2021 CIVIC SERVICE SATISFACTION SURVEY

Report Summary

2021-06-23

Contents

INTRODUCTION

1

Background and Objectives

This report presents the findings of the City of Vancouver's 2021 Civic Service Satisfaction Survey. The Civic Service Satisfaction Survey determines resident and business satisfaction with municipal services and provides insight into service priorities.

This is the third Civic Service Satisfaction Survey that Ipsos has conducted for the City of Vancouver. Previous surveys were conducted in 2018 and 2019. No survey was conducted in 2020 due to the COVID-19 pandemic.

Key research topics include:

- Important local issues
- Quality of life
- City services (satisfaction, level of investment)
- Financial planning

In addition, the 2021 survey also measures the impact of the COVID-19 pandemic on residents and businesses.

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.

Interviewing was conducted between April 19 and May 11, 2021.

Additional methodological details specific to residents and businesses can be found on the following page.

Methodology (cont.)

RESIDENTS

A total of 600 interviews were conducted with adult (18+) Vancouver residents, broken out as follows: Downtown/West End (n99), Northwest (n97), Northeast (n100), Southwest (n102), and Southeast (n202).

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

Interviewing was conducted on both landlines and cellphones, with the final sample split 70% landlines and 30% cellphones.

Sample was pulled by postal code for landlines and by billing centre for cellphones. 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.

BUSINESSES

A total of 200 interviews were conducted with Vancouver businesses, broken out as follows: small businesses with <25 employees (n114), medium businesses with 25 to 99 employees (n56), and large businesses with 100+ employees (n30).

A screening question was included at the start of the survey to confirm that respondents own, manage, or operate 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 2020 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 Results

INTERPRETING AND VIEWING 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.

TRACKING TO PREVIOUS SURVEYS

Where appropriate, this year’s results have been compared to past Civic Service Satisfaction Surveys. 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.

Arrows (▲▼) are used to denote any significant differences between previous years.

NORMATIVE COMPARISONS

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 and are thus based primarily on pre-pandemic data. Normative comparisons are available for residents only.

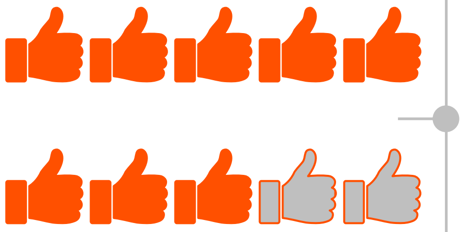
EXECUTIVE SUMMARY

2

Dashboard – Residents

QUALITY OF LIFE

OVERALL QUALITY OF LIFE

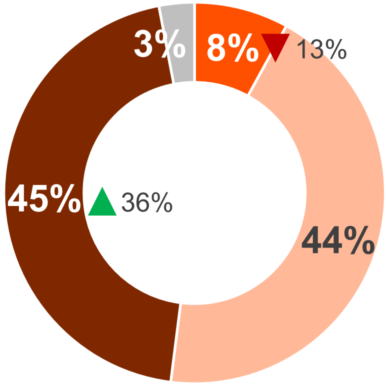


81% ▼ 89%

Of residents rate the overall quality of life as Very Good (**22%** ▼ 34%) or Good (**59%**)

CHANGE IN QUALITY OF LIFE

■ IMPROVED
■ STAYED THE SAME
■ WORSENED
■ DON'T KNOW



Base: All residents (n=600)
Quality of Life – Q2, Q3
Important Local Issues – Q1
Financial Planning – Q13, Q13a, Q13b, Q13d

IMPORTANT LOCAL ISSUES

TOP 3 ISSUES Answer list partially changed in 2021 – comparisons to previous years should be interpreted with caution.

32% ▲ 0%
COVID-19 (NET)

20% ▲ 11%
Social issues (e.g., homelessness, poverty, childcare)

19% ▼ 48%
Housing/accommodations (including housing affordability)

FINANCIAL PLANNING

VALUE FOR TAXES

76%
Of residents rate programs and services provided by the City as a Very Good Value for tax dollars (**15%** ▼ 21%) or Fairly Good (**61%**)

WILLINGNESS TO PAY MORE USER FEES

67%
Of residents are willing to pay more in user fees for services – Very Willing (**14%** ▼ 18%) and Somewhat Willing (**53%**)

TOP 3 PREFERRED OPTIONS TO BALANCE BUDGET

Answer list changed in 2021 – no longer comparable to previous years.

54%
Continue to offer the same services but not to the same level, for example reduced hours

33%
Postpone infrastructure projects (e.g., new amenities or major repairs)

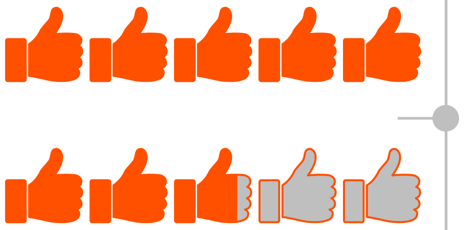
31%
Introduce new user fees for some City services that currently have no fees

▲ / ▼ Significantly higher/lower than previous year.
2019 value is indicated in black text beside each arrow

Dashboard – Residents (cont.)

CITY SERVICES

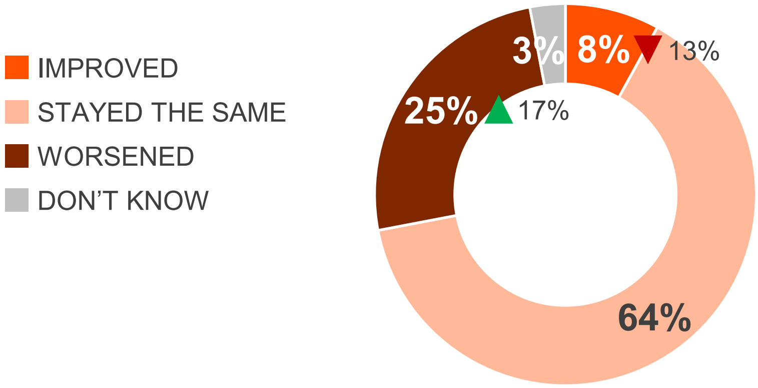
OVERALL SATISFACTION WITH CITY SERVICES



78% ▼ 86%

Of residents are satisfied with City services – Very Satisfied (**17%** ▼ 24%) or Somewhat Satisfied (**62%**)

CHANGE IN LEVEL AND QUALITY OF SERVICES



TOP 3 SERVICES WITH HIGHEST SATISFACTION RATINGS – VERY + SOMEWHAT SATISFIED

92%	**89%**	**88%**
Library services	Fire rescue and medical response	Providing garbage and green bin collection

BOTTOM 3 SERVICES WITH LOWEST SATISFACTION RATINGS – VERY + SOMEWHAT SATISFIED

44% ▼ 52%	**34%** ▼ 51%	**30%**
Social policies and projects that address issues such as poverty, mental health and addictions, immigration, and childcare	Homelessness services, such as shelters, warming centres, and housing support	Enabling affordable housing

TOP 3 SERVICES WHERE RESIDENTS FEEL THE CITY SHOULD INVEST MORE

75%	**73%**	**71%**
Homelessness services, such as shelters, warming centres, and housing support	Enabling affordable housing	Social policies and projects that address issues such as poverty, mental health and addictions, immigration, and childcare

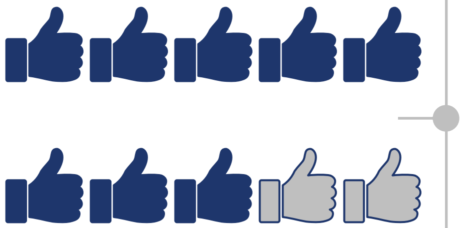
Base: All residents (n=600)
City Services – Q6, Q7, Q10, Q11

▲ / ▼ Significantly higher/lower than previous year.
2019 value is indicated in black text beside each arrow

Dashboard – Businesses

QUALITY OF LIFE

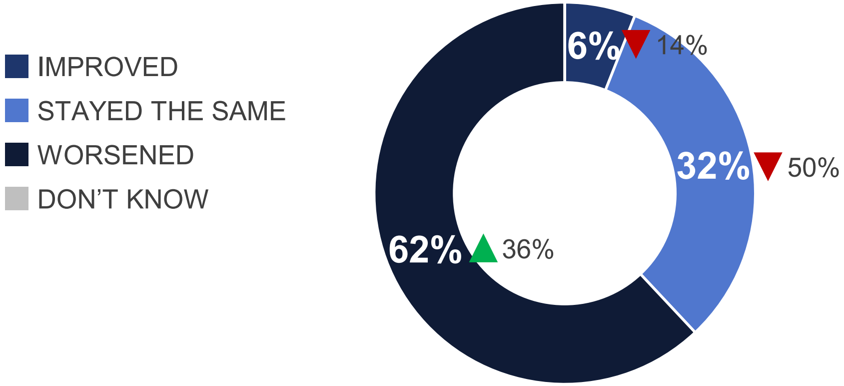
OVERALL QUALITY OF LIFE



80% ▼ 92%

Of businesses rate the overall quality of life as Very Good (**15%** ▼ 38%) or Good (**65%**)

CHANGE IN QUALITY OF LIFE



IMPORTANT LOCAL ISSUES

TOP 3 ISSUES

Answer list partially changed in 2021 – comparisons to previous years should be interpreted with caution.

38% ▲ 0%
COVID-19 (NET)

24% ▲ 13%
Social issues (e.g., homelessness, poverty, childcare)

11% ▼ 22%
Affordability/cost of living (excluding housing affordability)

FINANCIAL PLANNING

VALUE FOR TAXES

77%

Of businesses rate programs and services provided by the City as a Very Good Value for tax dollars (**11%**) or Fairly Good (**66%**)

WILLINGNESS TO PAY MORE USER FEES

68%

Of businesses are willing to pay more in user fees for services – Very Willing (**10%**) and Somewhat Willing (**58%**)

TOP 3 PREFERRED OPTIONS TO BALANCE BUDGET

Answer list changed in 2021 – no longer comparable to previous years.

51%
Continue to offer the same services but not to the same level, for example reduced hours

45%
Introduce new user fees for some City services that currently have no fees

30%
Increase user fees for City services that currently have fees

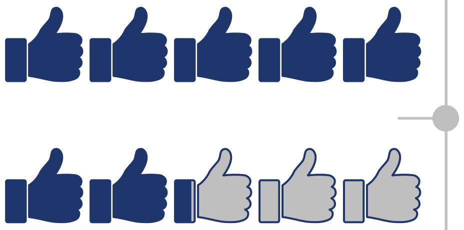
Base: All businesses (n=200)
Quality of Life – Q2, Q3
Important Local Issues – Q1
Financial Planning – Q13, Q13a, Q13b, Q13d

▲ / ▼ Significantly higher/lower than previous year.
2019 value is indicated in black text beside each arrow

Dashboard – Businesses (cont.)

CITY SERVICES

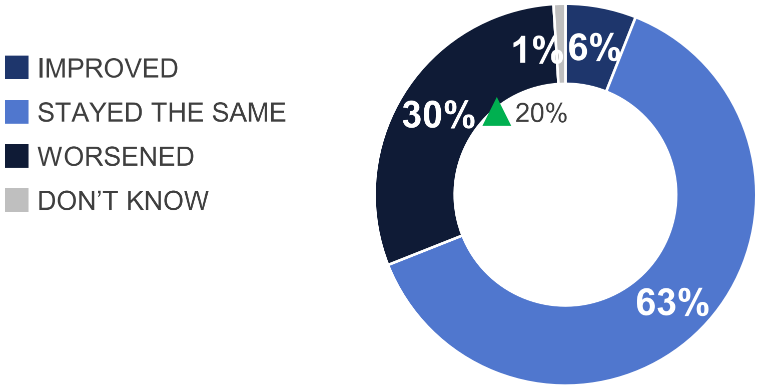
OVERALL SATISFACTION WITH CITY SERVICES



72%

Of businesses are satisfied with City services – Very Satisfied (**14%**) or Somewhat Satisfied (**58%**)

CHANGE IN LEVEL AND QUALITY OF SERVICES



TOP 3 SERVICES WITH HIGHEST SATISFACTION RATINGS – VERY + SOMEWHAT SATISFIED

95% Online services for paying taxes, tickets, utility bills, etc.

92% Fire rescue and medical response

89% Library services

BOTTOM 3 SERVICES WITH LOWEST SATISFACTION RATINGS – VERY + SOMEWHAT SATISFIED

62% City-wide and community long-range planning

56% Parking and enforcement

40% ▼ 53% Development & building permits

TOP 3 SERVICES WHERE BUSINESSES FEEL THE CITY SHOULD INVEST MORE

52% ▲ 38% Keeping our community clean - i.e., litter pick up, roads and sidewalks sweeping, receptacles etc.

51% Street infrastructure and maintenance

49% Fire rescue and medical response

Base: All businesses (n=200)
City Services – Q6, Q7, Q10, Q11

▲ / ▼ Significantly higher/lower than previous year.
2019 value is indicated in black text beside each arrow

Key Takeaways (page 1 of 2)

1. The COVID-19 pandemic has negatively impacted many aspects of everyday life for residents and businesses.

2. Key survey measures around overall quality of life and service satisfaction are positive but lower than previous years.
   - Quality of life: 81% residents (down 8 points from 2019), 80% businesses (down 12 points)
   - Overall service satisfaction: 78% residents (down 8 points), 72% businesses (down 8 points)

3. For residents, overall satisfaction has dropped for a number of services, including homelessness services, police services, recreation, emergency preparedness, social policies & projects, and making streets vibrant. There are also two services where business satisfaction has significantly decreased (police services and development & building permits).

4. Perceptions of a worsening quality of life are exacerbated this year, partly due to the COVID-19 pandemic but also due to issues around the cost of living, housing/accommodations, poverty/homelessness, and public safety/crime.

Key Takeaways (page 2 of 2)

5	COVID-19 tops this year's issue agenda but social issues (homelessness, poverty, childcare) are also a growing concern.
6	Residents prioritize investment in homelessness, affordable housing, and social policies. Businesses have more diverse priorities led by community cleanliness and street infrastructure.
7	Overall perceptions of value for taxes have not significantly changed from 2019.
8	Continuing to offer the same services but at a reduced level is the most preferred option for balancing the budget. Raising residential and business property taxes is the least preferred.

DETAILED RESULTS

3

COVID-19

4

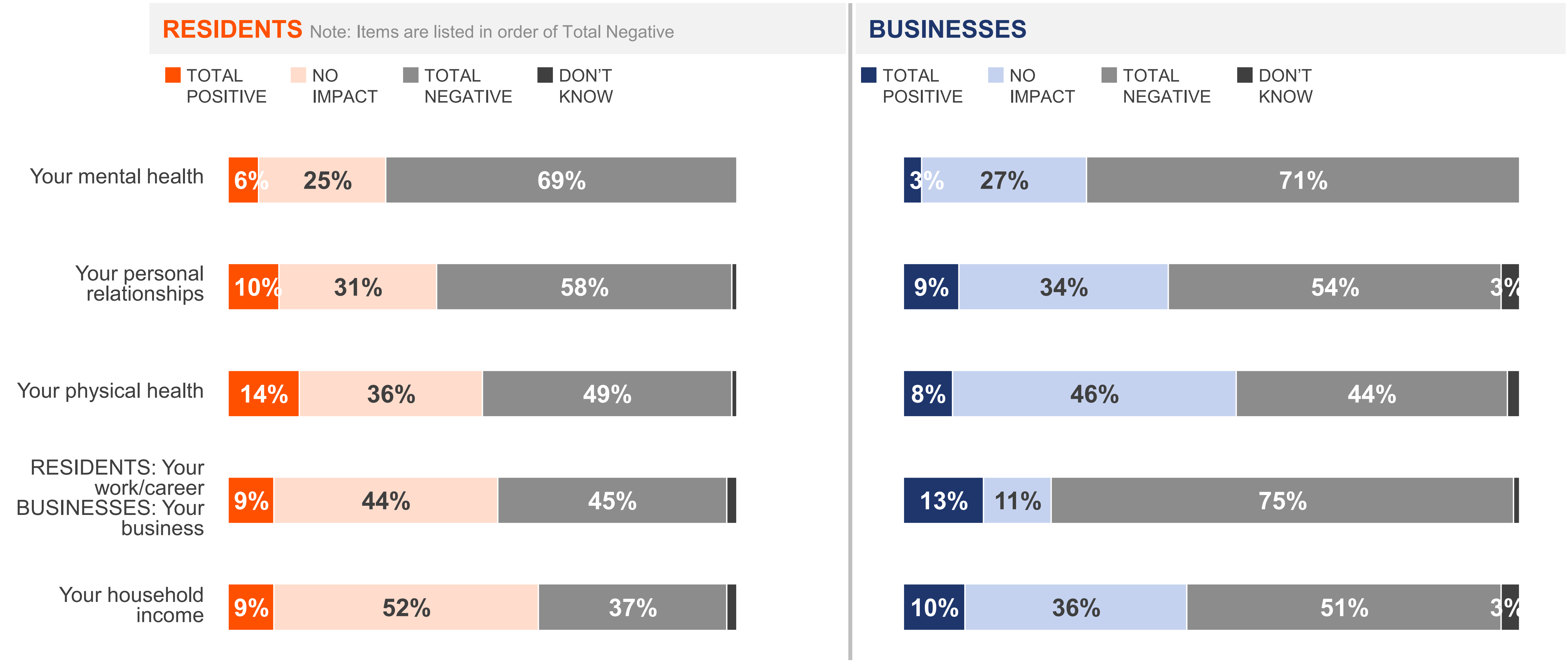
Section Summary

The COVID-19 pandemic has negatively impacted many aspects of everyday life for both residents and businesses.

- For residents, the greatest negative impact has been on their **mental health** (69%) and **personal relationships** (58%). The pandemic has also taken a toll on residents' **physical health** (49%), **work/career** (45%), and **household income** (37%).
    - Demographically, the negative impacts of the pandemic have been experienced disproportionally. For example, women are more likely than men to report experiencing a deterioration in their mental health, as are younger residents (<55 years of age) and renters. Younger residents and renters are also more likely to say their work/career and household income have been negatively impacted by the pandemic. The negative impact of the pandemic on household incomes is also felt more strongly among residents who are already on the lower end of the income spectrum.

- The impact on businesses is even more pronounced, with 75% saying their **business** has been negatively impacted by the pandemic and 71% saying their **mental health** has been negatively impacted. Many also report experiencing negative impacts on their **personal relationships** (54%), **household income** (51%), and **physical health** (44%).

