CIVIC SATISFACTION SURVEY REPORT

1.1 Executive summary

1.1.1 Introduction

The City of Vancouver's annual budget process offers multiple opportunities for public input and encourages broad listening for city-wide priorities and issues, feedback on City service levels, and consultation on emerging budget directions to help develop a picture of the public's preferences for where the City should focus its investments and resources. These inputs help shape emerging directions principally driven by Council and Board priorities, economic and technical analysis, long-range planning and ongoing public and stakeholder listening throughout the year.

City staff develop an engagement approach to help inform and underpin the Budget Outlook and then validate the 2020 Budget with input from residents, businesses and stakeholders.

Phase one involves a detailed research project with opinion research firm, IPSOS Public Affairs to understand resident and business satisfaction with City services and to understand the priorities among a representative sample of Vancouver residents..

1.1.2 Resident and Business Survey Results

IPSOS's research gave a snapshot of resident and business priorities, rated City of Vancouver services, and allowed Vancouver to benchmark its results against other municipalities surveyed across Canada. The research was highly detailed and provided rich information to help shape City service planning and budget priority setting.

- **Overall perceptions of Vancouver's quality of life are favourable** with a majority of residents and businesses reporting that 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. Among those saying the quality of life has worsened, cost of living and housing are the primary factors. Other factors include overcrowding and traffic.
- **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.

- **Most residents and businesses are satisfied with the overall level and quality of City services although satisfaction is lower than the national research 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.
- **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. A strong majority of businesses are also satisfied with many of the City's services. One notable exception is development and building permits.
- **Residents' top three investment priorities are enabling affordable housing, social policies and projects, and homelessness services**. Transportation infrastructure places fourth. **Businesses' top three priorities for investment are street infrastructure, development and building permits, and keeping our community clean**.
- The majority of residents and businesses say they **receive good value for their municipal tax dollars**, consistent with the national research norm.

1.2 Phase One — Civic Service Satisfaction Survey

1.2.1 Background and objectives

This section presents the findings of the City of Vancouver's 2019 Civic Service Satisfaction Survey conducted by Ipsos.

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)
- Financial planning

Where appropriate, this year's results have been compared to the City's 2018 Civic Service Satisfaction Survey. Comparing the year-over-year results allows the City to understand how residents and businesses' attitudes and priorities are changing, identify new or emerging issues facing the community, and monitor perceptions of the City's performance in key areas.

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.

1.2.2 Methodology

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 May 1 and 22, 2019.

Residents

A total of 602 interviews were conducted with adult (18+) Vancouver residents, broken out as follows: Downtown/West End (n97), Northwest (n104), Northeast (n102), Southwest (n107), and Southeast (n192).

- 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. This approach reflected the City's guidelines around translating city-wide initiatives when the home language other than English represent more than 5 per cent of the population.

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.

Businesses

A total of 201 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 (n23).

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.

1.2.3 Executive summary

Quality of life

Similar to last year, overall perceptions of Vancouver's quality of life are favourable. Overall, 89% of residents and 92% of businesses say the quality of life in Vancouver today is 'very good' or 'good'. In comparison, the normative resident score is 95% total good.

The majority of residents and businesses continue to think the quality of life has 'stayed the same' or 'improved' in the past three years. However, among those noticing a change, more say the quality of life has 'worsened' than 'improved'. Specifically, when asked how the quality of life in Vancouver has changed in the past three years, 48% of residents say 'stayed the same', 13% say 'improved', and 36% say 'worsened'. The results are similar among businesses (50% 'stayed the same', 14% 'improved', 36% 'worsened'). In comparison, the normative resident score demonstrates a more balanced view towards the direction quality of life is taking (52% 'stayed the same', 23% 'improved', 23% 'worsened').

- Among those saying the quality of life has worsened, the cost of living and housing are driving perceptions of a worsened quality of life.

Important local issues

Housing and infrastructure continue to dominate the issue agenda. When asked to identify the most important local issues facing the City at the present time, the two most frequently mentioned open-ended responses among residents are "housing/accommodations" (48%) and "infrastructure/transportation" (40%); all other issues are a distant second in priority. The leading top-of-mind issue among businesses is "infrastructure/transportation" (39%), followed by "cost of living" (22%) and "housing/accommodations" (19%). Housing mentions among businesses are down 19 percentage points this year.

City services

Similar to last year, overall satisfaction with City services is high. Overall, 86% 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 91% total satisfied.

The majority of residents and businesses continue to think services have 'stayed the same' or 'improved' in the past three years. Among those noticing a change, more say services have 'worsened' than 'improved' although the gap has shrunk this year (residents: 69% 'stayed the same', 13% 'improved', 17% 'worsened'; businesses: 73% 'stayed the same', 7% 'improved', 20% 'worsened'). Compared to 2018, there has been an increase in the percentage saying City services have 'stayed the same' (residents up 7 points, businesses up 11 points) and a decrease in the percentage saying City services have 'worsened' (residents down 5 points, businesses down 9 points).

- Respondents who think City services have worsened attribute this to a variety of factors, with no single explanation standing out from the rest.

Similar to last year, resident satisfaction extends to the delivery of specific services with a few notable exceptions. Enabling affordable housing continues to be the least satisfactory of all the tested services. Of the 26 services evaluated by residents, 14 receive a satisfaction score of 80% or higher (combined 'very/somewhat satisfied' ratings), with the highest ratings going to library services (92%), parks/green spaces (91%), recreation (91%), fire rescue & medical response (90%), and services to enhance parks (90%). The single least satisfactory service is enabling affordable housing (30% satisfied compared to 68% dissatisfied). While this year's results are largely similar to 2018, statistically significant increases in satisfaction are seen for recreation (up 5 points), services to enhance parks (up 5 points), making streets vibrant (up 7 points), and transportation infrastructure (up 9 points).

Businesses' service satisfaction remains high. Opinion is mixed on development & building permits. Of the 19 services evaluated by businesses, 10 receive a satisfaction score of 80% or higher (combined 'very/somewhat satisfied' ratings), with the highest ratings going to fire rescue & medical response (95%), police services (94%), online payment services (91%), and library services (91%). Opinion is mixed on development & building permits (53% satisfied, 40% dissatisfied). While overall satisfaction is statistically consistent with last year for all tested services, directional increases in satisfaction are seen for transportation infrastructure (up 8 points) and development & building permits (up 11 points).

Once again, residents' top three investment priorities are enabling affordable housing, homelessness services, and social policies & projects. Overall, 73% of residents say the City should 'invest more' in enabling affordable housing, 69% say the City should 'invest more' in homelessness services, and 69% say the City should 'invest more' in social policies & projects. While the remaining services are less of an investment priority, there are no services where a majority of residents think the City should reduce investment.

Businesses have more diverse investment priorities, led by street infrastructure and economic development. Overall, 49% of businesses say the City should 'invest more' in street infrastructure and 46% say the City should 'invest more' in economic development. Other investment priorities include emergency preparedness (44%), long-range planning (43%), transportation infrastructure (43%), development & building permits (41%), and fire rescue & medical response (40%). As with residents, there are no services where a majority of businesses think the City should reduce investment.

Financial planning

Similar to last year, the majority of residents and businesses say they receive good value for their municipal tax dollars. Overall, 81% of residents and 76% 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.

To balance the budget, residents and businesses prefer user fees (new/increased) over tax increases or a reduction in City services/staffing. New this year, respondents were presented with various options for balancing the budget and asked which ones they would most and second most prefer. Overall, there is a strong preference (combined most/second most mentions) for new or increased user fees, with 50% of residents saying 'introduce new user fees for some City services that currently have no fees' and 42% saying 'increase user fees for City services that currently have fees'. Similarly, 52% of businesses prefer new user fees and 45% prefer increased user fees. While a relatively large proportion of businesses also see an opportunity to cut back on City staffing (44% select 'reduce the level of staffing and personnel that provide City services'), only 27% of residents would like the City to take this approach when balancing the budget.

An increase in property taxes is the least preferred option for balancing the budget. When asked which option they would least prefer the City use to balance the budget, 'increase residential and business property taxes' is selected the most often by both residents (40%) and businesses (59%). This is more than double what is mentioned for any other option.

The majority of residents and businesses say they would be willing to pay more user fees for services. Overall, 72% of residents and 67% of businesses say they would be willing to pay more in user fees for the services they use in order to maintain or improve them.

Key takeaways

1. Most survey measures are stable and strong.
    - Quality of life (89% good residents, 92% good businesses)
    - Overall service satisfaction (86% satisfied residents, 80% satisfied businesses)
    - Value for taxes (81% good residents, 76% good businesses)
2. Satisfaction with individual services is largely unchanged and any shifts in overall satisfaction are positive.
3. Issues related to cost of living and housing are still making more see quality of life worsening versus improving.
4. Housing and transportation/infrastructure continue to dominate the issue agenda.
5. Residents prioritize investment in affordable housing, homelessness, and social policies. Businesses have more diverse priorities led by street infrastructure and economic development.
6. New/increased user fees are preferred to raising property taxes or making cuts to City services/staff.

1.2.4 Quality of life

1.2.4.1 Overall quality of life

Similar to last year, overall perceptions of Vancouver's quality of life are favourable.

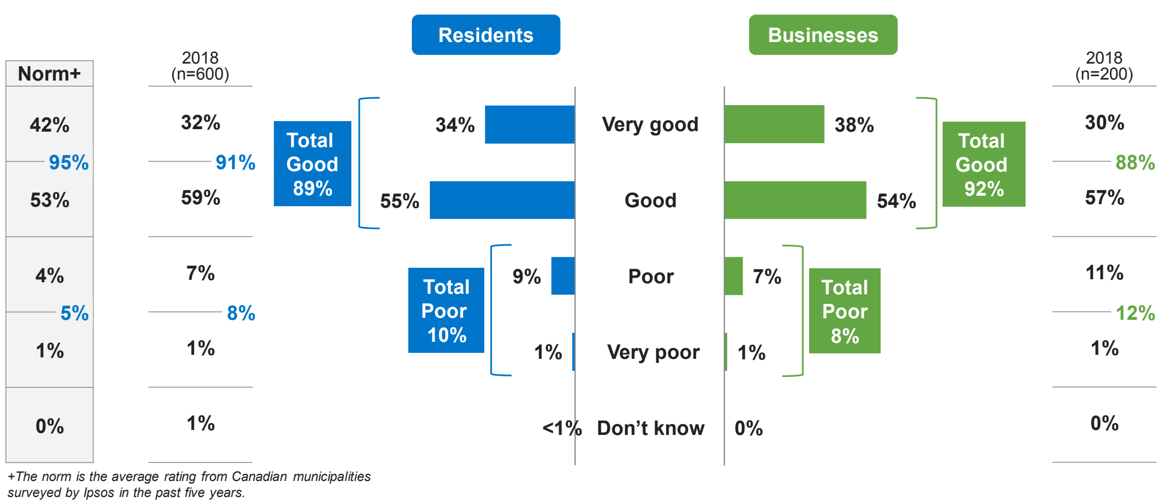
Overall, 89% of residents and 92% of businesses say the quality of life in Vancouver today is 'very good' or 'good'. Among residents, this includes 34% saying 'very good' and 55% saying 'good'. The distribution of responses among businesses is similar, with 38% saying 'very good' and 54% saying 'good'.

