City of Vancouver

Civic Service Satisfaction Survey

FINAL REPORT SUMMARY

GAME CHANGERS

INTRODUCTION

Background, Objectives and Methodology

INTRODUCTION

Background and Objectives

This report presents the findings of the City of Vancouver's 2018 Civic Service Satisfaction Survey.

The primary objective of the survey is to obtain Vancouver residents and businesses' feedback on municipal services and the value they perceive they are receiving from the City.

Key survey topics included:

- Important local issues
- Quality of life
- City services (satisfaction, level of investment)
- Value for taxes

Where appropriate, the City of Vancouver's results have been compared to Ipsos' municipal norms to provide a benchmark against which the City can evaluate its performance. These norms are based on research Ipsos has conducted in other Canadian municipalities within the past five years. Normative comparisons are available for residents only.

Due to changes in methodology and questionnaire design, this year's survey results cannot be compared to similar prior surveys.

Methodology (page 1 of 2)

Ipsos conducted a random and representative telephone survey with City of Vancouver residents and businesses.

Households with members who work for the City of Vancouver, belong to a City advisory committee, or are elected officials of the City were excluded from the survey via an upfront screening question.

All interviewing was conducted between July 5 and 19, 2018.

Residents

A total of 600 interviews were conducted with adult (18+) Vancouver residents, broken out as follows: Downtown/West End (n99), Northwest (n110), Northeast (n106), Southwest (n138), and Southeast (n147).

- 16th Avenue is the North-South boundary and Main Street is the West-East boundary.

A dual frame landline/cellphone sampling methodology was used, with the final sample split 70% landlines and 30% cellphones.

The landline sample was pulled by postal code while the cellphone sample was pulled by billing centre. A screening question was included at the start of the survey to confirm residency in the City of Vancouver.

Interviewing was conducted in English, Cantonese, and Mandarin.

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

Overall results are accurate to within ±4.0%, 19 times out of 20. The margin of error will be larger for sample subgroups.

Methodology (page 2 of 2)

Businesses

A total of 200 interviews were conducted with Vancouver businesses, broken out as follows: small businesses with <25 employees (n111), medium businesses with 25 to 99 employees (n67), and large businesses with 100+ employees (n22).

A screening question was included at the start of the survey to confirm that respondents owned, managed, or operated a business in the City of Vancouver. Interviews were conducted with the person responsible for the overall management and direction of their company at that specific location.

Interviewing was conducted exclusively on landlines in English.

The final data has been weighted by business size according to 2017 BC Stats data.

Overall results are accurate to within ±6.9%, 19 times out of 20. The margin of error will be larger for sample subgroups.

Interpreting and Viewing the Results

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

Analysis of some of the statistically significant demographic differences among residents is included where applicable. While a number of significant differences may appear in the cross-tabulation output, not all differences warrant discussion. Smaller sample sizes limit any meaningful demographic analysis among businesses.

EXECUTIVE SUMMARY

Summary of Results (page 1 of 2)

- Overall perceptions of quality of life are favourable. A majority of residents and businesses think that the quality of life has stayed the same or improved in the past three years. However, among those saying the quality of life has changed, both residents and businesses are much more likely to say things have worsened than improved.
- Housing and infrastructure dominate the public issue agenda.
- Overall satisfaction with City services is high. A majority of residents and businesses think that services have stayed the same or improved in the past three years. However, among those saying services have changed, both residents and businesses are more likely to say things have worsened than improved, although the difference is less than quality of life.
- Satisfaction extends to the delivery of specific services.
    - Highest scoring services: library, fire rescue & medical response, parks/green spaces (residents) and library, online payment, fire rescue & medical response, police (businesses).
    - Lowest scoring services: enabling affordable housing (residents) and development & building permits (businesses).

Executive Summary

Summary of Results (page 2 of 2)

- Respondents think the City should invest more or the same (not less) in all the tested services. Top investment priorities include:
  - Residents: enabling affordable housing, social policies & projects, and homelessness services. Transportation infrastructure places fourth.
  - Businesses: street infrastructure, development & building permits, and keeping our community clean.
- The majority of respondents say they receive good value for their municipal tax dollars.

QUALITY OF LIFE

Quality of Life

Section Summary (slide 1 of 2)

Overall perceptions of Vancouver's quality of life are favourable although lower than the norm. Overall, 91% of residents and 88% of businesses rate the quality of life in Vancouver today as 'very good' or 'good'. In comparison, the normative resident score is 96% total good.

- Residents' overall perceptions (combined 'very good/good' ratings) of Vancouver's quality of life are consistent across all key demographic subgroups.
- However, some differences are seen in the intensity of ratings, with higher 'very good' scores reported by homeowners (36% vs. 27% of renters) and those with household incomes of $100K+ (39% vs. 27% of <$60K, 28% of $60K-<$100K).

A majority of residents and businesses think that the quality of life has stayed the same or improved in the past three years. However, among those saying the quality of life has changed, both residents and businesses are much more likely to say things have worsened than improved. Specifically, 50% of residents say Vancouver's quality of life has 'stayed the same', 10% say 'improved', and 38% say 'worsened'. Among businesses, 41% say 'stayed the same', 12% say 'improved', and 46% say 'worsened'. These results are different than the norm, where residents tend to take a more balanced view towards the direction quality of life is taking (54% 'stayed the same', 22% 'improved', 21% 'worsened').

- Among residents, perceptions of a 'worsened' quality of life are higher among those who are 55+ years of age (52% vs. 22% of 18-34 years, 40% of 35-54 years), homeowners (43% vs. 32% of renters), and those with household incomes of $60K-<$100K (46% vs. 30% of <$60K, 34% of $100K+).
- Conversely, residents who are more likely to report an 'improved' quality of life include those who are 35-54 years of age (13% vs. 6% of 55+ years, 12% of 18-34 years) and those with children under the age of 18 living at home (16% vs. 9% of those without children at home).

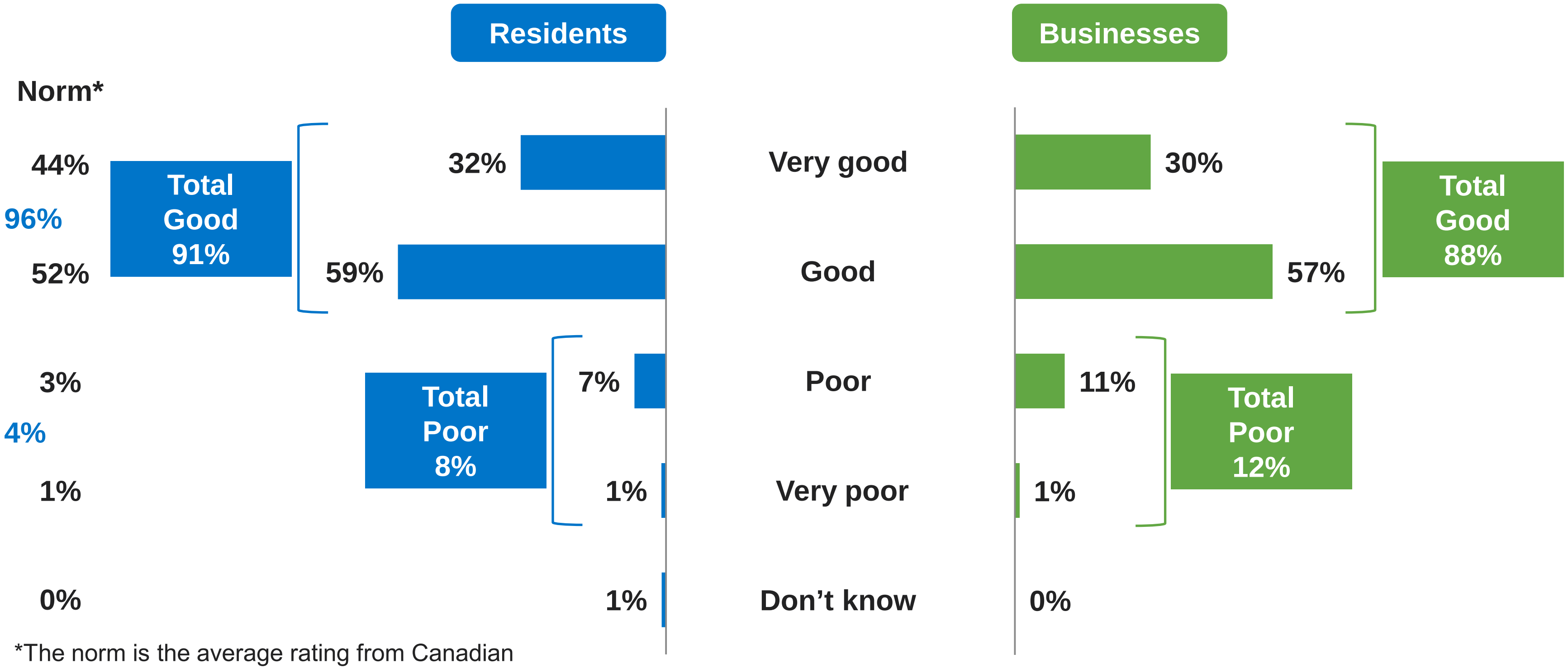
Section Summary (slide 2 of 2)

A variety of factors are behind impressions of an improved quality of life. Among residents saying the quality of life has improved, the top five open-ended reasons behind perceptions of an improved quality of life are “improved transportation options” (22%), “things are getting better/city is improving” (19%), “improved infrastructure/roads” (17%), “more facilities/amenities” (12%), and “employment opportunities” (11%). Among the few businesses saying the quality of life has improved, the leading open-ended reason is “improved infrastructure/roads” (22%). However, with only 21 businesses answering this question, these results should be interpreted with caution.

The cost of living and housing are driving perceptions of a worsened quality of life. Other factors include overcrowding and traffic. Among residents saying the quality of life has worsened, 43% attribute this to the “cost of living” and 31% mention “housing/accommodations” (coded open-ends). Secondary factors include “overcrowding/overpopulation/ overdevelopment” (20%) and “traffic congestion” (19%). Similarly, 42% of businesses saying the quality of life has worsened point to the “cost of living”. Other top mentions include “housing/accommodations” (29%) and “traffic congestion” (26%).

- Mentions of “cost of living” are higher among residents who are <55 years of age (53% vs. 31% of 55+ years), rent (54% vs. 36% of homeowners), and have household incomes of <$100K (includes 62% of <$60K and 46% of $60K-<$100K vs. 29% of $100K+).

