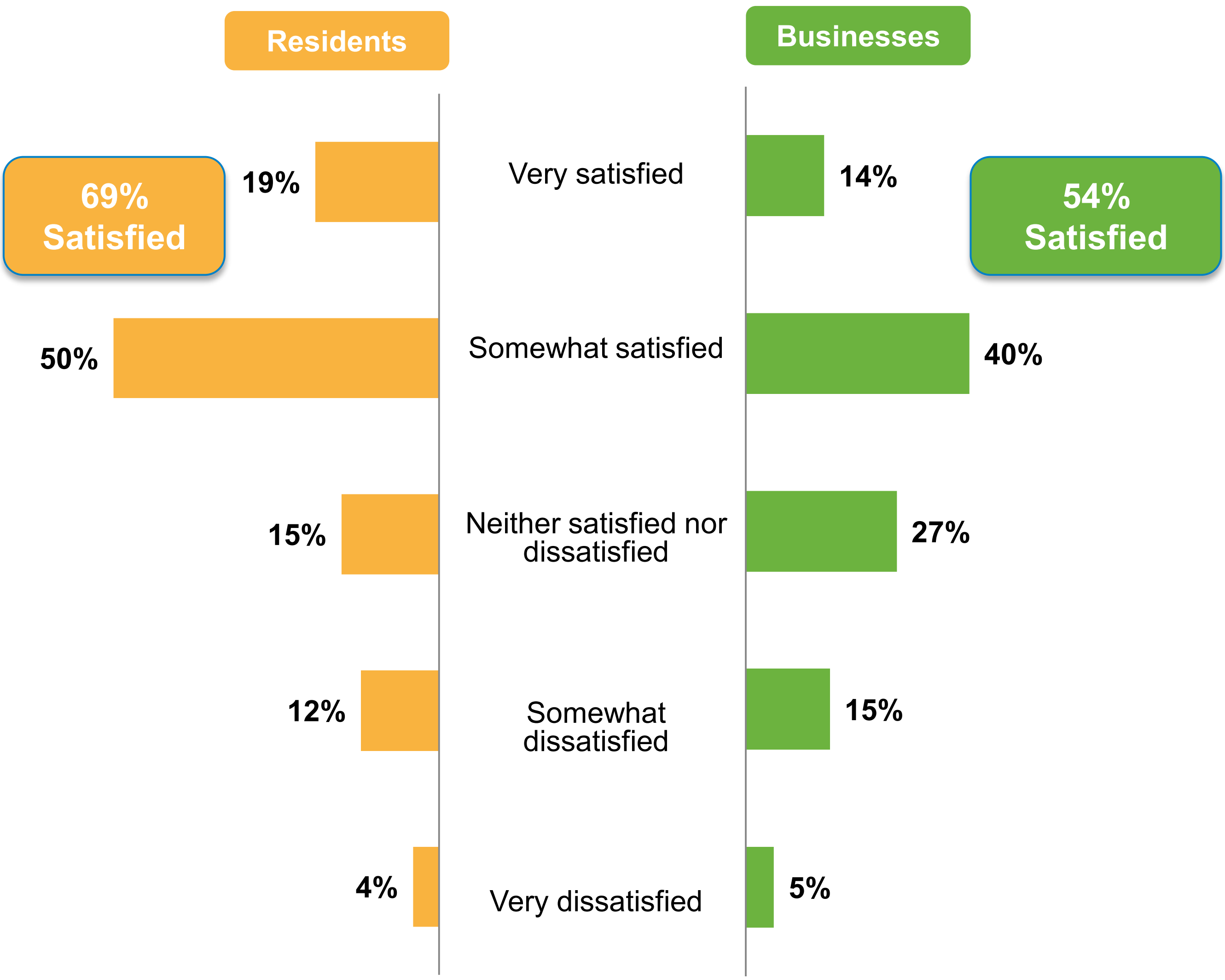
- Respondents also had the opportunity to tell us about other local issues they considered important, not present in the initial list of issues presented.

- The majority of respondents did not mention any other issues, and among those that did, many comments were further reflections on issues identified in the initial list of possible issues. However, some specific themes that emerged were:
  - Cleanliness of City streets and infrastructure (16 mentions)
  - Homelessness (11 mentions)
  - Traffic (9 mentions)
  - Foreign ownership (8 mentions)
  - Funding/support for arts and culture (8 mentions)
  - Cyclists/Bikes/Bike Lanes (7 mentions)

Base: Total respondents (n=148)

Overall Service Satisfaction

- Levels of satisfaction are high across all groups, and on average, three-quarters of residents are satisfied with City services.
- Business owners in Vancouver, show relatively lower satisfaction, with City services. Just over half report they are somewhat or very satisfied with the services their business receives.



Base: Resident respondents (n=1,816) and Business respondents (n=461)

Would you say you are generally satisfied or dissatisfied with the overall quality of services provided to residents/businesses by the City of Vancouver?

Overall Service Satisfaction Trend

- The average levels of satisfaction among residents has been stable over the last several years, with an overall increase since Budget 2014.
- Among businesses, satisfaction has also been stable , with a small increase in the percentage who say they are satisfied ("very" or "somewhat" satisfied) with City services to 54% from 50% in previous years.

	Budget 2016		Budget 2015		Budget 2014	
Response	Residents	Business	Residents	Business	Residents	Business
Very satisfied	19%	14%	21%	13%	16%	12%
Somewhat satisfied	50%	40%	50%	37%	55%	38%
Total Satisfied	**69%**	**54%**	**71%**	**50%**	**71%**	**50%**
Neither satisfied nor dissatisfied	15%	27%	10%	23%	n/a*	34%
Somewhat dissatisfied	12%	14%	13%	20%	22%	12%
Very dissatisfied	4%	5%	5%	7%	7%	4%
Total Dissatisfied	**16%**	**19%**	**18%**	**27%**	**29%**	**16%**

***Scale did not include a neutral option in Budget 2014**

Perceived Changes in Quality of Services

- Three-quarters of residents and businesses on average, believe the quality of services provided by the City have either stayed the same or gotten bettter.

Base: Resident respondents (n=1,816) and Business respondents (n=461)

And, would you say that the overall quality of services provided by the City of Vancouver residents/businesses has gotten better or worse over the past 2-3 years?

Perceived Changes in Quality of Services Trend

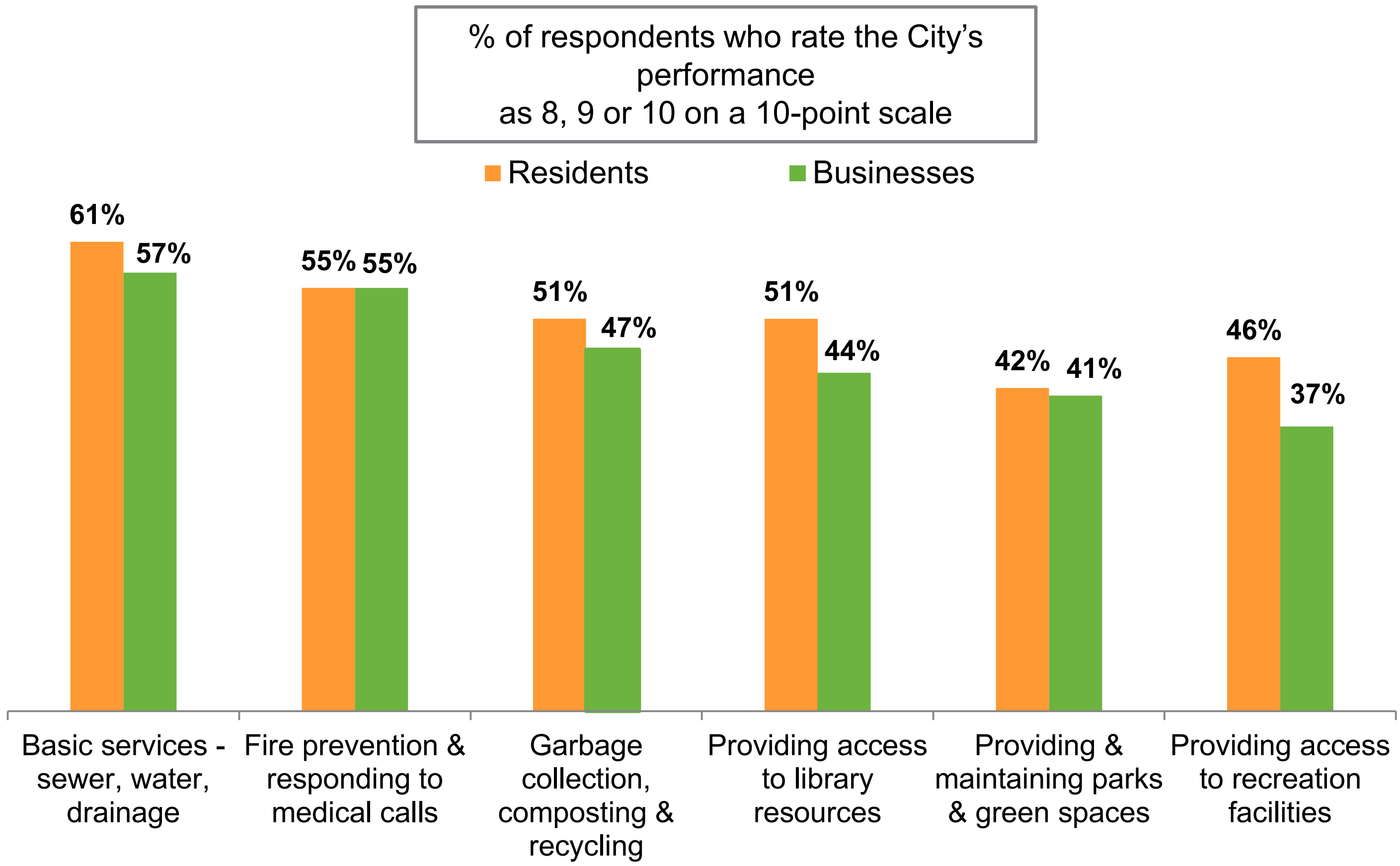
- Over the last few years, the majority of both residents and businesses have consistently believed that the quality of services provided by the City have either stayed the same, or gotten better.
- Businesses in particular have shown large improvements in their perceptions of the stability and enhancement of City services since Budget 2014.