This year's results are not statistically different from 2018, when 91% of residents and 88% of businesses rated Vancouver's quality of life as 'very good' or 'good'.

In comparison, the normative resident score is 95% total good, including 42% 'very good' and 53% 'good'.

QUALITY OF LIFE

Overall Quality of Life



Q2. How would you rate the overall quality of life in the City of Vancouver today?
Base: All residents (n=602); All businesses (n=201)

Younger residents are more likely to rate the quality of life in Vancouver as 'very good' or 'good' (94% of 18-34 years vs. 87% of 35+ years).

1.2.4.2 Change in quality of life

The majority of residents and businesses continue to think the quality of life has 'stayed the same' or 'improved' in the past three years. However, among those noticing a change, more say the quality of life has 'worsened' than 'improved'.

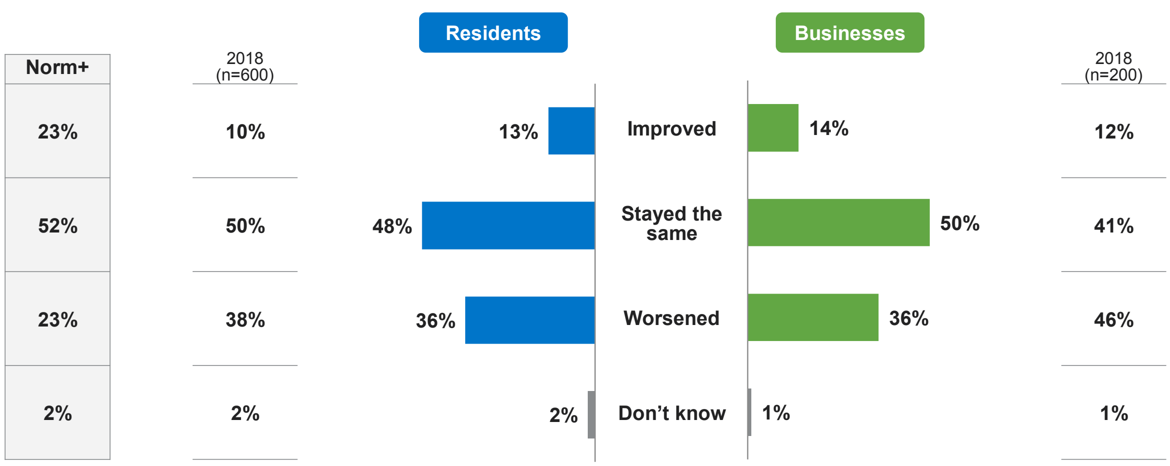
When asked how Vancouver's quality of life has changed in the past three years, 48% of residents say 'stayed the same', 13% say 'improved', and 36% say 'worsened'. Among businesses, 50% say 'stayed the same', 14% say 'improved', and 36% say 'worsened'.

This year's results are statistically consistent with 2018. While not statistically significant, the percentage of businesses saying the quality of life has 'worsened' is 10 down points this year (36% in 2019 vs. 46% in 2018).

In comparison, the normative resident score demonstrates a more balanced view towards the direction quality of life is taking, with 52% saying 'stayed the same', 23% saying 'improved', and 23% saying 'worsened.'

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.

▲/▼ Significantly higher/lower than previous year.

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=602); All businesses (n=201)

Perceptions of an 'improved' quality of life are higher among residents who are:

- 18-34 years of age (22% vs. 8% of 55+ years, 10% of 35-54 years)
- Renters (18% vs. 9% of homeowners)

Conversely, perceptions of a 'worsened' quality of life are higher among residents who are 35+ years of age (includes 44% of 55+ years and 40% of 35-54 years vs. 24% of 18-34 years).

Homeowners are more likely than renters to say the quality of life has 'stayed the same' (52% vs. 43%).

1.2.4.3 Reasons quality of life has improved

Transportation and infrastructure are the leading open-ended reasons behind perceptions of an improved quality of life.

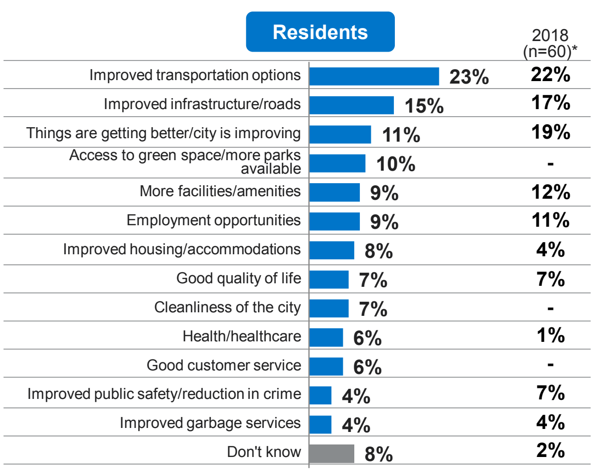
Nearly one-quarter (23%) of residents saying the quality of life has improved attribute this to "improved transportation options" (coded open-ends). Another 15% mention "improved infrastructure/roads." Other frequently mentioned responses include "things are getting better/city is improving" (11%) and "access to green space/more parks available" (10%). Mentions of green space/parks are new this year.

Among the few businesses saying the quality of life has improved, the leading open-ended reason is "improved infrastructure/roads" (22%, consistent with last year). However, with only 27 businesses answering this question, these results should be interpreted with caution.

QUALITY OF LIFE

Reasons Quality of Life has Improved

(among those saying the quality of life has improved) (coded open-ends, multiple responses allowed)



Businesses

Top Mentions

	2019 (n=27)**	2018 (n=21)**
Improved infrastructure/roads	22%	22%
More environmentally friendly city	19%	13%
Good quality of life	19%	8%
Improved access to services	18%	14%
Improved economy	12%	8%
Cleanliness of the city	12%	-

2019 resident mentions <4% not shown.

* Small base size, interpret with caution.

** Very small base size, interpret with extreme caution.

▲/▼ Significantly higher/lower than previous year.

Q4. Why do you think the quality of life has improved?
Base: Those saying the quality of life has improved; Residents (n=67)*; Businesses (n=27)**

1.2.4.4 Reasons quality of life has worsened

The cost of living and housing are driving perceptions of a worsened quality of life.

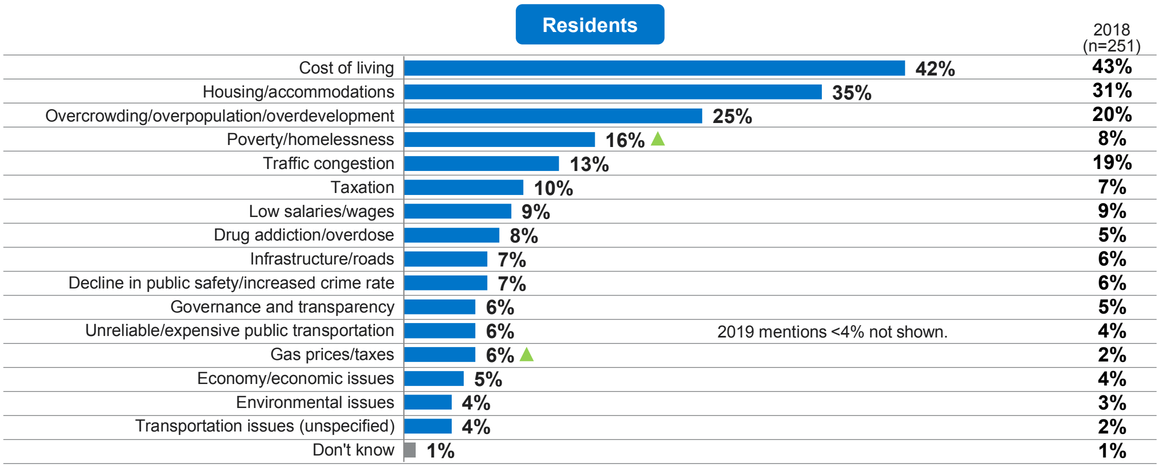
Among residents saying the quality of life has worsened, the two most commonly mentioned open-ended reasons are "cost of living" (42%) and "housing/accommodations" (35%). Other factors include "overcrowding/overpopulation/overdevelopment" (25%), "poverty/homelessness" (16%, up 8 points from 8% in 2018), "traffic congestion" (13%), and "taxation" (10%).

Among businesses saying the quality of life has worsened, 58% point to "cost of living" and 29% mention "housing/accommodations". Other reasons include "poverty/homelessness" (17%), "overcrowding/overpopulation/overdevelopment" (12%), "economy/economic issues" (12%, up 10 points from 2% in 2018), and "traffic congestion" (11%, down 15 points from 26% in 2018).

QUALITY OF LIFE

Reasons Quality of Life has Worsened (Residents)

(among those saying the quality of life has worsened) (coded open-ends, multiple responses allowed)



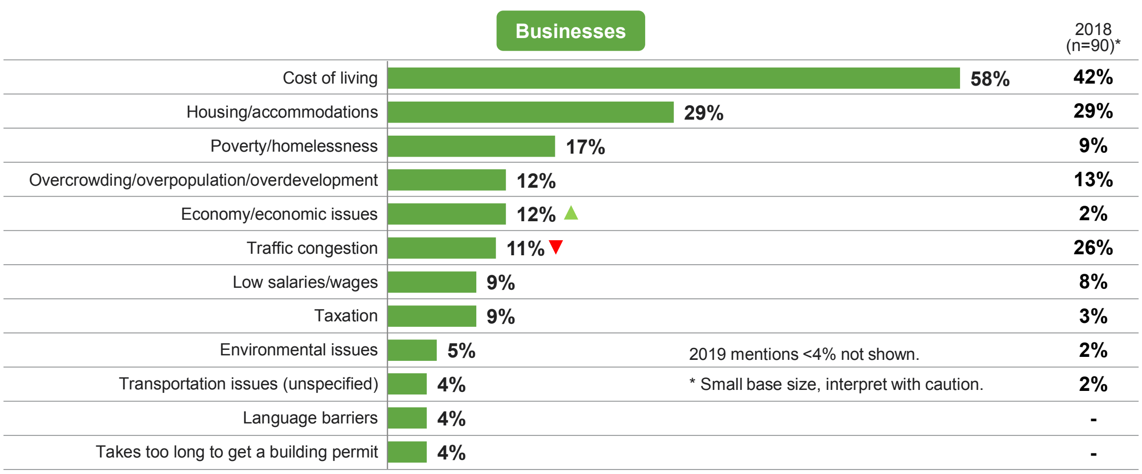
/ Significantly higher/lower than previous year.

Q5. Why do you think the quality of life has worsened?
Base: Residents saying the quality of life has worsened (n=235)

QUALITY OF LIFE

Reasons Quality of Life has Worsened (Businesses)

(among those saying the quality of life has worsened) (coded open-ends, multiple responses allowed)



/ Significantly higher/lower than previous year.