Overall Quality of Life

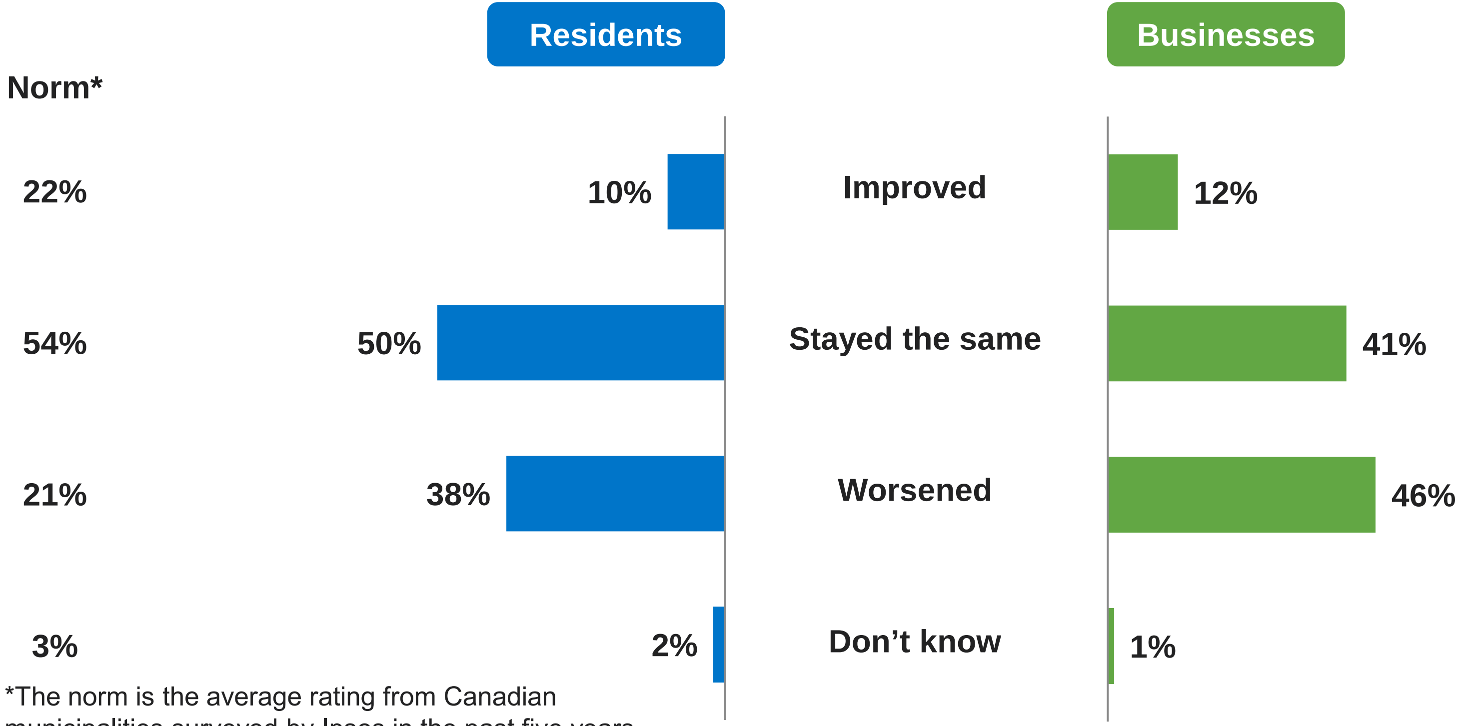


*The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.

Q2. How would you rate the overall quality of life in the City of Vancouver today?
Base: All residents (n=600); All businesses (n=200)

QUALITY OF LIFE

Change in Quality of Life



*The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.

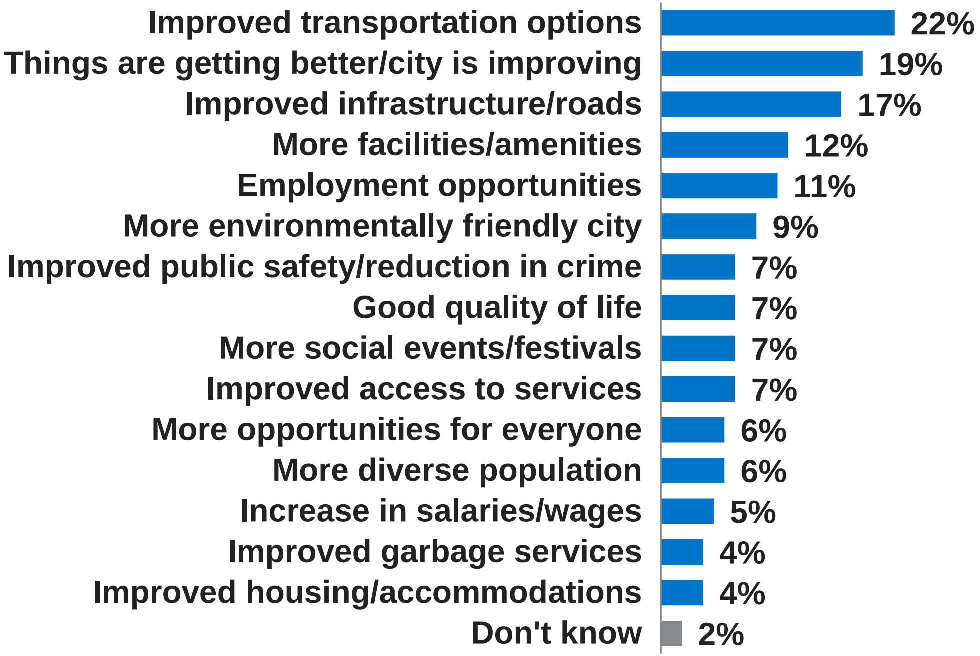
Q3. And, do you feel that the quality of life in the City of Vancouver in the past three years has improved, stayed the same, or worsened?

Base: All residents (n=600); All businesses (n=200)

Reasons Quality of Life has Improved

(among those saying the quality of life has improved) (Coded Open-Ends, Multiple Responses Allowed)

Residents



Businesses

Top Mentions	
Improved infrastructure/roads	22%
Improved access to services	14%
More facilities/amenities	13%
More environmentally friendly city	13%

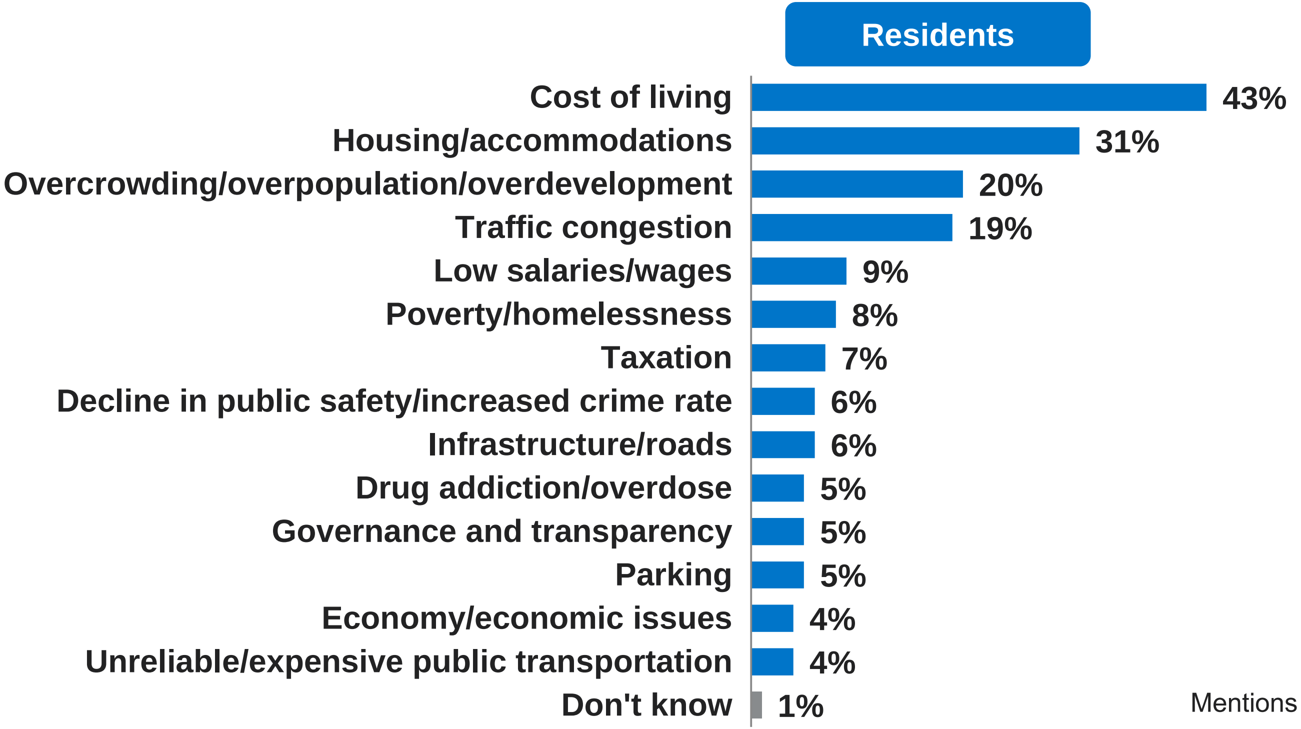
Resident mentions <4% not shown.

Small/very small base size, interpret with caution.

Q4. Why do you think the quality of life has improved?
Base: Those saying the quality of life has improved; Residents (n=60); Businesses (n=21)

Reasons Quality of Life has Worsened (Residents)

(among those saying the quality of life has worsened) (Coded Open-Ends, Multiple Responses Allowed)

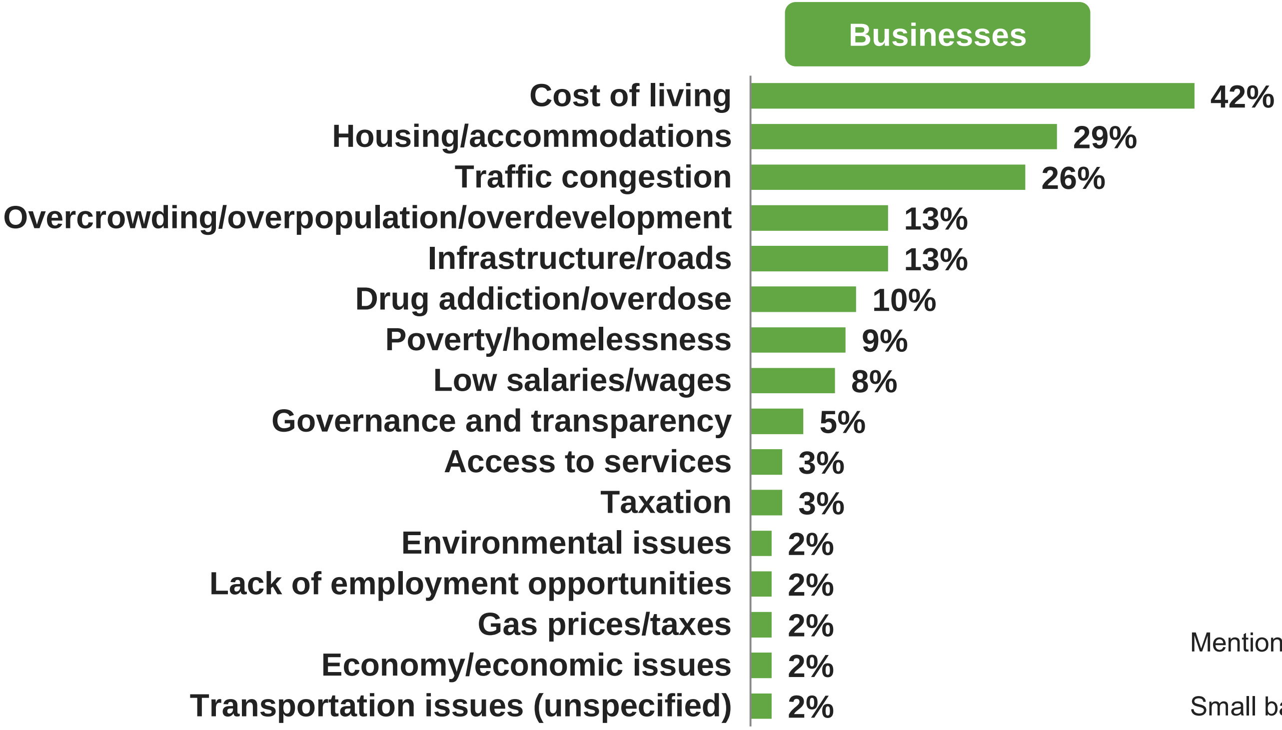


Mentions <4% not shown.

Q5. Why do you think the quality of life has worsened?
Base: Residents saying the quality of life has worsened (n=251)

Reasons Quality of Life has Worsened (Businesses)

(among those saying the quality of life has worsened) (Coded Open-Ends, Multiple Responses Allowed)



Mentions <2% not shown.

Small base size, interpret with caution.