	Budget 2016		Budget 2015		Budget 2014	
Response	Resident Sample	Business Sample	Resident Sample	Business Sample	Resident Sample	Business Sample
Much better	3%	4%	5%	3%	5%	3%
Somewhat better	29%	18%	30%	18%	33%	19%
Stayed the same	44%	52%	38%	45%	38%	38%
Total Much better or stayed the same	**76%**	**74%**	**73%**	**66%**	**76%**	**60%**
Somewhat worse	18%	20%	19%	24%	15%	22%
Much worse	6%	6%	7%	10%	9%	18%
Total Worse	**24%**	**26%**	**26%**	**34%**	**24%**	**40%**

Base: Resident respondents (n=1,816) and Business respondents (n=461)

Services City Delivers Best

- The City receives strongest satisfaction ratings for its provision of basic utility services (sewer, water, drainage), fire prevention and responding to medical calls and garbage collection, composting and recycling.
- Most of the top performing areas shown below were among the top rated service areas in the previous year.
- The following pages show the rated importance and satisfaction rating for all City services.



Base: Resident respondents (n=1,816) and Business respondents (n=461)

Please rate the job you think the City of Vancouver is doing in providing each type of service.

Service Importance & Satisfaction: Public Safety

Question - Importance	Response	Resident Sample	Business Sample
Fire prevention & responding to medical calls	Very important	86%	83%
	Somewhat important	12%	15%
	Total important	**98%**	**98%**
Reducing the crime rate and maintaining public safety	Very important	66%	63%
	Somewhat important	29%	31%
	Total important	**95%**	**94%**
Providing emergency preparedness information and support	Very important	45%	43%
	Somewhat important	46%	44%
	Total important	**91%**	**87%**

Base: Resident respondents (n=1,315) and Business respondents (n=397)

How important do you believe the following services/programs are to the larger community?

Service Importance & Satisfaction: Public Safety

Question – Satisfaction on scale of 0 to 10	Response	Resident Sample	Business Sample
Fire prevention & responding to medical calls	Rating of 8, 9 or 10	55%	55%
	Average rating	9.3	9.2
	Don't know responses	15%	12%
Reducing the crime rate and maintaining public safety	Rating of 8, 9 or 10	33%	30%
	Average rating	7.8	7.4
	Don't know responses	7%	6%
Providing emergency preparedness information and support	Rating of 8, 9 or 10	20%	22%
	Average rating	7.7	7.6
	Don't know responses	17%	16%

Base: Resident respondents (n=1,816) and Business respondents (n=461)

Below is a list of specific services that the City of Vancouver provides its residents/businesses. Please rate the job you think the City of Vancouver is doing in providing each type of service.

Service Importance & Satisfaction: Community Programs

Question - Importance	Response	Resident Sample	Business Sample
Providing access to recreation facilities (e.g. community centres) and delivering recreational programming	Very important	56%	53%
	Somewhat important	37%	41%
	Total important	**93%**	**94%**
Providing access to library resources (e.g. collections, computers), programs, information services and space	Very important	58%	51%
	Somewhat important	33%	37%
	Total important	**91%**	**87%**
Supporting community service organizations (e.g. shelters, childcare, social grants)	Very important	56%	51%
	Somewhat important	33%	36%
	Total important	**89%**	**87%**
Providing support services to the DTES	Very important	40%	36%
	Somewhat important	40%	40%
	Total important	**80%**	**76%**
Enabling affordable housing	Very important	61%	49%
	Somewhat important	26%	32%
	Total important	**87%**	**82%**

Base: Resident respondents (n=1,315) and Business respondents (n=397)

How important do you believe the following services/programs are to the larger community? Below is a list of specific services that the City of Vancouver provides its residents/businesses. Please rate the job you think the City of Vancouver is doing in providing each type of service.

Service Importance & Satisfaction: Community Programs

Question - Importance	Response	Resident Sample	Business Sample
Planning for and managing residential, commercial and industrial development	Very important	51%	57%
	Somewhat important	41%	38%
	Total important	**92%**	**95%**
Environmental protection, support for green projects (e.g. green grants, building retrofits programs, zero waste)	Very important	47%	41%
	Somewhat important	38%	35%
	Total important	**85%**	**76%**
Providing and maintaining parks and green spaces	Very important	65%	58%
	Somewhat important	31%	36%
	Total important	**96%**	**94%**

Base: Resident respondents (n=1,816) and Business respondents (n=461)
How important do you believe the following services/programs are to the larger community?

Service Importance & Satisfaction: Community Programs

Question — Satisfaction on scale of 0 to 10	Response	Resident Sample	Business Sample
Providing access to recreation facilities (e.g. community centres) and delivering recreational programming	Rating of 8, 9 or 10	46%	37%
	Average rating	8.2	7.9
	Don't know responses	4%	4%
Providing access to library resources (e.g. collections, computers), programs, information services and space	Rating of 8, 9 or 10	51%	44%
	Average rating	8.6	8.2
	Don't know responses	5%	6%
Supporting community service organizations (e.g. shelters, childcare, social grants)	Rating of 8, 9 or 10	15%	13%
	Average rating	7.7	7.4
	Don't know responses	19%	8%
Providing support services to the DTES	Rating of 8, 9 or 10	16%	17%
	Average rating	7.7	7.4
	Don't know responses	22%	15%

Base: Resident respondents (n=1,816) and Business respondents (n=461)

Below is a list of specific services that the City of Vancouver provides its residents/businesses. Please rate the job you think the City of Vancouver is doing in providing each type of service.

Service Importance & Satisfaction: Community Programs

Question - – Satisfaction on scale of 10	Response	Resident Sample	Business Sample
Enabling affordable housing	Rating of 8, 9 or 10	6%	7%
	Average rating	4.8	5.0
	Don't know responses	6%	7%
Planning for and managing residential, commercial and industrial development	Rating of 8, 9 or 10	10%	10%
	Average rating	6.4	5.8
	Don't know responses	12%	7%
Environmental protection, support for green projects (e.g. green grants, building retrofits programs, zero waste)	Rating of 8, 9 or 10	34%	30%
	Average rating	7.8	7.8
	Don't know responses	6%	9%
Providing and maintaining parks and green spaces	Rating of 8, 9 or 10	45%	41%
	Average rating	7.9	7.7
	Don't know responses	1%	1%

Base: Resident respondents (n=1,816) and Business respondents (n=461)

Below is a list of specific services that the City of Vancouver provides its residents/businesses. Please rate the job you think the City of Vancouver is doing in providing each type of service.

Service Importance & Satisfaction: Utilities & Engineering Public Works

Question - Importance	Response	Resident Sample	Business Sample
Providing basic services – sewer, water, drainage	Very important	92%	93%
	Somewhat important	8%	9%
	Total important	**100%**	**00%**
Providing garbage collection, composting, and recycling services	Very important	84%	78%
	Somewhat important	15%	18%
	Total important	**99%**	**96%**
Providing transportation infrastructure for walking, bikes, transit, and vehicles	Very important	77%	71%
	Somewhat important	19%	23%
	Total important	**96%**	**94%**
Maintaining and enhancing street infrastructure (e.g. pavement condition, cleanliness, lighting, roundabout gardens)	Very important	59%	62%
	Somewhat important	36%	34%
	Total important	**95%**	**96%**
Managing curbside parking spaces	Very important	26%	26%
	Somewhat important	45%	42%
	Total important	**71%**	**68%**

Base: Resident respondents (n=1,816) and Business respondents (n=461)

How important do you believe the following services/programs are to the larger community?