Q5. Why do you think the quality of life has worsened?
Base: Businesses saying the quality of life has worsened (n=74)*

Mentions of "cost of living" are higher among residents who:

- Are 35-54 years of age (59% vs. 28% of 55+ years, 41% of 18-34 years)
- Live in households with children under the age of 18 at home (53% vs. 38% of those without children at home)

Renters are more likely than homeowners to mention "housing/accommodations" (51% vs. 24%).

1.2.5 Important local issues

Housing and infrastructure continue to dominate the issue agenda.

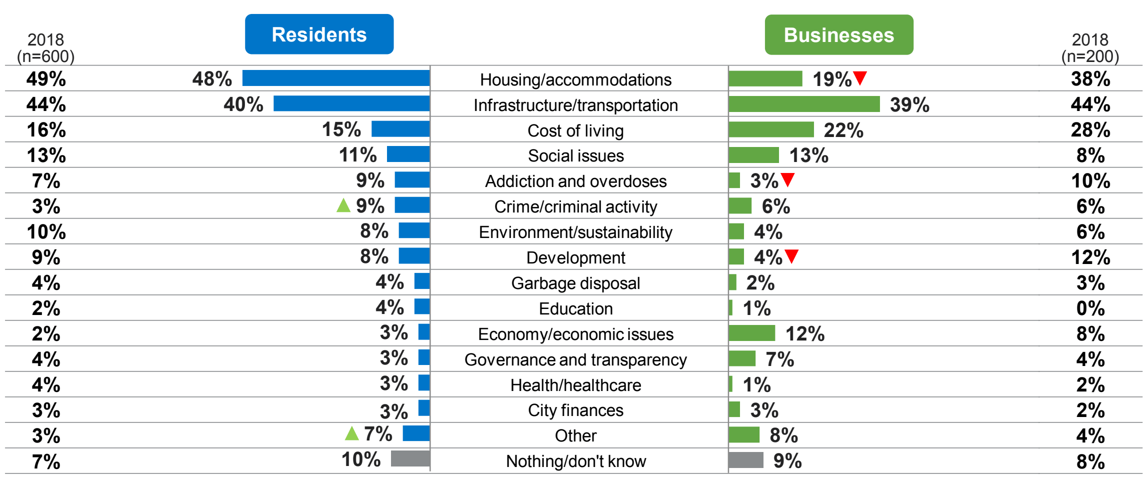
When asked to identify the most important local issues facing the City at the present time, the two most frequently mentioned open-ended responses among residents are "housing/accommodations" (48%) and "infrastructure/transportation" (40%), similar to last year. All other issues are a distant second in priority. Mentions of "crime/criminal activity" are up 6 percentage points this year (9% in 2019 vs. 3% in 2018).

The leading top-of-mind issue among businesses this year is "infrastructure/transportation" (39%), statistically consistent with 2018. This is followed by "cost of living" (22%) and "housing/accommodations" (19%). Housing mentions are down 19 percentage points this year (19% in 2019 vs. 38% in 2018). Businesses this year are also less likely to mention "development" (down 8 points, moving from 12% in 2018 to 4% in 2019) and "addiction and overdoses" (down 7 points, moving from 10% in 2018 to 3% in 2019).

IMPORTANT LOCAL ISSUES

Important Local Issues

(coded open-ends, multiple responses allowed)



Q1. From your perspective as a [RESIDENT: resident of] [BUSINESS: business owner, manager, or operator in] the City of Vancouver, what are the most important local issues facing the City at the present time? Anything else?
Base: All residents (n=602); All businesses (n=201)

▲ / ▼ Significantly higher/lower than previous year.

Mentions of "housing/accommodations" are higher among residents who are 35-54 years of age (53% vs. 39% of 18-34 years, 50% of 55+ years).

Mentions of "infrastructure/transportation" are higher among residents who are 35-54 years of age (48% vs. 31% of 18-34 years, 40% of 55+ years), those living in the Southeast (45% vs. 28% in Downtown/West End, 37% in the Northeast, 42% in the Northwest, 42% in the Southwest), and homeowners (45% vs. 33% of renters).

1.2.6 City services

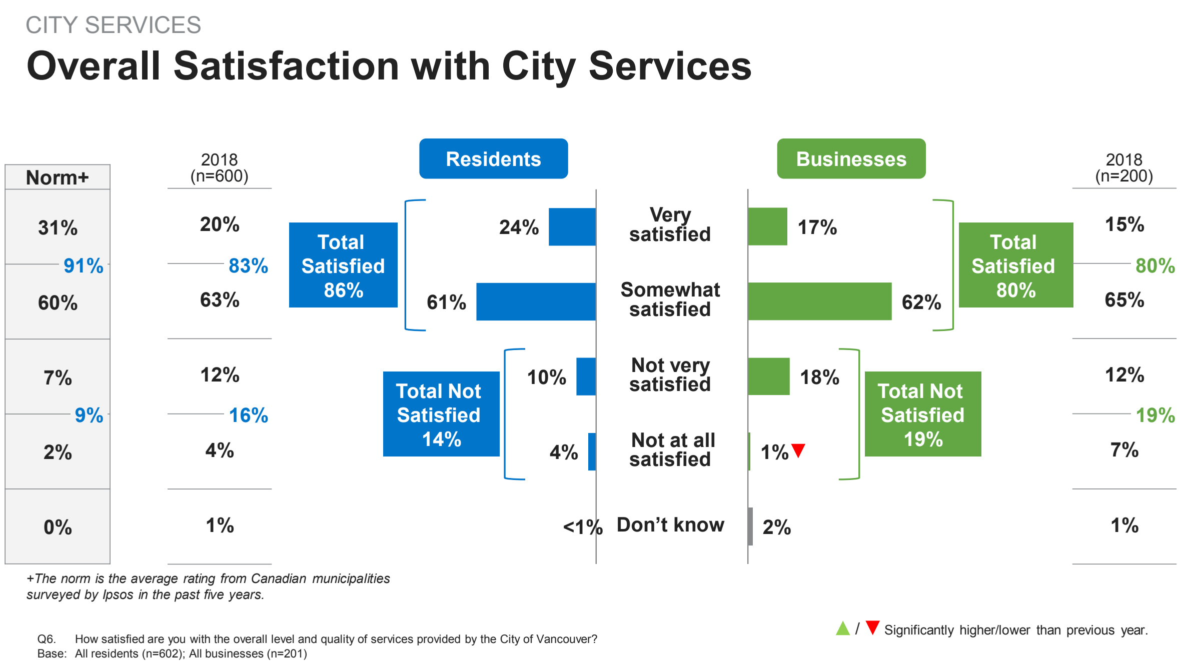
1.2.6.1 Overall satisfaction with City services

Similar to last year, overall satisfaction with City services is high.

Overall, 86% 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. Most of those who are satisfied describe their satisfaction as ‘somewhat’ rather than ‘very’. Among residents, this includes 24% saying ‘very satisfied’ and 61% saying ‘somewhat satisfied’. Among businesses, 17% say ‘very satisfied’ and 62% say ‘somewhat satisfied’.

This year’s results are not statistically different from 2018, when 83% of residents and 80% of businesses said they were satisfied with the City’s overall services.

In comparison, the normative resident score is 91% total satisfied, including 31% ‘very satisfied’ and 60% ‘somewhat satisfied’.



Overall satisfaction (combined ‘very/somewhat satisfied’ ratings) with services is higher among residents who are:

- 18-34 years of age (93% vs. 81% of 55+ years, 83% of 35-54 years)
- Renters (91% vs. 81% of homeowners)

1.2.6.2 Change in City services

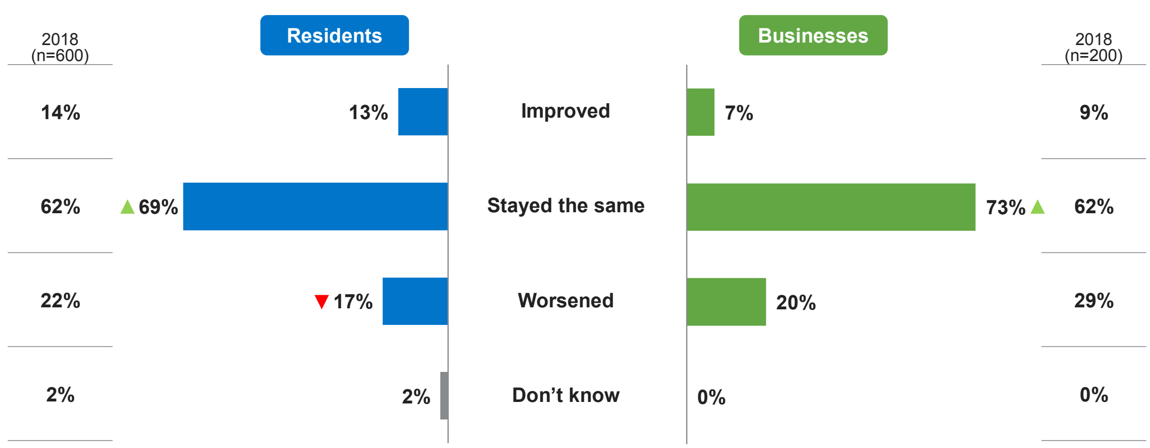
The majority of residents and businesses continue to think services have 'stayed the same' or 'improved' in the past three years. Among those noticing a change, more say services have 'worsened' than 'improved' although the gap has shrunk this year.

When asked how the overall level and quality of City services has changed in the past three years, 69% of residents say 'stayed the same', 13% say 'improved', and 17% say 'worsened'. Among businesses, 73% say 'stayed the same', 7% say 'improved', and 20% say 'worsened'.

Compared to 2018, there has been an increase in the percentage of respondents saying City services have 'stayed the same' (residents up 7 points, businesses up 11 points) and a decrease in the percentage saying City services have 'worsened' (residents down 5 points, businesses down 9 points).

CITY SERVICES

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=602); All businesses (n=201)

▲/▼ Significantly higher/lower than previous year.