Impact of COVID-19



Labels <3% not shown
Base: All residents (n=600); All businesses (n=200)
COVID1. Overall, what kind of impact, if any, has the COVID-19 pandemic had on each of the following? Would you say the COVID-19 pandemic has had a very positive impact, slightly positive impact, no impact, slightly negative impact or very negative impact on …?

Impact of COVID-19 (Residents)
(by Gender, Age, and Neighbourhood)

TOTAL NEGATIVE											
		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Your mental health	69%	64%	73% B	73% F	75% F	58%	77% HJ	62%	77% HJ	61%	67%
Your personal relationships	58%	53%	61%	56%	59%	59%	63%	65%	60%	53%	53%
Your physical health	49%	45%	51%	53%	52% F	42%	53%	38%	57% H	43%	51%
Your work/career	45%	43%	45%	55% F	52% F	27%	51%	45%	48%	42%	42%
Your household income	37%	37%	36%	48% F	38% F	23%	41%	34%	37%	32%	39%

Base: All residents (n=600)
COVID1. Overall, what kind of impact, if any, has the COVID-19 pandemic had on each of the following? Would you say the COVID-19 pandemic has had a very positive impact, slightly positive impact, no impact, slightly negative impact or very negative impact on …?

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Impact of COVID-19 (Residents)

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

TOTAL NEGATIVE								
		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Your mental health	**69%**	**72%**	**68%**	**65%**	**75% D**	**69%**	**69%**	**71%**
Your personal relationships	**58%**	**58%**	**58%**	**57%**	**59%**	**60%**	**62%**	**54%**
Your physical health	**49%**	**56%**	**47%**	**46%**	**49%**	**50%**	**52%**	**50%**
Your work/career	**45%**	**55% C**	**42%**	**40%**	**50% D**	**50%**	**41%**	**47%**
Your household income	**37%**	**41%**	**35%**	**33%**	**42% D**	**48% H**	**37%**	**31%**

Base: All residents (n=600)
COVID1. Overall, what kind of impact, if any, has the COVID-19 pandemic had on each of the following? Would you say the COVID-19 pandemic has had a very positive impact, slightly positive impact, no impact, slightly negative impact or very negative impact on …?

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

QUALITY OF LIFE

5

Section Summary

Overall perceptions of quality of life are favourable but down from previous years.

- Eight-in-ten (81%) residents rate Vancouver's overall quality of life today as 'very good' (22%) or 'good' (59%), down 8 percentage points from 2019.
  - Overall perceptions of quality of life (combined 'very good/good' responses) are higher among residents living in the Northwest and those with household incomes of $100K+.

- Similarly, 80% of businesses rate the overall quality of life favourably (15% 'very good', 65% 'good'), down 12 percentage points from 2019.

- In comparison, the normative resident score is 95% total good, including 40% saying 'very good' and 55% saying 'good'.

Perceptions of a worsening quality of life are exacerbated this year.

- Nearly half (45%) of residents say the quality of life in Vancouver has 'worsened' over the past three years, up 9 points from 2019. Another 44% say the quality of life has 'stayed the same' (on par with 2019) and 8% say it has 'improved' (down 5 points).
  - Perceptions of an 'worsening' quality of life are higher among women, those who are 35+ years of age, and those with household incomes of $60K+.

- Perceptions of a deteriorating quality of life are even more pronounced among businesses, with 62% saying the quality of life has 'worsened' over the past three years (up 26 points from 2019). Another 32% say the quality of life has 'stayed the same' (down 18 points) and 6% say it has 'improved' (down 8 points).

- In comparison, the normative resident score includes 19% saying 'improved', 49% saying 'stayed the same', and 31% saying 'worsened'.

Section Summary (cont.)

A variety of factors are behind perceptions of an improved quality of life.

- Among residents saying the quality of life has ‘improved’, the three most frequently mentioned open-ended explanations are “things are getting better/city is improving” (14%), “improved transportation options” (11%), and “more facilities/amenities” (10%).

- With only 10 businesses saying the quality of life has ‘improved’, coding of open-ended responses is not recommended.

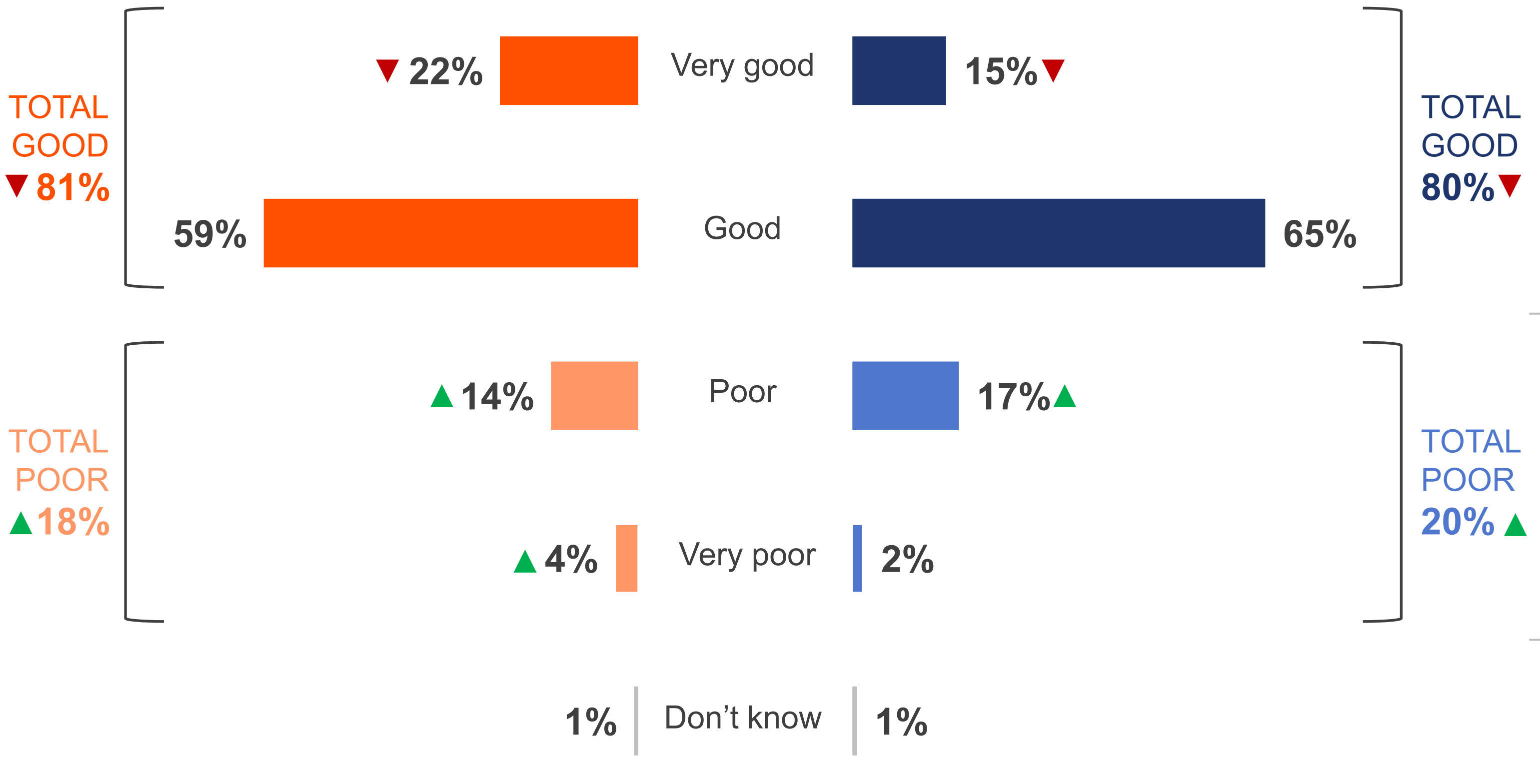
The COVID-19 pandemic contributes to perceptions of a worsened quality of life but is not the only reason for feeling this way.

- One-quarter (26%) of residents saying the quality of life has ‘worsened’ attribute this to “COVID-19/pandemic” on an open-ended basis. With the appearance of COVID-19, mentions of “cost of living” (23%) and “housing/accommodations” (21%) are down this year (dropping 19 points and 14 points, respectively), although still figure prominently overall. Other leading contributing factors include “poverty/homelessness” (18%) and “decline in public safety/increased crime rate” (16%). Mentions of public safety and crime are up 9 points this year as compared to 2019.
    - Demographically, men are more likely than women to mention “COVID-19/pandemic”. Residents <55 years of age are more likely to mention “cost of living”, while those who are 35-54 years of age and renters are more likely to mention “housing/accommodations”.

- Although “COVID-19/pandemic” is also a reason why some businesses feel the quality of life has ‘worsened’ (15%), it is not the leading factor behind deteriorating perceptions. Rather, businesses who feel the quality of life has ‘worsened’ more frequently attribute this to “poverty/ homelessness” (27%), “housing/accommodations” (23%), “decline in public safety/increased crime rate” (20%), and “cost of living” (18%). Similar to residents, mentions of public safety and crime among businesses are up 17 points this year as compared to 2019. Conversely, there has been a 40-point drop in cost of living mentions.

Overall Quality of Life

NORM+	RESIDENTS 2018 (n=600)	RESIDENTS 2019 (n=602)	BUSINESSES 2019 (n=201)	BUSINESSES 2018 (n=200)
40%	32%	34%	38%	30%
95%	91%	89%	92%	88%
55%	59%	55%	54%	57%
4%	7%	9%	7%	11%
5%	8%	10%	8%	12%
1%	1%	1%	1%	1%
0%	1%	<1%	0%	0%



+ The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.
Base: All residents (n=600); All businesses (n=200)
Q2. How would you rate the overall quality of life in the City of Vancouver today?

▲ / ▼ Significantly higher/lower than previous year.

Overall Quality of Life (Residents)

(by Gender, Age, and Neighbourhood)

		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Very good	22%	24%	21%	18%	21%	28% D	22%	34% K	22%	25% K	15%
Good	59%	61%	59%	64%	59%	54%	54%	58%	57%	60%	63%
Poor	14%	11%	14%	13%	16%	12%	15%	6%	16% H	14%	16% H
Very Poor	4%	3%	4%	4%	3%	5%	8% J	2%	3%	2%	5%
Don't know	1%	1%	1%	1%	1%	1%	1%	1%	1%	0%	2%
TOTAL GOOD	81%	85%	80%	82%	81%	81%	76%	92% GIK	80%	85%	78%
TOTAL POOR	18%	14%	19%	17%	18%	17%	23% H	8%	19% H	15%	20% H

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

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Overall Quality of Life (Residents)

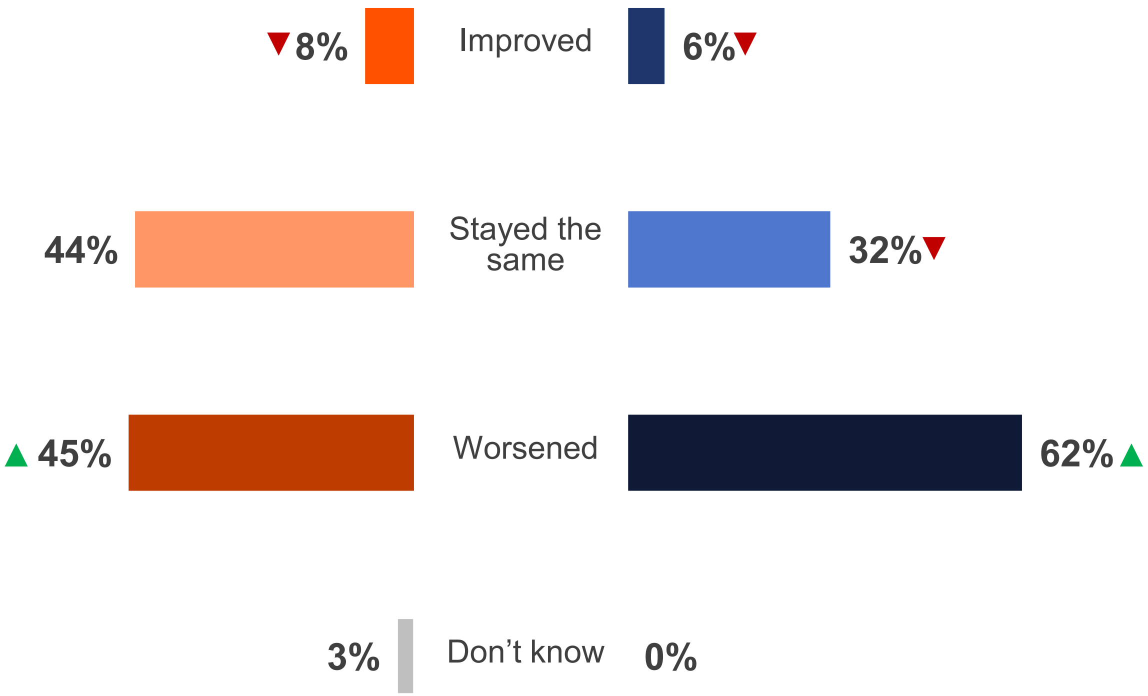
(by Household Composition, Own/Rent, and Household Income)

		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Very good	22%	20%	23%	24%	19%	19%	24%	25%
Good	59%	59%	59%	58%	61%	60%	51%	64% G
Poor	14%	18%	12%	13%	14%	15% H	17% H	8%
Very Poor	4%	2%	5%	4%	5%	4%	6%	2%
Don't know	1%	<1%	1%	1%	1%	1%	2%	<1%
TOTAL GOOD	81%	80%	82%	82%	81%	80%	76%	90% FG
TOTAL POOR	18%	20%	17%	17%	19%	19% H	22% H	10%

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

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Change in Quality of Life



NORM+	2018 (n=600)	2019 (n=602)	RESIDENTS		BUSINESSES	2019 (n=201)	2018 (n=200)
19%	10%	13%	▼8%	Improved	6%▼	14%	12%
49%	50%	48%	44%	Stayed the same	32%▼	50%	41%
31%	38%	36%	▲45%	Worsened	62%▲	36%	46%
1%	2%	2%	3%	Don't know	0%	1%	1%

+ The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.
Base: All residents (n=600); All businesses (n=200)
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?

▲ / ▼ Significantly higher/lower than previous year.

Change in Quality of Life (Residents)

(by Gender, Age, and Neighbourhood)

		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Improved	**8%**	**10%**	**5%**	**6%**	**9%**	**8%**	**5%**	**14%**	**8%**	**6%**	**7%**
Stayed the same	**44%**	**47%**	**42%**	**54% EF**	**40%**	**38%**	**37%**	**42%**	**39%**	**48%**	**50%**
Worsened	**45%**	**40%**	**50% B**	**34%**	**49% D**	**54% D**	**53%**	**42%**	**47%**	**43%**	**43%**
Don't know	**3%**	**4%**	**2%**	**6% EF**	**2%**	**<1%**	**4% K**	**3%**	**6% K**	**2%**	**1%**

Base: All residents (n=600)
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?

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Change in Quality of Life (Residents)

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

		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Improved	**8%**	**7%**	**8%**	**8%**	**7%**	**7%**	**10%**	**7%**
Stayed the same	**44%**	**43%**	**44%**	**43%**	**44%**	**51% G**	**37%**	**44%**
Worsened	**45%**	**47%**	**45%**	**48%**	**44%**	**36%**	**51% F**	**47% F**
Don't know	**3%**	**3%**	**3%**	**1%**	**5% D**	**6% G**	**1%**	**2%**

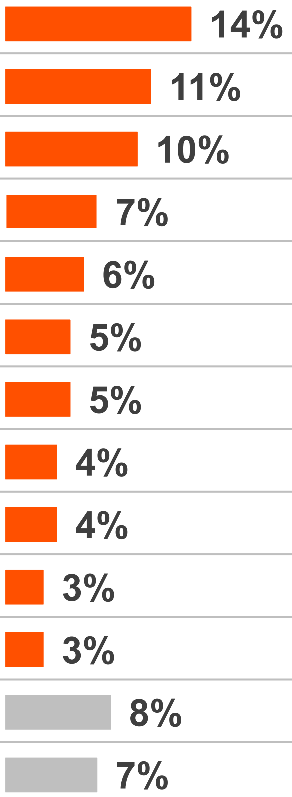
Base: All residents (n=600)
Q3. And, do you feel that the quality of life in the City of Vancouver in the past three years has improved, stayed the same, or worsened?

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Reasons Quality of Life has Improved (Residents)

(among those saying the quality of life has improved) (coded open-ends)

RESIDENTS (Only mentions of 3% or more in current year shown)



		2019 (n=67)*	2018 (n=60)*
Things are getting better/city is improving	14%	11%	19%
Improved transportation options	11%	23%	22%
More facilities/amenities	10%	9%	12%
Good quality of life	7%	7%	7%
Improved infrastructure/roads	6%	15%	17%
Improved access to services	5%	2%	7%
Improved public safety/reduction in crime	5%	4%	7%
More diverse population	4%	1%	6%
Health/healthcare	4%	6%	1%
More environmentally friendly city	3%	2%	9%
More opportunities for everyone	3%	0%	6%
Nothing	8%	0%	0%
Don't know	7%	8%	2%

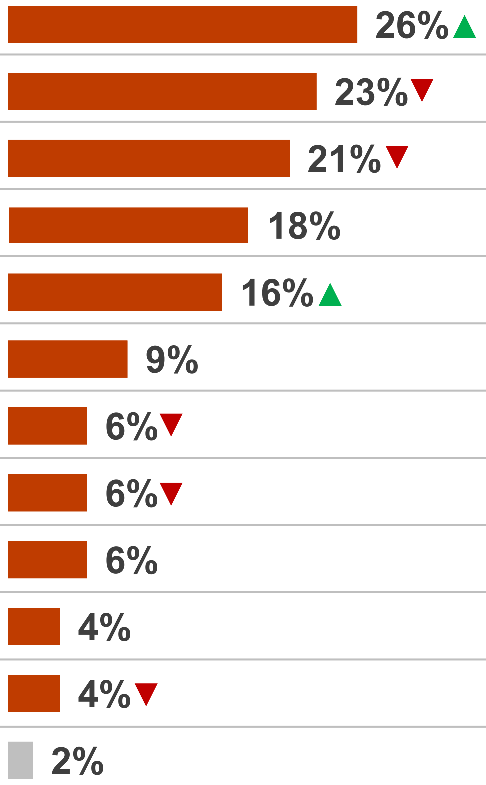
* Small base size (<100), interpret with caution. ** Very small base size (<50), interpret with extreme caution.
Base: Those saying the quality of life has improved: Residents (n=47**); Businesses (n=10)**
Q4. Why do you think the quality of life has improved?