Q5. Why do you think the quality of life has worsened?
Base: Businesses saying the quality of life has worsened (n=90)

IMPORTANT LOCAL ISSUES

Important Local Issues

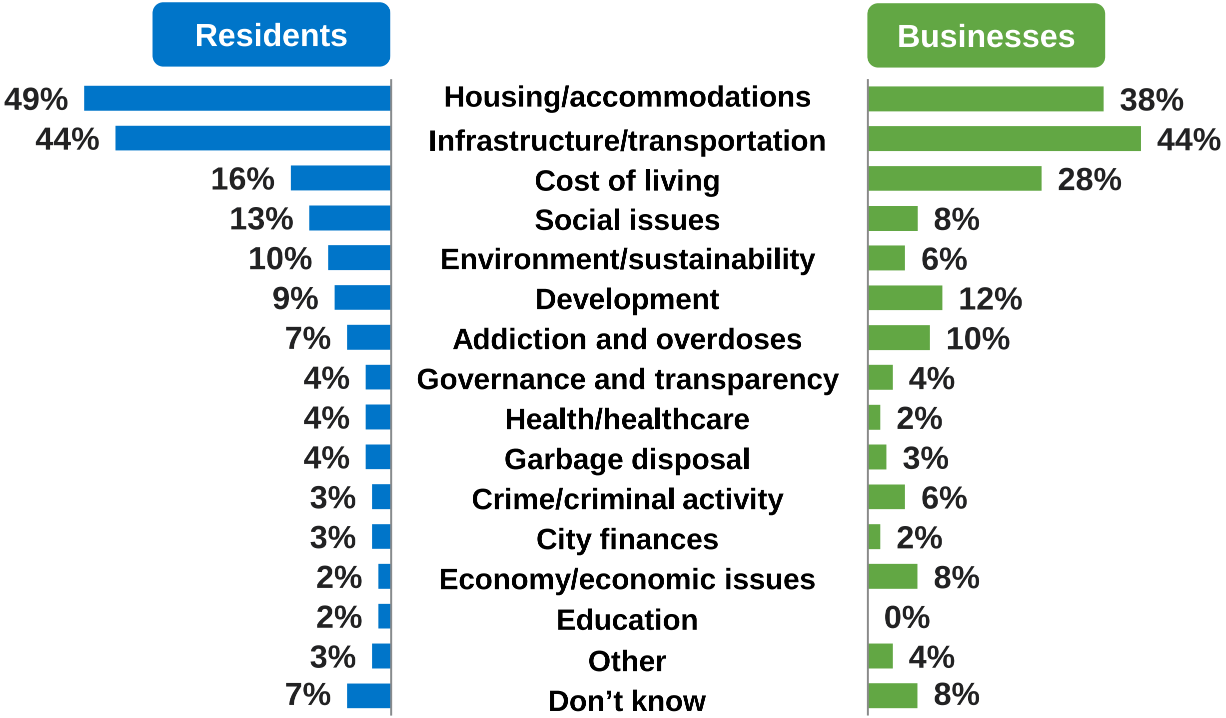
Section Summary

Housing and infrastructure dominate the public issue agenda. Among residents, the two most frequently mentioned top-of-mind issues are “housing/accommodations” (49%) and “infrastructure/transportation” (44%). All other issues are a distant second in priority. The same top two issues are also voiced by businesses although the order is reversed, with 44% mentioning “infrastructure/transportation” and 38% mentioning “housing/accommodations”. “Cost of living” is a third issue of note among businesses, garnering 28% of mentions.

- Among residents, mentions of “housing/accommodations” are higher among women (56% vs. 41% of men), those who are 35-54 years of age (55% vs. 43% of 18-34 years, 47% of 55+ years), and those with household incomes of $100K+ (58% vs. 39% of <$60K, 50% of $60K-<$100K).
- Mentions of “infrastructure/transportation” are higher among residents living in the Southwest (52% vs. 37% in the Downtown/West End, 38% in the Southeast, 48% in the Northwest, 48% in the Northeast) and homeowners (49% vs. 38% of renters).

Important Local Issues

(Coded Open-Ends, Multiple Responses Allowed)



Q1. From your perspective as a resident of the City of Vancouver, what are the most important local issues facing the city at the present time? Anything else?

Base: All residents (n=600); All businesses (n=200)

CITY SERVICES

Section Summary (slide 1 of 4)

Most residents and businesses are satisfied with the overall level and quality of City services although satisfaction is lower than the norm. Overall, 83% of residents and 80% of businesses say they are satisfied (combined 'very/somewhat satisfied' ratings) with the overall level and quality of services provided by the City of Vancouver. In comparison, the normative resident score is 90% total satisfied.

- Younger residents are more likely to say they are satisfied (combined 'very/somewhat satisfied' ratings) with the City's overall level and quality of services (87% of 18-34 years vs. 78% of 55+ years, 82% of 35-54 years).

A majority of residents and businesses think that services have stayed the same or improved in the past three years. However, among those saying services have changed, both residents and businesses are more likely to say things have worsened than improved, although the difference is less than quality of life. Specifically, 62% of residents say services have 'stayed the same', 14% say 'improved', and 22% say 'worsened'. Among businesses, 62% say 'stayed the same', 9% say 'improved', and 29% say 'worsened'.

- Among residents, perceptions of 'worsened' services are higher among those who are 55+ years of age (33% vs. 12% of 18-34 years, 21% of 35-54 years), those living in the Downtown/West End (30% vs. 16% in the Southeast, 19% in the Northeast, 25% in the Northwest, 25% in the Southwest), homeowners (29% vs. 15% of renters), and those with household incomes of $100K+ (26% vs. 16% of <$60K, 18% of $60K-<$100K).
- Conversely, perceptions of 'improved' services are higher among those with household incomes of <$60K (20% vs. 7% of $60K-<$100K, 13% of $100K+).

Section Summary (slide 2 of 4)

Residents and businesses offer different explanations for saying City services have improved. Among residents saying City services have improved, the most frequently mentioned open-ended reason is “more transportation options” (21%). Other explanations include “improved infrastructure/roads” (16%), “good customer service” (14%), “services have improved (unspecified)” (13%), “improved access to services” (13%), and “increased focus on environment” (13%). Conversely, among the few businesses saying City services have improved, the leading open-ended reason is “good customer service” (30%). However, with only 19 businesses answering this question, these results should be interpreted with caution.

Respondents who think City services have worsened attribute this to a variety of factors, with no single explanation standing out from the rest. Among residents saying the overall level and quality of City services has worsened, the leading open-ended explanations are “governance and transparency” (20%), “poor quality of service” (16%), “overcrowding/overpopulation/overdevelopment” (15%), and “garbage services” (15%). Businesses saying City services have worsened offer an even greater diversity of opinion, with only five percentage points separating the eight most frequently mentioned open-ended responses (and none garnering more than 16% of mentions). Of these, the two leading responses are “delays in getting permits/building permits” (16%) and “governance and transparency” (16%).

City Services

Section Summary (slide 3 of 4)

Resident satisfaction extends to the delivery of specific services with a few notable exceptions. Enabling affordable housing is the least satisfactory of all the tested services. Residents are highly satisfied with many of the tested services, with 14 of the 26 services receiving a satisfaction score of 80% or higher (combined 'very/somewhat satisfied' ratings). Moreover, another seven services receive a satisfaction score of 67% or higher. Of the remaining five services, opinion is mixed on parking (58% satisfied), social policies & projects (51%), development & building permits (50%), and homelessness services (50%). The single least satisfactory service is enabling affordable housing, with only 28% of residents saying they are satisfied with the City's performance in this area. Seven-in-ten (69%) say they are dissatisfied, including 31% saying 'not at all satisfied'.

- Satisfaction with **enabling affordable housing** is *lowest* among women (22% vs. 34% of men), those who are 18-34 years of age (21% vs. 33% of 55+ years, 29% of 35-54 years), and renters (16% vs. 39% of homeowners).
- A summary of other significant demographic differences can be found in the tables on pages 31-34.

A strong majority of businesses are also satisfied with many of the City's services. One notable exception is development & building permits. More than three-quarters of businesses say they are satisfied (combined 'very/somewhat satisfied' ratings) with 14 of the 20 tested services. In comparison, the remaining six services receive relatively lower satisfaction scores. This includes economic development (69% satisfied), street infrastructure (67%), transportation infrastructure (66%), long-range planning (64%), and parking (59%). Development & building permits is the only service that is rated satisfactory by a minority of businesses (42% satisfied). One-half (51%) say they are dissatisfied in this regard, including 28% saying 'not at all satisfied'.

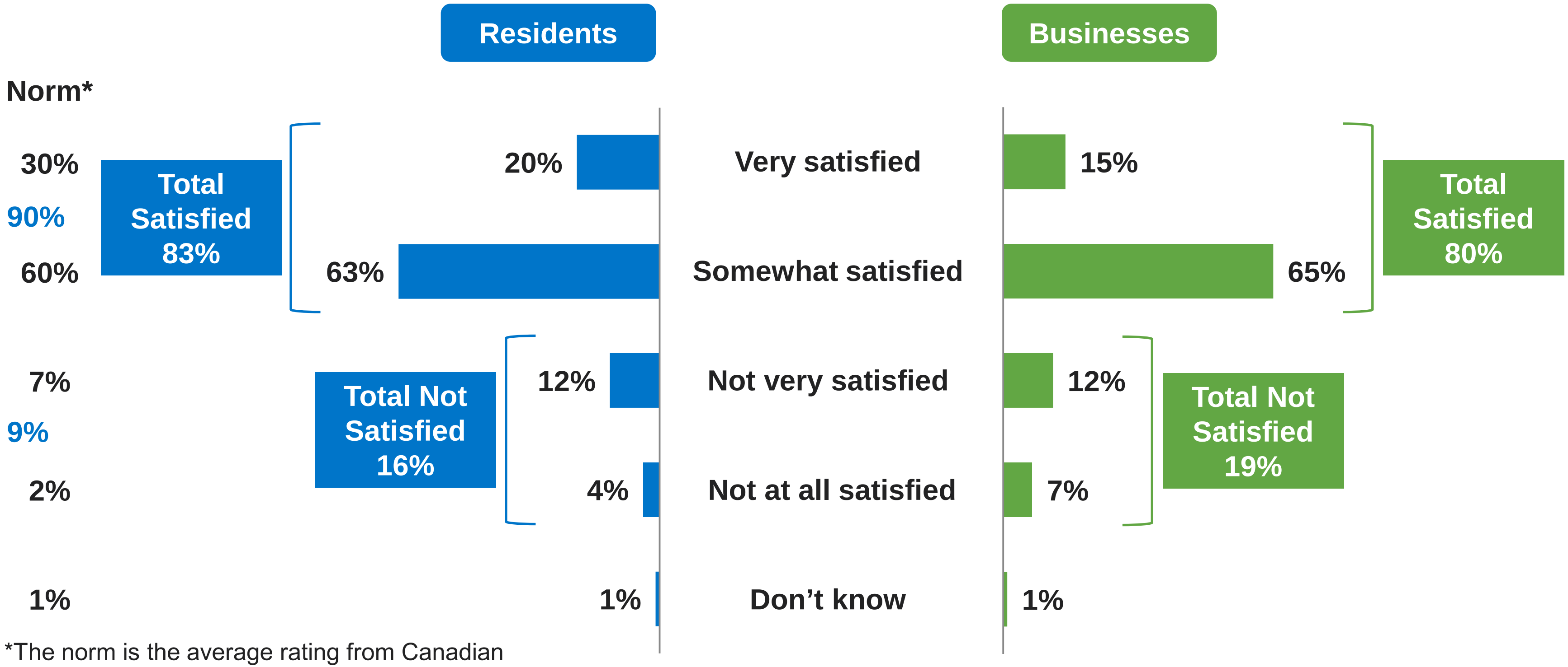
Section Summary (slide 4 of 4)

Residents' top three investment priorities are enabling affordable housing, social policies & projects, and homelessness services. Transportation infrastructure places fourth. Overall, 73% of residents say the City should 'invest more' in enabling affordable housing, 71% say the City should 'invest more' in social policies & projects, and 66% say the City should 'invest more' in homelessness services. A slight majority (53%) of residents say the City should 'invest more' in transportation infrastructure. While the remaining services are seen as less of an investment priority, there are no services where a majority of residents think the City should reduce investment.