Residents who are more likely to say City services have 'improved' include:

- Those who are 18-34 years of age (18% vs. 9% of 55+ years, 10% of 35-54 years)
- Those living in the Northeast (19% vs. 9% in Downtown/West End, 9% in the Southwest, 13% in the Northwest, 13% in the Southeast)
- Renters (17% vs. 9% of homeowners)
- Those with household incomes of <$60K (17% vs. 10% of $60K+)

Perceptions of 'worsened' City services are higher among residents who are:

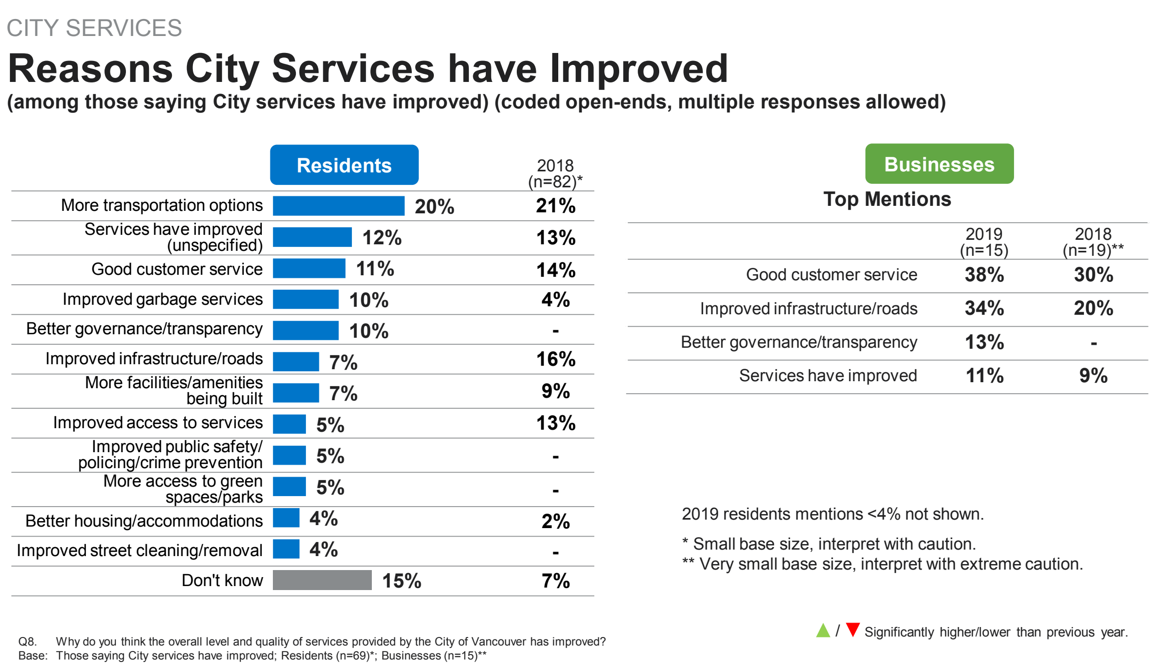
- 55+ years of age (27% vs. 5% of 18-34 years, 18% of 35-54 years)
- Homeowners (21% vs. 12% of renters)

1.2.6.3 Reasons City services have improved

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" (20%). Other explanations include "services have improved (unspecified)" (12%), "good customer service" (11%), "improved garbage services" (10%), and "better governance/transparency" (10%). Mentions of improved governance are new this year.

Conversely, among the few businesses saying City services have improved, the leading open-ended reasons are "good customer service" (38%) and "improved infrastructure/roads" (34%). However, with only 15 businesses answering this question, these results should be interpreted with caution.



1.2.6.4 Reasons City services have worsened

Residents and businesses offer a variety of explanations for saying City services have worsened.

Among residents saying City services have worsened, the leading open-ended reason is "poor quality of service" (23%), followed by "governance and transparency" (14%), "garbage services"

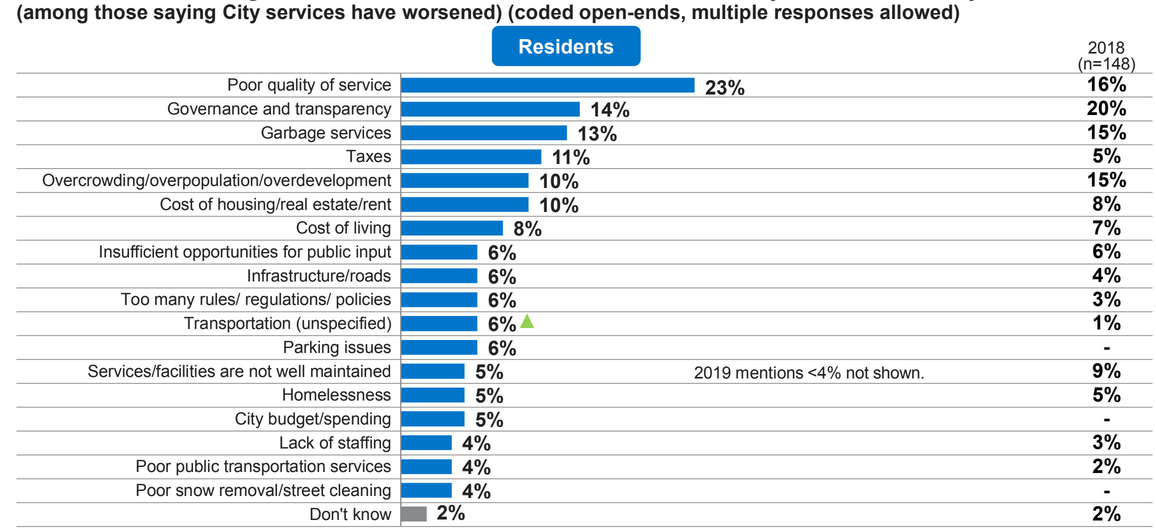
(13%), “taxes” (11%), “overcrowding/overpopulation/overdevelopment” (10%), and “cost of housing/real estate/rent” (10%). This year’s results are statistically consistent with 2018.

Businesses saying City services have worsened offer an even greater variety of responses, with no single reason mentioned by more than 16% of respondents. Overall, the two leading open-ended responses are “governance and transparency” (16%) and “City budget/spending" (16%). Budget mentions are new this year.

CITY SERVICES

Reasons City Services have Worsened (Residents)

(among those saying City services have worsened) (coded open-ends, multiple responses allowed)

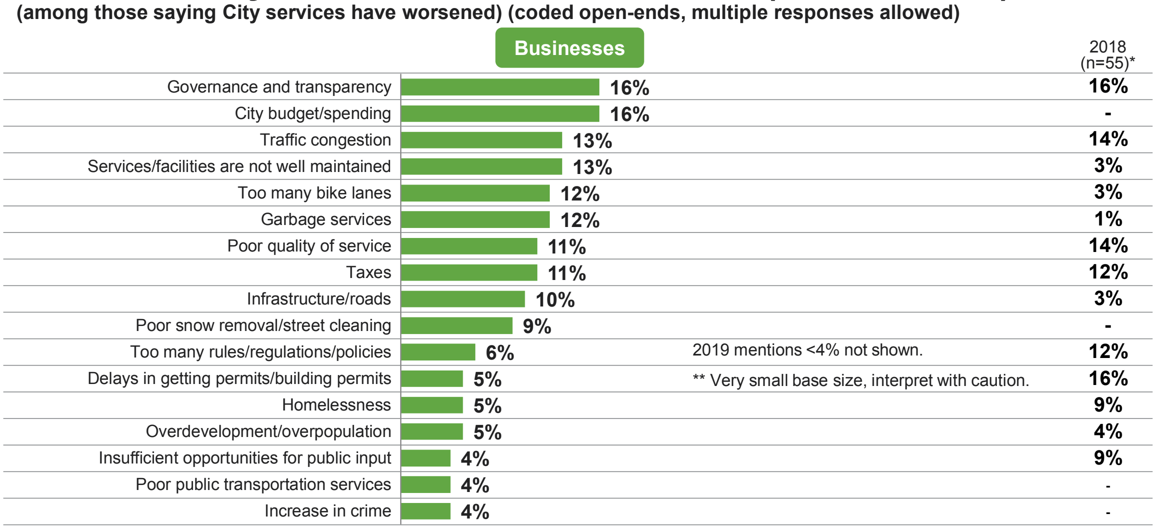


Q9. Why do you think the overall level and quality of services provided by the City of Vancouver has worsened?
Base: Residents saying City services have worsened (n=116)

CITY SERVICES

Reasons City Services have Worsened (Businesses)

(among those saying City services have worsened) (coded open-ends, multiple responses allowed)



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=39)**

1.2.6.5 Satisfaction with specific services

Residents and businesses were asked to rate their satisfaction with a variety of specific City services.

A total of 26 services were asked to residents; due to the number of services requiring feedback, each resident was randomly asked about 20 different services, resulting in an average base size of 456 respondents per service (actual base sizes range from 478 to 414).

The number of services asked to businesses was smaller (19), allowing all businesses to provide feedback on all the tested services. Last year businesses were asked about 20 different services but 'providing garbage and green bin collection' was removed in 2019 because the City is not responsible for providing this service to businesses.

The wording of these services has been abbreviated for reporting purposes. Please see the Appendix for the complete service wording presented to respondents.

Residents

Similar to last year, resident satisfaction extends to the delivery of specific services with a few notable exceptions. Enabling affordable housing continues to be 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, five services receive a satisfaction score of 90% or higher – these include **library services** (92%), **parks/green spaces** (91%), **recreation** (91%), **fire rescue & medical response** (90%), and **services to enhance parks** (90%).

In comparison to the 14 highest rated services, slightly lower satisfaction scores are seen for **emergency preparedness** (79%), **availability of online services** (78%), **bylaw enforcement** (78%), **transportation infrastructure** (76%), **street infrastructure** (72%), **multi-channel service access** (70%), and **economic development** (66%). However, even these are rated satisfactory by at least two-thirds of residents.

Of the remaining five services, opinion is mixed on **parking** (59% satisfied), **development & building permits** (55%), **social policies & projects** (52%), and **homelessness services** (51%). The single least satisfactory service is **enabling affordable housing**, with only 30% of residents saying they are satisfied with the City's performance in this area. Nearly seven-in-ten (68%) say they are dissatisfied, including 28% saying 'not at all satisfied'.

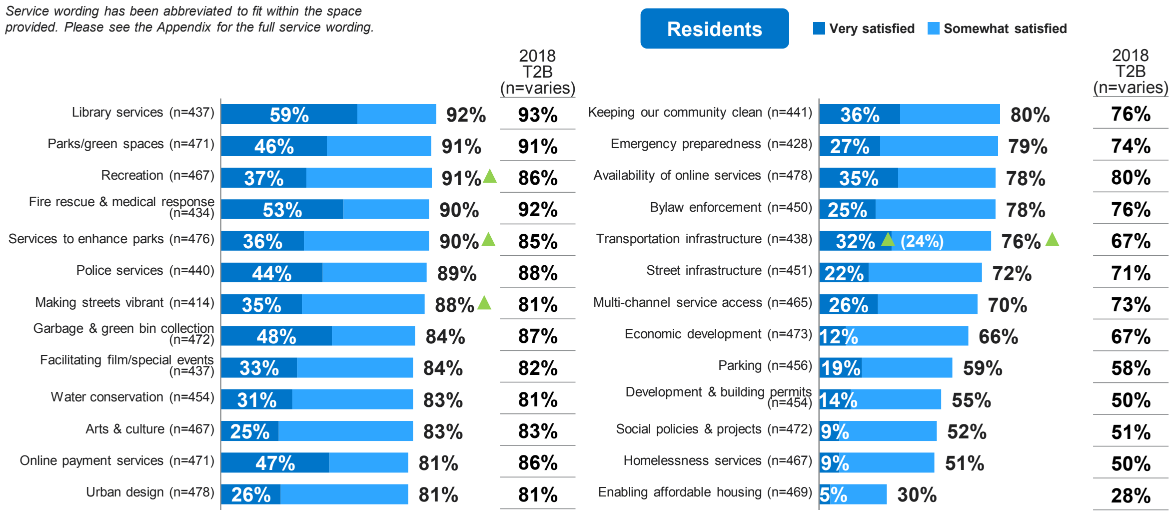
While this year's results are largely similar to 2018, statistically significant increases in satisfaction are seen for the following four services (two in Parks and two in ENG-PW).