Service Importance & Satisfaction: Utilities & Engineering Public Works

Question - – Satisfaction on scale of 10	Response	Resident Sample	Business Sample
Providing basic services – sewer, water, drainage	Rating of 8, 9 or 10	61%	57%
	Average rating	8.8	8.6
	Don’t know responses	2%	3%
Providing garbage collection, composting, and recycling services	Rating of 8, 9 or 10	51%	47%
	Average rating	8.2	8.0
	Don’t know responses	2%	2%
Providing transportation infrastructure for walking, bikes, transit, and vehicles	Rating of 8, 9 or 10	34%	29%
	Average rating	7.3	6.9
	Don’t know responses	1%	2%
Maintaining and enhancing street infrastructure (e.g. pavement condition, cleanliness, lighting, roundabout gardens)	Rating of 8, 9 or 10	29%	25%
	Average rating	7.2	6.9
	Don’t know responses	1%	2%
Managing curbside parking spaces	Rating of 8, 9 or 10	20%	21%
	Average rating	7.7	7.4
	Don’t know responses	19%	16%

Base: Resident respondents (n=1816) and Business respondents (n=461)

Below is a list of specific services that the City of Vancouver provides its residents/ businesses. Please rate the job you think the City of Vancouver is doing in providing each type of service.

Service Importance & Satisfaction: General Government & Corporate

Question - Importance	Response	Resident Sample	Business Sample
Managing tax dollars	Very important	81%	81%
	Somewhat important	17%	16%
	Total important	**98%**	**97%**
Promoting economic development	Very important	43%	48%
	Somewhat important	46%	39%
	Total important	**89%**	**87%**
Permits, inspections and enforcement (e.g. building, renovation, business license, parking, dogs, etc.)	Very important	38%	40%
	Somewhat important	50%	42%
	Total important	**88%**	**82%**
Maintaining City infrastructure – administration buildings, vehicles, equipment and IT	Very important	38%	38%
	Somewhat important	53%	52%
	Total important	**91%**	**90%**
Providing information, engagement channels and customer service (website, in person and 3-1-1)	Very important	41%	35%
	Somewhat important	46%	49%
	Total important	**87%**	**84%**

Base: Resident respondents (n=1,816) and Business respondents (n=461)
How important do you believe the following services/programs are to the larger community?

Service Importance & Satisfaction: General Government & Corporate

Question - – Satisfaction on scale of 10	Response	Resident Sample	Business Sample
Managing tax dollars	Rating of 8, 9 or 10	14%	13%
	Average rating	7.0	6.2
	Don't know responses	15%	10%
Promoting economic development	Rating of 8, 9 or 10	15%	15%
	Average rating	7.5	7.0
	Don't know responses	17%	14%
Permits, inspections and enforcement (e.g. building, renovation, business license, parking, dogs, etc.)	Rating of 8, 9 or 10	12%	15%
	Average rating	7.2	6.5
	Don't know responses	21%	10%
Maintaining City infrastructure – administration buildings, vehicles, equipment and IT	Rating of 8, 9 or 10	16%	21%
	Average rating	8.4	8.1
	Don't know responses	27%	21%
Providing information, engagement channels and customer service (website, in person and 3-1-1)	Rating of 8, 9 or 10	36%	35%
	Average rating	8.1	8.0
	Don't know responses	10%	9%

Base: Resident respondents (n=1,816) and Business respondents (n=461)

Below is a list of specific services that the City of Vancouver provides its residents/businesses. Please rate the job you think the City of Vancouver is doing in providing each type of service.

Other Important Service Priorities

When respondents were asked about other service priorities they consider to be important that were not asked about, most respondents did not provide a response. Among those who did provide a response, common issues that were mentioned include:

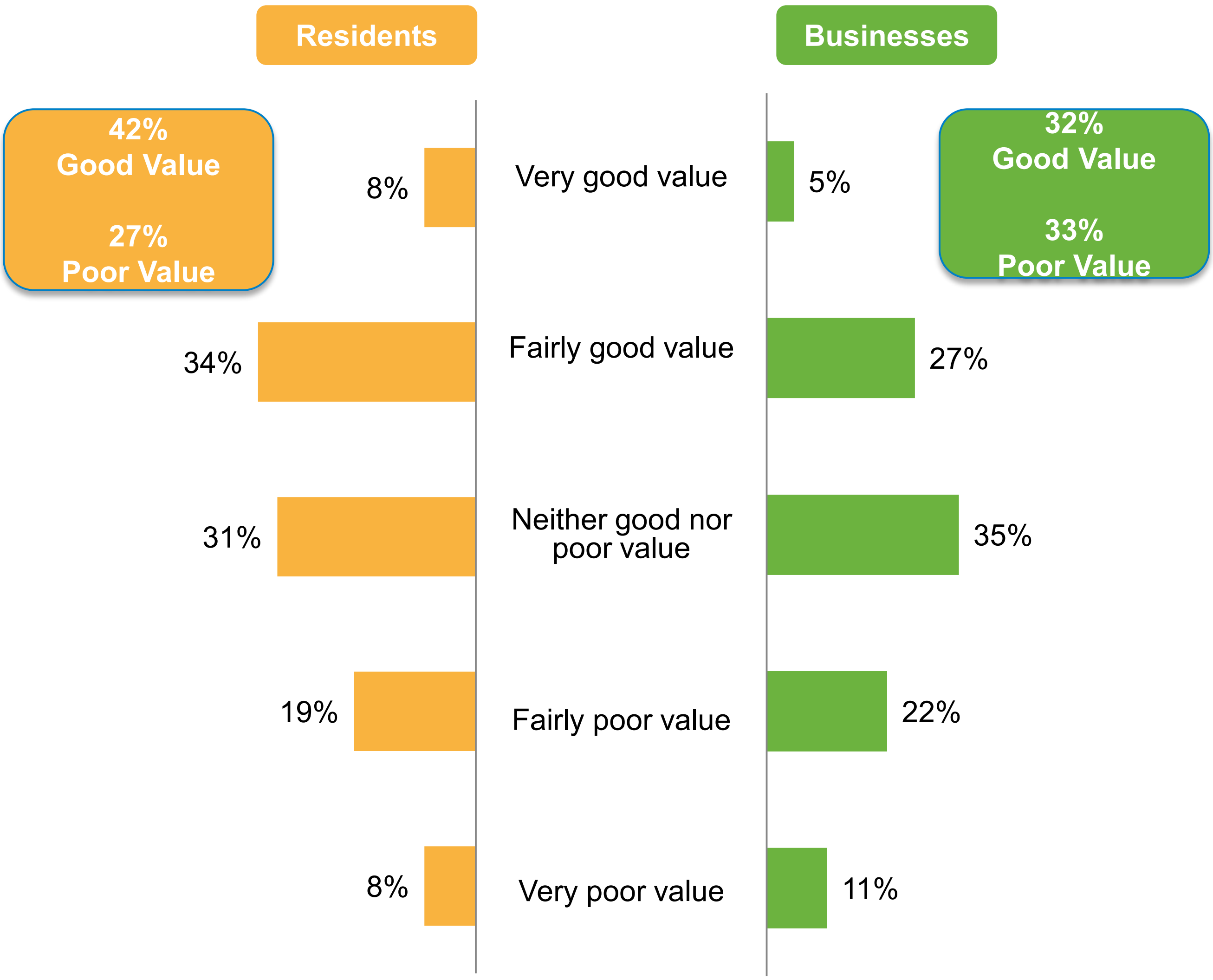
- Development, permits and planning (90 mentions);
- Transportation (75 mentions);
- Local governance, transparency, spending (65 mentions);
- Bike Lanes (53 mentions);
- Affordable Housing (53 mentions);
- Engagement/community connections (49 mentions)
- Environment (48 mentions);
- Garbage collection / recycling / composting (43 mentions);
- Bylaw enforcement (42 mentions); and
- Jobs/economy (38 mentions)

Base (n=1026)

Are there any other priorities that you think are important that were not included in the previous list?

Overall Value for Tax Dollar

- Residents are more likely than businesses to believe they are receiving good value for their tax dollar, with 4 out of 10 believing they get good value.
- Perceptions among businesses are split, with about a third believing they receive good value for their tax dollar, and a third who think they do not.



Base: Resident respondents (n=1,816) and Business respondents (n=461)

Thinking about all of the programs and services you/ your business receives from the City of Vancouver, and the level of property taxes or rent you/ your business pays, would you say that you/ your business gets overall good value or poor value for your/ its tax dollars?