- Younger residents (aged 18-34 years) and renters are more likely to say the City should 'invest more' in **enabling affordable housing**, **social policies & projects**, and **homelessness services**.
- A summary of other significant demographic differences can be found in the tables on pages 38-41.

Businesses' top three priorities for investment are street infrastructure, development & building permits, and keeping our community clean. Overall, 53% of businesses say the City should 'invest more' in street infrastructure, 52% say the City should 'invest more' in development & building permits, and 50% say the City should 'invest more' in keeping our community clean. While the remaining services are seen as less of an investment priority, there are no services where a majority of businesses think the City should reduce investment.

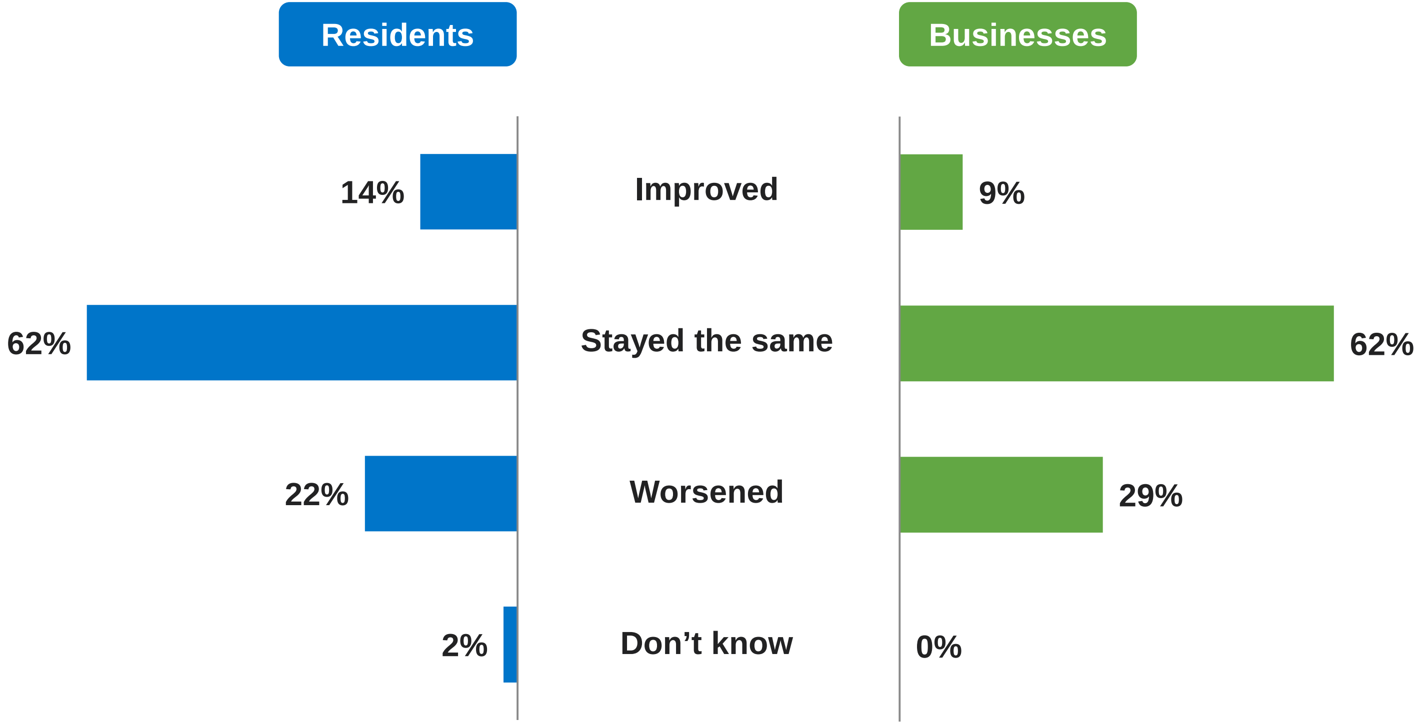
Overall Satisfaction with City Services



*The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.

Q6. How satisfied are you with the overall level and quality of services provided by the City of Vancouver?
Base: All residents (n=600); All businesses (n=200)

Change in City Services



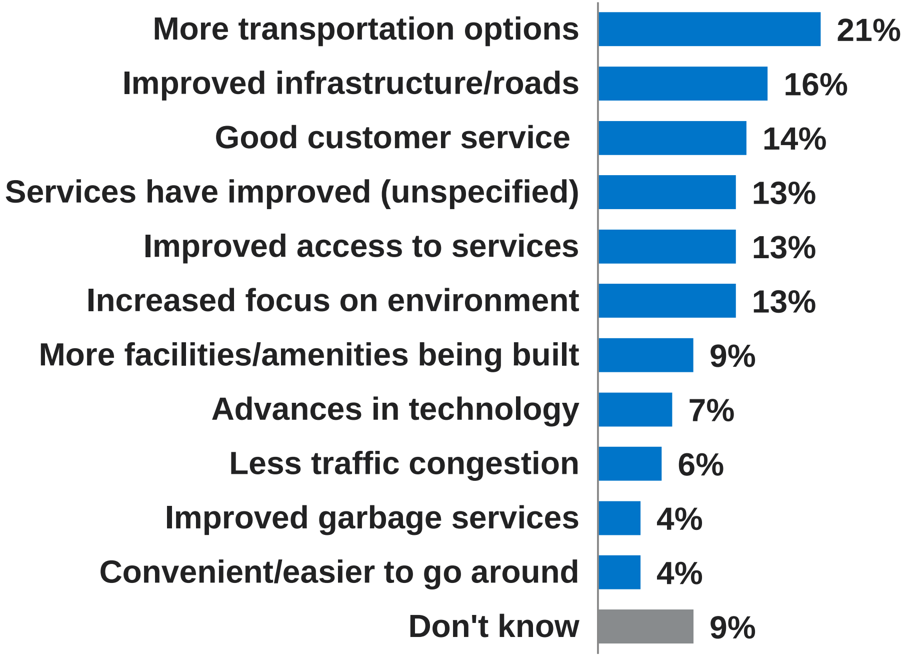
Q7. And, do you feel that the overall level and quality of services provided by the City of Vancouver in the past three years has improved, stayed the same, or worsened?

Base: All residents (n=600); All businesses (n=200)

Reasons City Services have Improved

(among those saying City services have improved) (Coded Open-Ends, Multiple Responses Allowed)

Residents



Businesses

Top Mentions	
Good customer service	30%
Improved infrastructure/roads	20%
Improved access to services	19%
Advances in technology	19%

Resident mentions <4% not shown.

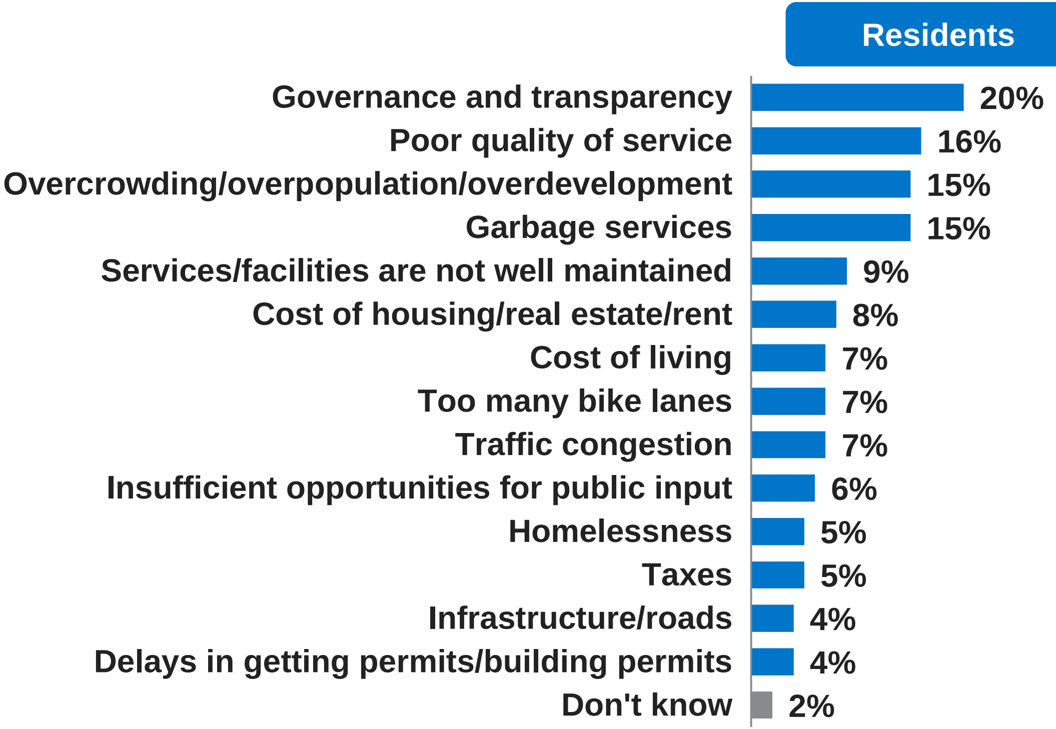
Small/very small base size, interpret with caution.

Q8. Why do you think the overall level and quality of services provided by the City of Vancouver has improved?
Base: Those saying City services have improved; Residents (n=82); Businesses (n=19)

CITY SERVICES

Reasons City Services have Worsened (Residents)

(among those saying City services have worsened) (Coded Open-Ends, Multiple Responses Allowed)

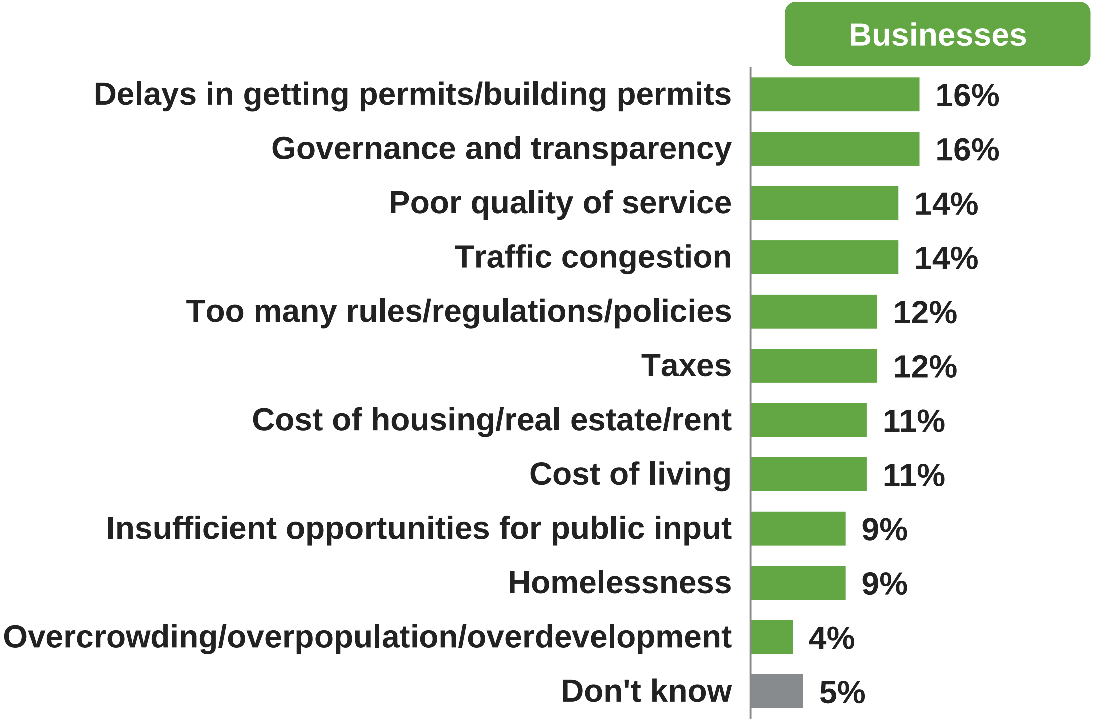


Mentions <4% not shown.