- Recreation (up 5 points, moving from 86% in 2018 to 91% in 2019)
- Services to enhance parks (up 5 points, moving from 85% in 2018 to 90% in 2019)
- Making streets vibrant (up 7 points, moving from 81% in 2018 to 88% in 2019)
- Transportation infrastructure (up 9 points, moving from 67% in 2018 to 76% in 2019)

CITY SERVICES

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.



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 (combined 'very/somewhat satisfied' ratings) with **enabling affordable housing** is *lowest* among those who are 18-34 years of age (23% vs. 37% of 55+ years, 29% of 35-54 years), living Downtown/West End (22% vs. 38% in the Southwest, 32% in the Northeast, 29% in the Southeast, 25% in the Northwest), and renters (21% vs. 37% of homeowners).

A summary of other significant demographic differences can be found in the following four tables. The first two tables show how satisfaction varies by gender, age, and neighbourhood. The third and fourth tables show how satisfaction varies by household composition (with/without children under the age of 18 living at home), own/rent, and income.

CITY 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	[B]	[C]	[D]	[E]	[F]	[G]	[H]	[I]	[J]	[K]
Library services	92%	92%	94%	93%	95%	90%	92%	94%	93%	89%	94%
Parks/green spaces	91%	90%	93%	95%	89%	90%	93%	95% K	94%	91%	87%
Recreation	91%	91%	92%	93%	90%	89%	94%	91%	90%	90%	90%
Fire rescue & medical response	90%	91%	89%	90%	91%	88%	89%	88%	99% GHJK	85%	90%
Services to enhance parks	90%	89%	92%	94% F	91%	87%	96% H	85%	94%	90%	88%
Police services	89%	87%	91%	86%	89%	93%	90%	86%	89%	87%	90%
Making streets vibrant	88%	85%	90%	90%	90%	83%	86%	92%	89%	87%	86%
Garbage & green bin collection	84%	86%	83%	89%	81%	82%	82%	82%	88%	85%	83%
Facilitating film/special events	84%	78%	89% B	85%	87% F	78%	82%	82%	83%	84%	86%
Water conservation	83%	85%	83%	81%	84%	84%	87%	83%	80%	82%	84%
Arts & culture	83%	82%	85%	82%	83%	85%	84%	79%	84%	86%	83%
Online payment services	81%	82%	82%	79%	88% F	78%	80%	83%	80%	82%	81%
Urban design	81%	80%	83%	82%	82%	79%	79%	86%	83%	80%	80%

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).

CITY SERVICES

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	[B]	[C]	[D]	[E]	[F]	[G]	[H]	[I]	[J]	[K]
Keeping our community clean	80%	80%	80%	87% EF	77%	76%	79%	86%	74%	87%	76%
Emergency preparedness	79%	77%	81%	78%	78%	79%	82%	73%	78%	89% HK	74%
Availability of online services	78%	77%	80%	83% F	81% F	72%	83%	72%	85% HK	82%	73%
Bylaw enforcement	78%	80%	78%	82%	76%	75%	80%	77%	83%	73%	79%
Transportation infrastructure	76%	73%	79%	82% E	71%	76%	76%	78%	79%	79%	71%
Street infrastructure	72%	71%	73%	81% EF	66%	68%	76%	70%	79%	74%	66%
Multi-channel service access	70%	67%	73%	69%	76%	67%	73%	59%	70%	72%	74% H
Economic development	66%	68%	66%	68%	65%	65%	67%	65%	74%	62%	65%
Parking	59%	57%	62%	64%	59%	53%	61%	56%	67%	59%	56%
Development & building permits	55%	54%	56%	78% EF	51% F	34%	52%	49%	58%	49%	61%
Social policies & projects	52%	55%	50%	60% E	44%	53%	55%	52%	53%	56%	48%
Homelessness services	51%	50%	53%	57%	49%	48%	40%	55%	59% G	60% G	47%
Enabling affordable housing	30%	26%	34%	23%	29%	37% D	22%	25%	32%	38% G	29%

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).

CITY SERVICES

Satisfaction with Specific Services (Residents)

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

		RESIDENTS						
		HH Composition		Own/Rent		HH Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Total Satisfied	Total	[B]	[C]	[D]	[E]	[F]	[G]	[H]
Library services	92%	98% C	90%	91%	93%	91%	99% FH	90%
Parks/green spaces	91%	87%	92%	92%	90%	91%	91%	93%
Recreation	91%	91%	91%	91%	91%	91%	90%	91%
Fire rescue & medical response	90%	87%	91%	87%	95% D	90%	95% H	86%
Services to enhance parks	90%	93%	90%	88%	94% D	88%	91%	94%
Police services	89%	91%	88%	87%	91%	86%	91%	92%
Making streets vibrant	88%	87%	88%	86%	91%	89%	89%	86%
Garbage & green bin collection	84%	80%	85%	79%	89% D	84%	86%	87%
Facilitating film/special events	84%	87%	82%	84%	84%	86%	86%	82%
Water conservation	83%	87%	82%	85%	82%	84%	86%	87%
Arts & culture	83%	78%	85%	81%	88% D	83%	89%	81%
Online payment services	81%	85%	80%	84%	78%	77%	80%	88% F
Urban design	81%	82%	81%	81%	82%	84%	83%	81%

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)

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

CITY SERVICES

Satisfaction with Specific Services (Residents)

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

		RESIDENTS						
		HH Composition		Own/Rent		HH Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Total Satisfied	Total	[B]	[C]	[D]	[E]	[F]	[G]	[H]
Keeping our community clean	80%	78%	81%	73%	88% D	85%	80%	76%
Emergency preparedness	79%	80%	78%	77%	80%	75%	85%	78%
Availability of online services	78%	77%	79%	78%	80%	76%	81%	80%
Bylaw enforcement	78%	75%	79%	77%	78%	77%	81%	80%
Transportation infrastructure	76%	72%	78%	67%	86% D	80%	74%	75%
Street infrastructure	72%	64%	74%	67%	76% D	72%	75%	71%
Multi-channel service access	70%	71%	70%	73%	65%	68%	69%	73%
Economic development	66%	65%	66%	62%	70%	66%	67%	66%
Parking	59%	62%	58%	59%	60%	54%	61%	69% F
Development & building permits	55%	50%	56%	49%	60% D	57%	64% H	46%
Social policies & projects	52%	46%	54%	50%	53%	55%	58% H	44%
Homelessness services	51%	48%	52%	49%	51%	48%	60% F	50%
Enabling affordable housing	30%	27%	30%	37% E	21%	29%	28%	31%

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)

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

Businesses

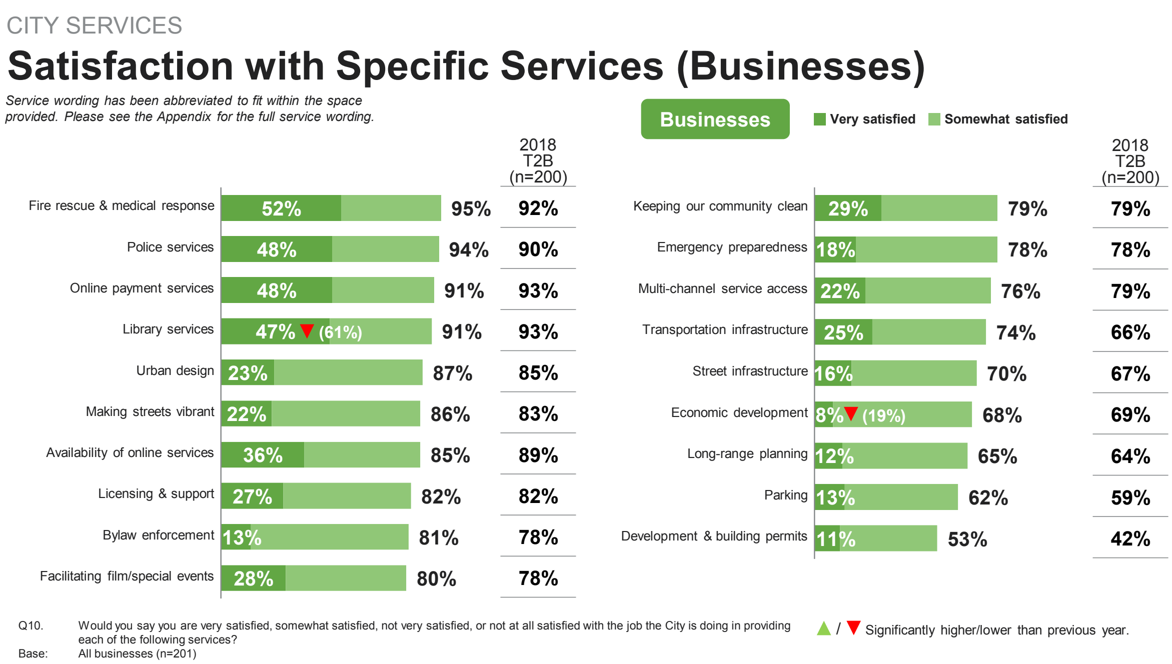
Businesses' service satisfaction remains high. Opinion is mixed on development & building permits.

Of the 19 services evaluated by businesses, 10 receive a satisfaction score of 80% or higher (combined 'very/somewhat satisfied' ratings), with the highest ratings going to **fire rescue & medical response** (95%), **police services** (94%), **online payment services** (91%), and **library services** (91%).

In comparison to the 10 highest rated services, slightly lower satisfaction scores are seen for **keeping our community clean** (79%), **emergency preparedness** (78%), **multi-channel service access** (76%), **transportation infrastructure** (74%), **street infrastructure** (70%), **economic development** (68%), **long-range planning** (65%), and **parking** (62%). However, even these are rated satisfactory by more than six-in-ten businesses.

Opinion is mixed on the one remaining service, **development & building permits**. While just over one-half (53%) of businesses say they are satisfied with this service, four-in-ten (40%) are dissatisfied, including 20% saying 'not at all satisfied'.

Overall satisfaction (combined 'very/somewhat satisfied' ratings) is statistically consistent with last year for all tested services. While not statistically significant, directional increases in satisfaction are seen for **transportation infrastructure** (up 8 points, moving from 66% in 2018 to 74% in 2019) and **development & building permits** (up 11 points, moving from 42% in 2018 to 53% in 2019).