Overall Value for Tax Dollar Trend

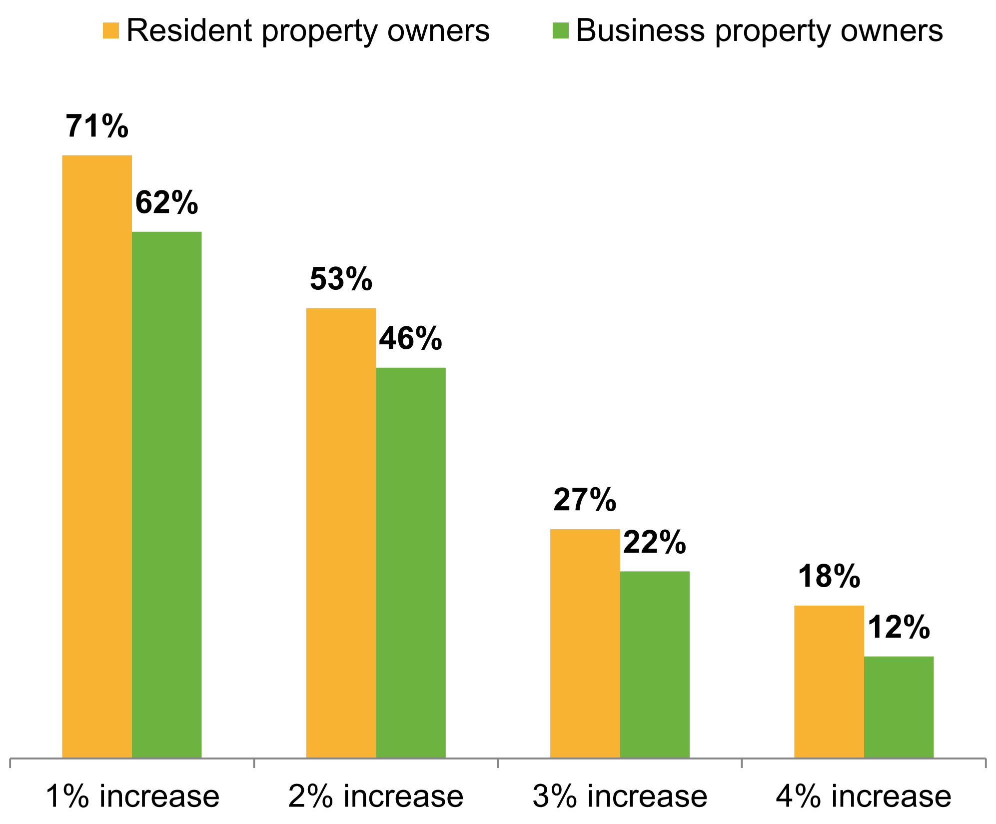
- Compared to last year, overall, residents' perceptions of the value they receive for their tax dollar remain steady.
- Businesses also show similar ratings of value over time, lower than residents.
- Over the last few years, residents responding online have become somewhat less likely to report that they receive good value for their tax dollar.

	Budget 2016		Budget 2015		Budget 2014	
Response	Resident Sample	Business Sample	Resident Sample	Business Sample	Residents Sample	Business Sample
Very good value	8%	5%	10%	6%	8%	3%
Fairly good value	34%	27%	36%	23%	45%	31%
Total Good Value	**42%**	**32%**	**46%**	**29%**	**53%**	**34%**
Neither good nor poor value	31%	35%	24%	35%	n/a	n/a
Fairly poor value	19%	22%	21%	23%	31%	37%
Very poor value	8%	11%	9%	14%	10%	20%
Total Poor value	**28%**	**33%**	**30%**	**37%**	**41%**	**57%**
Don't know	**n/a**	**n/a**	**n/a**	**n/a**	**6%**	**9%**

Base: Resident respondents (n=1,816) and Business respondents (n=461)

Willingness to Pay Increased Taxes

- The majority of resident and business property owners are wiling to pay a 1% tax increase, on average 67% are willing to pay such an increase
- Additionally, half are also willing to pay a 2% tax increase (although resident owners are somewhat more willing in this case).



Base: Resident respondents who own their home (n=655) ; Business respondents who own their business property (n=152)

Would you be willing or not willing to pay an increase in your property taxes/business property taxes to keep services at current levels?

Willingness to Pay Increased Taxes Trend (Among Property Owners)

- Over the last several years there have been fluctuations in the willingness of residents and businesses property owners to pay increased taxes. But at the lower taxation increase levels (1-2%) more than half overall have been willing to accept such increases.
- In addition, residents have consistently shown a greater tax tolerance than businesses at all taxation increase levels.

	Budget 2016		Budget 2015		Budget 2014	
Rate increase	Resident Sample	Business Sample	Resident Sample	Business Sample	Resident Sample	Business Sample
1%	71%	62%	73%	65%	67%	65%
2%	53%	46%	57%	48%	54%	50%
3%	27%	22%	30%	24%	32%	22%
4%	22%	12%	20%	18%	16%	15%

Willingness to Pay Increased Taxes (Among Renters)

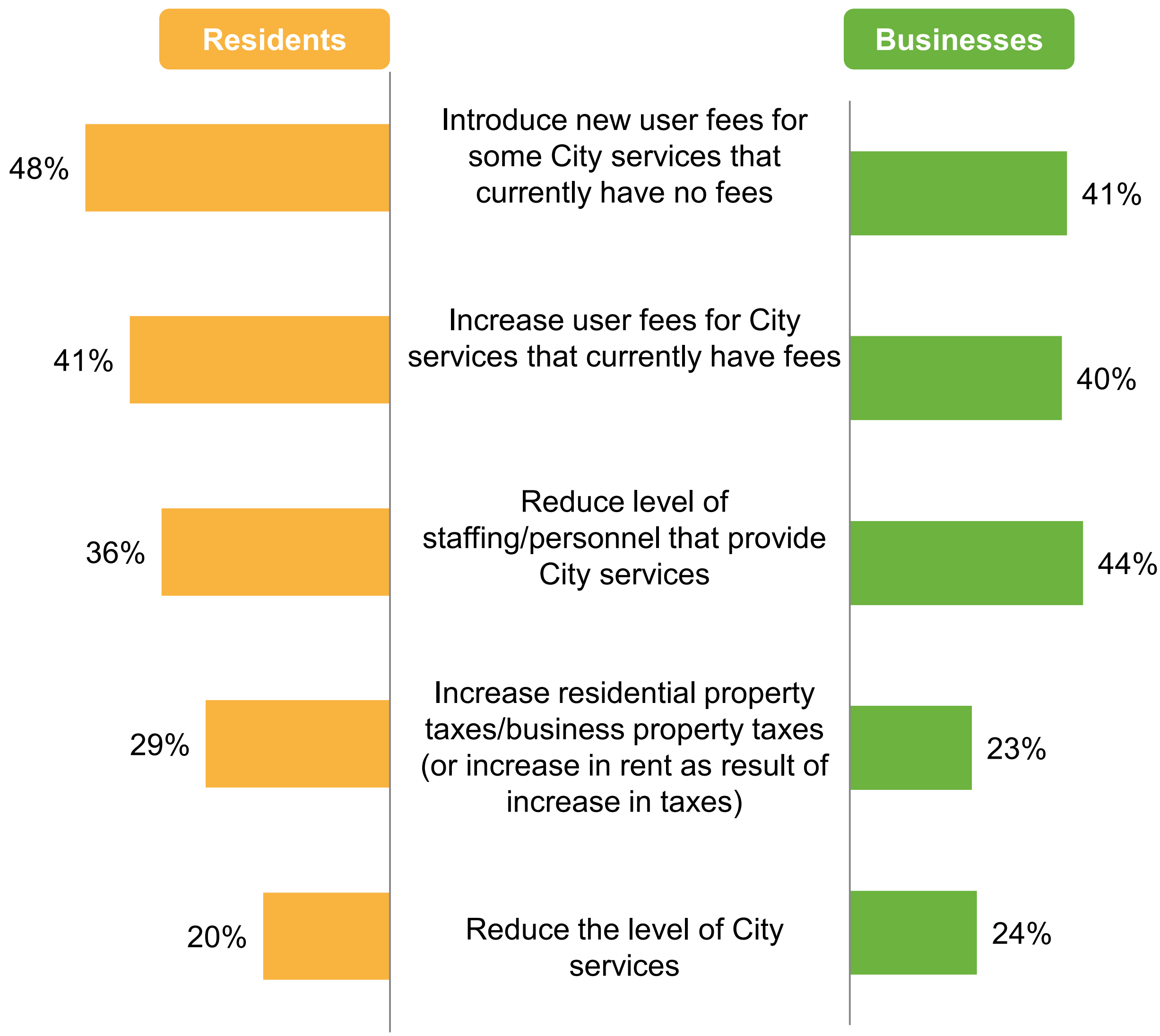
- Less than half of residential and business property renters are willing to pay higher rent to maintain current service levels (as a result of a tax increase passed onto them by their property owner).
- They are less willing overall, than property owners to tolerate the impact of tax increases. But business renters have a relatively higher tax tolerance than residential renters.

Base: Resident respondents who rent their home (n=716); Business respondents who rent their business property (n=260)

Thinking about this, would you be willing to pay more per month in rent, in order to maintain the current level of services provided by the City of Vancouver?"