Sample sizes do not allow for significance testing.

Reasons Quality of Life has Worsened (Residents)

(among those saying the quality of life has worsened) (coded open-ends)

RESIDENTS (Only mentions of 3% or more in current year shown)



		2019 (n=235)	2018 (n=251)
COVID-19/pandemic	26%▲	n/a	n/a
Cost of living	23%▼	42%	43%
Housing/accommodations	21%▼	35%	31%
Poverty/homelessness	18%	16%▲	8%
Decline in public safety/increased crime rate	16%▲	7%	6%
Drug addiction/overdose	9%	8%	5%
Traffic congestion	6%▼	13%	19%
Overcrowding/overpopulation/overdevelopment	6%▼	25%	20%
Governance and transparency	6%	6%	5%
Infrastructure/roads	4%	7%	6%
Taxation	4%▼	10%	7%
Don't know	2%	1%	1%

Base: Residents saying the quality of life has worsened (n=289)
Q5. Why do you think the quality of life has worsened?

▲ / ▼ Significantly higher/lower than previous year.

Top Five Reasons Quality of Life has Worsened (Residents)

(by Gender, Age, Own/Rent, and HH Income)

	TOTAL	GENDER		AGE			OWN/RENT		HH INCOME	
		MALE [B]	FEMALE [C]	18-34** [D]	35-54 [E]	55+ [F]	OWN [G]	RENT [H]	<$80K [I]	$80K+ [J]
COVID-19/pandemic	**26%**	**32% C**	**21%**	**24%**	**22%**	**30%**	**25%**	**27%**	**28%**	**23%**
Cost of living	**23%**	**20%**	**24%**	**30% F**	**28% F**	**13%**	**23%**	**23%**	**21%**	**26%**
Housing/accommodations	**21%**	**18%**	**24%**	**20%**	**26% F**	**15%**	**13%**	**31% G**	**22%**	**21%**
Poverty/homelessness	**18%**	**23%**	**15%**	**16%**	**19%**	**18%**	**23% H**	**13%**	**14%**	**22%**
Decline in public safety/increased crime rate	**16%**	**12%**	**20%**	**22%**	**15%**	**13%**	**13%**	**21%**	**19%**	**16%**

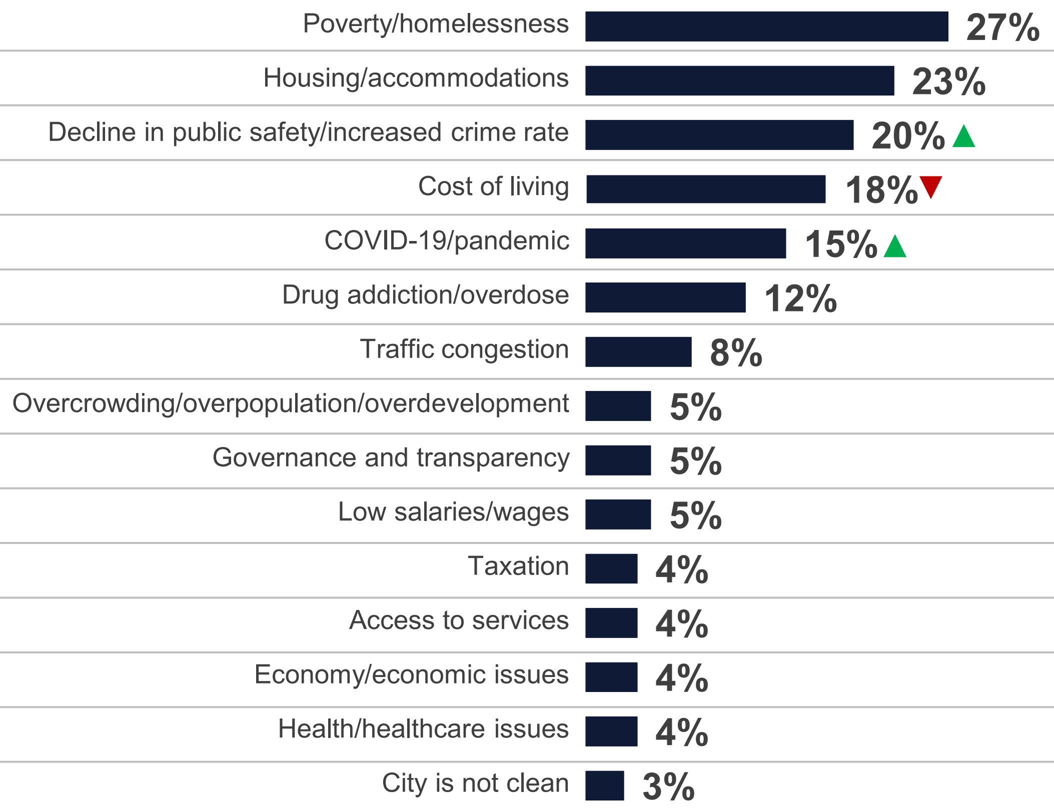
* Small base size (<100), interpret with caution. ** Very small base size (<50), interpret with extreme caution
Base: Residents saying the quality of life has worsened (n=289)
Q5. Why do you think the quality of life has worsened?

BCDEFGHIJ A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Reasons Quality of Life has Worsened (Businesses)

(among those saying the quality of life has worsened) (coded open-ends)

BUSINESSES (Only mentions of 3% or more in current year shown)



		2019 (n=74)*	2018 (n=90)*
Poverty/homelessness	27%	17%	9%
Housing/accommodations	23%	29%	29%
Decline in public safety/increased crime rate	20% ▲	3%	0%
Cost of living	18% ▼	58%	42%
COVID-19/pandemic	15% ▲	n/a	n/a
Drug addiction/overdose	12%	3%	10%
Traffic congestion	8%	11% ▼	26%
Overcrowding/overpopulation/overdevelopment	5%	12%	13%
Governance and transparency	5%	3%	5%
Low salaries/wages	5%	9%	8%
Taxation	4%	9%	3%
Access to services	4%	2%	3%
Economy/economic issues	4%	12% ▲	2%
Health/healthcare issues	4%	3%	0%
City is not clean	3%	3%	0%

* Small base size (<100), interpret with caution.
Base: Businesses saying the quality of life has worsened (n=124)
Q5. Why do you think the quality of life has worsened?

▲ / ▼ Significantly higher/lower than previous year.

IMPORTANT LOCAL ISSUES

6

Section Summary

COVID-19 tops this year’s issue agenda.

- On an open-ended basis, 32% of residents identify “COVID-19” as the most important local issue facing the City of Vancouver at the present time. “Social issues (e.g., homelessness, poverty, childcare)” places second, garnering 20% of mentions and up 9 points from 2019 (comparisons to previous years should be interpreted with caution due to some changes in the answer list). Rounding out the top three is “housing/accommodations (including housing affordability)” at 19%, down 29 points from 2019. Mentions of “infrastructure/transportation” are also down significantly this year, dropping 28 points to currently sit at 12%.
    - “COVID-19” is more likely to be mentioned by residents who are 18-34 years of age, renters, and those with household incomes of <$60K. Conversely, “social issues (e.g., homelessness, poverty, childcare)” are more likely to be mentioned by those with household incomes of $60K+. Mentions of “housing/accommodations” are higher among those living in the Northwest, Northeast, and the Downtown/West End.

- “COVID-19” is also the most frequently mentioned issue among businesses (38%). This is followed by “social issues (e.g., homelessness, poverty, childcare)” (24%, up 11 points from 2019) and “affordability/cost of living (excluding housing affordability)” (11%, down 11 points). As with residents, the percentage of businesses mentioning “infrastructure/transportation” is down significantly this year (7%, dropping 32 points from 2019).

Important Local Issues (Residents)

(coded open-ends, multiple responses allowed)

RESIDENTS (Only mentions of 3% or more in current year shown)

		2019 (n=602)	2018 (n=600)
COVID-19 (NET)	32%▲	n/a	n/a
Other COVID-19 mentions (e.g., health and safety, general mentions)	21%▲	n/a	n/a
Post-pandemic recovery	5%▲	n/a	n/a
COVID-19 restrictions/health orders	4%▲	n/a	n/a
Social issues (e.g., homelessness, poverty, childcare)	20%▲	11%	13%
Housing/accommodations (including housing affordability)	19%▼	48%	49%
Affordability/cost of living (excluding housing affordability)	13%	15%	16%
Infrastructure/transportation	12%▼	40%	44%
Addiction and overdoses	11%	9%	7%
Economy/economic issues	8%▲	3%	2%

		2019 (n=602)	2018 (n=600)
Crime/criminal activity	7%	9%▲	3%
Health/healthcare	6%▲	3%	4%
Development (e.g., densification, impact on green space)	5%▼	8%	9%
Environment/environmental issues/sustainability	5%▼	8%	10%
Governance and transparency (e.g., bylaws and enforcement)	4%	3%	4%
Small/local business (unrelated to post-pandemic economic recovery of businesses)	4%▲	n/a	n/a
City finances (e.g., debt, spending)	3%	3%	3%
Racism and inequity	3%▲	n/a	n/a
Nothing/don't know	10%	10%	7%

Base: All residents (n=600)
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?

Answer list partially changed in 2021 – comparisons to previous years should be interpreted with caution.

▲ / ▼ Significantly higher/lower than previous year.

Top Ten Important Local Issues (Residents)

(by Gender, Age, and Neighbourhood)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD				
		MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
COVID-19 (NET)	**32%**	**31%**	**31%**	**41% EF**	**27%**	**26%**	**31%**	**26%**	**31%**	**34%**	**34%**
Social issues	**20%**	**17%**	**23%**	**18%**	**22%**	**21%**	**25%**	**22%**	**21%**	**15%**	**18%**
Housing/accommodations	**19%**	**19%**	**19%**	**15%**	**23%**	**18%**	**23% K**	**27% K**	**25% K**	**17%**	**10%**
Affordability/cost of living	**13%**	**12%**	**13%**	**11%**	**13%**	**15%**	**11%**	**18%**	**15%**	**12%**	**11%**
Infrastructure/transportation	**12%**	**11%**	**14%**	**10%**	**11%**	**17%**	**11%**	**14%**	**13%**	**20% K**	**8%**
Addiction and overdoses	**11%**	**10%**	**12%**	**6%**	**13% D**	**12%**	**17% HJ**	**6%**	**13%**	**7%**	**10%**
Economy/economic issues	**8%**	**7%**	**10%**	**9%**	**7%**	**9%**	**8%**	**11%**	**7%**	**11%**	**7%**
Crime/criminal activity	**7%**	**6%**	**8%**	**4%**	**10% F**	**5%**	**11% H**	**2%**	**5%**	**4%**	**9% H**
Health/healthcare	**6%**	**5%**	**7%**	**4%**	**7%**	**7%**	**4%**	**7%**	**8%**	**3%**	**7%**
Development	**5%**	**6%**	**5%**	**1%**	**7% D**	**8% D**	**4%**	**6%**	**3%**	**8%**	**5%**
Environment	**5%**	**4%**	**6%**	**4%**	**5%**	**6%**	**4%**	**10% I**	**2%**	**5%**	**6%**

Base: All residents (n=600)
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?

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Top Ten Important Local Issues (Residents)

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

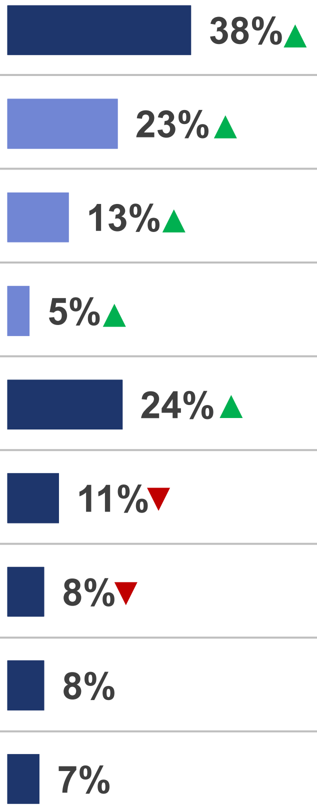
		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
COVID-19 (NET)	32%	27%	33%	27%	36% D	40% H	30%	24%
Social issues	20%	19%	20%	22%	18%	12%	24% F	28% F
Housing/accommodations	19%	20%	19%	17%	23%	17%	18%	24%
Affordability/cost of living	13%	16%	12%	14%	13%	8%	14%	17% F
Infrastructure/transportation	12%	11%	13%	16% E	9%	12%	11%	15%
Addiction and overdoses	11%	12%	10%	11%	10%	7%	13%	13%
Economy/economic issues	8%	8%	9%	9%	9%	8%	7%	8%
Crime/criminal activity	7%	9%	6%	8%	6%	3%	9% F	8% F
Health/healthcare	6%	8%	5%	5%	6%	4%	4%	8%
Development	5%	7%	5%	9% E	1%	2%	3%	9% FG
Environment	5%	5%	5%	6%	4%	3%	4%	8% F

Base: All residents (n=600)
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?

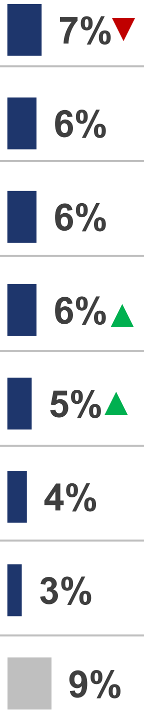
BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Important Local Issues (Businesses)
(coded open-ends, multiple responses allowed)

BUSINESSES (Only mentions of 3% or more in current year shown)



		2019 (n=201)	2018 (n=200)
COVID-19 (NET)	38%▲	n/a	n/a
Other COVID-19 mentions (e.g., health and safety, general mentions)	23%▲	n/a	n/a
Post-pandemic recovery	13%▲	n/a	n/a
COVID-19 restrictions/health orders	5%▲	n/a	n/a
Social issues (e.g., homelessness, poverty, childcare)	24%▲	13%	8%
Affordability/cost of living (excluding housing affordability)	11%▼	22%	28%
Housing/accommodations (including affordability)	8%▼	19%▼	38%
Addiction and overdoses	8%	3%▼	10%
Crime/criminal activity	7%	6%	6%



		2019 (n=201)	2018 (n=200)
Infrastructure/transportation	7%▼	39%	44%
Economy/economic issues	6%	12%	8%
Governance and transparency (e.g., bylaws and enforcement)	6%	7%	4%
Small/local business (unrelated to post-pandemic economic recovery of businesses)	6%▲	n/a	n/a
Health/healthcare	5%▲	1%	2%
Development (e.g., densification, impact on green space)	4%	4%▼	12%
City finances (e.g., debt, spending)	3%	3%	2%
Nothing/don't know	9%	9%	8%

Base: All businesses (n=200)
Q1. From your perspective as a 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?

Answer list partially changed in 2021 – comparisons to previous years should be interpreted with caution.

▲ / ▼ Significantly higher/lower than previous year.

CITY SERVICES

7

Section Summary

Most residents and businesses are satisfied with City services overall, although less so than previous years.

- In total, 78% of residents say they are ‘very’ (17%) or ‘somewhat’ (62%) satisfied with the overall level and quality of services provided by the City of Vancouver, down 8 points from 2019.
    - Overall satisfaction (combined ‘very/somewhat satisfied’ ratings) with services is higher among women, those living outside of the Downtown/West End, and those with household incomes of <$60K.

- Overall satisfaction among businesses stands at 72% this year, including 14% saying ‘very satisfied’ and 58% saying ‘somewhat satisfied’. While not statistically significant, there has been a directional decrease in overall satisfaction among businesses this year (down 8 points from 2019).

- In comparison, the normative resident score is 90% total satisfied (31% ‘very satisfied’, 59% ‘somewhat satisfied’).

Most say the overall level and quality of City services has stayed the same over the past three years, although negative momentum is growing.

- Nearly two-thirds (64%) of residents say the overall level and quality of City services has ‘stayed the same’ in the past three years (on par with 2019), compared to 8% saying ‘improved’ (down 5 points) and 25% saying ‘worsened’ (up 8 points).
    - Perceptions of ‘worsened’ services are higher among residents who are 35+ years of age, live in the Downtown/West End, live in households with children under the age of 18, and have household incomes of $60K+.

- Similarly, 63% of businesses say the overall level and quality of services has ‘stayed the same’ in the past three years, compared to 6% saying ‘improved’ and 30% saying ‘worsened’. The percentage of businesses saying City services have ‘worsened’ is up 10 points from 2019.

Section Summary (cont.)

A variety of factors are behind impressions of improved City services.

- Among residents saying City services have ‘improved’, the most frequently mentioned open-ended reasons are “improved access to services” (11%), “more efficient/faster services” (11%), “services have improved (unspecified)” (10%), and “more transportation options” (10%).

- With only 14 businesses saying City services have ‘improved’, coding of open-ended responses is not recommended.

Governance/transparency and the COVID-19 pandemic are frequently cited by both residents and businesses as a reason why City services have worsened.

- Among residents saying City services have ‘worsened’, the top three leading open-ended reasons are “governance and transparency” (17%), “COVID-19/pandemic” (13%), and “poor quality of service” (11%, down 12 points from 2019). Another 10% mention “overdevelopment/ overpopulation”. Analysis by demographic segment is limited due to small sample sizes.

- Among businesses saying City services have ‘worsened’, the leading open-ended reason is “governance and transparency” (35%), followed by “COVID-19/pandemic” (17%) and “homelessness” (15%). Another 10% mention “too many rules/regulations/policies”.

Section Summary (cont.)

Residents are satisfied with most of the evaluated services, but satisfaction has dropped in a number of areas this year.

- Of the 26 services evaluated by residents, 20 receive an overall satisfaction score (combined ‘very/somewhat satisfied’ responses) higher than 70%, with the highest satisfaction rating going to **library services** (92%).

- In comparison, **economic development** (67%), **parking** (65%), and **development & building permits** (52%) score relatively lower, although are still deemed satisfactory by a majority of residents.

- Only a minority of residents say they are satisfied with **social policies & projects** (44%), **homelessness services** (34%), and **enabling affordable housing** (30%).

- Compared to 2019, overall satisfaction is notably lower this year for **homelessness services** (down 17 points), **police services** (down 11 points), **recreation** (down 8 points), **emergency preparedness** (down 8 points), **social policies & projects** (down 8 points), and **making streets vibrant** (down 6 points). Moreover, the intensity of satisfaction with many services has shifted this year, moving from ‘very’ to ‘somewhat’ satisfied. Positively, overall satisfaction with **online payment services** is up 6 points from 2019.