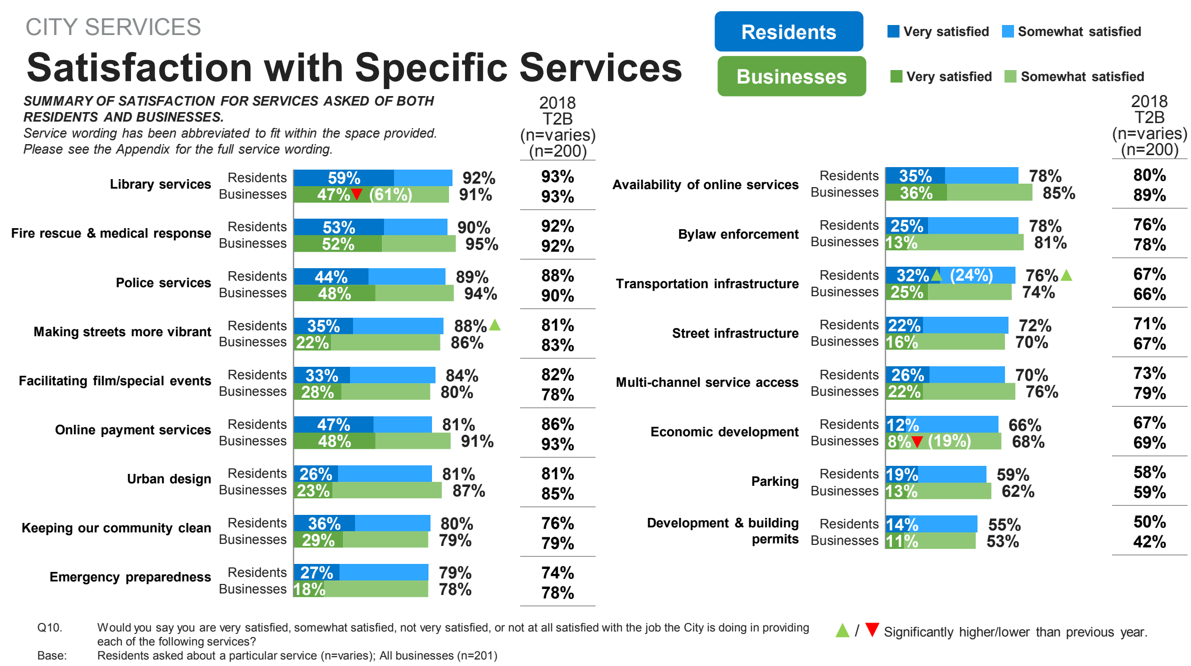


Comparing resident and business satisfaction

While resident and business satisfaction are similar for most services, there are five areas where businesses are notably more satisfied.

Looking specifically at the services asked to both residents and businesses shows largely similar satisfaction scores (combined 'very/somewhat satisfied') for most services. However, there are five services where businesses report statistically higher satisfaction scores. These include:

- Fire rescue & medical response (95% businesses vs. 90% residents)
- Police services (94% businesses vs. 89% residents)
- Online payment services (91% businesses vs. 81% residents)
- Urban design (87% businesses vs. 81% residents)
- Availability of online services (85% businesses vs. 78% residents)



1.2.6.6 Investment in specific services

Residents and businesses were also asked their opinions on how much the City should invest (more, same, less) in each specific service to better understand spending priorities.

Broadly speaking, respondents continue to think the City should invest more or the same in all the evaluated services; there are no services where a majority of respondents think the City should reduce investment. However, there are clearly some services that are a greater spending priority.

While many of respondents' top investment priorities align with the services with which they are less satisfied, this is not always the case. In other words, satisfaction is not always a predictor of how much respondents would like the City to invest in a specific service, suggesting that other factors (such as the priority attached to a service) likely also play a role.

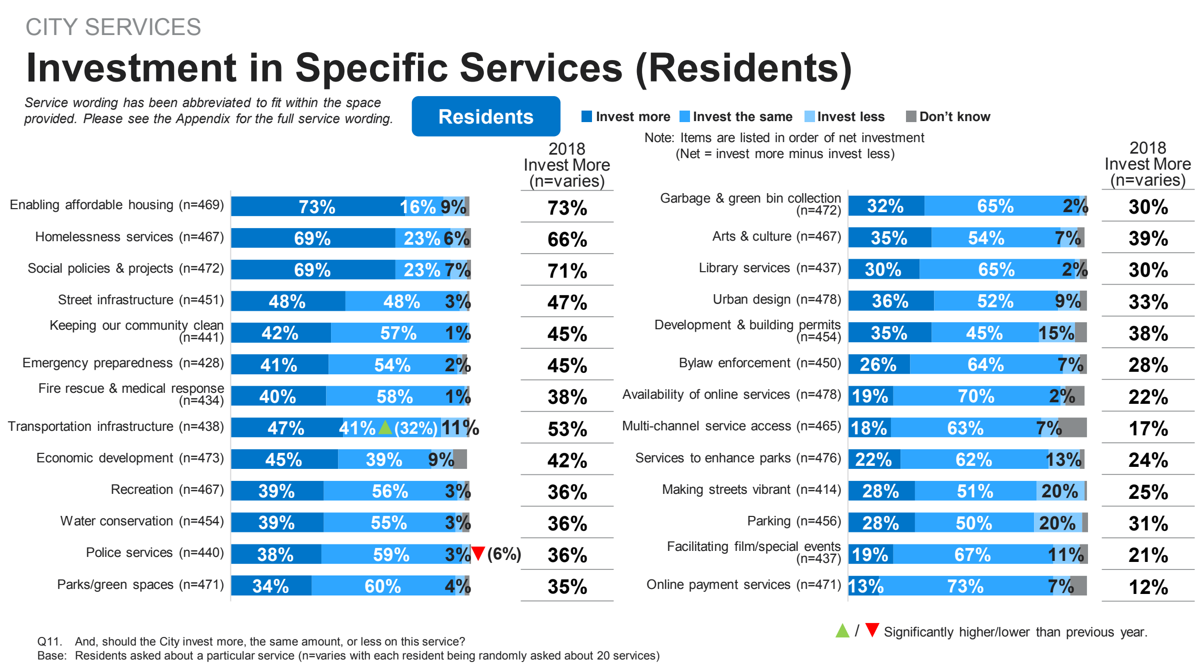
Residents

Once again, residents' top three investment priorities are enabling affordable housing, homelessness services, and social policies & projects.

Overall, 73% of residents say the City should 'invest more' in **enabling affordable housing**, 69% say the City should 'invest more' in **homelessness services**, and 69% say the City should 'invest more' in **social policies & projects**.

This year's results are largely similar to 2018, with no statistically significant changes in the percentage saying the City should 'invest more' in a specific service.

In the chart below, services have been listed in order of net investment (net = invest more minus invest less).



Renters are more likely than homeowners to say the City should 'invest more' in **enabling affordable housing**, **homelessness services**, and **social policies & projects**. A summary of these and other significant demographic differences can be found in the following four tables.

CITY SERVICES

Investment in Specific Services (Residents)

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

	RESIDENTS										
		Gender		Age			Neighbourhood				
	Total	Male	Female	18-34	35-54	55+	DT	NW	NE	SW	SE
Invest More	(n=varies)	[B]	[C]	[D]	[E]	[F]	[G]	[H]	[I]	[J]	[K]
Enabling affordable housing	**73%**	72%	73%	82% EF	69%	69%	87% JK	74%	78% J	63%	68%
Homelessness services	**69%**	63%	73% B	72%	71%	63%	76% J	70%	74% J	55%	70% J
Social policies & projects	**69%**	63%	74% B	68%	71%	66%	75%	69%	68%	61%	71%
Street infrastructure	**48%**	49%	48%	46%	46%	52%	44%	50%	38%	52%	52%
Transportation infrastructure	**47%**	43%	50%	54% F	47%	40%	45%	36%	52%	49%	49%
Economic development	**45%**	47%	43%	50%	44%	39%	42%	42%	39%	41%	54% I
Keeping our community clean	**42%**	42%	42%	42%	41%	44%	42%	38%	43%	32%	51% J
Emergency preparedness	**41%**	36%	45%	36%	46%	42%	39%	43%	46%	36%	43%
Fire rescue & medical response	**40%**	36%	42%	38%	41%	38%	36%	36%	27%	35%	54% GHIJ
Recreation	**39%**	37%	39%	35%	43%	38%	43%	37%	34%	36%	41%
Water conservation	**39%**	30%	46% B	52% EF	33%	31%	42%	36%	42%	36%	38%
Police services	**38%**	35%	42%	30%	35%	49% DE	47% I	35%	30%	38%	38%
Urban design	**36%**	39%	34%	36%	34%	37%	46%	31%	37%	32%	35%

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

	RESIDENTS										
		Gender		Age			Neighbourhood				
	Total	Male	Female	18-34	35-54	55+	DT	NW	NE	SW	SE
Invest More	(n=varies)	[B]	[C]	[D]	[E]	[F]	[G]	[H]	[I]	[J]	[K]
Arts & culture	**35%**	31%	40%	33%	43% F	29%	35%	35%	40%	29%	38%
Development & building permits	**35%**	37%	34%	22%	35% D	49% DE	32%	42%	32%	36%	34%
Parks/green spaces	**34%**	33%	35%	36%	35%	33%	36%	25%	36%	31%	40% H
Garbage & green bin collection	**32%**	35%	28%	34%	37% F	24%	44% HJ	22%	33%	20%	37% HJ
Library services	**30%**	31%	28%	26%	35%	28%	28%	25%	29%	28%	35%
Making streets vibrant	**28%**	26%	30%	25%	32%	27%	29%	27%	33%	27%	27%
Parking	**28%**	29%	27%	33%	23%	28%	24%	23%	27%	29%	31%
Bylaw enforcement	**26%**	23%	29%	18%	33% D	28% D	23%	27%	20%	27%	29%
Services to enhance parks	**22%**	22%	21%	22%	20%	23%	19%	26%	18%	22%	25%
Availability of online services	**19%**	18%	19%	21%	18%	20%	21% I	19%	9%	21% I	23% I
Facilitating film/special events	**19%**	22%	16%	21%	17%	17%	18%	17%	24%	17%	18%
Multi-channel service access	**18%**	20%	17%	21%	17%	16%	18%	18%	25%	15%	17%
Online payment services	**13%**	14%	12%	14%	13%	12%	12%	10%	16%	11%	14%

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 Household Income) (table 1 of 2)

	RESIDENTS							
		HH Composition		Own/Rent		HH Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Invest More	Total (n=varies)	[B]	[C]	[D]	[E]	[F]	[G]	[H]
Enabling affordable housing	**73%**	60%	77% B	62%	87% D	80% H	74%	69%
Homelessness services	**69%**	63%	70%	64%	74% D	72%	68%	68%
Social policies & projects	**69%**	69%	68%	62%	76% D	72%	66%	74%
Street infrastructure	**48%**	47%	48%	50%	46%	51%	47%	47%
Transportation infrastructure	**47%**	46%	47%	43%	52%	54%	43%	47%
Economic development	**45%**	53%	43%	43%	46%	47%	48%	39%
Keeping our community clean	**42%**	44%	41%	43%	40%	42%	40%	43%
Emergency preparedness	**41%**	38%	42%	44%	40%	42%	42%	41%
Fire rescue & medical response	**40%**	34%	41%	38%	42%	45%	43%	33%
Recreation	**39%**	44%	37%	38%	41%	41%	40%	38%
Water conservation	**39%**	28%	42% B	32%	47% D	42%	46% H	32%
Police services	**38%**	37%	38%	38%	38%	46% H	34%	29%
Urban design	**36%**	33%	37%	34%	40%	38%	40%	35%

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)

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

CITY SERVICES

Investment in Specific Services (Residents)

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

	RESIDENTS							
		HH Composition		Own/Rent		HH Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Invest More	Total (n=varies)	[B]	[C]	[D]	[E]	[F]	[G]	[H]
Arts & culture	**35%**	38%	34%	34%	38%	40%	33%	36%
Development & building permits	**35%**	40%	34%	39%	30%	35%	32%	36%
Parks/green spaces	**34%**	36%	34%	28%	41% D	36%	36%	35%
Garbage & green bin collection	**32%**	38%	30%	28%	34%	38% H	30%	25%
Library services	**30%**	27%	30%	25%	33%	30%	36%	24%
Making streets vibrant	**28%**	30%	28%	29%	28%	31%	20%	32%
Parking	**28%**	29%	27%	21%	34% D	34% H	31% H	17%
Bylaw enforcement	**26%**	25%	26%	29%	24%	28%	25%	23%
Services to enhance parks	**22%**	20%	23%	22%	23%	26% G	16%	23%
Availability of online services	**19%**	15%	21%	19%	18%	24% H	19%	14%
Facilitating film/special events	**19%**	19%	19%	13%	24% D	25% G	13%	15%
Multi-channel service access	**18%**	17%	19%	17%	19%	20%	20%	16%
Online payment services	**13%**	10%	14%	8%	18% D	17% H	14%	7%

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)

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

Businesses

Businesses have more diverse investment priorities, led by street infrastructure and economic development.