Support for City Measures to Balance Budget

- The public is open to a variety of tools to balance the City's budget, so no one measure presented was supported by a majority of residents or businesses. Respondents were most likely to support measures related to increasing user fees or decreasing personnel (but not level of service) for the provision of City services.

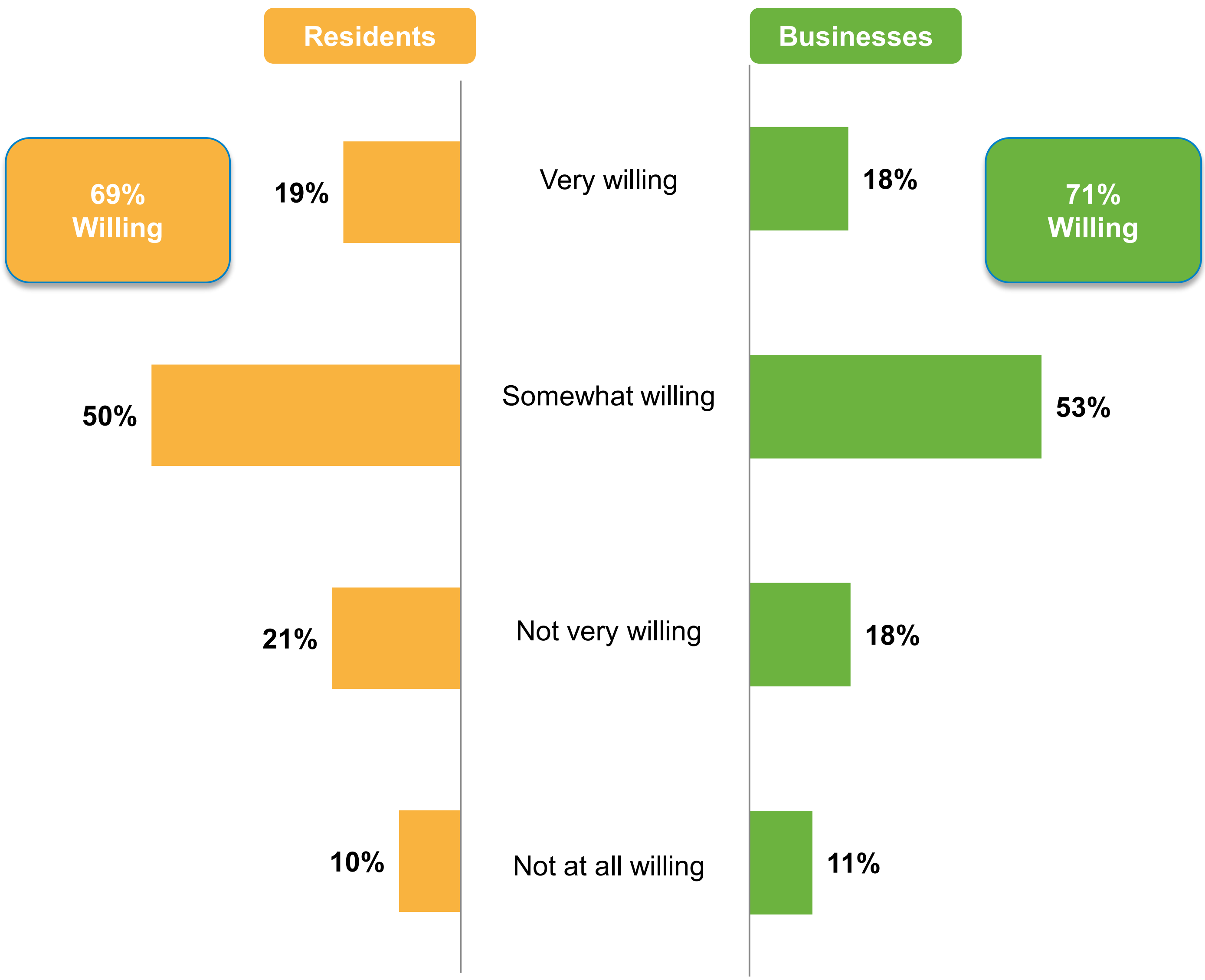


Base: Resident respondents (n=1,816) and Business respondents (n=461)

Now, to balance the 2016 budget as required by law, the City of Vancouver has a number of options to consider. Which of the following options would you prefer the City use to balance its budget?

Support for User Fees to Increase Efficiency

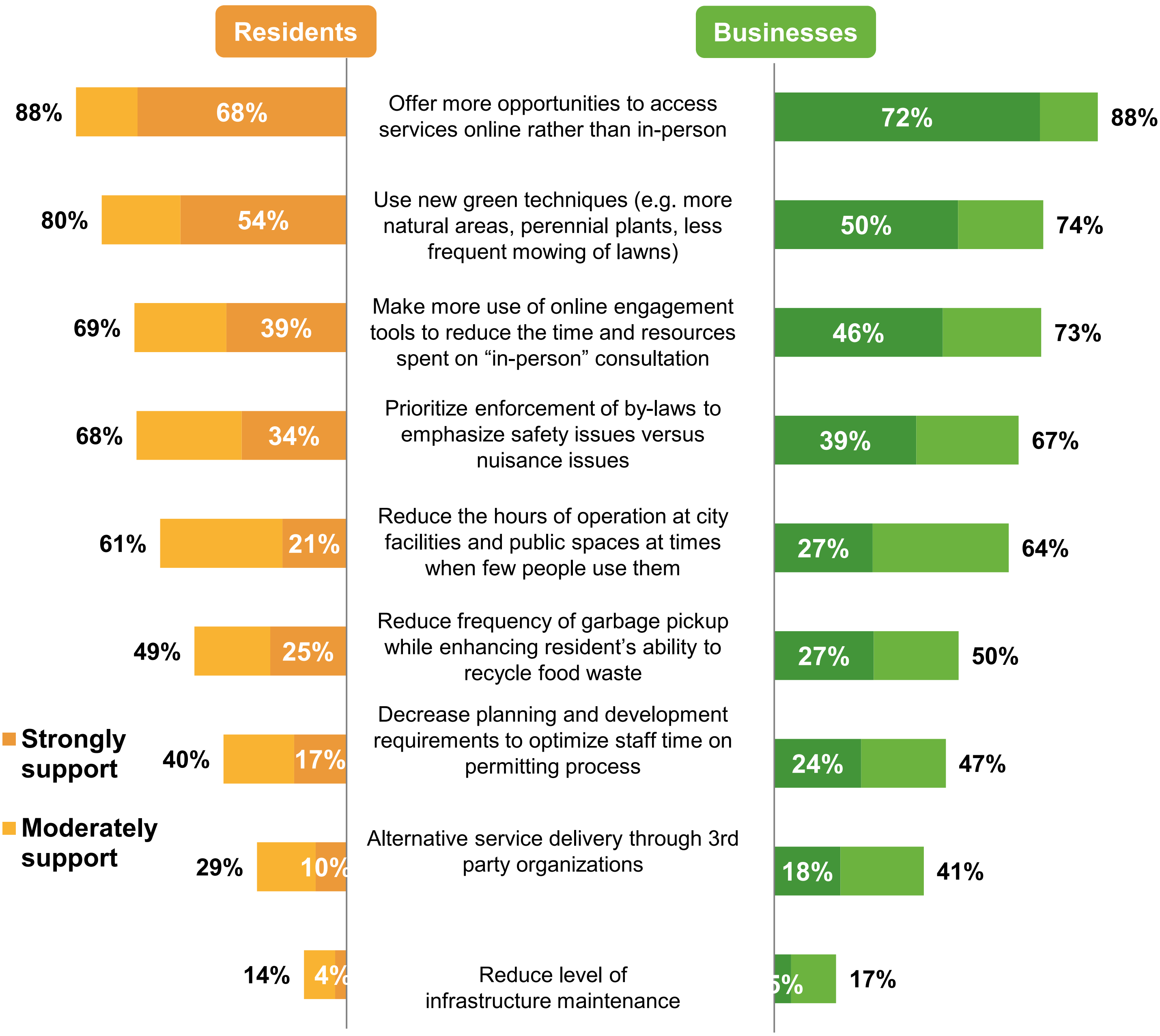
- New for Budget 2016, online respondents were asked specifically about their support for increased user fees for services that they or their business use
- The proportion willing to pay more in user fees is high, at 70% of respondents on average among residents and businesses.



Base: Resident respondents (n=1,816) and Business respondents (n=461)
…Now think about the City services that you or your business use. Would you be willing to pay more in user fees for the services you use in order to maintain or improve them?