Section Summary (cont.)

Business remain satisfied with most services, although two significant drops in satisfaction are seen this year.

- Of the 19 services evaluated by businesses, 13 receive a satisfaction score (combined ‘very/somewhat satisfied’ responses) higher than 70%, with the highest ratings going to **online payment services** (95%) and **fire rescue & medical response** (92%).

- In comparison, relatively lower satisfaction scores are seen for **keeping our community clean** (69%), **street infrastructure** (69%), **economic development** (67%), **long-range planning** (62%), and **parking** (56%). However, these are still rated satisfactory by a majority of businesses.

- Businesses are the least satisfied with **development & building permits**, with only 40% saying they are satisfied with this service.

- Compared to 2019, overall satisfaction is statistically consistent for most services. Two notable exceptions are **police services** (down 15 points) and **development & building permits** (down 13 points). While directional decreases are seen for many other services, these differences are not statistically significant.

Section Summary (cont.)

Residents' top three investment priorities continue to be homelessness services, enabling affordable housing, and social policies & projects.

- Overall, 75% of residents say the City should 'invest more' in **homelessness services**, 73% say the City should 'invest more' in **enabling affordable housing**, and 71% say the City should 'invest more' in **social policies & projects**. These three services stand out above all others when it comes to priorities for investment.

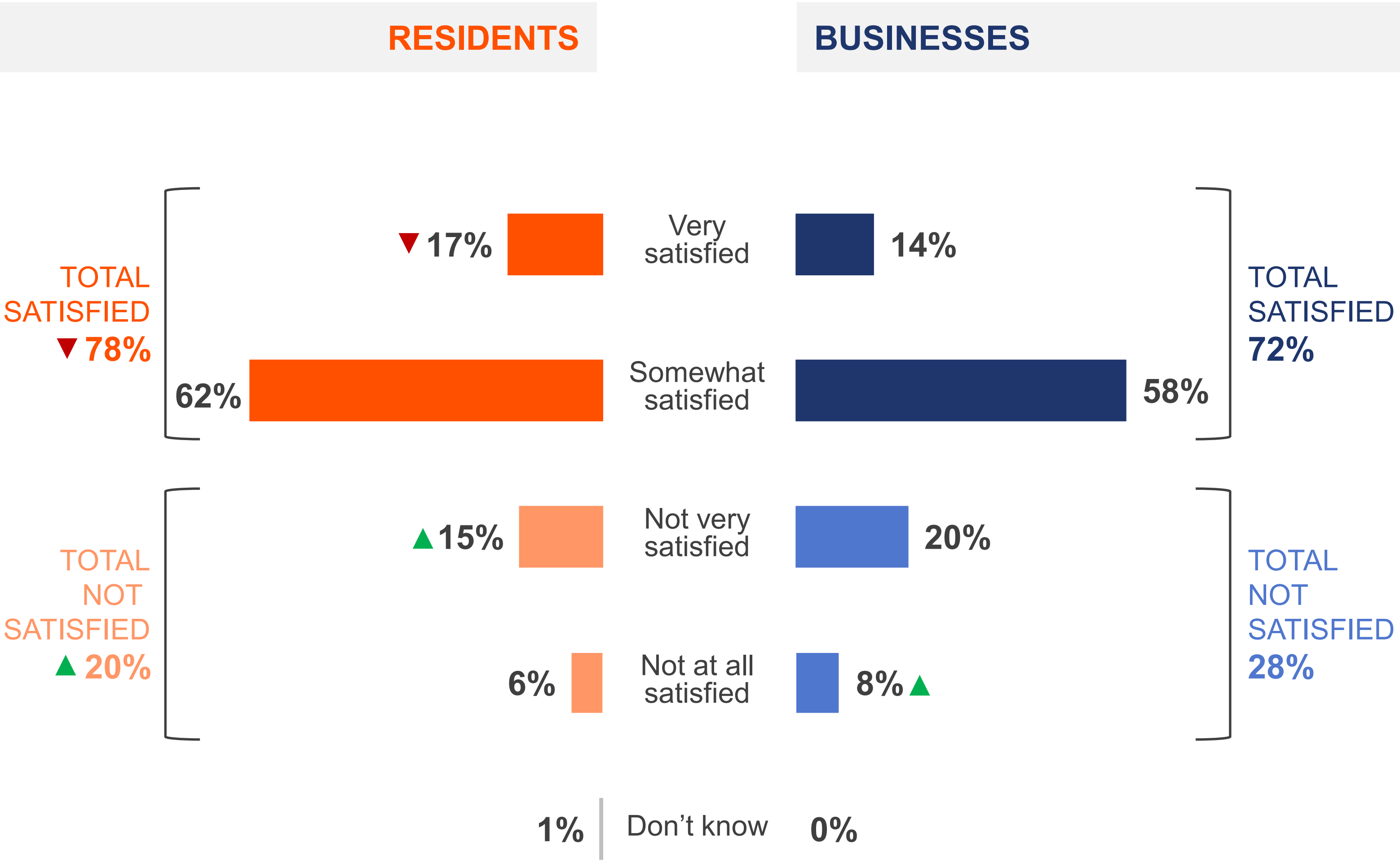
- Comparisons to 2019 show generally little change in residents' priorities for investment. There are only three services where there has been a statistically significant drop in the percentage saying 'invest more': **garbage & green bin collection** (down 8 points), **by-law enforcement** (down 7 points), and **parking** (down 7 points).

Businesses continue to have more diverse investment priorities, led by community cleanliness and street infrastructure.

- Overall, 52% of businesses say the City should 'invest more' in **keeping our community clean** and 51% say the City should 'invest more' in **street infrastructure**. Other investment priorities include **fire rescue & medical response** (49%), **economic development** (47%), **long-range planning** (46%), **police services** (46%), **development & building permits** (43%), **emergency preparedness** (42%), and **transportation infrastructure** (40%).

- This year's results are generally consistent with 2019. There are only two services where there has been a statistically significant change in the percentage saying 'invest more', and these are **keeping our community clean** (up 14 points) and **availability of online services** (up 10 points).

Overall Satisfaction with City Services



	NORM+	RESIDENTS 2018 (n=600)	RESIDENTS 2019 (n=602)	BUSINESSES 2019 (n=201)	BUSINESSES 2018 (n=200)
Very satisfied	31%	20%	24%	17%	15%
TOTAL SATISFIED	90%	83%	86%	80%	80%
Somewhat satisfied	59%	63%	61%	62%	65%
Not very satisfied	8%	12%	10%	18%	12%
TOTAL NOT SATISFIED	10%	16%	14%	19%	19%
Not at all satisfied	2%	4%	4%	1%▼	7%
Don't know	0%	1%	<1%	2%	1%

+ The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.
Base: All residents (n=600); All businesses (n=200)
Q6. How satisfied are you with the overall level and quality of services provided by the City of Vancouver?

▲ / ▼ Significantly higher/lower than previous year.

Overall Satisfaction with City Services (Residents)

(by Gender, Age, and Neighbourhood)

		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Very satisfied	17%	17%	16%	14%	13%	23% DE	11%	17%	19%	24% GK	13%
Somewhat satisfied	62%	58%	67% B	68% F	63%	54%	57%	62%	64%	56%	66%
Not very satisfied	15%	18% C	10%	13%	17%	14%	22% K	13%	12%	16%	12%
Not at all satisfied	6%	5%	6%	5%	6%	7%	8%	6%	5%	4%	6%
Don't know	1%	2%	<1%	1%	1%	2%	2%	2%	0%	0%	2%
TOTAL SATISFIED	78%	75%	83% B	81%	76%	77%	68%	80%	83% G	80%	80% G
TOTAL NOT SATISFIED	20%	23%	17%	18%	23%	21%	30% IK	19%	17%	20%	18%

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

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Overall Satisfaction with City Services (Residents)

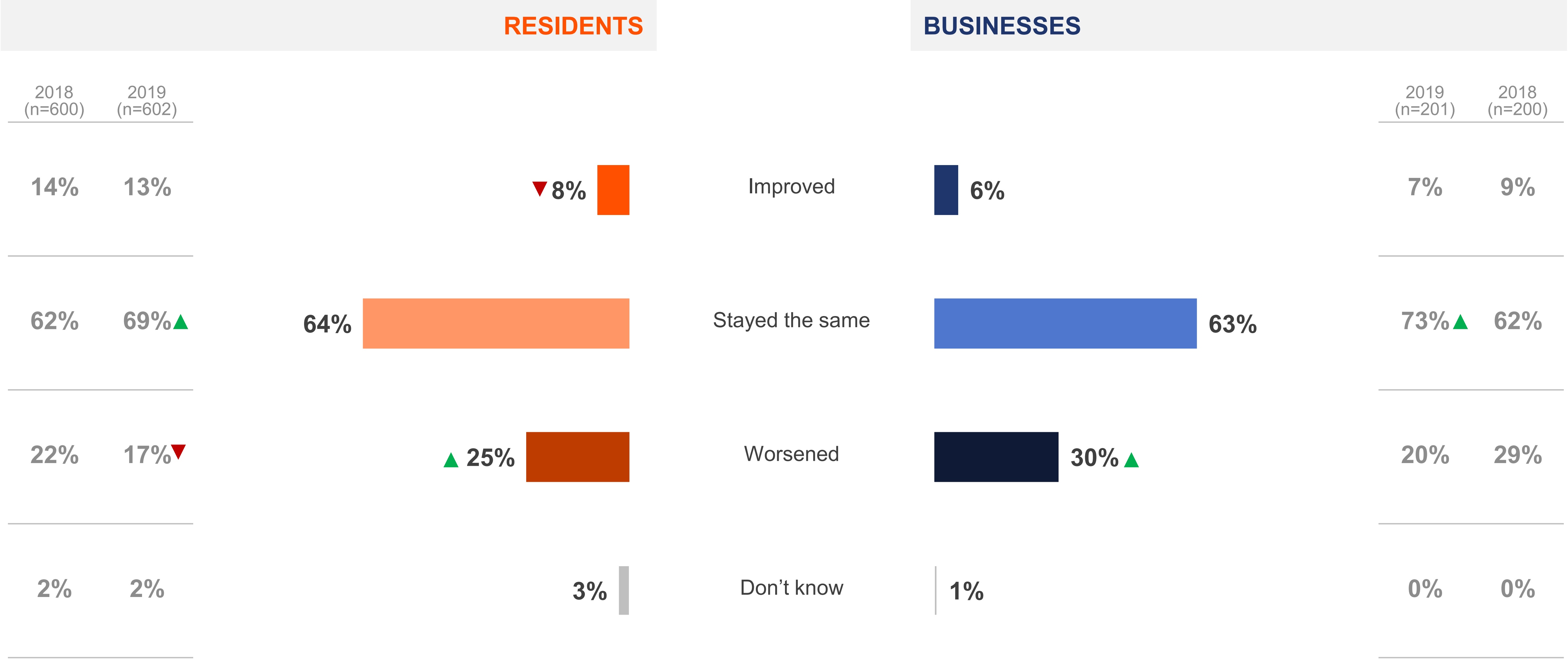
(by Household Composition, Own/Rent, and Household Income)

	TOTAL	HH COMPOSITION		OWN/RENT		HH INCOME		
		CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Very satisfied	**17%**	**11%**	**18%**	**17%**	**16%**	**21% H**	**18%**	**11%**
Somewhat satisfied	**62%**	**62%**	**61%**	**60%**	**62%**	**62%**	**60%**	**63%**
Not very satisfied	**15%**	**19%**	**13%**	**16%**	**13%**	**11%**	**12%**	**20% F**
Not at all satisfied	**6%**	**7%**	**6%**	**6%**	**7%**	**4%**	**9% F**	**6%**
Don't know	**1%**	**1%**	**1%**	**1%**	**2%**	**3% GH**	**0%**	**0%**
TOTAL SATISFIED	**78%**	**73%**	**80%**	**77%**	**79%**	**83% H**	**78%**	**74%**
TOTAL NOT SATISFIED	**20%**	**26%**	**19%**	**22%**	**20%**	**14%**	**22%**	**26% F**

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

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Change in City Services



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

▲ / ▼ Significantly higher/lower than previous year.

Change in City Services (Residents)

(by Gender, Age, and Neighbourhood)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD				
		MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Improved	**8%**	**8%**	**8%**	**12% E**	**5%**	**6%**	**7%**	**8%**	**6%**	**9%**	**8%**
Stayed the same	**64%**	**67%**	**62%**	**69%**	**62%**	**61%**	**54%**	**69%**	**63%**	**64%**	**68% G**
Worsened	**25%**	**21%**	**27%**	**13%**	**30% D**	**31% D**	**34% K**	**21%**	**21%**	**25%**	**23%**
Don't know	**3%**	**4%**	**3%**	**5%**	**3%**	**2%**	**4%**	**2%**	**10% HJK**	**1%**	**1%**

Base: All residents (n=600)
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?

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Change in City Services (Residents)

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

	TOTAL	HH COMPOSITION		OWN/RENT		HH INCOME		
		CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Improved	**8%**	**4%**	**9%**	**6%**	**10%**	**10%**	**8%**	**6%**
Stayed the same	**64%**	**62%**	**65%**	**65%**	**62%**	**69%**	**64%**	**61%**
Worsened	**25%**	**32% C**	**23%**	**27%**	**23%**	**17%**	**28% F**	**29% F**
Don't know	**3%**	**2%**	**4%**	**2%**	**5%**	**4%**	**1%**	**4%**

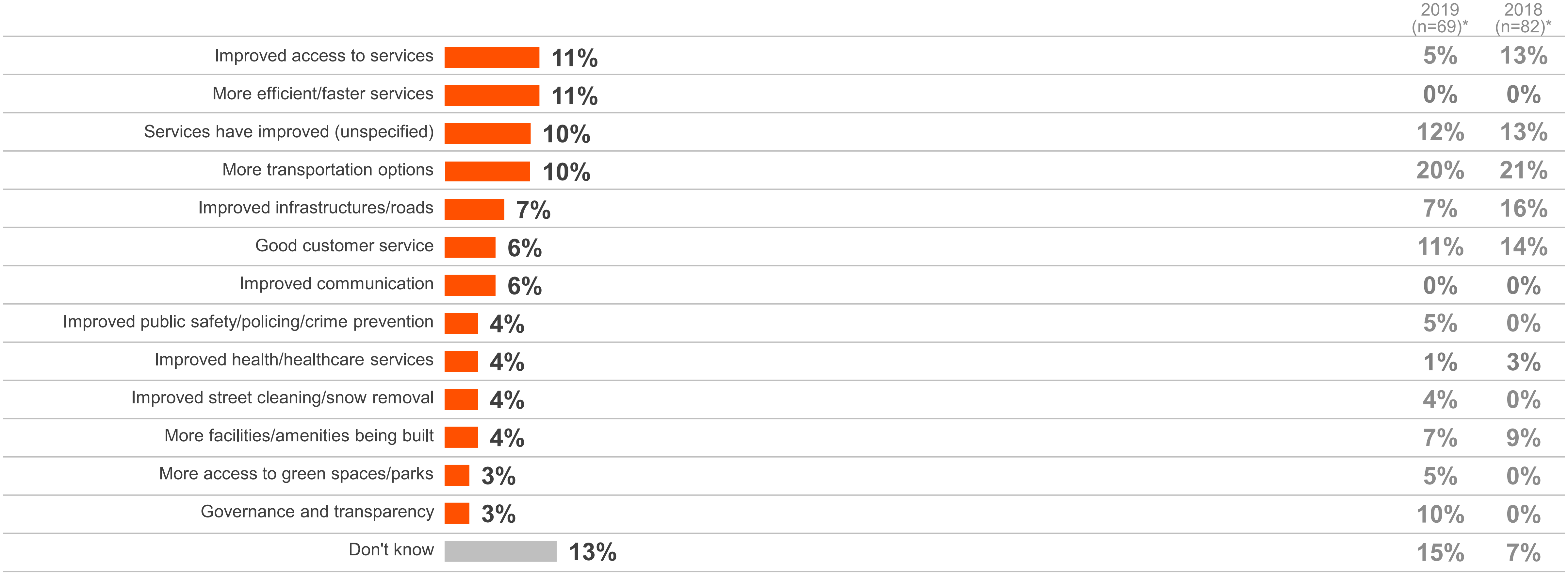
Base: All residents (n=600)
Q7. And, do you feel that the overall level and quality of services provided by the City of Vancouver in the past three years has improved, stayed the same, or worsened?

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Reasons City Services have Improved (Residents)

(among those saying City services have improved) (coded open-ends)

RESIDENTS (Only mentions of 3% or more in current year shown)



		2019 (n=69)*	2018 (n=82)*
Improved access to services	11%	5%	13%
More efficient/faster services	11%	0%	0%
Services have improved (unspecified)	10%	12%	13%
More transportation options	10%	20%	21%
Improved infrastructures/roads	7%	7%	16%
Good customer service	6%	11%	14%
Improved communication	6%	0%	0%
Improved public safety/policing/crime prevention	4%	5%	0%
Improved health/healthcare services	4%	1%	3%
Improved street cleaning/snow removal	4%	4%	0%
More facilities/amenities being built	4%	7%	9%
More access to green spaces/parks	3%	5%	0%
Governance and transparency	3%	10%	0%
Don't know	13%	15%	7%

* Small base size (<100), interpret with caution. ** Very small base size (<50), interpret with extreme caution.