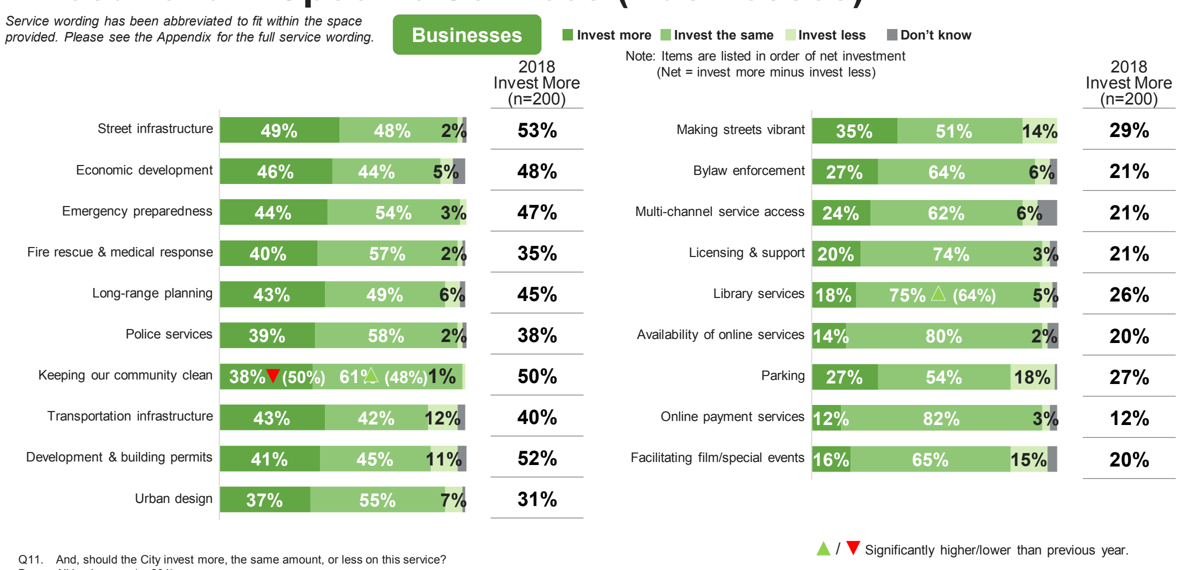
Overall, 49% of businesses say the City should ‘invest more’ in **street infrastructure** and 46% say the City should ‘invest more’ in **economic development**. Other investment priorities include **emergency preparedness** (44%), **long-range planning** (43%), **transportation infrastructure** (43%), **development & building permits** (41%), and **fire rescue & medical response** (40%).

This year’s results are largely similar to 2018. The only service where there has been a statistically significant change in the percentage saying ‘invest more’ is **keeping our community clean** (down 12 points, moving from 50% in 2018 to 38% in 2019).

Similar to residents, the services in the chart below have been listed in order of net investment (net = invest more minus invest less).

CITY SERVICES

Investment in Specific Services (Businesses)



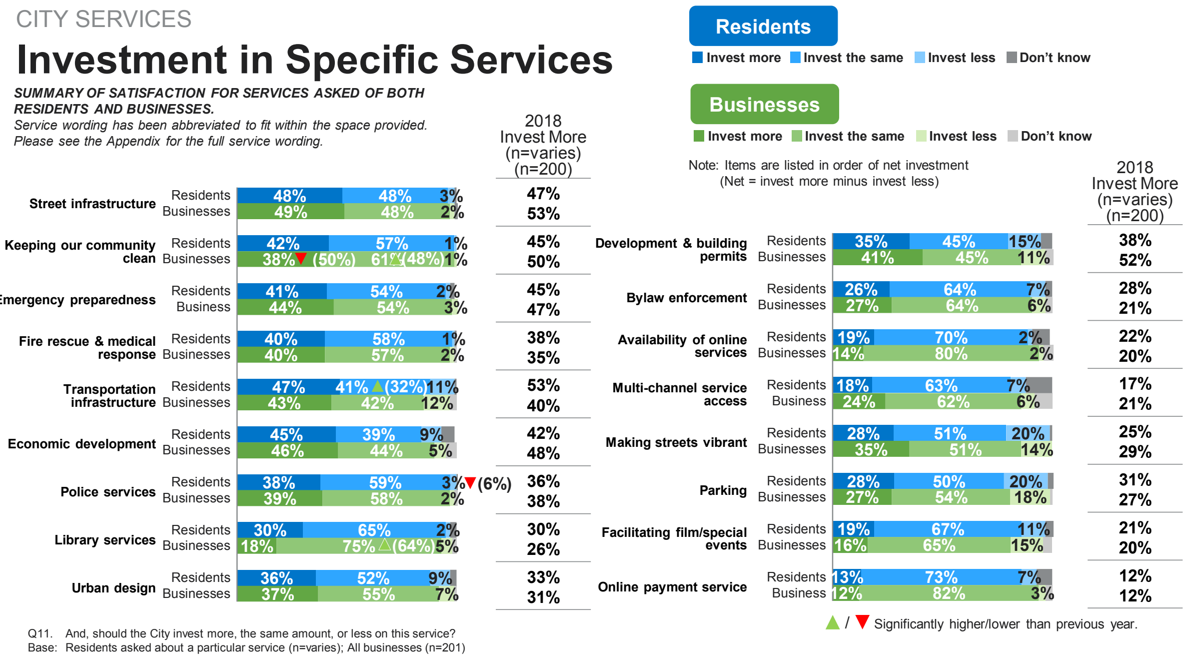
Q11. And, should the City invest more, the same amount, or less on this service?
Base: All businesses (n=201)

Comparing resident and business investment priorities

Residents are more likely than businesses to say the City should ‘invest more’ in library services.

Overall, residents and businesses provide similar ‘invest more’ ratings for most tested services. The one exception is **library services**, which is more of an investment priority for residents than businesses (30% vs. 18%). However, this is not a top investment priority for either segment.

Again, the services in the chart below have been listed in order of net investment (net = invest more minus invest less).



1.2.7 Financial planning

1.2.7.1 Value for taxes

Similar to last year, the majority of residents and businesses say they receive good value for their municipal tax dollars.

Overall, 81% of residents and 76% of businesses say they receive ‘very’ or ‘fairly’ good value for their municipal tax dollars. Among residents, this includes 21% saying ‘very good value’ and 60% saying ‘fairly good value’. Among businesses, 13% say ‘very good value’ and 64% say ‘fairly good value’.

This year’s results are statistically consistent with 2018, when 79% of residents and 72% of businesses said they received good value (combined ‘very/fairly’ ratings) for their municipal tax dollars.

The normative resident score is 81% total good value, including 20% ‘very good value’ and 61% ‘fairly good value’.

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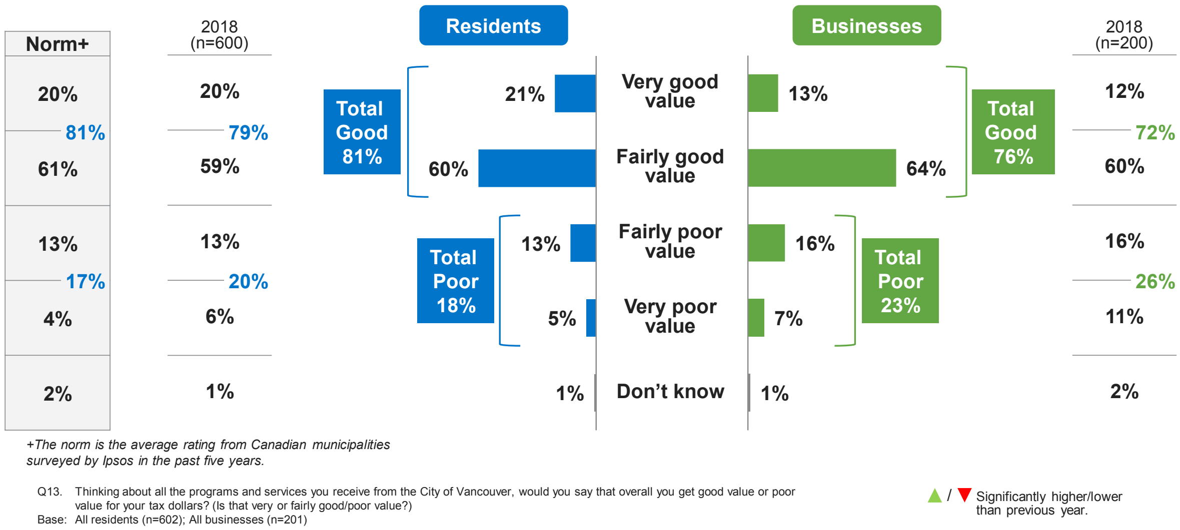
Value for Taxes



Among residents, perceptions of value for taxes (combined 'very/fairly good value' ratings) are higher among:

- Women (85% vs. 78% of men)
- Those who are 18-34 years of age (86% vs. 78% of 35+ years)
- Renters (85% vs. 76% of homeowners)

1.2.7.2 Preferred options to balance budget

To balance the budget, residents and businesses prefer user fees (new/increased) over tax increases or a reduction in City services/staffing.

New this year, respondents were presented with a number of options for balancing the budget and asked which ones they would most and second most prefer the City use. The percentages reported below are the total preferred (combined most/second most mentions).

Overall, there is a strong preference for new or increased user fees among both residents and businesses. Specifically, 50% of residents say 'introduce new user fees for some City services that currently have no fees' and 42% of residents say 'increase user fees for City services that currently have fees'. Similarly, 52% of businesses prefer new user fees and 45% prefer increased user fees.

While a relatively large proportion of businesses also see an opportunity to cut back on City staffing (44% select 'reduce the level of staffing and personnel that provide City services'), only 27% of residents would like the City to take this approach when balancing the budget.