Support for Efficiency Measures for Services

- The use of online options for services and engagement, as well as green techniques receive the most support for finding efficiencies in service provision,

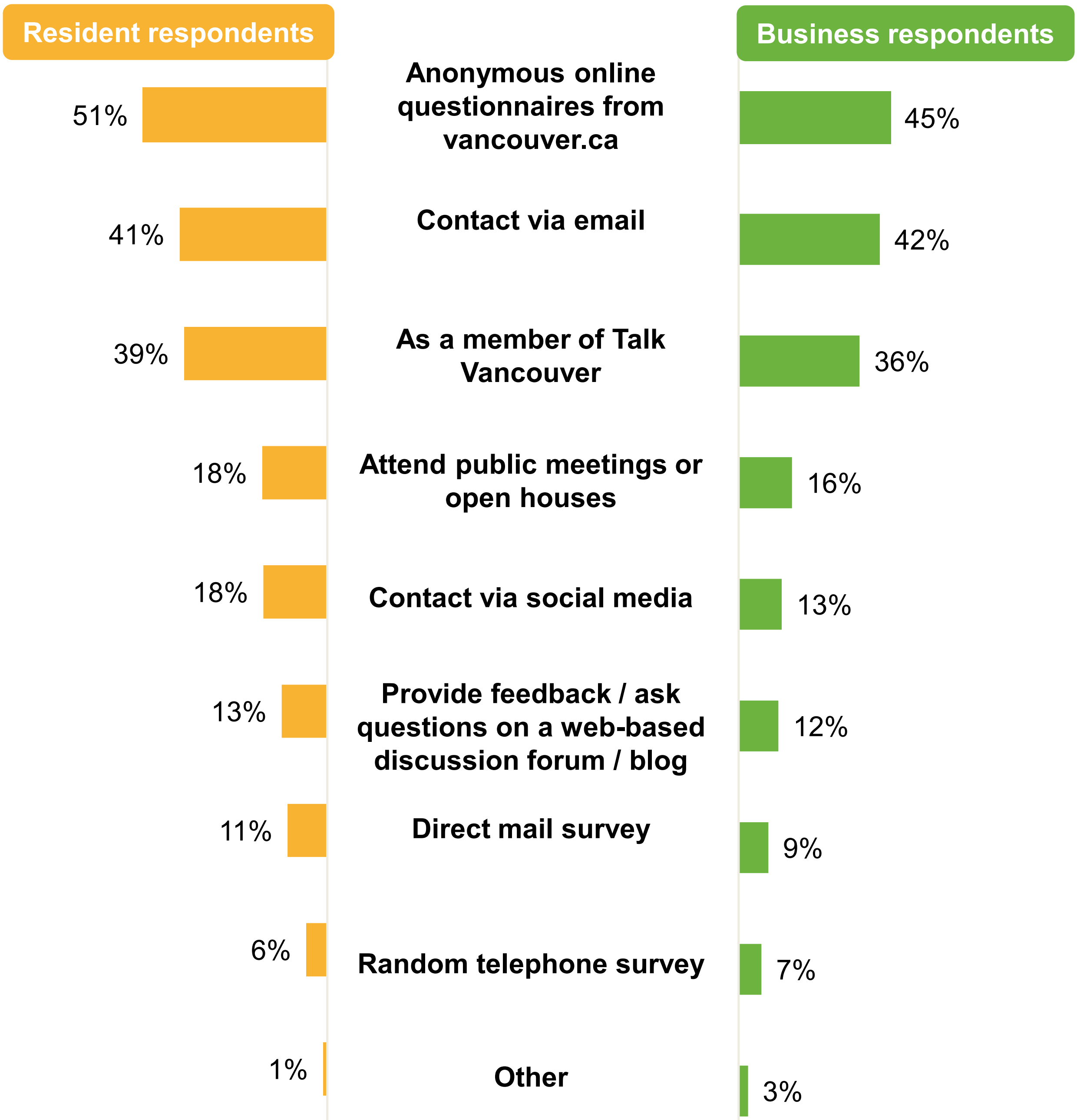


Base: Resident respondents (n=1,816) and Business respondents (n=461)

There are a number of initiatives which are common across other cities trying to find efficiencies in providing services to their residents/businesses. Would you support or oppose the City of Vancouver doing each of the initiatives below?

Preferred Method of Contact

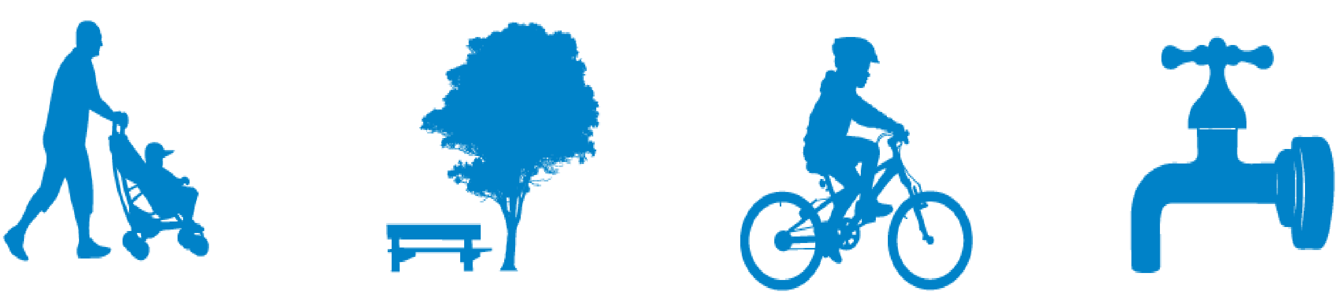
- Respondents prefer electronic means of contact with the City, such as online questionnaires, email and as a member of Talk Vancouver, the City's online public engagement panel.



Base: Resident respondents (n=1,816) and Business respondents (n=461)

…We always like to check in on how you would prefer to interact with us. From the list below, please tell us which channels you are most likely to participate in.

3: Summary of Feedback from 3-1-1 and In-person Outreach



Intercept Summary: Methodology

- To increase the opportunities for citizens to provide their input on the 2016 Budget and Service Satisfaction survey, the City used two additional channels to reach out to the public on three key questions from the questionnaire:

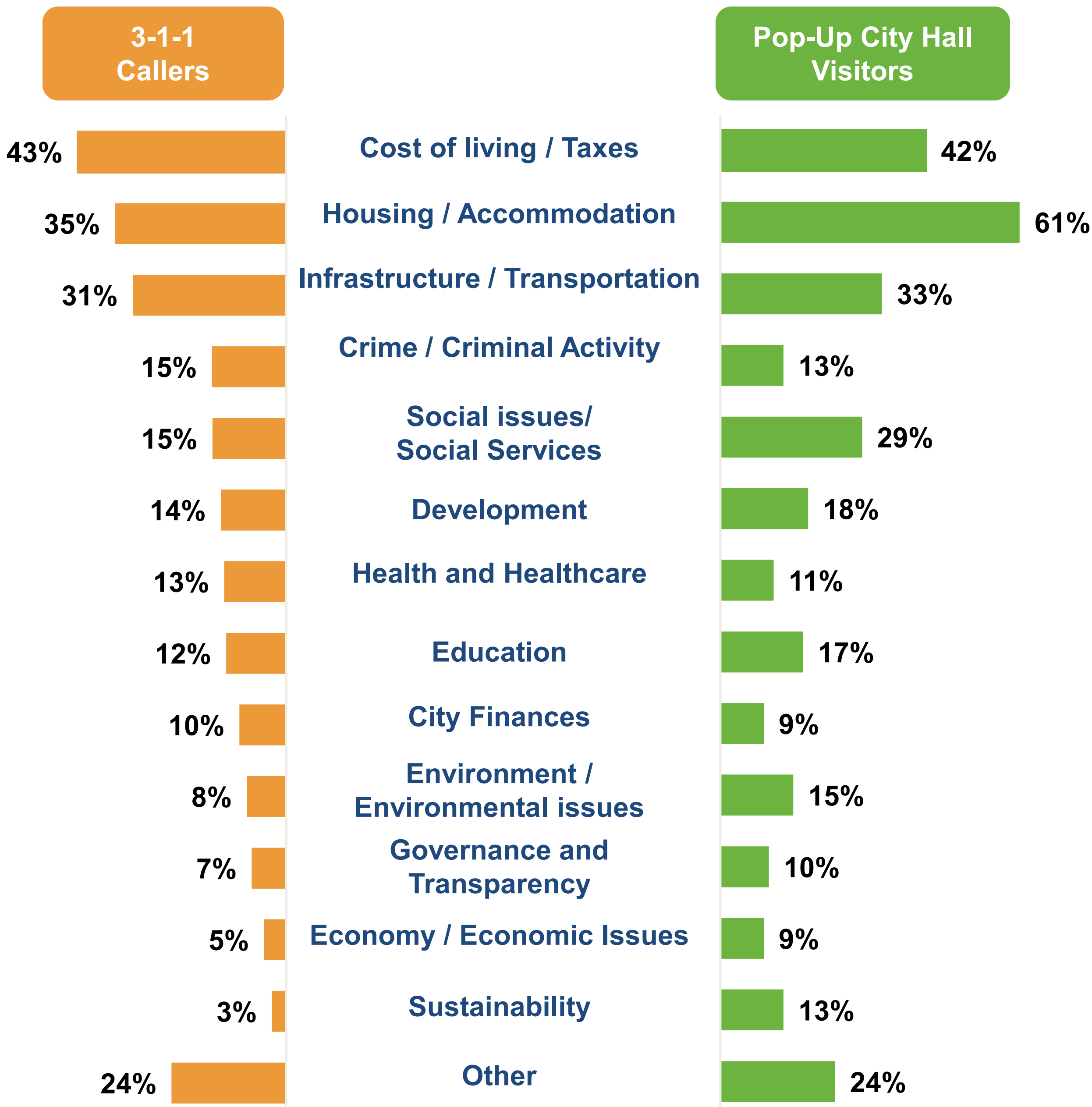
    - **3-1-1:** In October, the City used its 3-1-1 telephone service to ask random callers who identified themselves as residents if they were willing to take the three-question survey.
    - **In-person outreach:** Through its Pop Up City Hall initiative, the City visited three different community centres, and one private space across the City in October. Visitors to these locations were asked the short survey by Finance staff using iPads on site. The Finance team also joined the City's annual Doors Open Vancouver event to reach residents in person.