Base: Those saying City services have improved: Residents (n=42**); Businesses (n=14**)

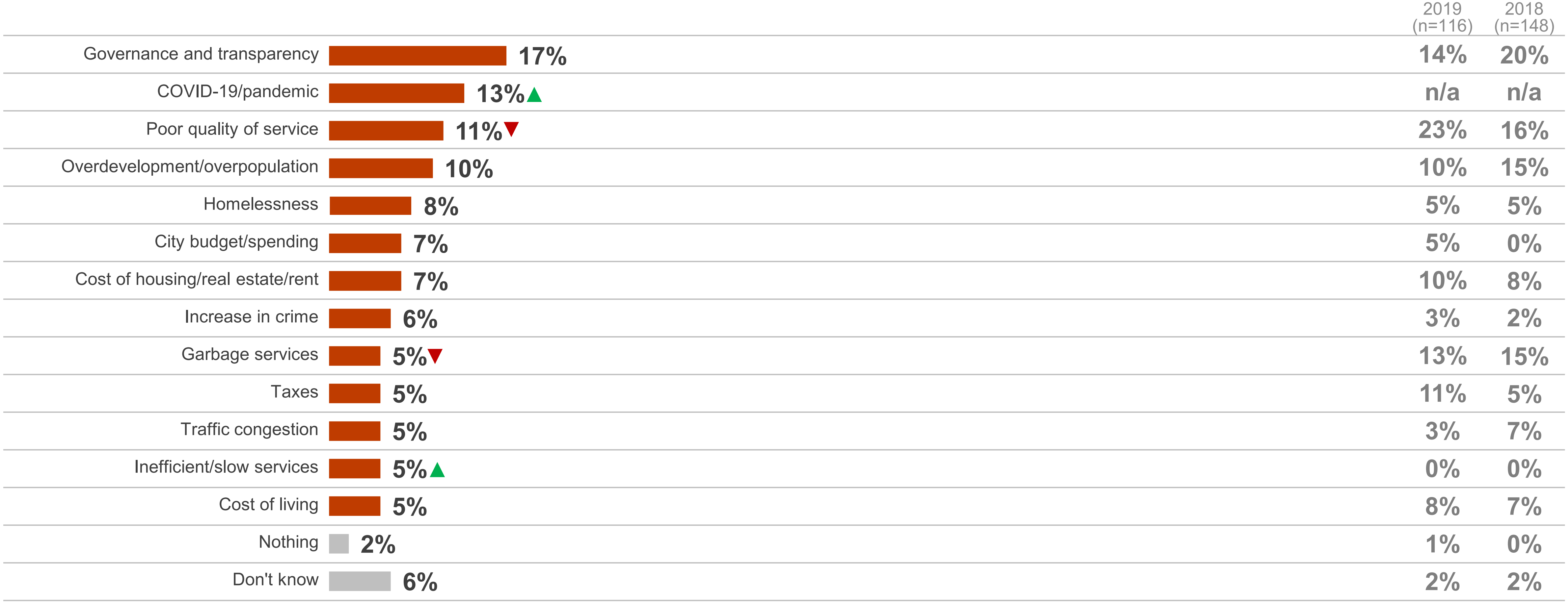
Q8. Why do you think the overall level and quality of services provided by the City of Vancouver has improved?

Sample sizes do not allow for significance testing.

Reasons City Services have Worsened (Residents)

(among those saying City services have worsened) (coded open-ends)

RESIDENTS (Only mentions of 5% or more in current year shown)



		2019 (n=116)	2018 (n=148)
Governance and transparency	17%	14%	20%
COVID-19/pandemic	13%▲	n/a	n/a
Poor quality of service	11%▼	23%	16%
Overdevelopment/overpopulation	10%	10%	15%
Homelessness	8%	5%	5%
City budget/spending	7%	5%	0%
Cost of housing/real estate/rent	7%	10%	8%
Increase in crime	6%	3%	2%
Garbage services	5%▼	13%	15%
Taxes	5%	11%	5%
Traffic congestion	5%	3%	7%
Inefficient/slow services	5%▲	0%	0%
Cost of living	5%	8%	7%
Nothing	2%	1%	0%
Don't know	6%	2%	2%

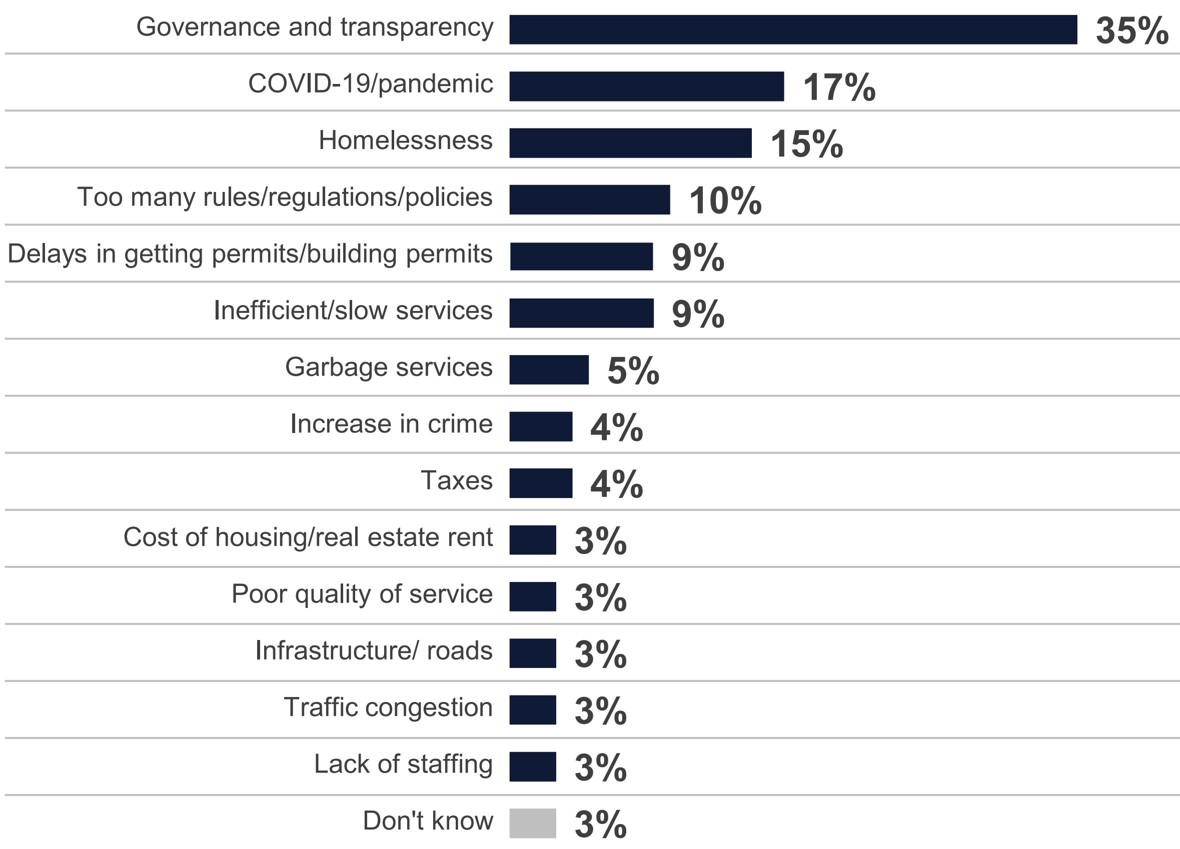
Base: Residents saying City services have worsened (n=161)
Q9. Why do you think the overall level and quality of services provided by the City of Vancouver has worsened?

▲ / ▼ Significantly higher/lower than previous year.

Reasons City Services have Worsened (Businesses)

(among those saying City services have worsened) (coded open-ends)

BUSINESSES (Only mentions of 3% or more in current year shown)



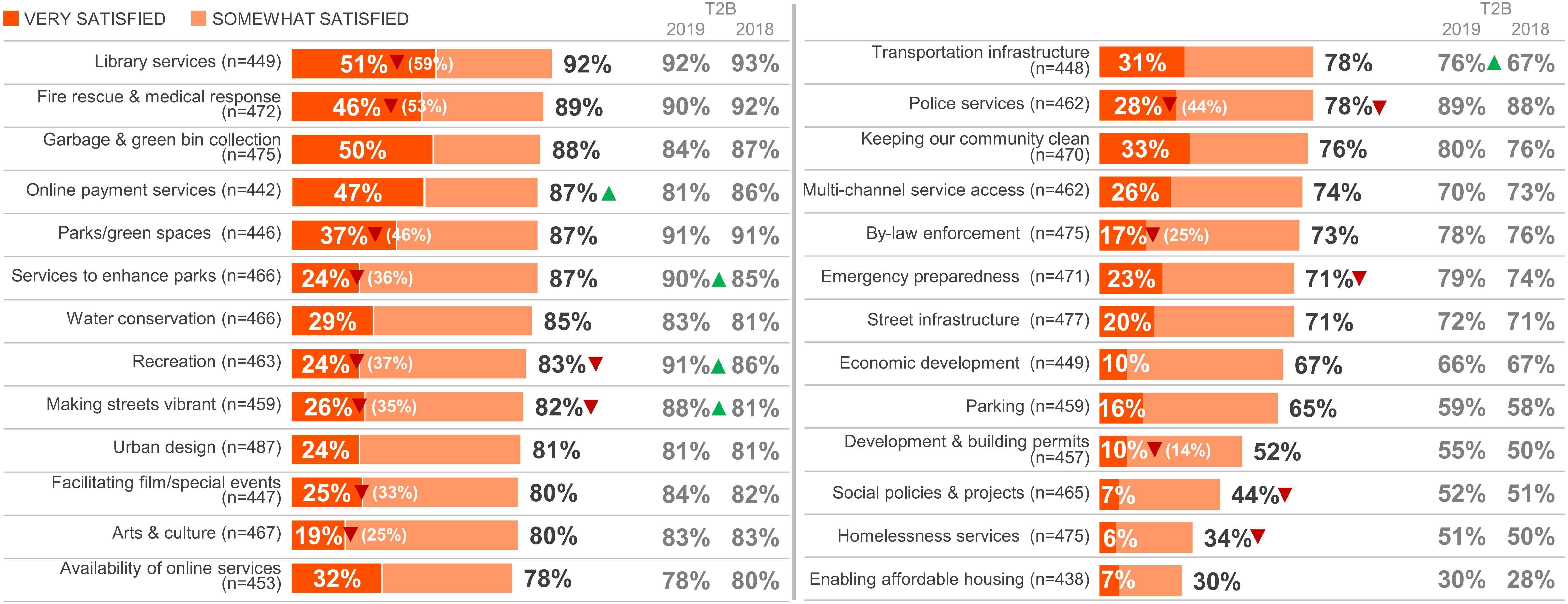
		2019 (n=39)**	2018 (n=55)*
Governance and transparency	35%	16%	16%
COVID-19/pandemic	17%	n/a	n/a
Homelessness	15%	5%	9%
Too many rules/regulations/policies	10%	6%	12%
Delays in getting permits/building permits	9%	5%	16%
Inefficient/slow services	9%	0%	0%
Garbage services	5%	12%	1%
Increase in crime	4%	4%	0%
Taxes	4%	11%	12%
Cost of housing/real estate rent	3%	0%	11%
Poor quality of service	3%	11%	14%
Infrastructure/ roads	3%	10%	3%
Traffic congestion	3%	13%	14%
Lack of staffing	3%	1%	0%
Don't know	3%	0%	5%

* Small base size (<100), interpret with caution. ** Very small base size (<50), interpret with extreme caution.
Base: Businesses saying City services have worsened (n=67*)
Q9. Why do you think the overall level and quality of services provided by the City of Vancouver has worsened?

Sample sizes do not allow for significance testing.

Satisfaction with Specific Services (Residents)

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



Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services)
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please keep in mind that some of the City's services and programs have been temporarily stopped or reduced based on direction from provincial public health due to the COVID-19 pandemic. Considering that, please tell me how satisfied you are with the job the City is doing overall in providing each service. (Scale: very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied)

▲ / ▼ Significantly higher/lower than previous year.

Satisfaction with Specific Services (Residents)

(by Gender, Age, and Neighbourhood)

TOTAL SATISFIED (service wording has been abbreviated to fit within the space provided)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD				
		MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Library services	**92%**	**91%**	**93%**	**94%**	**94% F**	**88%**	**91%**	**94%**	**92%**	**89%**	**94%**
Fire rescue & medical response	**89%**	**91%**	**88%**	**92%**	**88%**	**88%**	**86%**	**89%**	**91%**	**90%**	**90%**
Garbage & green bin collection	**88%**	**87%**	**88%**	**89%**	**85%**	**88%**	**83%**	**85%**	**90%**	**89%**	**90%**
Online payment services	**87%**	**87%**	**89%**	**89%**	**90%**	**83%**	**90%**	**86%**	**90%**	**91%**	**83%**
Parks/green spaces	**87%**	**89%**	**85%**	**88%**	**86%**	**87%**	**85%**	**96% GIK**	**84%**	**88%**	**85%**
Services to enhance parks	**87%**	**85%**	**90%**	**87%**	**88%**	**87%**	**90%**	**87%**	**88%**	**90%**	**84%**
Water conservation	**85%**	**85%**	**86%**	**82%**	**87%**	**85%**	**82%**	**87%**	**87%**	**83%**	**85%**
Recreation	**83%**	**82%**	**84%**	**83%**	**81%**	**86%**	**80%**	**85%**	**80%**	**88%**	**83%**
Making streets vibrant	**82%**	**79%**	**84%**	**82%**	**81%**	**82%**	**81%**	**78%**	**89%**	**83%**	**79%**
Urban design	**81%**	**79%**	**83%**	**86% F**	**81%**	**76%**	**80%**	**74%**	**79%**	**91% HI**	**81%**
Facilitating film/special events	**80%**	**81%**	**79%**	**79%**	**80%**	**81%**	**81%**	**78%**	**77%**	**83%**	**79%**
Arts & culture	**80%**	**80%**	**82%**	**82%**	**78%**	**80%**	**73%**	**80%**	**82%**	**83%**	**81%**
Availability of online services	**78%**	**80%**	**79%**	**81%**	**80%**	**75%**	**79%**	**79%**	**80%**	**77%**	**78%**

Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services)
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please keep in mind that some of the City's services and programs have been temporarily stopped or reduced based on direction from provincial public health due to the COVID-19 pandemic. Considering that, please tell me how satisfied you are with the job the City is doing overall in providing each service. (Scale: very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied)

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Satisfaction with Specific Services (Residents)

(by Gender, Age, and Neighbourhood) (cont.)

TOTAL SATISFIED (service wording has been abbreviated to fit within the space provided)

		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Transportation infrastructure	78%	78%	79%	81%	79%	75%	79%	76%	78%	79%	79%
Police services	78%	83% C	73%	72%	75%	87% DE	79%	77%	69%	80%	83% I
Keeping our community clean	76%	76%	75%	79%	72%	76%	75%	87% I	70%	75%	75%
Multi-channel service access	74%	73%	76%	78%	75%	70%	72%	68%	86% GHJ	69%	76%
By-law enforcement	73%	73%	74%	80% E	68%	72%	71%	73%	72%	75%	73%
Emergency preparedness	71%	74%	69%	67%	72%	75%	76%	67%	78%	64%	72%
Street infrastructure	71%	69%	72%	78% F	70%	63%	67%	77%	71%	69%	71%
Economic development	67%	64%	70%	75% E	60%	68%	63%	69%	63%	65%	72%
Parking	65%	62%	68%	66%	68%	61%	70%	69%	62%	67%	60%
Development & building permits	52%	53%	52%	73% EF	41%	42%	54%	49%	48%	55%	54%
Social policies & projects	44%	49% C	38%	50%	38%	43%	37%	47%	44%	43%	47%
Homelessness services	34%	36%	33%	36%	31%	37%	33%	36%	33%	30%	37%
Enabling affordable housing	30%	35% C	25%	22%	30%	36% D	26%	33%	29%	30%	29%

Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services)
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please keep in mind that some of the City's services and programs have been temporarily stopped or reduced based on direction from provincial public health due to the COVID-19 pandemic. Considering that, please tell me how satisfied you are with the job the City is doing overall in providing each service. (Scale: very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied)

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Satisfaction with Specific Services (Residents)

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

TOTAL SATISFIED (service wording has been abbreviated to fit within the space provided)

		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Library services	92%	94%	92%	93%	89%	92%	95%	90%
Fire rescue & medical response	89%	89%	89%	91%	86%	87%	91%	93%
Garbage & green bin collection	88%	86%	88%	86%	90%	92%	88%	86%
Online payment services	87%	93%	86%	91% E	82%	83%	85%	95% FG
Parks/green spaces	87%	91%	86%	84%	90%	94% GH	81%	85%
Services to enhance parks	87%	85%	88%	90% E	83%	87%	85%	91%
Water conservation	85%	85%	85%	84%	86%	81%	89%	86%
Recreation	83%	81%	84%	87% E	78%	83%	84%	84%
Making streets vibrant	82%	80%	82%	81%	83%	84%	76%	83%
Urban design	81%	85%	80%	79%	84%	85%	84%	79%
Facilitating film/special events	80%	81%	80%	79%	80%	81%	86%	76%
Arts & culture	80%	81%	80%	82%	77%	76%	85%	83%
Availability of online services	78%	82%	78%	79%	79%	75%	80%	83%

Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services)
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please keep in mind that some of the City's services and programs have been temporarily stopped or reduced based on direction from provincial public health due to the COVID-19 pandemic. Considering that, please tell me how satisfied you are with the job the City is doing overall in providing each service. (Scale: very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied)

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Satisfaction with Specific Services (Residents)

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

TOTAL SATISFIED (service wording has been abbreviated to fit within the space provided)

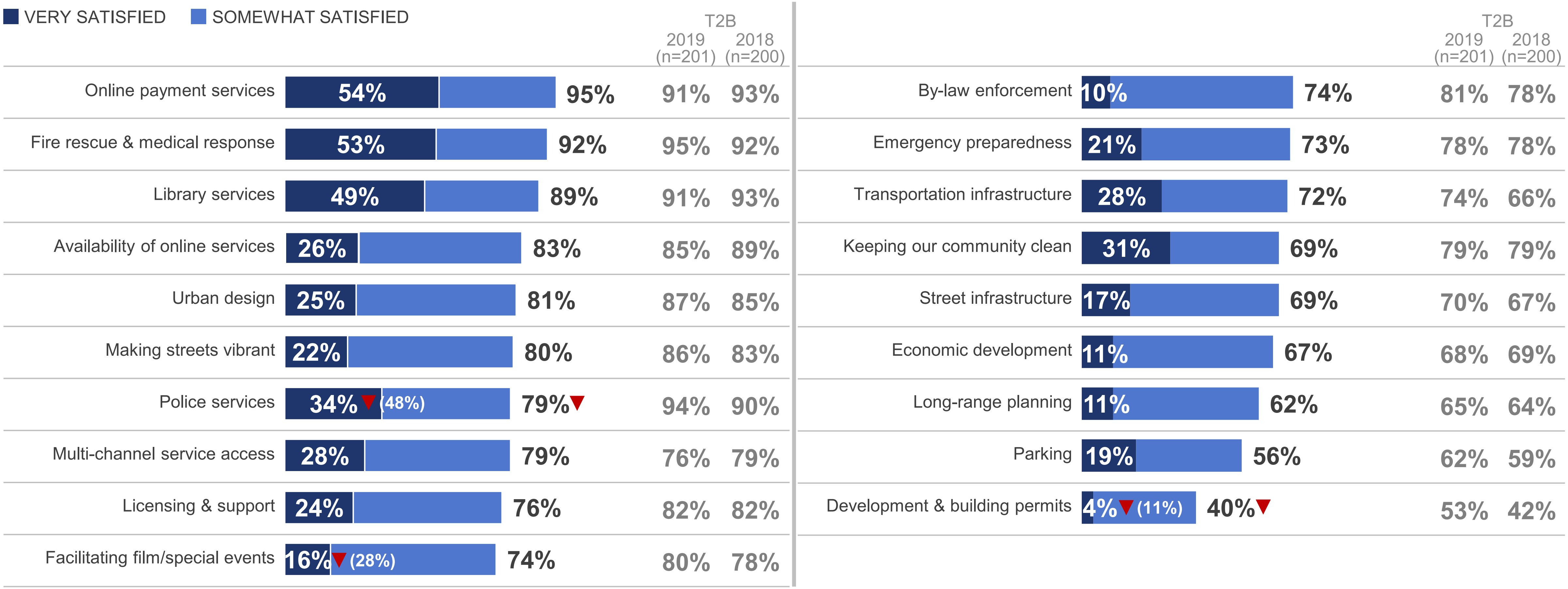
		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Transportation infrastructure	78%	75%	79%	73%	82%	86% H	78%	74%
Police services	78%	73%	80%	82% E	71%	74%	79%	82%
Keeping our community clean	76%	73%	77%	72%	79%	85% GH	71%	70%
Multi-channel service access	74%	80%	73%	79% E	68%	73%	79%	75%
By-law enforcement	73%	69%	74%	73%	74%	81% H	73%	69%
Emergency preparedness	71%	74%	71%	74%	69%	76%	68%	68%
Street infrastructure	71%	69%	71%	69%	71%	71%	69%	72%
Economic development	67%	62%	69%	65%	68%	74%	70%	62%
Parking	65%	64%	65%	66%	62%	68%	58%	71% G
Development & building permits	52%	48%	53%	46%	59% D	66% H	54% H	40%
Social policies & projects	44%	43%	44%	47%	38%	51% H	47%	35%
Homelessness services	34%	31%	35%	33%	35%	46% GH	31%	26%
Enabling affordable housing	30%	26%	31%	32%	23%	35% H	30%	22%

Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services)
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please keep in mind that some of the City's services and programs have been temporarily stopped or reduced based on direction from provincial public health due to the COVID-19 pandemic. Considering that, please tell me how satisfied you are with the job the City is doing overall in providing each service. (Scale: very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied)

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Satisfaction with Specific Services (Businesses)

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



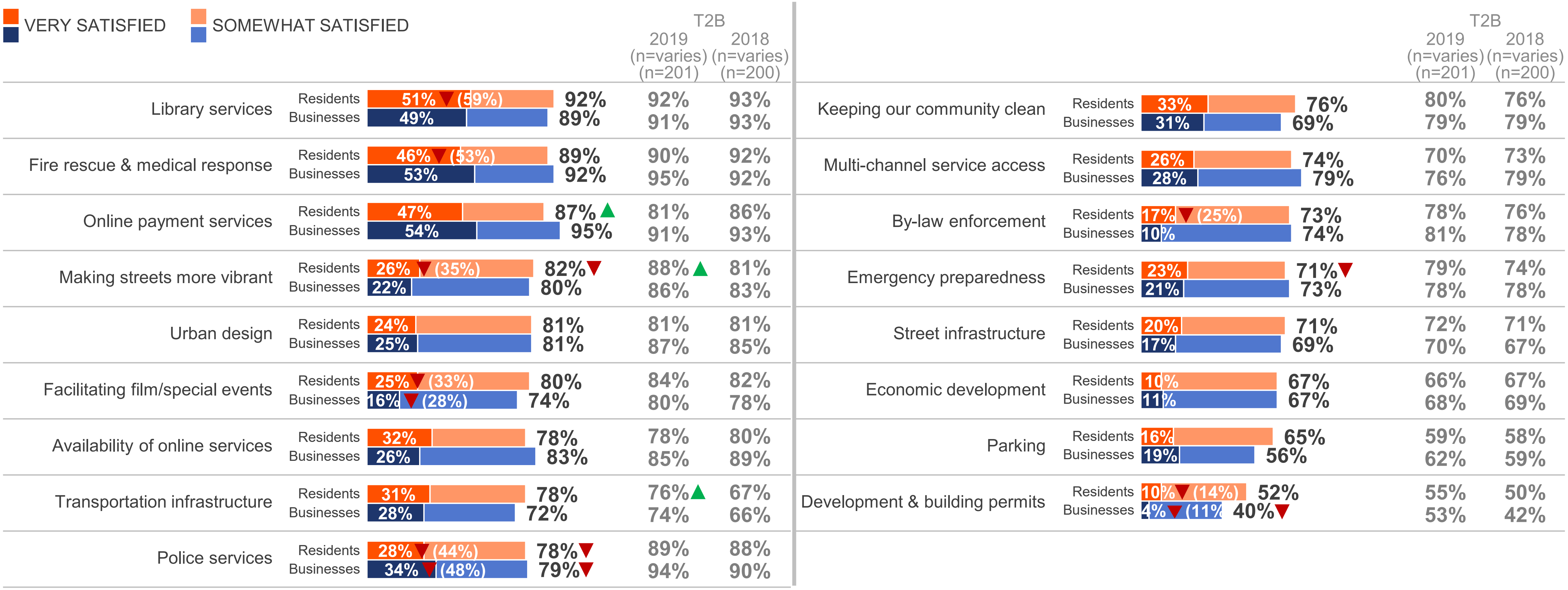
Base: All businesses (n=200)
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please keep in mind that some of the City's services and programs have been temporarily stopped or reduced based on direction from provincial public health due to the COVID-19 pandemic. Considering that, please tell me how satisfied you are with the job the City is doing overall in providing each service. (Scale: very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied)

▲ / ▼ Significantly higher/lower than previous year.

Satisfaction with Specific Services

Summary of satisfaction for services asked of both residents and businesses

RESIDENTS / BUSINESSES (Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.)

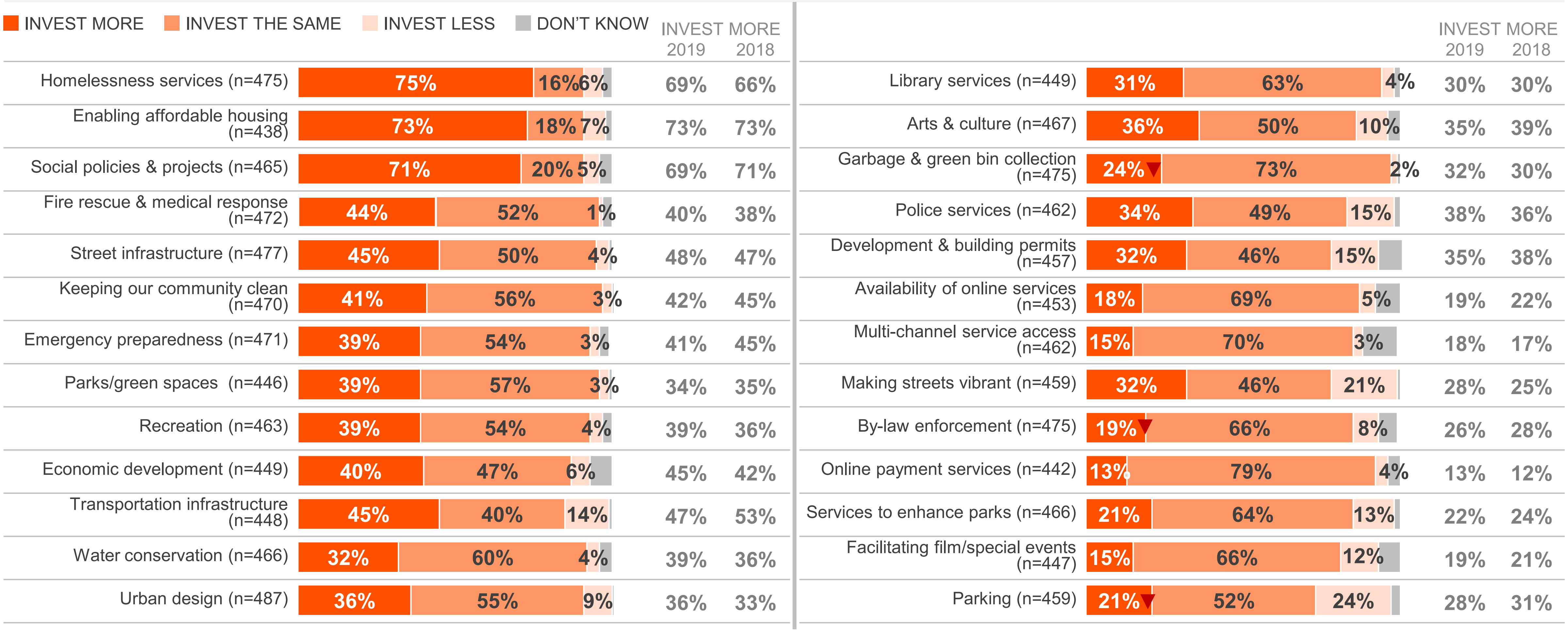


Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services); All businesses (n=200)
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please keep in mind that some of the City's services and programs have been temporarily stopped or reduced based on direction from provincial public health due to the COVID-19 pandemic. Considering that, please tell me how satisfied you are with the job the City is doing overall in providing each service. (Scale: very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied)

▲ / ▼ Significantly higher/lower than previous year.

Investment in Specific Services (Residents)

RESIDENTS (Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.)
Note: Items are listed in order of net investment (Net = invest more *minus* invest less).



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

Only significant differences for invest more are shown.

▲ / ▼ Significantly higher/lower than previous year.

Investment in Specific Services (Residents)

(by Gender, Age, and Neighbourhood)

INVEST MORE (service wording has been abbreviated to fit within the space provided)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD				
		MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Homelessness services	75%	70%	81% B	80% F	74%	70%	83%	69%	75%	77%	71%
Enabling affordable housing	73%	66%	79% B	77%	75%	66%	82% H	65%	79%	67%	72%
Social policies & projects	71%	68%	76%	75%	73%	64%	72%	67%	70%	72%	73%
Street infrastructure	45%	45%	46%	41%	45%	48%	44%	35%	40%	53% H	48%
Transportation infrastructure	45%	48%	44%	51% F	50% F	36%	42%	51%	52%	40%	44%
Fire rescue & medical response	44%	39%	49% B	50%	41%	41%	50%	42%	39%	34%	50% J
Keeping our community clean	41%	37%	45%	38%	43%	40%	47%	32%	36%	43%	42%
Economic development	40%	43%	37%	45% F	44% F	32%	55% HI	36%	28%	39%	42%
Emergency preparedness	39%	38%	40%	44%	40%	35%	40%	39%	32%	38%	44%
Parks/green spaces	39%	39%	40%	39%	44%	34%	39%	34%	45%	30%	44%
Recreation	39%	39%	39%	31%	47% D	38%	38%	37%	45%	35%	38%
Arts & culture	36%	33%	41%	32%	38%	39%	38%	36%	39%	39%	33%
Urban design	36%	35%	36%	45% F	36% F	26%	41% J	43% J	44% J	19%	33% J

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

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Investment in Specific Services (Residents)

(by Gender, Age, and Neighbourhood) (cont.)

INVEST MORE (service wording has been abbreviated to fit within the space provided)

		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Police services	34%	31%	39%	24%	35%	42% D	43%	31%	30%	32%	35%
Development & building permits	32%	39% C	25%	23%	40% D	32%	32%	30%	26%	39%	32%
Making streets vibrant	32%	34%	30%	31%	36%	29%	25%	37%	33%	36%	30%
Water conservation	32%	30%	36%	42% EF	27%	28%	33%	27%	30%	26%	40% J
Library services	31%	30%	34%	26%	38% D	29%	32%	37%	35%	31%	25%
Garbage & green bin collection	24%	23%	25%	28% F	26%	17%	32%	20%	20%	18%	27%
Parking	21%	22%	21%	27% F	19%	16%	25%	12%	17%	22%	25% H
Services to enhance parks	21%	24%	19%	22%	21%	22%	33% IK	31% IK	14%	23%	14%
By-law enforcement	19%	19%	20%	13%	25% D	21%	17%	20%	23%	21%	17%
Availability of online services	18%	23% C	13%	24% E	14%	16%	17%	25%	17%	14%	18%
Facilitating film/special events	15%	17%	13%	14%	16%	15%	18%	20%	18%	11%	11%
Multi-channel service access	15%	18%	13%	12%	17%	17%	11%	18%	17%	16%	15%
Online payment services	13%	14%	12%	17% E	8%	13%	1%	22% GJ	14% G	7%	17% GJ

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

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Investment in Specific Services (Residents)

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

INVEST MORE (service wording has been abbreviated to fit within the space provided)

		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Homelessness services	75%	72%	75%	70%	81% D	77%	72%	74%
Enabling affordable housing	73%	70%	74%	63%	84% D	76%	70%	73%
Social policies & projects	71%	71%	71%	67%	76%	71%	70%	75%
Street infrastructure	45%	43%	46%	46%	46%	46%	53% H	38%
Transportation infrastructure	45%	51%	44%	45%	47%	44%	47%	50%
Fire rescue & medical response	44%	32%	47% B	41%	47%	47%	49% H	36%
Keeping our community clean	41%	42%	40%	40%	41%	39%	47%	38%
Economic development	40%	40%	41%	39%	44%	38%	41%	44%
Emergency preparedness	39%	37%	40%	37%	41%	43%	39%	36%
Parks/green spaces	39%	40%	39%	39%	37%	36%	38%	45%
Recreation	39%	49% C	35%	40%	41%	39%	40%	38%
Arts & culture	36%	31%	38%	33%	45% D	39%	40%	33%
Urban design	36%	29%	38%	35%	34%	32%	40%	38%

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

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Investment in Specific Services (Residents)
(by Household Composition, Own/Rent, and Household Income) (cont.)

INVEST MORE (service wording has been abbreviated to fit within the space provided)

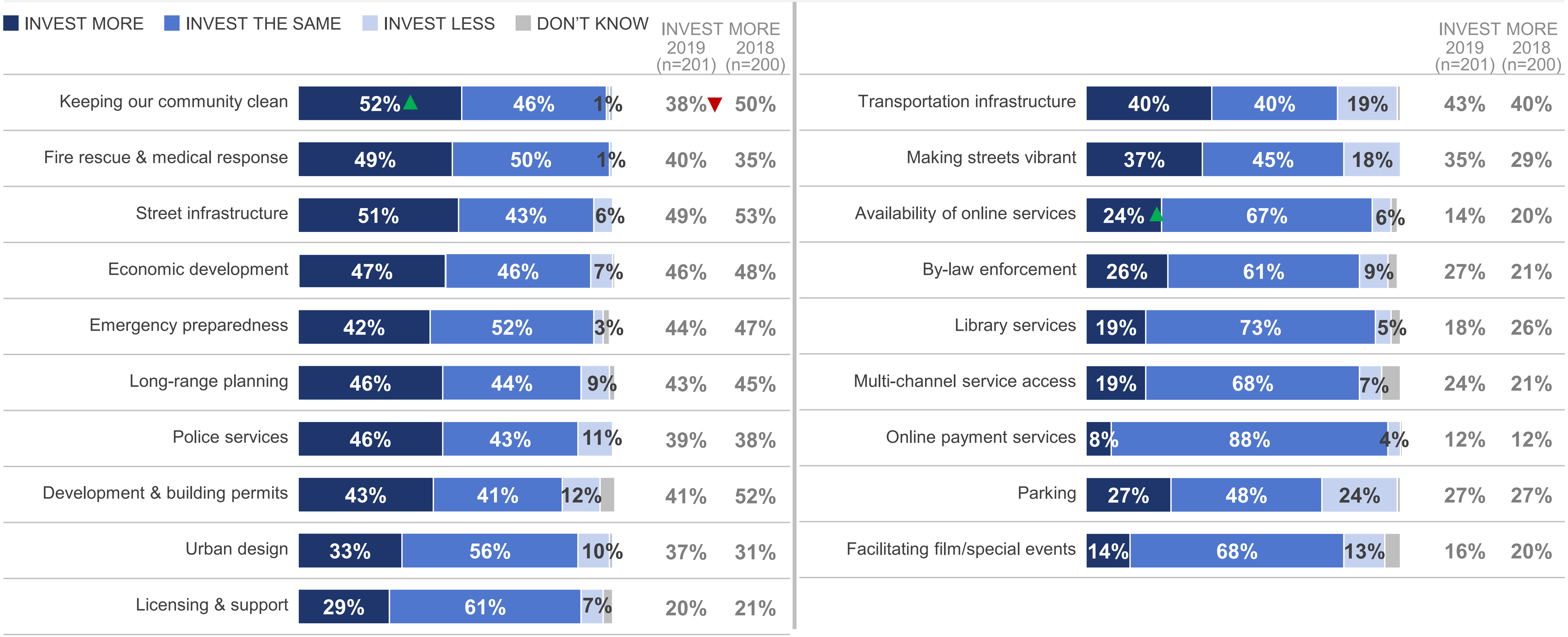
	TOTAL	HH COMPOSITION		OWN/RENT		HH INCOME		
		CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Police services	34%	31%	35%	33%	35%	34%	38%	30%
Development & building permits	32%	38%	30%	37% E	27%	21%	34% F	44% F
Making streets vibrant	32%	31%	32%	31%	33%	31%	33%	34%
Water conservation	32%	26%	34%	28%	36%	40% H	37% H	22%
Library services	31%	38%	29%	31%	36%	34%	28%	30%
Garbage & green bin collection	24%	26%	23%	23%	25%	25%	21%	23%
Parking	21%	18%	22%	19%	21%	26% H	25% H	14%
Services to enhance parks	21%	22%	21%	22%	23%	23%	19%	24%
By-law enforcement	19%	22%	19%	21%	19%	17%	23%	19%
Availability of online services	18%	14%	19%	17%	20%	21%	16%	19%
Facilitating film/special events	15%	14%	15%	17%	14%	21%	14%	12%
Multi-channel service access	15%	16%	15%	16%	15%	21% H	13%	10%
Online payment services	13%	10%	14%	13%	13%	20% H	14% H	4%

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

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Investment in Specific Services (Businesses)

BUSINESSES (Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.)
Note: Items are listed in order of net investment (Net = invest more *minus* invest less).