Q9. Why do you think the overall level and quality of services provided by the City of Vancouver has worsened?
Base: Residents saying City services have worsened (n=148)

Reasons City Services have Worsened (Businesses)

(among those saying City services have worsened) (Coded Open-Ends, Multiple Responses Allowed)



Mentions <4% not shown.

Small base size, interpret with caution.

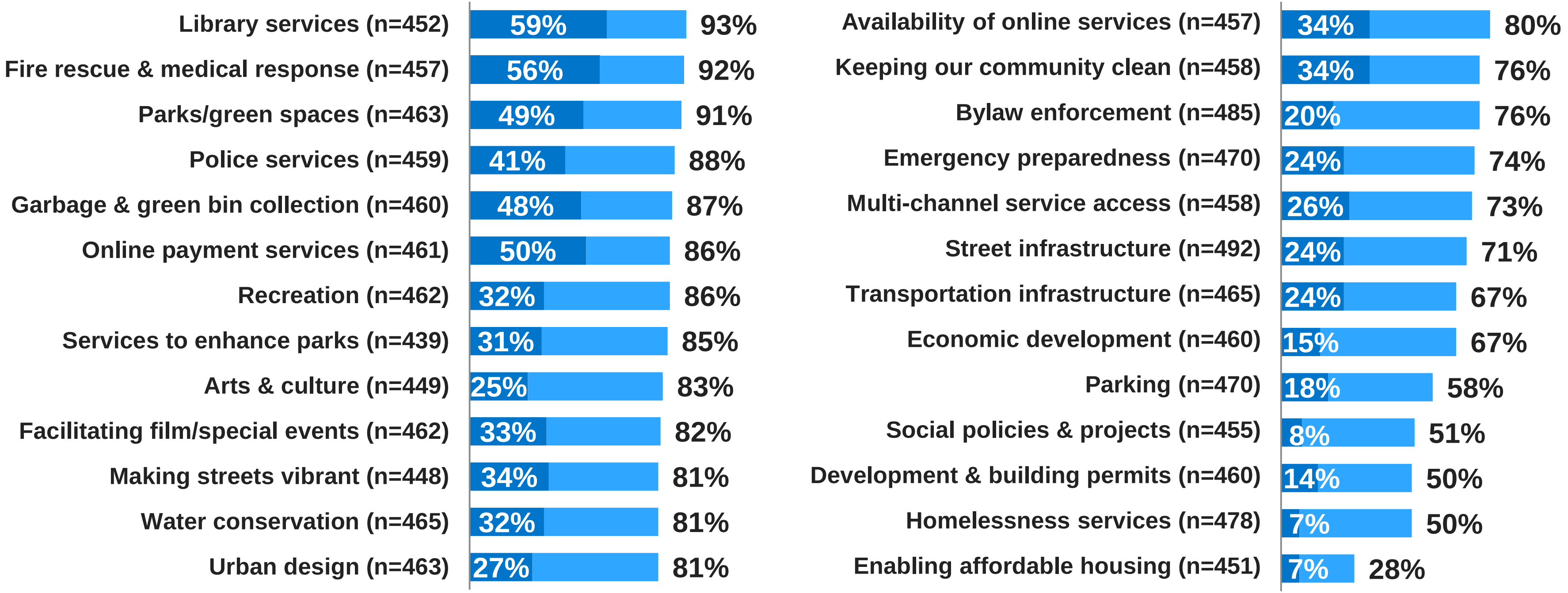
Q9. Why do you think the overall level and quality of services provided by the City of Vancouver has worsened?
Base: Businesses saying City services have worsened (n=55)

Satisfaction with Specific Services (Residents)

Service wording has been abbreviated to fit within the space provided.
Please see the Appendix for the full service wording.

Residents

Very satisfied | Somewhat satisfied



Q10. Would you say you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied with the job the City is doing in providing each of the following services?

Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services)

Satisfaction with Specific Services (Residents)

(by Gender, Age, and Neighbourhood) (table 1 of 2)

	RESIDENTS										
		Gender		Age			Neighbourhood				
		Male	Female	18-34	35-54	55+	DT	NW	NE	SW	SE
Total Satisfied	Total (n=varies) [A]	Base (n=varies) [B]	Base (n=varies) [C]	Base (n=varies) [D]	Base (n=varies) [E]	Base (n=varies) [F]	Base (n=varies) [G]	Base (n=varies) [H]	Base (n=varies) [I]	Base (n=varies) [J]	Base (n=varies) [K]
Library services	93%	93%	94%	96% F	93%	89%	95%	93%	91%	95%	92%
Fire rescue & medical response	92%	94%	90%	91%	92%	93%	96%	93%	87%	94%	90%
Parks/green spaces	91%	91%	92%	95% F	92%	87%	89%	93%	92%	92%	91%
Police services	88%	90%	85%	83%	90%	90%	91% J	92% J	84%	77%	93% J
Garbage & green bin collection	87%	88%	85%	89%	86%	84%	95% IJ	86%	78%	84%	89% I
Online payment services	86%	86%	86%	88%	89% F	80%	85%	90%	84%	85%	86%
Recreation	86%	87%	84%	86%	86%	85%	86%	84%	79%	85%	90% I
Services to enhance parks	85%	84%	86%	83%	88%	84%	91% I	86%	77%	91% I	82%
Arts & culture	83%	87%	80%	83%	81%	87%	85%	81%	77%	83%	88% I
Facilitating film/special events	82%	86%	80%	84%	82%	81%	88%	84%	80%	81%	80%
Making streets vibrant	81%	81%	82%	87%	77%	80%	76%	74%	87% H	80%	85%
Water conservation	81%	84%	79%	74%	85%	85% D	86%	84%	74%	78%	84%
Urban design	81%	78%	84%	87% F	82%	74%	73%	83%	85%	81%	82%

Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.

Q10. Would you say you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied with the job the City is doing in providing each of the following services?

Base: Residents asked about a particular service (n varies)

BCDEFGHIJK *Significantly higher than subgroup indicated by letter. (at 95% confidence level).*

Satisfaction with Specific Services (Residents)

(by Gender, Age, and Neighbourhood) (table 2 of 2)

	RESIDENTS										
		Gender		Age			Neighbourhood				
		Male	Female	18-34	35-54	55+	DT	NW	NE	SW	SE
Total Satisfied	Total (n=varies) [A]	Base (n=varies) [B]	Base (n=varies) [C]	Base (n=varies) [D]	Base (n=varies) [E]	Base (n=varies) [F]	Base (n=varies) [G]	Base (n=varies) [H]	Base (n=varies) [I]	Base (n=varies) [J]	Base (n=varies) [K]
Availability of online services	80%	84%	77%	79%	81%	81%	72%	94% GIJK	76%	78%	82%
Keeping our community clean	76%	79%	73%	77%	76%	77%	67%	85% G	80%	79%	73%
Bylaw enforcement	76%	80%	73%	79%	76%	71%	76%	73%	71%	72%	81%
Emergency preparedness	74%	76%	72%	74%	70%	78%	74%	69%	78%	72%	76%
Multi-channel service access	73%	75%	72%	66%	78% D	75%	67%	65%	76%	74%	80% H
Street infrastructure	71%	74%	69%	73%	70%	69%	70%	71%	74%	67%	72%
Transportation infrastructure	67%	70%	63%	66%	70%	65%	66%	63%	65%	64%	73%
Economic development	67%	71% C	61%	67%	66%	68%	65%	62%	59%	71%	72%
Parking	58%	60%	56%	65% F	57%	52%	47%	53%	58%	57%	68% GH
Social policies & projects	51%	56%	47%	51%	50%	53%	55%	47%	41%	50%	58% I
Development & building permits	50%	54%	48%	58%	47%	47%	49%	52%	51%	39%	58% J
Homelessness services	50%	54%	46%	50%	48%	52%	40%	52%	41%	56% G	55%
Enabling affordable housing	28%	34% C	22%	21%	29%	33% D	29%	24%	22%	24%	35%

Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.

Q10. Would you say you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied with the job the City is doing in providing each of the following services?

Base: Residents asked about a particular service (n varies)

BCDEFGHIJK *Significantly higher than subgroup indicated by letter. (at 95% confidence level).*

Satisfaction with Specific Services (Residents)

(by Household Composition, Own/Rent, and Income) (table 1 of 2)

	RESIDENTS							
		HH Composition		Own/Rent		Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Total Satisfied	Total (n=varies) [A]	Base (n=varies) [B]	Base (n=varies) [C]	Base (n=varies) [D]	Base (n=varies) [E]	Base (n=varies) [F]	Base (n=varies) [G]	Base (n=varies) [H]
Library services	93%	96%	92%	93%	93%	90%	93%	98% F
Fire rescue & medical response	92%	90%	92%	92%	91%	92%	98% H	90%
Parks/green spaces	91%	91%	92%	90%	93%	91%	93%	90%
Police services	88%	88%	88%	89%	88%	91%	86%	86%
Garbage & green bin collection	87%	84%	87%	85%	88%	85%	85%	91%
Online payment services	86%	90%	85%	87%	84%	85%	82%	90%
Recreation	86%	86%	86%	86%	85%	80%	91% F	87%
Services to enhance parks	85%	85%	85%	88%	81%	81%	93% F	86%
Arts & culture	83%	79%	85%	85%	81%	81%	87%	85%
Facilitating film/special events	82%	85%	82%	82%	82%	82%	85%	83%
Making streets vibrant	81%	76%	82%	80%	81%	81%	85%	81%
Water conservation	81%	84%	81%	85% E	78%	81%	82%	82%
Urban design	81%	82%	81%	80%	83%	83%	79%	85%

Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.

Q10. Would you say you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied with the job the City is doing in providing each of the following services?

Base: Residents asked about a particular service (n varies)

BCDEFGHIJK *Significantly higher than subgroup indicated by letter. (at 95% confidence level).*

Satisfaction with Specific Services (Residents)

(by Household Composition, Own/Rent, and Income) (table 2 of 2)

	RESIDENTS							
		HH Composition		Own/Rent		Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Total Satisfied	Total (n=varies) [A]	Base (n=varies) [B]	Base (n=varies) [C]	Base (n=varies) [D]	Base (n=varies) [E]	Base (n=varies) [F]	Base (n=varies) [G]	Base (n=varies) [H]
Availability of online services	80%	82%	80%	83%	78%	77%	85%	81%
Keeping our community clean	76%	75%	77%	77%	76%	75%	77%	77%
Bylaw enforcement	76%	76%	75%	74%	76%	76%	76%	77%
Emergency preparedness	74%	76%	74%	73%	74%	75%	74%	75%
Multi-channel service access	73%	88% C	70%	77%	69%	70%	76%	75%
Street infrastructure	71%	72%	70%	68%	75%	79% H	73%	66%
Transportation infrastructure	67%	72%	65%	66%	70%	76% GH	62%	63%
Economic development	67%	75%	64%	66%	69%	70%	69%	65%
Parking	58%	68% C	56%	58%	57%	62%	52%	61%
Social policies & projects	51%	58%	49%	54%	50%	55%	55%	46%
Development & building permits	50%	54%	49%	45%	55%	59% H	56% H	40%
Homelessness services	50%	51%	50%	55% E	43%	49%	56%	51%
Enabling affordable housing	28%	33%	27%	39% E	16%	23%	33%	28%

Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.

Q10. Would you say you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied with the job the City is doing in providing each of the following services?