- The short questionnaire used for these two channels was asked of random participants and did not include any demographic questions, therefore, the resulting data cannot be considered representative of the larger population. Results are meant to act as a supplement to the longer, representative online survey.

Consultation activity	Participants
Public events • Doors Open, City Hall, Oct 2,3 • Pop-Up: Renfrew Community Centre, Oct 15 • Pop-Up: Britannia Community Centre, Oct 16 • Pop-Up: Kerrisdale Community Centre, Oct 22 • Pop-up: lupii cafe, Champlain Cres., Oct. 23	**78** survey respondents, Over 350 interactions
• Random 3-1-1 caller surveys	**877** residents

Intercept Summary: Important

- As with online respondents, 3-1-1 callers and Pop-up City Hall visitors see the cost of living, housing, and infrastructure and transportation as top issues.



Base: 3-1-1 callers (877) and In-person (through Pop Up City Hall) respondents (78)

From your perspective as a resident what are the most important local issues facing the City at the present time? (Select up to three).

Intercept Summary: Important City Issues Trend

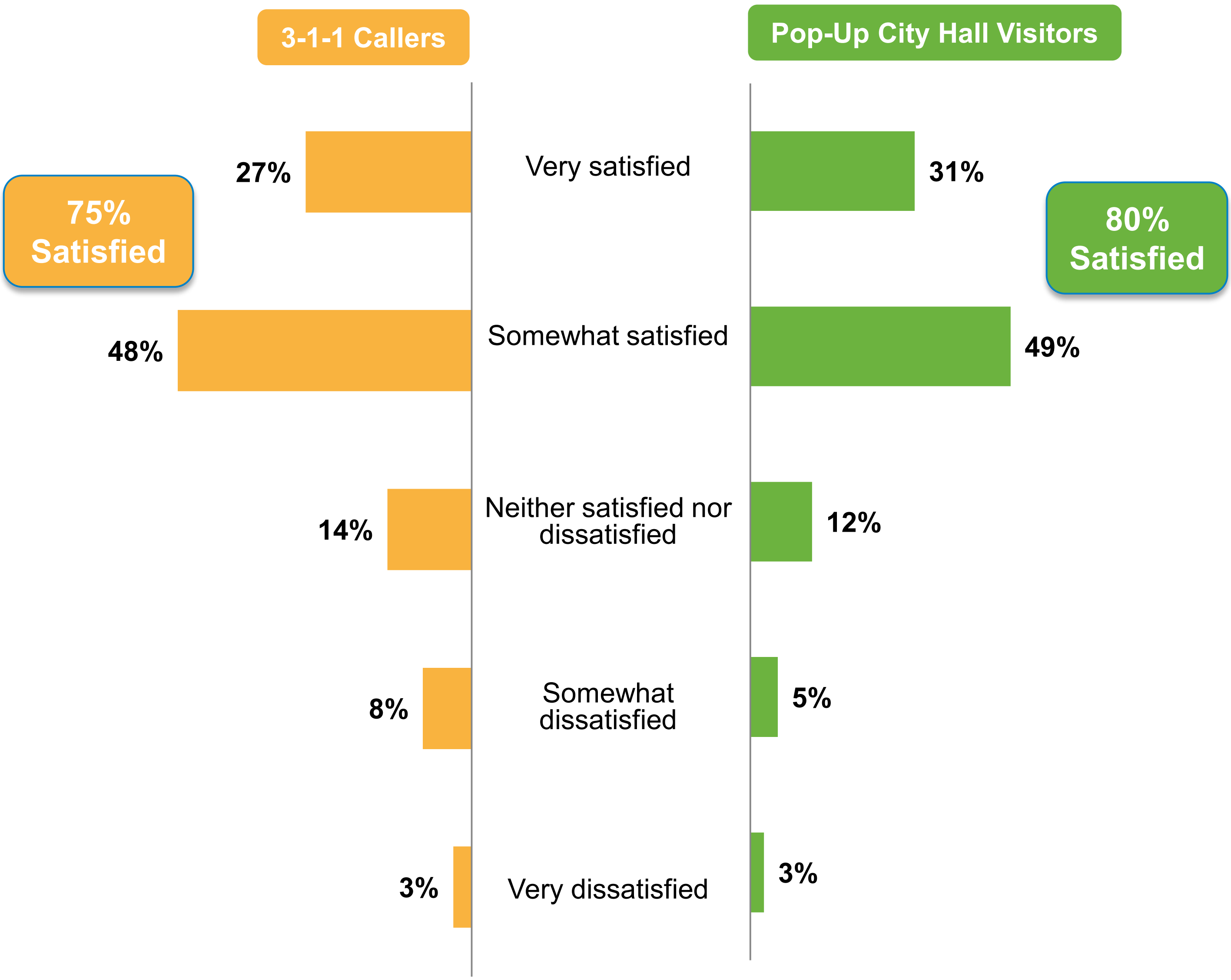
- Comparing this year's results with previous years, a number of the top issues are consistent. namely housing, transportation, social issues/social services (note: in-person intercept surveys were not conducted in previous years).

3-1-1 Callers		
2016 Budget Survey	**2015 Budget Survey**	**2014 Budget survey**
Cost of living/taxes (43%)	Cost of living/taxes (39%)	Transportation: bike lanes, traffic, parking
Housing/ Accommodation (35%)	Infrastructure/ Transportation (29%)	Housing and homelessness
Infrastructure/ Transportation (31%)	Housing/Accommodations (27%)	Garbage and clean streets
Crime/Criminal Activity (15%) and Social issues/Social services (15%)	Social issues (17%)	Social Services
Education (12%)	Education	Crime/criminal activity

Pop-Up City Hall Visitors	
2016 Budget Survey	**2015 Budget Survey**
Cost of living (42%)	Housing/ accommodations (40%)
Infrastructure/Transportation (33%)	Cost of living/taxes (35%)
Social issues/Social services (29%)	Social issues/Social services (29%)
Development (18%)	Infrastructure/ Transportation (27%)
Housing (61%)	Education

Intercept Summary: Overall Satisfaction

- Satisfaction is high among intercept respondents, with three-quarters of them satisfied with the services they receive from the City.



Base: 3-1-1 callers (n=877) and Pop-Up City Hall visitors (n=79)

And, would you say that the overall quality of services provided by the City of Vancouver residents/businesses has gotten better or worse over the past 2-3 years?