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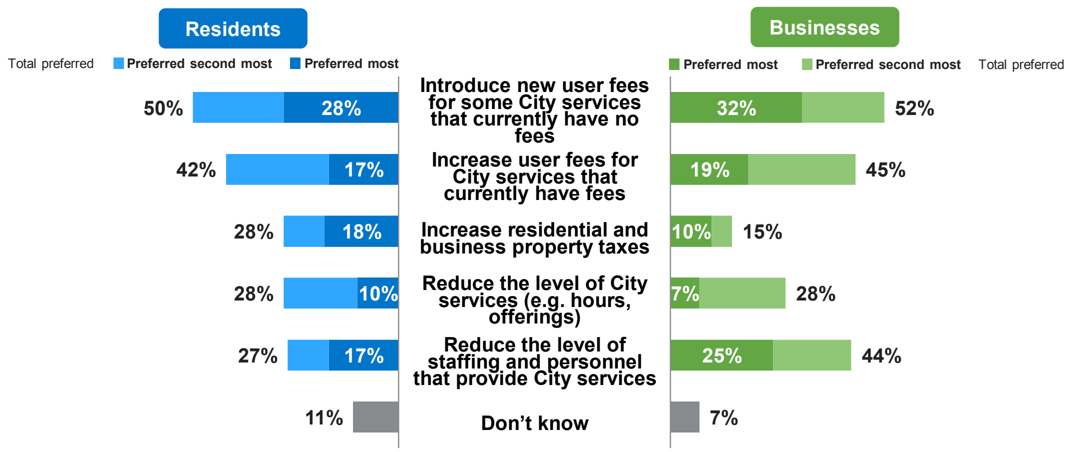
Preferred Options to Balance Budget



Q13a. Now, to balance the 2019 budget as required by law, the City of Vancouver has a number of options to consider. Which of the following would you most prefer the City use to balance its budget?
Q13b. Which one would you second most prefer?
Base: All residents (n=602); All businesses (n=201)

Renters are twice as likely as homeowners to say the City should 'increase residential and business property taxes' (41% vs. 20%). Other significant demographic differences are summarized in the following two tables.

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Preferred Options to Balance Budget (Residents)

(by Gender, Age, and Neighbourhood)

	RESIDENTS										
		Gender		Age			Neighbourhood				
		Male	Female	18-34	35-54	55+	DT	NW	NE	SW	SE
Total Preferred	Total (n=602)	(n=280) [B]	(n=307) [C]	(n=119) [D]	(n=226) [E]	(n=256) [F]	(n=97) [G]	(n=104) [H]	(n=102) [I]	(n=107) [J]	(n=192) [K]
Introduce new user fees for some City services that currently have no fees	50%	47%	53%	55%	50%	44%	53%	40%	45%	48%	56% H
Increase user fees for City services that currently have fees	42%	42%	44%	41%	44%	40%	46%	45%	37%	42%	41%
Increase residential and business property taxes	28%	31%	26%	36% F	29% F	20%	26%	39% K	35% K	25%	23%
Reduce the level of City services (e.g. hours, offerings)	28%	30%	26%	31%	24%	28%	23%	35% J	26%	19%	32% J
Reduce the level of staffing and personnel that provide City services	27%	27%	26%	22%	26%	34% D	23%	24%	33%	29%	26%

Q13a. Now, to balance the 2019 budget as required by law, the City of Vancouver has a number of options to consider. Which of the following would you most prefer the City use to balance its budget?
Q13b. Which one would you second most prefer?
Base: All residents (n=602)

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

FINANCIAL PLANNING

Preferred Options to Balance Budget (Residents)

(by Household Composition, Own/Rent, and Household Income)

		RESIDENTS						
		HH Composition		Own/Rent		HH Income		
		Children	No Children	Own	Rent	<$60K	$60K-<$100K	$100K+
Total Preferred	Total (n=602)	(n=147) [B]	(n=454) [C]	(n=351) [D]	(n=226) [E]	(n=217) [F]	(n=151) [G]	(n=170) [H]
Introduce new user fees for some City services that currently have no fees	50%	47%	51%	49%	50%	49%	47%	56%
Increase user fees for City services that currently have fees	42%	44%	42%	42%	42%	37%	46%	51% F
Increase residential and business property taxes	28%	24%	30%	20%	41% D	27%	35%	31%
Reduce the level of City services (e.g. hours, offerings)	28%	30%	27%	31%	23%	24%	32%	24%
Reduce the level of staffing and personnel that provide City services	27%	28%	26%	32% E	23%	29%	24%	22%

Q13a. Now, to balance the 2019 budget as required by law, the City of Vancouver has a number of options to consider. Which of the following would you most prefer the City use to balance its budget?
Q13b. Which one would you second most prefer?
Base: All residents (n=602)

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

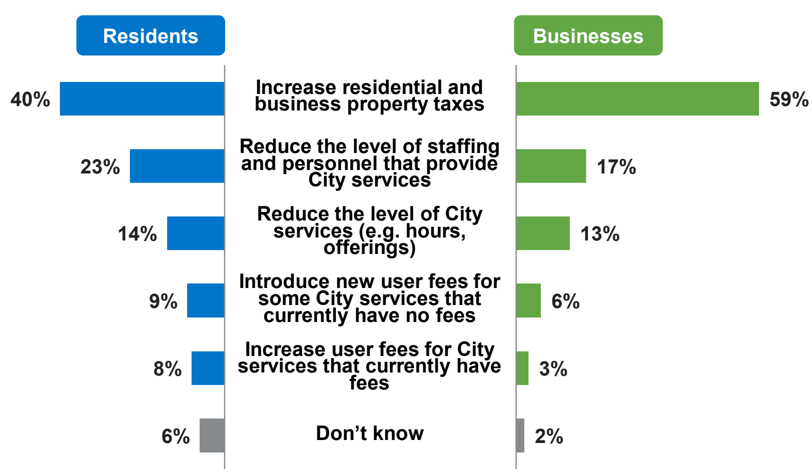
1.2.7.3 Least preferred option to balance budget

An increase in property taxes is the least preferred option for balancing the budget.

When asked which option they would least prefer the City use to balance the budget, ‘increase residential and business property taxes’ is selected the most often by both residents (40%) and businesses (59%). This is more than double what is mentioned for any other option.

FINANCIAL PLANNING

Least Preferred Option to Balance Budget



Q13c. And which one would you least prefer?
Base: All residents (n=602); All businesses (n=201)

Among residents, the greatest push back against an increase in property taxes comes from:

- Homeowners (49% select this as their least preferred option vs. 29% of renters)
- Those with household incomes of $100K+ (49% select this as their least preferred option vs. 31% of $60K-<$100K, 36% of <$60K)

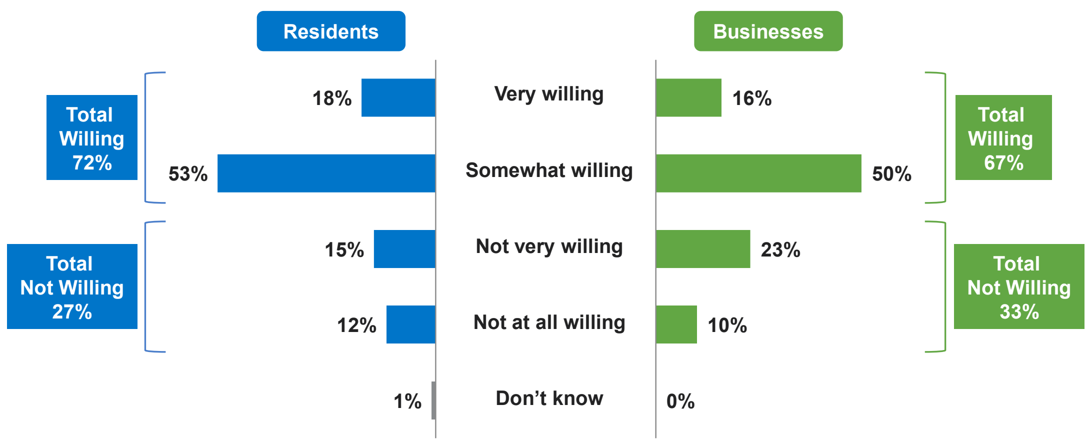
1.2.7.4 Willingness to pay more user fees for services

The majority of residents and businesses say they would be willing to pay more user fees for services.

Overall, 72% of residents and 67% of businesses say they would be willing to pay more in user fees for the services they use in order to maintain or improve them. Among residents, this includes 18% saying 'very willing' and 53% saying 'somewhat willing'. The distribution among businesses is similar (16% 'very willing', 50% 'somewhat willing').

FINANCIAL PLANNING

Willingness to Pay More User Fees For Services



Q13d. In the past, the public has indicated a preference for increasing user fees versus property tax as a mechanism to balance the budget. Now think about the City services that [RESIDENT: you use] [BUSINESS: your business uses]. How willing would you be to pay more in user fees for the services [RESIDENT: you use] [BUSINESS: your business uses] in order to maintain or improve them?
Base: All residents (n=602); All businesses (n=201)

Residents with household incomes of $60K+ are the most likely to say they are willing to pay more user fees for services (79% vs. 64% of <$60K).

1.2.8 Appendix: Weighted sample characteristics

Residents

WEIGHTED SAMPLE CHARACTERISTICS

Weighted Sample Characteristics (Residents)

(weighted by gender/age and neighbourhood)

	2019 (n=602)	2018 (n=600)
Neighbourhood		
Downtown/West End	17%	17%
Northwest	16%	16%
Northeast	17%	17%
Southwest	19%	19%
Southeast	31%	31%
Gender		
Male	46%	48%
Female	51%	50%
Other	1%	1%
Refused	1%	1%
Age		
18 to 34 years	33%	33%
35 to 54 years	34%	34%
55+ years	32%	32%
Children <18 in HH		
Yes	25%	22%
No	75%	78%

	2019 (n=602)	2018 (n=600)
Own/Rent		
Own	53%	54%
Rent	42%	41%
Other	5%	6%
Income		
<$60K	37%	35%
$60K to <$100K	26%	21%
$100K+	27%	33%
Refused	10%	11%
Ethnicity		
European (net)	42%	46%
Asian (net)	31%	31%
North American (net)	23%	22%
Latin American (net)	6% ▲	2%
African (net)	1%	1%
Other regions (net)	3%	5%
Don't know	5%	3%

▲ / ▼ Significantly higher/lower than previous year.

Businesses

WEIGHTED SAMPLE CHARACTERISTICS

Weighted Sample Characteristics (Businesses)

(weighted by business size)

	2019 (n=201)	2018 (n=200)
Neighbourhood		
Downtown/West End	34%	46%
Northwest	23% ▲	13%
Northeast	14%	18%
Southwest	19% ▲	9%
Southeast	6%	12%
Business Size		
<25 employees	88%	88%
25 to 99 employees	9%	9%
100+ employees	2%	2%
Own/Rent		
Own	23%	25%
Rent	76%	74%

▲ / ▼ Significantly higher/lower than previous year.

1.2.9 Appendix: Full service wording

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
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

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