Base: Residents asked about a particular service (n varies)

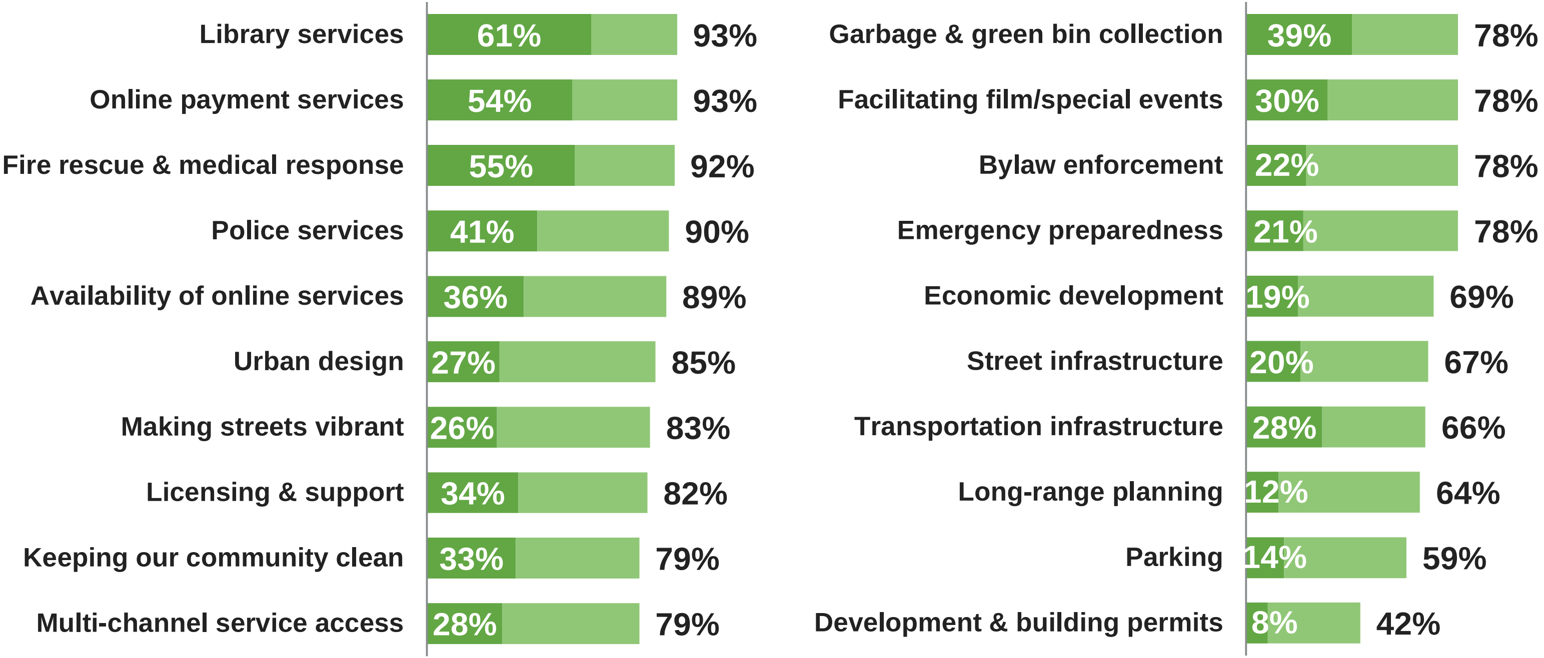
BCDEFGHIJK *Significantly higher than subgroup indicated by letter. (at 95% confidence level).*

Satisfaction with Specific Services (Businesses)

Service wording has been abbreviated to fit within the space provided.
Please see the Appendix for the full service wording.

Businesses

Very satisfied Somewhat satisfied

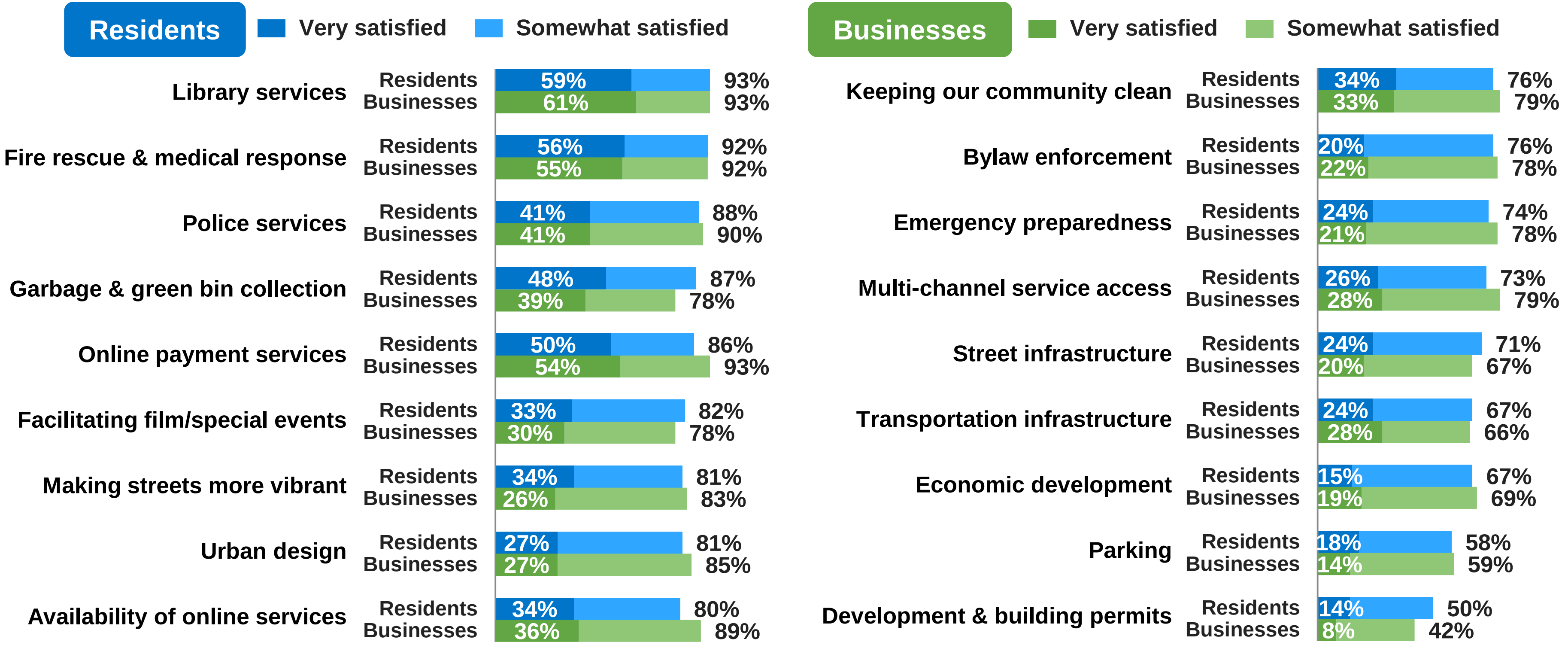


Q10. Would you say you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied with the job the City is doing in providing each of the following services?
Base: All businesses (n=200)

CITY SERVICES

Satisfaction with Specific Services

SUMMARY OF SATISFACTION FOR SERVICES ASKED OF BOTH RESIDENTS AND BUSINESSES.
Service wording has been abbreviated to fit within the space provided.
Please see the Appendix for the full service wording.



Q10. Would you say you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied with the job the City is doing in providing each of the following services?
Base: Residents asked about a particular service (n varies); All businesses (n=200)

CITY SERVICES

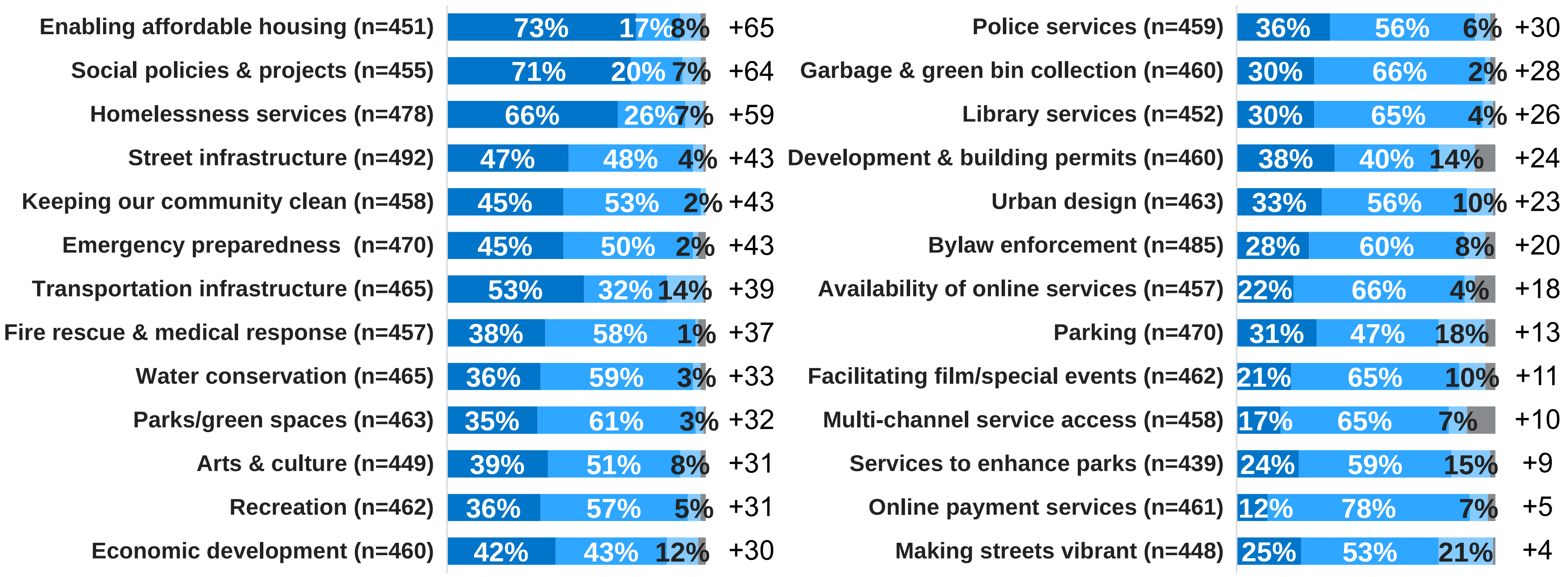
Investment in Specific Services (Residents)

Service wording has been abbreviated to fit within the space provided.
Please see the Appendix for the full service wording.

Residents

Invest more | Invest the same | Invest less | Don’t know | Net

Net = invest more minus invest less



Q11. And, should the City invest more, the same amount, or less on this service?
Base: Residents asked about a particular service (n varies with each resident being randomly asked about 20 services)

Investment in Specific Services (Residents)

(by Gender, Age, and Neighbourhood) (table 1 of 2)

	RESIDENTS										
		Gender		Age			Neighbourhood				
		Male	Female	18-34	35-54	55+	DT	NW	NE	SW	SE
Invest More	Total (n=varies) [A]	Base (n=varies) [B]	Base (n=varies) [C]	Base (n=varies) [D]	Base (n=varies) [E]	Base (n=varies) [F]	Base (n=varies) [G]	Base (n=varies) [H]	Base (n=varies) [I]	Base (n=varies) [J]	Base (n=varies) [K]
Enabling affordable housing	73%	71%	76%	85% EF	72%	63%	76%	69%	81%	70%	72%
Social policies & projects	71%	67%	75%	76% F	72%	64%	67%	71%	75%	71%	71%
Homelessness services	66%	60%	72% B	73% F	65%	60%	72%	65%	69%	65%	63%
Street infrastructure	47%	47%	46%	48%	45%	49%	42%	46%	48%	47%	51%
Keeping our community clean	45%	45%	46%	49%	43%	43%	51% H	34%	41%	40%	52% H
Emergency preparedness	45%	46%	46%	49%	46%	41%	41%	50%	47%	42%	47%
Transportation infrastructure	53%	53%	54%	64% F	56% F	40%	54%	55%	53%	49%	55%
Fire rescue & medical response	38%	36%	40%	35%	35%	44%	32%	41%	30%	41%	43%
Water conservation	36%	33%	38%	39%	37%	31%	26%	34%	45% G	32%	38%
Parks/green spaces	35%	38%	32%	30%	36%	39%	33%	44%	35%	32%	33%
Arts & culture	39%	38%	39%	48% F	38%	30%	42%	37%	53% K	37%	31%
Recreation	36%	36%	36%	35%	40%	34%	35%	33%	35%	40%	37%
Economic development	42%	42%	42%	46%	43%	37%	35%	44%	43%	39%	47%

Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.