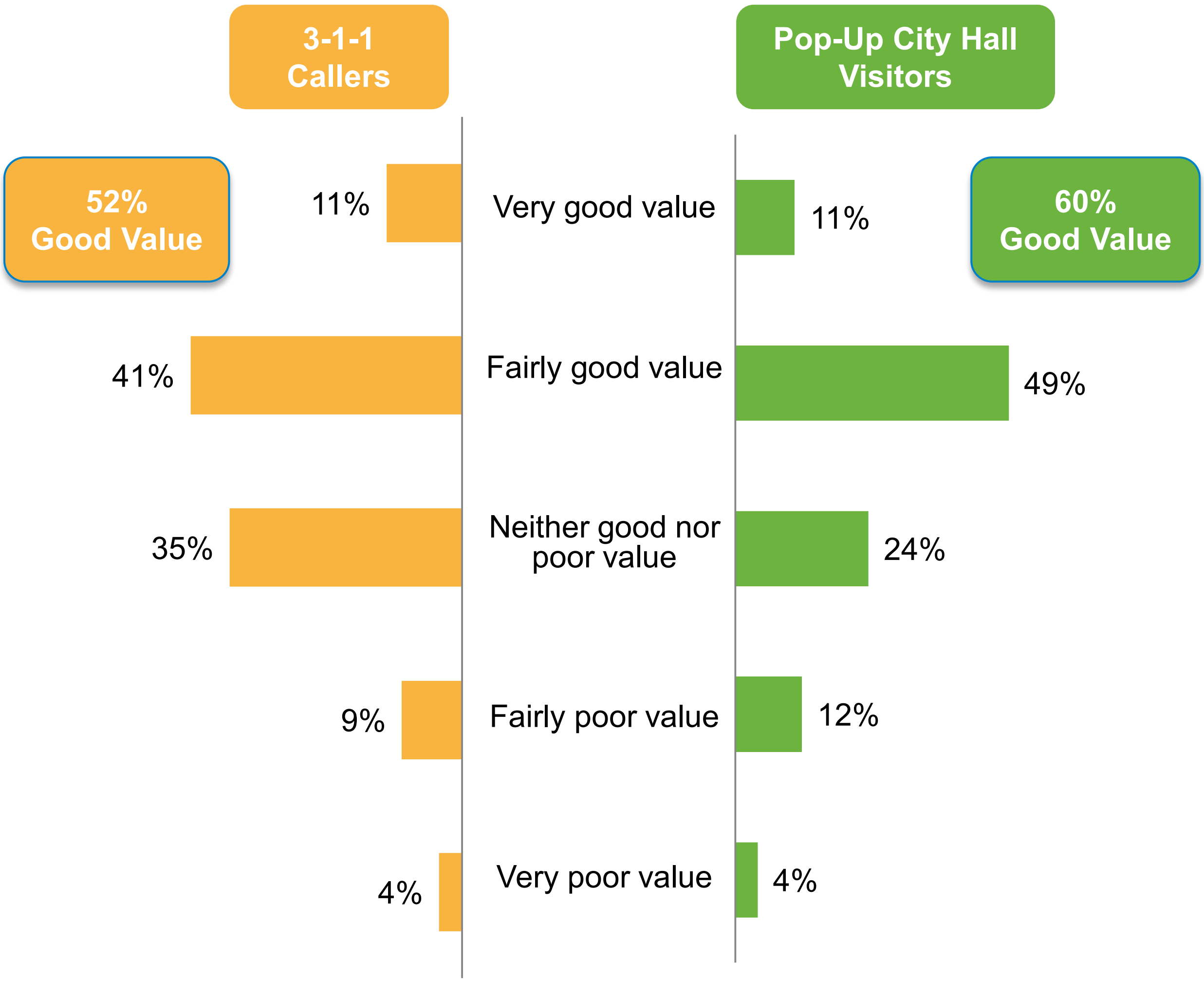
Intercept Summary: Overall Service Satisfaction Trend

- Overall satisfaction was asked of 3-1-1 Callers and Pop-Up City Hall visitors beginning in Budget 2015.
- Satisfaction among residents across these groups remained stable from last year.

	Budget 2016		Budget 2015	
Response	3-1-1 Callers	Pop-Up City Hall Visitors	3-1-1 Callers	Pop-Up City Hall Visitors
Very satisfied	27%	31%	25%	27%
Somewhat satisfied	48%	49%	48%	55%
Total Satisfied	**75%**	**80%**	**73%**	**82%**
Neither satisfied nor dissatisfied	14%	12%	14%	8%
Somewhat dissatisfied	8%	5%	8%	5%
Very dissatisfied	3%	3%	6%	5%
Total Dissatisfied	**11%**	**8%**	**14%**	**10%**

Intercept Summary: Value for Tax Dollar

- Over half of residents (3-1-1- and Pop-up) on average, believe they are getting good value for their tax dollar.



Base: 3-1-1 Callers (n=877) and Pop-Up City Hall Visitors (n=78)

Thinking about all of the programs and services you/ receive from the City of Vancouver, and the level of property taxes or rent you/ your business pays, would you say that you/ your business gets overall good value or poor value for your/ its tax dollars?

Intercept Summary: Value for Tax Dollar Trend

- Across the past several years, half or more of intercept respondents believe they receive good value for their tax dollar.
- In 2014 of 3-1-1 Budget survey, this question was asked slightly differently (Thinking about all of the programs and services you receive from the City of Vancouver, and the amount of property taxes or rent you pay, would you say that you get overall good value for your tax dollars? Yes/No). The results for Budget 2014, are broadly in-line with the 2015, and 2016 results.

	Budget 2016		Budget 2015		Budget 2014	
Response	3-1-1 Callers	Pop-Up City Hall Visitors	3-1-1 Callers	Pop-Up City Hall Visitors	3-1-1 Callers*	Pop-Up City Hall Visitors
Very good value	11%	11%	13%	14%	n/a	n/a
Fairly good value	41%	49%	39%	40%	n/a	n/a
Total Good Value	**52%**	**60%**	**52%**	**54%**	**54% (yes)**	n/a
Neither good nor poor value	35%	24%	32%	16%	n/a	n/a
Fairly poor value	9%	12%	10%	19%	n/a	n/a
Very poor value	4%	4%	6%	11%	n/a	n/a
Total Poor value	**13%**	**16%**	**16%**	**30%**	**45% (no)**	n/a

4: Multi-stakeholder Workshop

Multi-stakeholder workshop

As a wrap-up to the survey, the Finance team invited representatives from the City's broad range of Council Advisory Committees and Business Improvement Associations to provide their perspectives on budget directions and public input.

16 participants attended the workshop on October 26. They were representatives from: Seniors Advisory Committee, Women's Advisory Committee, Persons with Disabilities Advisory Committee, Arts and Culture Policy Council, Vancouver Planning Commission, LGBTQ2+ Advisory Committee, Chinatown Historic Area Planning Committee, Gastown BIA.

Participants were presented with an overview of budget planning and the economic outlook as well as the draft results from the public consultation. They used this information to answer three key questions in small group discussions. A Finance team member was at each table for the in-depth conversation.

Key themes from the workshop:

Discussion 1: Budget Priorities

How well do the budget priorities for 2016 reflect what we've heard from the public? Do the budget priorities for 2016 reflect what you feel the city's greatest needs are from the perspective of your groups/networks? Where are the gaps?

- Housing affordability is reflected and an important issue, however related actions are not clear enough. For example, the percentage of the Community Services budget does not reflect the priority identified.
- Budget should be reviewed from the lens of different vulnerable communities.
- Foundational/sustainability priorities should continue to be underlined – example, the importance of maintain infrastructure that are fundamental to a functioning city, ongoing training and performance improvements for staff.

Discussion 2: Business transformations and long-term planning

Productivity/business transformation and or revenue opportunities are required to balance the budget. What are your ideas for business transformation and/or revenue opportunities?

- Look at a new model for pensions to examine issues around equity, long-term sustainability, public safety, support for non-profits, etc.
- Generate new user fees (taxation on items such as hotel tax, AirBnB, services/booking fees).
- Align activities with City priorities. For example, looking at user fees: Increasing user fees for recreational services would not support the Healthy City priority so not a good choice but user fees for water use would support the sustainability priority.
- Leverage your partnerships and collaborations – mutual capacity building will help to support the long-term health of community organizations too.
- Proportional property tax based on income/need. Asset based tax benefits – get tax break if you need it.
- Investigate extra taxes on investment properties.

Discussion 3: Service metrics

What do the metrics in the Service Plans tell us? What are some possible ways to improve performance in these areas? Are these the right metrics?

- Alignment of service plans and metrics with City priorities is necessary and currently missing.
- The metrics should provide a better story regarding demographic use, and in particular, who is NOT using services and why. Consider intersectionality, people don't fall into just one category.
- Metrics should provide better information on the effectiveness of services or the quality of service that people are getting.
- Look at the efficiency between the revenue generated from the cost to see effective revenue generating user fees (dog licenses, bicycle licenses).
- Be more ambitious in targets.
- Create automated metric reporting.

Appendix

Sample Composition – Business Owners

Demographic group	Survey Sample - Businesses
Gender	
Male	57%
Female	36%
Transgender	1%
None of the above	1%
Prefer not to say	5%
Age	
18-39 **	25%
40-49	24%
50-59	28%
60 and over	23%
Residential Zone (of Business)	
Downtown	36%
Northwest	21%
Northeast	15%
Southwest	16%
Southeast	12%

Sample Composition – Business Owners cont.

Demographic group	Survey Sample - Businesses
Ethnicity	
North American Canadian First Nations (or Aboriginal Band) American	**43%** 41% 1% 3%
Europe British Isles (e.g. English, Scottish, Irish, Welsh) Eastern European (e.g. Russian, Ukrainian, Croatian, etc.) German French Other European (e.g. Greek, Italian, Swedish etc.)	**43%** 26% 7% 6% 3% 9%
Asia Chinese South Asian (e.g. Punjabi, Indian, Tamil, Pakistani, Bangladeshi, etc.) Japanese Other Asian (e.g. . Filipino, Thai, Vietnamese etc.)	**15%** 12% 1% 1% 1%
Latin/South American	**2%**
Africa	**2%**
Other regions (e.g. Middle Eastern, Oceania, Caribbean)	**2%**