	INVEST MORE 2019 (n=201)	INVEST MORE 2018 (n=200)
Keeping our community clean	38%▼	50%
Fire rescue & medical response	40%	35%
Street infrastructure	49%	53%
Economic development	46%	48%
Emergency preparedness	44%	47%
Long-range planning	43%	45%
Police services	39%	38%
Development & building permits	41%	52%
Urban design	37%	31%
Licensing & support	20%	21%
Transportation infrastructure	43%	40%
Making streets vibrant	35%	29%
Availability of online services	14%	20%
By-law enforcement	27%	21%
Library services	18%	26%
Multi-channel service access	24%	21%
Online payment services	12%	12%
Parking	27%	27%
Facilitating film/special events	16%	20%

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

Only significant differences for invest more are shown.

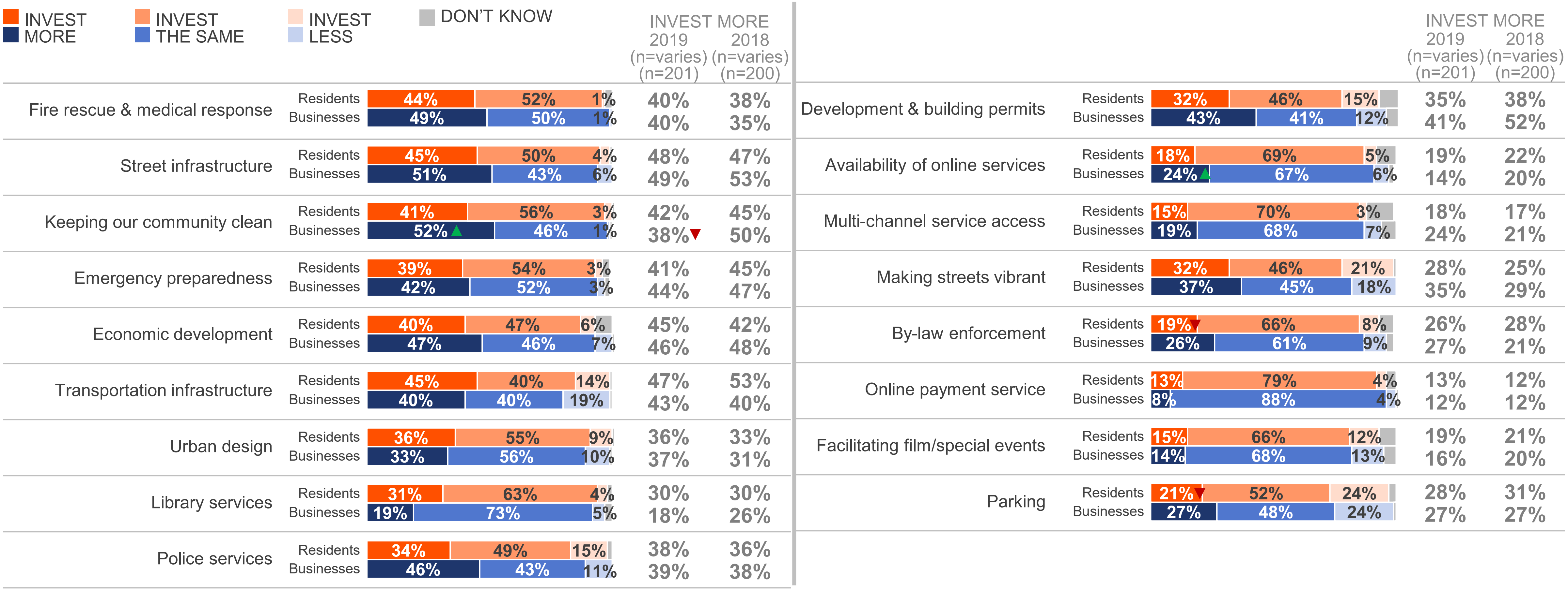
▲ / ▼ Significantly higher/lower than previous year.

Investment in Specific Services

Summary of investment in services asked of both residents and businesses

RESIDENTS / BUSINESSES

(Service wording has been abbreviated to fit within the space provided. Please see the Appendix for the full service wording.)
Note: Items are listed in order of net investment (Net = invest more *minus* invest less).



		INVEST MORE	INVEST THE SAME	INVEST LESS	INVEST MORE 2019 (n=varies) (n=201)	INVEST MORE 2018 (n=varies) (n=200)
Fire rescue & medical response	Residents	44%	52%	1%	40%	38%
	Businesses	49%	50%	1%	40%	35%
Street infrastructure	Residents	45%	50%	4%	48%	47%
	Businesses	51%	43%	6%	49%	53%
Keeping our community clean	Residents	41%	56%	3%	42%	45%
	Businesses	52% ▲	46%	1%	38% ▼	50%
Emergency preparedness	Residents	39%	54%	3%	41%	45%
	Businesses	42%	52%	3%	44%	47%
Economic development	Residents	40%	47%	6%	45%	42%
	Businesses	47%	46%	7%	46%	48%
Transportation infrastructure	Residents	45%	40%	14%	47%	53%
	Businesses	40%	40%	19%	43%	40%
Urban design	Residents	36%	55%	9%	36%	33%
	Businesses	33%	56%	10%	37%	31%
Library services	Residents	31%	63%	4%	30%	30%
	Businesses	19%	73%	5%	18%	26%
Police services	Residents	34%	49%	15%	38%	36%
	Businesses	46%	43%	11%	39%	38%
Development & building permits	Residents	32%	46%	15%	35%	38%
	Businesses	43%	41%	12%	41%	52%
Availability of online services	Residents	18%	69%	5%	19%	22%
	Businesses	24% ▲	67%	6%	14%	20%
Multi-channel service access	Residents	15%	70%	3%	18%	17%
	Businesses	19%	68%	7%	24%	21%
Making streets vibrant	Residents	32%	46%	21%	28%	25%
	Businesses	37%	45%	18%	35%	29%
By-law enforcement	Residents	19% ▼	66%	8%	26%	28%
	Businesses	26%	61%	9%	27%	21%
Online payment service	Residents	13%	79%	4%	13%	12%
	Businesses	8%	88%	4%	12%	12%
Facilitating film/special events	Residents	15%	66%	12%	19%	21%
	Businesses	14%	68%	13%	16%	20%
Parking	Residents	21% ▼	52%	24%	28%	31%
	Businesses	27%	48%	24%	27%	27%

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

Only significant differences for invest more are shown.

▲ / ▼ Significantly higher/lower than previous year.

FINANCIAL PLANNING

8

Section Summary

Most continue to say they receive good value for their municipal tax dollars.

- Three-quarters (76%) of residents say they receive ‘very’ (15%) or ‘fairly’ (61%) good value for their municipal tax dollars. While overall perceptions (combined ‘very/fairly good value’ responses) are down slightly from 2019, this drop is not statistically significant. However, the percentage saying ‘very good value’ is down a significant 6 points.
  - Overall perceptions of value for taxes (combined ‘very/fairly good value’ responses) is generally consistent across the key demographic segments, with one exception. Specifically, those living in households without children under the age of 18 are more likely to say they receive good value for their municipal tax dollars. It is also of note that homeowners are more likely than renters to rate their value for taxes poorly.

- Similarly, 77% of businesses rate the value for taxes as ‘very’ (11%) or ‘fairly’ (66%) good. Businesses’ perceived value for taxes has not significantly changed from 2019.

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

Section Summary (cont.)

To balance the budget, residents and businesses would like to see the City continue to offer the same services but at a reduced level.

- Respondents were presented with several 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). Comparisons to previous years are unavailable for this question due to changes in the answer list.

- Residents show a strong preference for **continue to offer the same services but not to the same level, for example reduced hours** (54%). All other options are rated lower, with **postpone infrastructure projects (e.g., new amenities or major repairs)** (33%) and **introduce new user fees for some City services that currently have no fees** (31%) rounding out the top three.
    - A preference for **continue to offer the same services but not to the same level** is demonstrated the most strongly by those who are 18-34 years of age, live in the Southeast, and live in households without children under the age of 18. Homeowners are more likely than renters to opt for **introduce new user fees for some City services that currently have no fees**, while renters are more likely than homeowners to say they prefer **increase residential and business property taxes**.

- Businesses also show a strong preference for **continue to offer the same services but not to the same level, for example reduced hours** (51%). **Introduce new user fees for some City services that currently have no fees** is in close second (45%), followed by **increase user fees for City services that currently have fees** (30%).

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

- When asked which option they would *least* prefer the City use to balance the budget, the number one response by far is **increase residential and business property taxes**, chosen by 40% of residents and 53% of businesses.
    - Among residents, the greatest push back against an **increase in residential and business property taxes** comes from those who are 35-54 years of age, live in households with children under the age of 18, homeowners, and have household incomes of $60K+.

Section Summary (cont.)

There is continued willingness to pay more user fees for services.

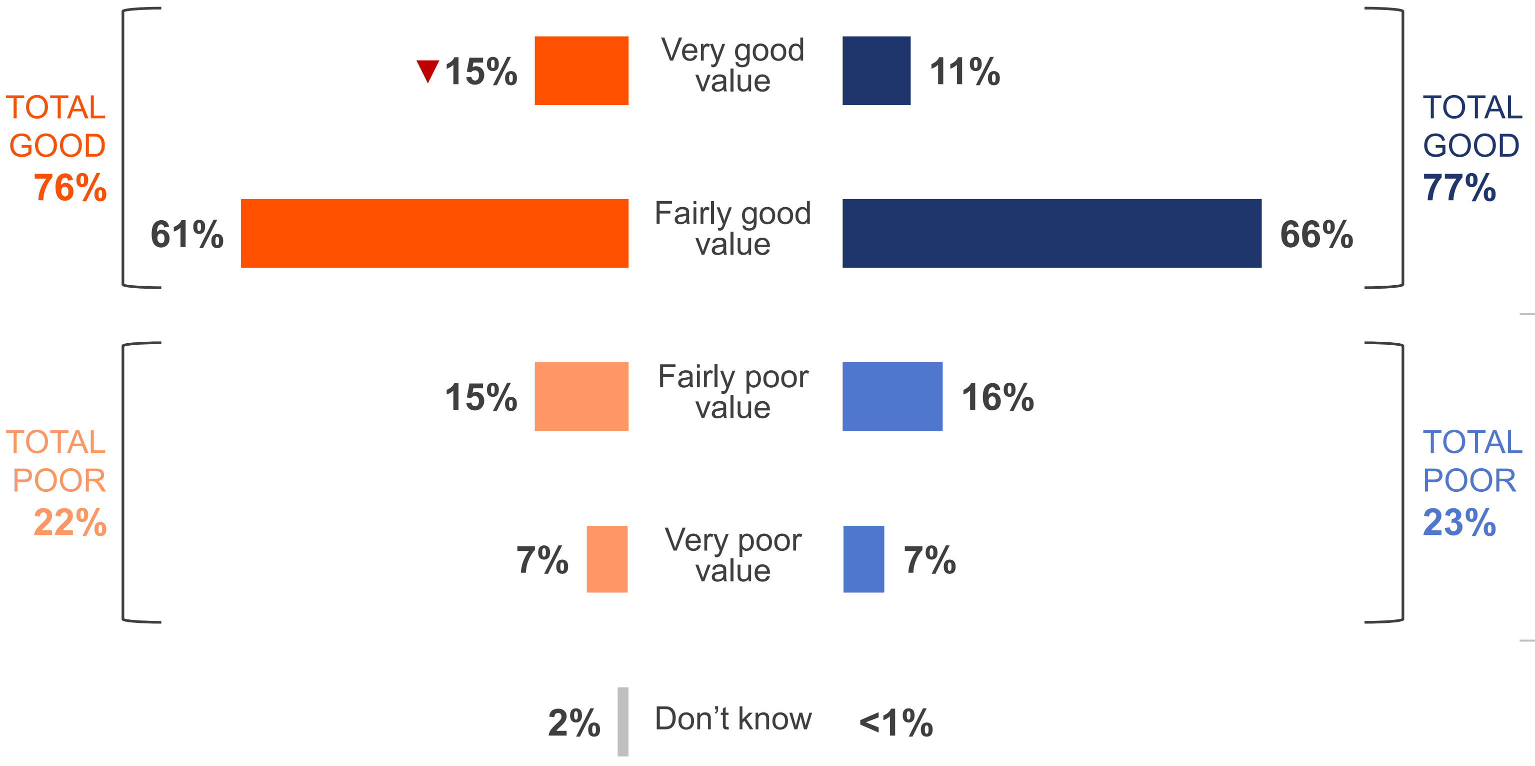
- Two-thirds (67%) of residents say they would be willing to pay more in user fees for the services they use in order to maintain or improve them (14% ‘very willing’, 53% ‘somewhat willing’). While overall willingness to pay (combined ‘very/somewhat willing’ responses) is down slightly from 2019, this drop is not statistically significant. However, there has been a significant drop in the percentage saying ‘very willing’ (down 4 points).
    - Overall willingness to pay (combined ‘very/somewhat willing’ responses) is generally consistent across the key demographic segments, with one notable exception. Specifically, residents with household incomes of $60K+ are more likely to say they would be willing to pay more user fees for services.

- Similarly, 68% of businesses say they would be ‘very’ (10%) or ‘somewhat’ (58%) willing to pay more user fees for the services they use. Businesses’ willingness to pay is statistically unchanged from 2019.

Value for Taxes

RESIDENTS **BUSINESSES**

NORM+	2018 (n=600)	2019 (n=602)	2019 (n=201)	2018 (n=200)
20%	20%	21%	13%	12%
81%	79%	81%	76%	72%
61%	59%	60%	64%	60%
13%	13%	13%	16%	16%
17%	20%	18%	23%	26%
4%	6%	5%	7%	11%
2%	1%	1%	1%	2%



+ The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.
Base: All residents (n=600); All businesses (n=200)
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?)

▲ / ▼ Significantly higher/lower than previous year.

Value for Taxes (Residents)

(by Gender, Age, and Neighbourhood)

		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Very good value	15%	17%	13%	14%	10%	20% E	9%	18%	18%	17%	14%
Fairly good value	61%	61%	63%	64%	63%	57%	64%	57%	60%	61%	63%
Fairly poor value	15%	15%	14%	11%	19% D	16%	15%	20%	12%	17%	13%
Very poor value	7%	5%	6%	7%	7%	6%	8%	3%	9%	4%	8%
Don't know	2%	1%	3%	4%	1%	1%	3%	3%	2%	0%	2%
TOTAL GOOD VALUE	76%	78%	77%	79%	73%	77%	74%	74%	78%	78%	77%
TOTAL POOR VALUE	22%	21%	20%	18%	25%	22%	23%	22%	20%	22%	21%

Base: All residents (n=600)
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?)

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Value for Taxes (Residents)

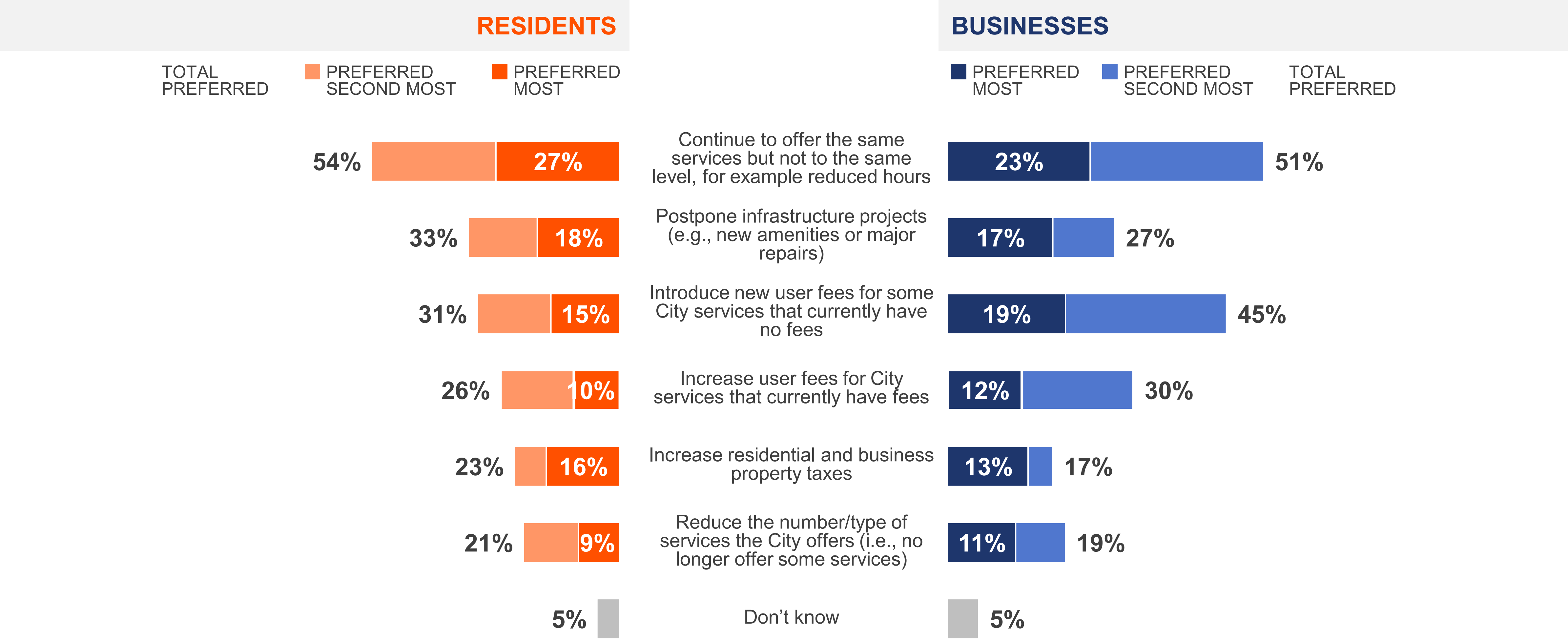
(by Household Composition, Own/Rent, and Household Income)

		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Very good value	15%	8%	17% B	12%	19% D	19% H	17% H	9%
Fairly good value	61%	61%	61%	61%	61%	61%	59%	65%
Fairly poor value	15%	22% C	13%	19% E	9%	12%	15%	17%
Very poor value	7%	8%	6%	7%	8%	5%	7%	8%
Don't know	2%	2%	2%	2%	3%	4%	1%	1%
TOTAL GOOD VALUE	76%	69%	78% B	73%	80%	79%	76%	74%
TOTAL POOR VALUE	22%	29% C	20%	25% E	17%	17%	23%	25%

Base: All residents (n=600)
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?)

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Preferred Options to Balance Budget



Base: All residents (n=600); All businesses (n=200)
Q13a. Now, to balance the 2022 budget as required by law, the City of Vancouver has a number of options to consider. Which of the following options would you most prefer the City use to balance its budget? (IF NECESSARY: User fees are monies paid to the City by the public to access specific services, facilities, and utilities. These include things like: the cost of licences, permits, use of City-owned facilities, and utilities.)
Q13b. Which one would you second most prefer?