Q11. And, should the City invest more, less, or the same amount on this service?
Base: Residents asked about a particular service (n varies)

BCDEFGHIJK *Significantly higher than subgroup indicated by letter. (at 95% confidence level).*

Investment in Specific Services (Residents)

(by Gender, Age, and Neighbourhood) (table 2 of 2)

	RESIDENTS										
		Gender		Age			Neighbourhood				
		Male	Female	18-34	35-54	55+	DT	NW	NE	SW	SE
Invest More	Total (n=varies) [A]	Base (n=varies) [B]	Base (n=varies) [C]	Base (n=varies) [D]	Base (n=varies) [E]	Base (n=varies) [F]	Base (n=varies) [G]	Base (n=varies) [H]	Base (n=varies) [I]	Base (n=varies) [J]	Base (n=varies) [K]
Police services	36%	34%	39%	25%	39% D	43% D	40%	32%	41%	36%	35%
Garbage & green bin collection	30%	27%	33%	37% F	28%	24%	37%	26%	36%	29%	26%
Library services	30%	25%	33%	33%	28%	27%	31%	31%	32%	24%	31%
Development & building permits	38%	43%	34%	31%	40%	43% D	30%	37%	37%	46% G	39%
Urban design	33%	39% C	28%	35%	30%	32%	35%	33%	32%	33%	32%
Bylaw enforcement	28%	26%	29%	19%	32% D	31% D	25%	29%	42% GJK	26%	21%
Availability of online services	22%	28% C	18%	27%	23%	17%	24%	16%	26%	19%	25%
Parking	31%	31%	31%	33%	30%	31%	37%	29%	30%	27%	32%
Facilitating film/special events	21%	26% C	17%	23%	21%	19%	18%	18%	23%	15%	26%
Multi-channel service access	17%	17%	17%	18%	17%	17%	23%	14%	15%	19%	14%
Services to enhance parks	24%	25%	22%	20%	30% F	20%	14%	30% G	24%	19%	28% G
Online payment services	12%	14%	10%	14%	9%	13%	9%	13%	16%	13%	10%
Making streets vibrant	25%	27%	24%	25%	29%	22%	32%	31%	20%	21%	25%

Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.

Q11. And, should the City invest more, less, or the same amount on this service?
Base: Residents asked about a particular service (n varies)

BCDEFGHIJK *Significantly higher than subgroup indicated by letter. (at 95% confidence level).*

Investment in Specific Services (Residents)

(by Household Composition, Own/Rent, and Income) (table 1 of 2)

	RESIDENTS							
		HH Composition		Own/Rent		Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Invest More	Total (n=varies) [A]	Base (n=varies) [B]	Base (n=varies) [C]	Base (n=varies) [D]	Base (n=varies) [E]	Base (n=varies) [F]	Base (n=varies) [G]	Base (n=varies) [H]
Enabling affordable housing	73%	69%	75%	62%	86% D	79%	73%	70%
Social policies & projects	71%	71%	71%	65%	78% D	76% G	61%	71%
Homelessness services	66%	61%	68%	57%	77% D	71%	65%	63%
Street infrastructure	47%	48%	47%	48%	48%	46%	50%	46%
Keeping our community clean	45%	51%	44%	42%	52%	49%	40%	41%
Emergency preparedness	45%	51%	44%	42%	51%	47%	45%	43%
Transportation infrastructure	53%	53%	53%	46%	60% D	60%	50%	50%
Fire rescue & medical response	38%	45%	36%	38%	39%	43% H	47% H	25%
Water conservation	36%	37%	35%	31%	38%	39%	35%	33%
Parks/green spaces	35%	36%	35%	36%	36%	36%	32%	39%
Arts & culture	39%	35%	40%	30%	50% D	45% H	38%	33%
Recreation	36%	47% C	33%	36%	35%	38%	35%	35%
Economic development	42%	43%	42%	43%	42%	48% H	53% H	31%

Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.

Q11. And, should the City invest more, less, or the same amount on this service?
Base: Residents asked about a particular service (n varies)

BCDEFGHIJK *Significantly higher than subgroup indicated by letter. (at 95% confidence level).*

CITY SERVICES

Investment in Specific Services (Residents)

(by Household Composition, Own/Rent, and Income) (table 2 of 2)

	RESIDENTS							
		HH Composition		Own/Rent		Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Invest More	Total (n=varies) [A]	Base (n=varies) [B]	Base (n=varies) [C]	Base (n=varies) [D]	Base (n=varies) [E]	Base (n=varies) [F]	Base (n=varies) [G]	Base (n=varies) [H]
Police services	36%	39%	35%	38%	36%	40%	40%	31%
Garbage & green bin collection	30%	32%	30%	26%	37% D	35%	32%	25%
Library services	30%	33%	29%	29%	33%	34%	26%	28%
Development & building permits	38%	45%	36%	44% E	33%	40%	35%	40%
Urban design	33%	31%	33%	29%	38%	38%	25%	30%
Bylaw enforcement	28%	29%	27%	29%	28%	33%	26%	24%
Availability of online services	22%	27%	21%	21%	26%	25%	25%	20%
Parking	31%	30%	31%	27%	36% D	37% H	37% H	23%
Facilitating film/special events	21%	23%	20%	20%	22%	26% H	23%	15%
Multi-channel service access	17%	17%	17%	13%	22% D	20%	19%	13%
Services to enhance parks	24%	32% C	21%	21%	28%	26%	23%	22%
Online payment services	12%	11%	12%	11%	15%	15%	12%	10%
Making streets vibrant	25%	30%	24%	22%	31% D	31%	22%	23%

Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.

Q11. And, should the City invest more, less, or the same amount on this service?
Base: Residents asked about a particular service (n varies)

BCDEFGHIJK *Significantly higher than subgroup indicated by letter. (at 95% confidence level).*

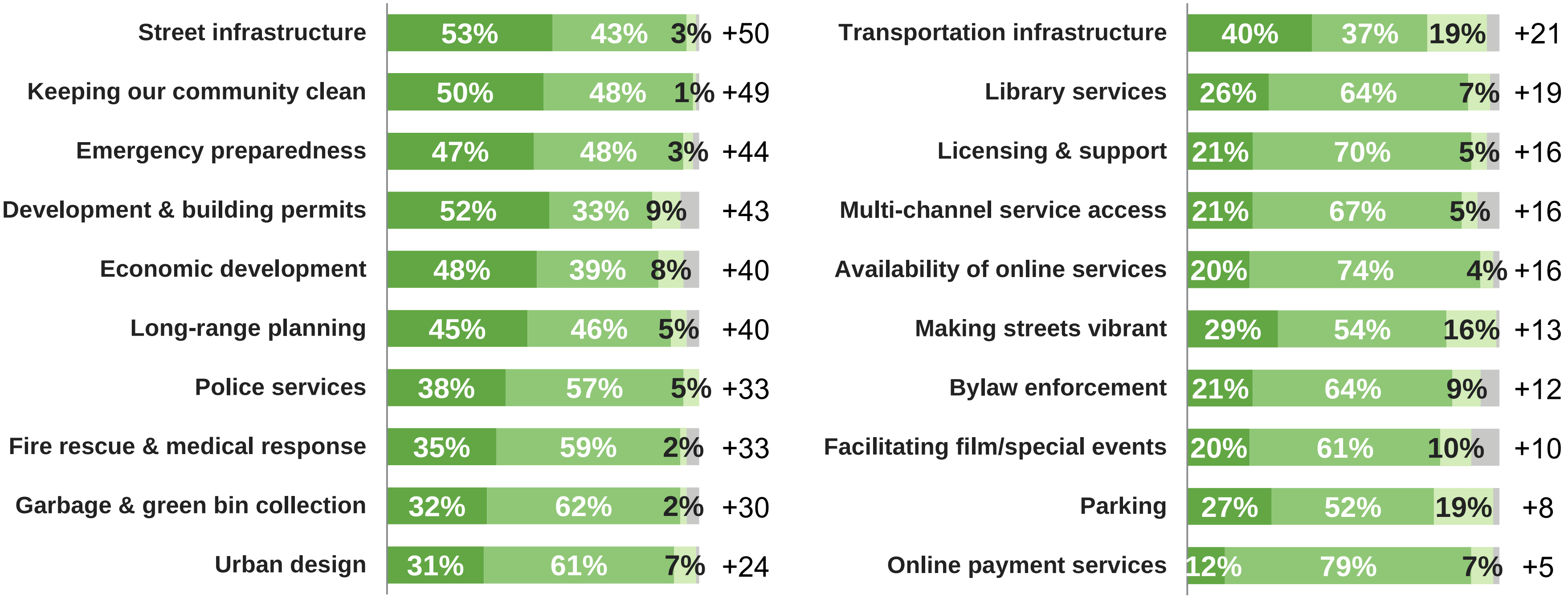
Investment in Specific Services (Businesses)

Service wording has been abbreviated to fit within the space provided.
Please see the Appendix for the full service wording.

Businesses

Invest more | Invest the same | Invest less | Don't know | Net

Net = invest more minus invest less



Q11. And, should the City invest more, the same amount, or less on this service?
Base: All businesses (n=200)

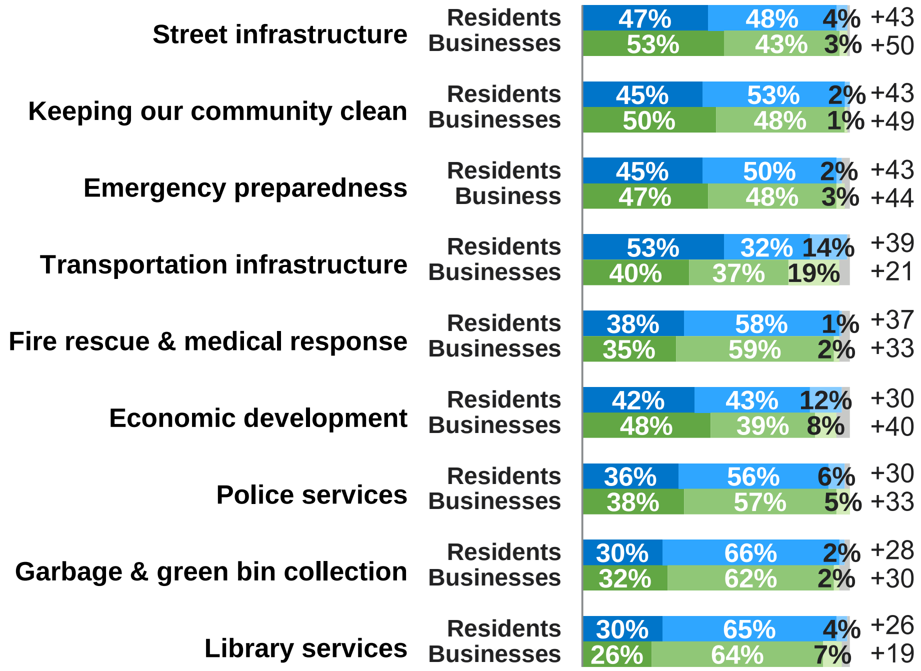
CITY SERVICES

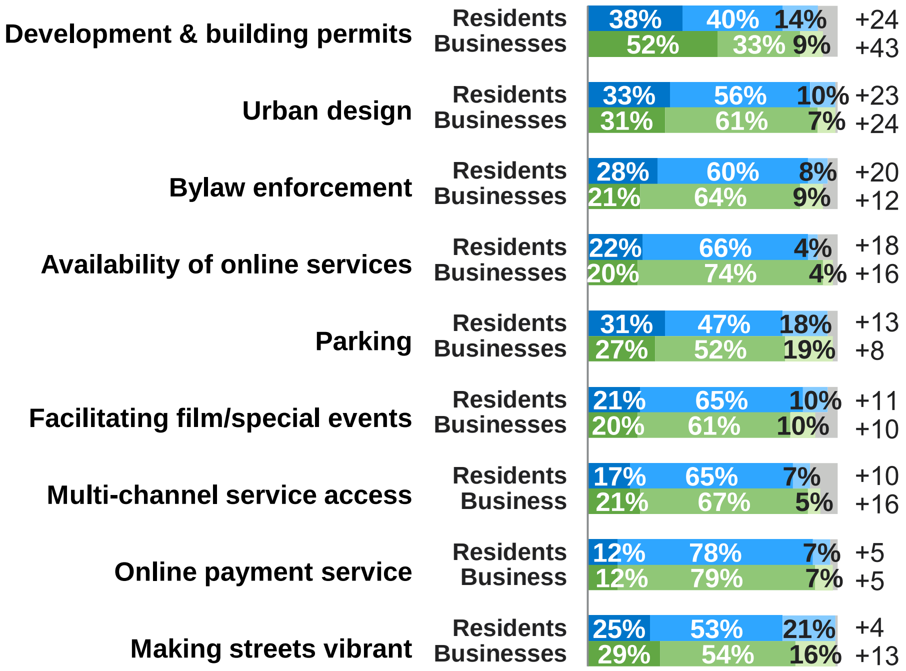
Investment in Specific Services

SUMMARY OF INVESTMENT FOR SERVICES ASKED TO BOTH RESIDENTS AND BUSINESSES.
Service wording has been abbreviated to fit within the space provided.
Please see the Appendix for the full service wording.

Residents — Invest more | Invest the same | Invest less | Don't know | Net (Net = invest more minus invest less)

Businesses — Invest more | Invest the same | Invest less | Don't know | Net (Net = invest more minus invest less)





Q11. And, should the City invest more, the same amount, or less on this service?
Base: Residents asked about a particular service (n varies); All businesses (n=200)

VALUE FOR TAXES

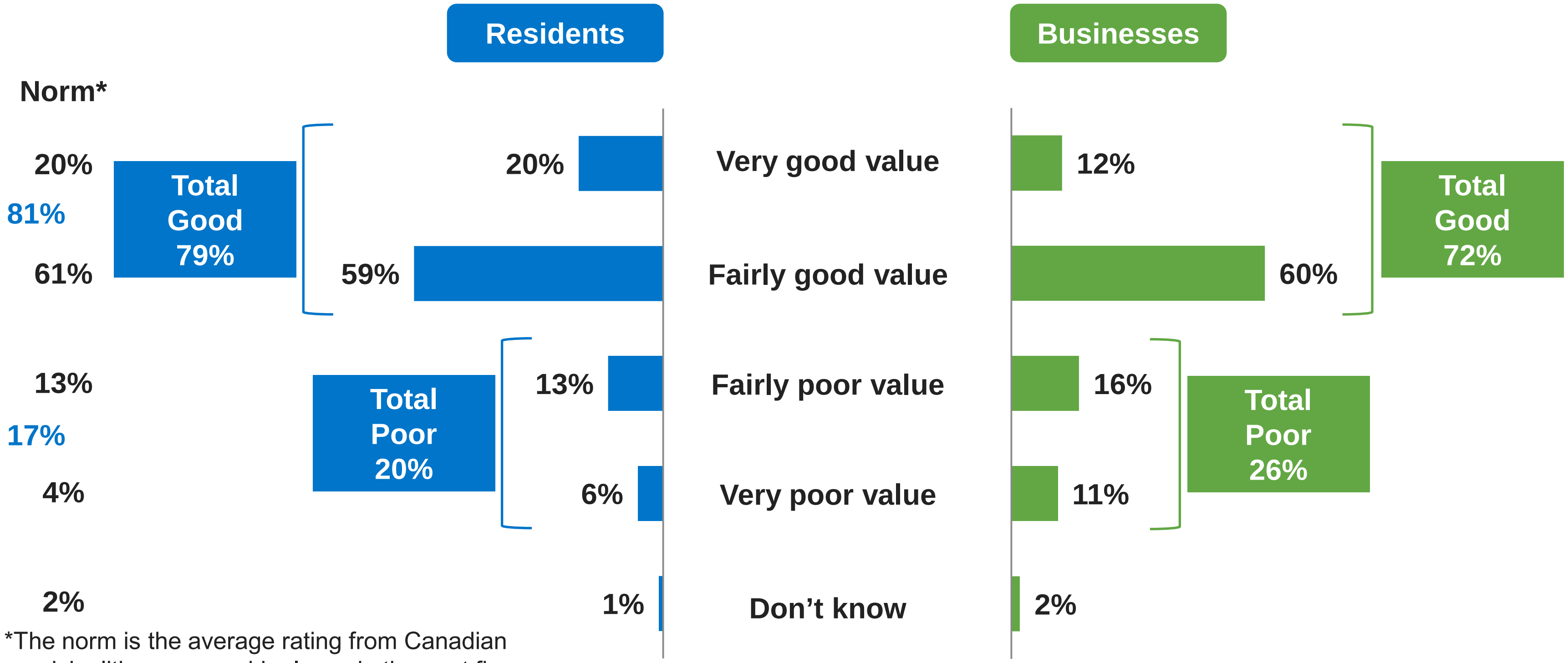
Value for Taxes

Section Summary

The majority of residents and businesses say they receive good value for their municipal tax dollars, consistent with the norm. Overall, 79% of residents and 72% of businesses say they receive ‘very’ or ‘fairly’ good value for their municipal tax dollars. In comparison, the normative resident score is 81% total good value.

- Residents living in households without children under the age of 18 are more likely to say they receive good value (combined ‘very/fairly good value’ ratings) for their municipal tax dollars (81% vs. 72% of those with children at home).

Value for Taxes



*The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.

Q13. Thinking about all the programs and services you receive from the City of Vancouver, would you say that overall you get good value or poor value for your tax dollars? (Is that very or fairly good/poor value?)

Base: All residents (n=600); All businesses (n=200)

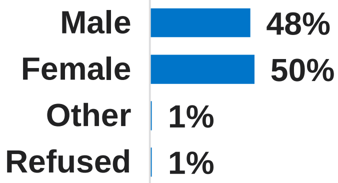
WEIGHTED SAMPLE CHARACTERISTICS

Weighted Sample Characteristics (Residents)

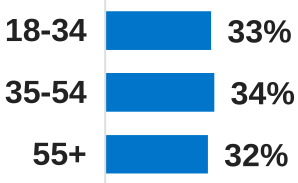
(weighted by gender/age and neighbourhood)

NEIGHBOURHOOD

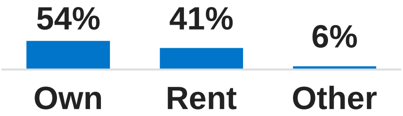
GENDER



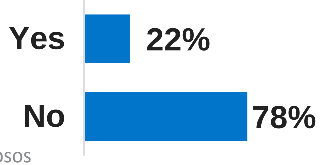
AGE



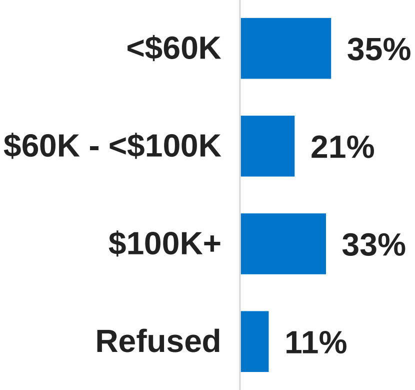
OWN/RENT



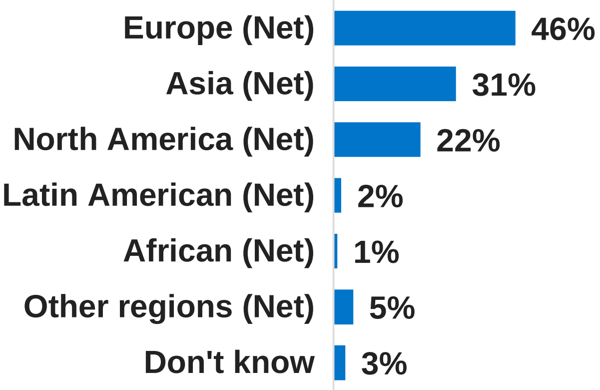
CHILDREN < 18 IN HH



INCOME



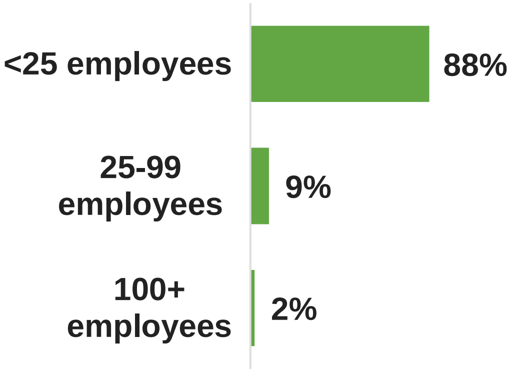
ETHNICITY



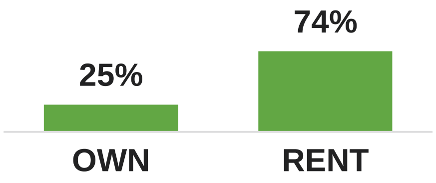
Weighted Sample Characteristics (Businesses)

(weighted by business size)

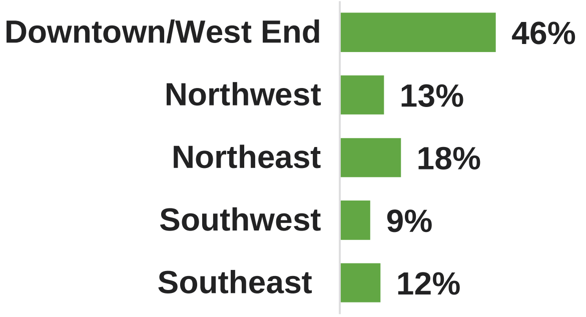
BUSINESS SIZE



OWN/RENT



NEIGHBORHOOD



APPENDIX

APPENDIX

Full Service Wording (page 1 of 3)

Chart Wording	Full Service Wording
Parks/green spaces	Provision and maintenance of a diversity of parks and green spaces
Recreation	Provision and support of recreation facilities and programs
Services to enhance parks	Provision of services to enhance parks and recreational experiences, such as golf courses, marinas and concessions
Arts & culture	Support for arts and cultural services, programs, and organizations
Social policies & projects	Social policies and projects that address issues such as poverty, mental health and addictions, immigration, and childcare
Homelessness services	Homelessness services, such as shelters, warming centres, and housing support
Licensing & support	Business licensing and support
Development & building permits	Development and building permits
By-law enforcement	By-law enforcement for buildings, property use and animal services
Transportation infrastructure	Providing transportation infrastructure for walking, bikes, transit and vehicles
Parking	Parking and enforcement

APPENDIX

Full Service Wording (page 2 of 3)

Chart Wording	Full Service Wording
Street infrastructure	Street infrastructure and maintenance
Making streets vibrant	Making streets vibrant through landscaping, art, furniture, patios and innovative temporary installations
Facilitating film/special events	Facilitating the production and permits for film and special events on city streets and spaces
Keeping our community clean	Keeping our community clean - i.e. litter pick up, roads and sidewalks sweeping, receptacles etc.
Water conservation	Water conservation and resource management
Garbage & green bin collection	Providing garbage and green bin collection
Online payment services	Online services for paying taxes, tickets, utility bills, etc.
Availability of online services	Availability of online services via Vancouver.ca
Multi-channel service access	Providing multi-channel access to City services through the VanConnect mobile app and the 3-1-1 contact centre
Enabling affordable housing	Enabling affordable housing
Economic development	Promoting economic development

APPENDIX

Full Service Wording (page 3 of 3)

Chart Wording	Full Service Wording
Urban design	Urban design that enhances public life and public spaces
Long-range planning	City-wide and community long-range planning
Fire rescue & medical response	Fire rescue and medical response
Emergency preparedness	Providing emergency preparedness information and support
Police services	Police services
Library services	Library services