Answer list changed in 2021 – no longer comparable to previous years.

Preferred Options to Balance Budget (Residents)

(by Gender, Age, and Neighbourhood)

TOTAL PREFERRED											
		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Continue to offer the same services but not to the same level, for example reduced hours	**54%**	**53%**	**53%**	**61%** **E**	**48%**	**52%**	**56%**	**52%**	**44%**	**54%**	**59%** **I**
Postpone infrastructure projects (e.g., new amenities or major repairs)	**33%**	**29%**	**36%**	**41%** **EF**	**29%**	**28%**	**37%**	**26%**	**30%**	**32%**	**36%**
Introduce new user fees for some City services that currently have no fees	**31%**	**30%**	**31%**	**24%**	**31%**	**36%** **D**	**31%**	**30%**	**26%**	**33%**	**32%**
Increase user fees for City services that currently have fees	**26%**	**32%** **C**	**21%**	**20%**	**30%** **D**	**27%**	**24%**	**34%** **K**	**33%**	**20%**	**22%**
Increase residential and business property taxes	**23%**	**22%**	**24%**	**28%**	**22%**	**19%**	**20%**	**31%** **K**	**24%**	**24%**	**19%**
Reduce the number/type of services the City offers (i.e., no longer offer some services)	**21%**	**26%** **C**	**16%**	**19%**	**25%**	**18%**	**18%**	**19%**	**28%**	**22%**	**18%**
Don't know	**5%**	**3%**	**7%** **B**	**2%**	**6%** **D**	**7%** **D**	**6%**	**3%**	**5%**	**4%**	**5%**

Base: All residents (n=600)
Q13a. Now, to balance the 2022 budget as required by law, the City of Vancouver has a number of options to consider. Which of the following options would you most prefer the City use to balance its budget? (IF NECESSARY: User fees are monies paid to the City by the public to access specific services, facilities, and utilities. These include things like: the cost of licences, permits, use of City-owned facilities, and utilities.)
Q13b. Which one would you second most prefer?

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Preferred Options to Balance Budget (Residents)

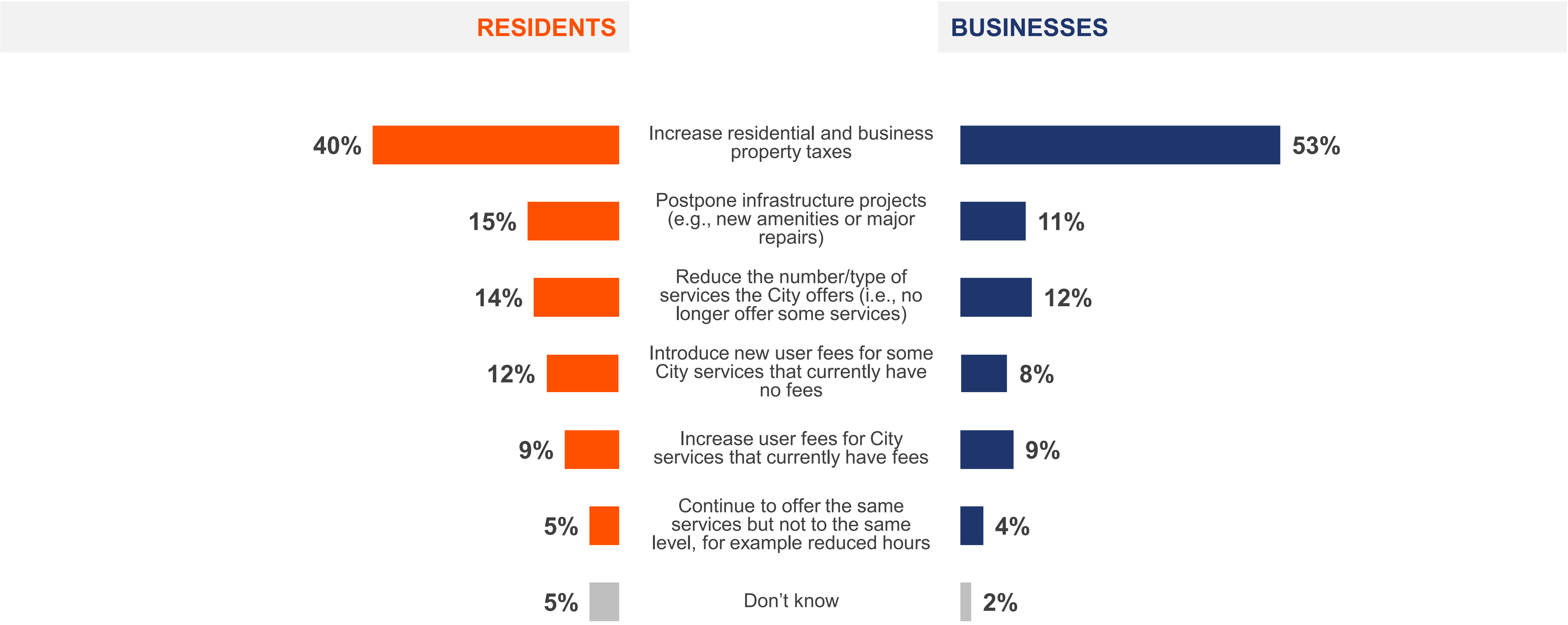
(by Household Composition, Own/Rent, and Household Income)

TOTAL PREFERRED								
		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Continue to offer the same services but not to the same level, for example reduced hours	54%	43%	57% B	55%	50%	54%	55%	51%
Postpone infrastructure projects (e.g., new amenities or major repairs)	33%	33%	33%	33%	31%	35%	36%	28%
Introduce new user fees for some City services that currently have no fees	31%	32%	30%	35% E	24%	26%	31%	35%
Increase user fees for City services that currently have fees	26%	27%	25%	27%	27%	16%	29% F	32% F
Increase residential and business property taxes	23%	26%	22%	17%	31% D	23%	20%	28%
Reduce the number/type of services the City offers (i.e., no longer offer some services)	21%	26%	19%	20%	22%	24%	20%	19%
Don't know	5%	5%	5%	4%	5%	9% GH	3%	2%

Base: All residents (n=600)
Q13a. Now, to balance the 2022 budget as required by law, the City of Vancouver has a number of options to consider. Which of the following options would you most prefer the City use to balance its budget? (IF NECESSARY: User fees are monies paid to the City by the public to access specific services, facilities, and utilities. These include things like: the cost of licences, permits, use of City-owned facilities, and utilities.)
Q13b. Which one would you second most prefer?

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Least Preferred Options to Balance Budget



Base: All residents (n=600); All businesses (n=200)
Q13c. And which one would you least prefer?

Answer list changed in 2021 – no longer comparable to previous years.

Least Preferred Options to Balance Budget (Residents)

(by Gender, Age, and Neighbourhood)

		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Increase residential and business property taxes	40%	40%	40%	34%	49% DF	38%	46%	40%	34%	36%	43%
Postpone infrastructure projects (e.g., new amenities or major repairs)	15%	17%	13%	16%	12%	16%	14%	17%	17%	14%	15%
Reduce the number/type of services the City offers (i.e., no longer offer some services)	14%	15%	14%	17%	14%	13%	15%	15%	10%	14%	17%
Introduce new user fees for some City services that currently have no fees	12%	12%	12%	18% F	10%	8%	11%	11%	22% GK	11%	7%
Increase user fees for City services that currently have fees	9%	8%	9%	10%	6%	11% E	10%	5%	7%	16% HK	8%
Continue to offer the same services but not to the same level, for example reduced hours	5%	4%	5%	5%	5%	4%	2%	10% GK	7%	4%	3%
Don't know	5%	4%	5%	1%	4%	9% DE	2%	2%	4%	4%	8%

Base: All residents (n=600)
Q13c. And which one would you least prefer?

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Least Preferred Options to Balance Budget (Residents)

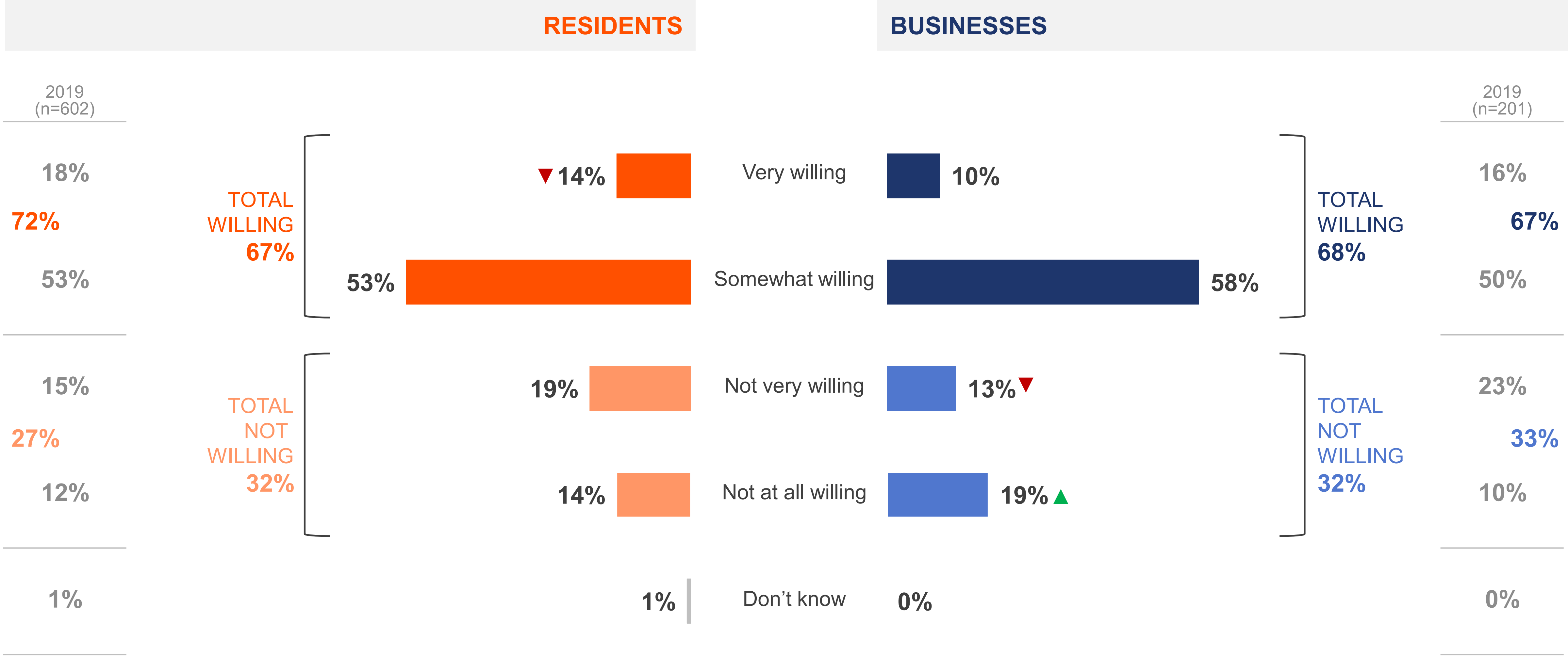
(by Household Composition, Own/Rent, and Household Income)

	TOTAL	HH COMPOSITION		OWN/RENT		HH INCOME		
		CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Increase residential and business property taxes	40%	49% C	38%	51% E	27%	25%	46% F	49% F
Postpone infrastructure projects (e.g., new amenities or major repairs)	15%	12%	16%	12%	17%	13%	15%	18%
Reduce the number/type of services the City offers (i.e., no longer offer some services)	14%	10%	16%	13%	17%	16%	18% H	10%
Introduce new user fees for some City services that currently have no fees	12%	7%	13%	8%	17% D	15%	12%	11%
Increase user fees for City services that currently have fees	9%	14% C	8%	8%	10%	14% G	5%	7%
Continue to offer the same services but not to the same level, for example reduced hours	5%	4%	5%	3%	7% D	9% G	1%	4%
Don't know	5%	4%	5%	5%	5%	8% H	4%	1%

Base: All residents (n=600)
Q13c. And which one would you least prefer?

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Willingness to Pay More User Fees for Services



Base: All residents (n=600); All businesses (n=200)
Q13d. In the past, the public has indicated a preference for increasing user fees versus property as a mechanism to balance the budget. Now think about the City services that [RESIDENTS: you use] [BUSINESSES: your business uses]. How willing would you be to pay more in user fees for the services [RESIDENTS: you use] [BUSINESSES: your business uses] in order to maintain or improve them?

▲ / ▼ Significantly higher/lower than previous year.

Willingness to Pay More User Fees for Services (Residents)

(by Gender, Age, and Neighbourhood)

		GENDER		AGE			NEIGHBOURHOOD				
	TOTAL	MALE [B]	FEMALE [C]	18-34 [D]	35-54 [E]	55+ [F]	DT [G]	NW [H]	NE [I]	SW [J]	SE [K]
Very willing	**14%**	**14%**	**14%**	**8%**	**19% D**	**13%**	**17%**	**15%**	**14%**	**10%**	**13%**
Somewhat willing	**53%**	**54%**	**54%**	**59%**	**50%**	**50%**	**44%**	**55%**	**52%**	**58%**	**55%**
Not very willing	**19%**	**18%**	**18%**	**19%**	**19%**	**18%**	**22%**	**19%**	**17%**	**17%**	**18%**
Not at all willing	**14%**	**13%**	**13%**	**13%**	**12%**	**16%**	**16%**	**10%**	**16%**	**14%**	**13%**
Don't know	**1%**	**<1%**	**2%**	**1%**	**0%**	**2% E**	**1%**	**1%**	**2%**	**1%**	**1%**
TOTAL WILLING	**67%**	**68%**	**68%**	**67%**	**69%**	**64%**	**61%**	**70%**	**65%**	**68%**	**68%**
TOTAL NOT WILLING	**32%**	**32%**	**31%**	**32%**	**31%**	**34%**	**39%**	**29%**	**33%**	**31%**	**31%**

Base: All residents (n=600)
Q13d. In the past, the public has indicated a preference for increasing user fees versus property as a mechanism to balance the budget. Now think about the City services that you use. How willing would you be to pay more in user fees for the services you use in order to maintain or improve them?

BCDEFGHIJK A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Willingness to Pay More User Fees for Services (Residents)

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

		HH COMPOSITION		OWN/RENT		HH INCOME		
	TOTAL	CHILDREN [B]	NO CHILDREN [C]	OWN [D]	RENT [E]	<$60K [F]	$60K-<$100K [G]	$100K+ [H]
Very willing	**14%**	**18%**	**12%**	**16% E**	**9%**	**12%**	**11%**	**19%**
Somewhat willing	**53%**	**49%**	**54%**	**48%**	**59% D**	**48%**	**63% F**	**52%**
Not very willing	**19%**	**18%**	**19%**	**18%**	**20%**	**22%**	**16%**	**16%**
Not at all willing	**14%**	**15%**	**13%**	**16%**	**11%**	**16%**	**9%**	**13%**
Don’t know	**1%**	**0%**	**1%**	**2%**	**<1%**	**2%**	**<1%**	**0%**
TOTAL WILLING	**67%**	**67%**	**66%**	**64%**	**68%**	**60%**	**75% F**	**71% F**
TOTAL NOT WILLING	**32%**	**33%**	**32%**	**34%**	**32%**	**38% G**	**25%**	**29%**

Base: All residents (n=600)
Q13d. In the past, the public has indicated a preference for increasing user fees versus property as a mechanism to balance the budget. Now think about the City services that you use. How willing would you be to pay more in user fees for the services you use in order to maintain or improve them?

BCDEFGH A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

WEIGHTED SAMPLE CHARACTERISTICS

9

Weighted Sample Characteristics

(weighted by gender/age and neighbourhood)

RESIDENTS

	2021 (n=600)	2019 (n=602)	2018 (n=600)
Neighbourhood			
Downtown/West End	**17%**	**17%**	**17%**
Northwest	**16%**	**16%**	**16%**
Northeast	**17%**	**17%**	**17%**
Southwest	**19%**	**19%**	**19%**
Southeast	**31%**	**31%**	**31%**
Gender			
Male	**47%**	**46%**	**48%**
Female	**51%**	**51%**	**50%**
Other	**<1%**	**1%**	**1%**
Refused	**2%**	**1%**	**1%**
Age			
18 to 34 years	**33%**	**33%**	**33%**
35 to 54 years	**34%**	**34%**	**34%**
55+ years	**32%**	**32%**	**32%**
Children <18 in HH			
Yes	**22%**	**25%**	**22%**
No	**77%**	**75%**	**78%**

	2021 (n=600)	2019 (n=602)	2018 (n=600)
Own/Rent			
Own	**53%**	**53%**	**54%**
Rent	**39%**	**42%**	**41%**
Other	**7%**	**5%**	**6%**
Income			
<$60K	**32%**	**37%**	**35%**
$60K to <$100K	**28%**	**26%**	**21%**
$100K+	**32%**	**27%**▼	**33%**
Refused	**9%**	**10%**	**11%**
Ethnicity			
European (net)	**42%**	**42%**	**46%**
Asian (net)	**38%**▲	**31%**	**31%**
North American (net)	**19%**	**23%**	**22%**
Latin/South American (net)	**4%**	**6%**▲	**2%**
African (net)	**1%**	**1%**	**1%**
Other regions (net)	**2%**	**3%**	**5%**
Refused	**3%**	**5%**	**3%**

▲ / ▼ Significantly higher/lower than previous year.

Weighted Sample Characteristics

(weighted by business size)

BUSINESSES

	2021 (n=200)	2019 (n=201)	2018 (n=200)
Neighbourhood			
Downtown/West End	**37%**	**34%**	**46%**
Northwest	**13%**▼	**23%**▲	**13%**
Northeast	**14%**	**14%**	**18%**
Southwest	**16%**	**19%**▲	**9%**
Southeast	**14%**▲	**6%**	**12%**
Business Size			
<25 employees	**88%**	**88%**	**88%**
25 to 99 employees	**10%**	**9%**	**9%**
100+ employees	**2%**	**2%**	**2%**
Own/Rent			
Own	**24%**	**23%**	**25%**
Rent	**74%**	**76%**	**74%**

▲ / ▼ Significantly higher/lower than previous year.

APPENDIX

10

Full Service Wording

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.

Full Service Wording

CHART WORDING	FULL SERVICE WORDING
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
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

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Game Changers

In our world of rapid change, the need for reliable information
to make confident decisions has never been greater.

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Ultimately, success comes down to a simple truth:
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