From: "Mochrie, Paul" <Paul.Mochrie@vancouver.ca>
To: "Direct to Mayor and Council - DL"
"City Manager's Correspondence Group - DL"
Date: 2/16/2023 11:23:20 AM
Subject: Memo on 2023 Budget Engagement
Attachments: 20230214 - CEC - FRS - Ipsos 2023 Civic Satisfaction Survey Results.pdf
20230214 - CEC - FRS - 2023 Budget engagement - Council memo.pdf

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Dear Mayor and Council,

Please see the attached memo from Patrice Impey and Maria Pontikis related to 2023 Budget engagement and market research findings. You also will find attached a draft topline report of the Civic Satisfaction Survey. A short summary is as follows:

- Of those who participated in this year.s Budget engagement process, top priorities were housing affordability , “climate action” and “community facilities (e.g., community centres, libraries)”. Respondents provided a broad range of suggestions for balancing the budget, including comments about property taxes and budget allocation for police services.

- In addition, the City had Ipsos conduct a randomly selected, representative survey of Vancouver residents and businesses to track satisfaction with City services and provide insight into service priorities. Residents prioritize investment in “affordable housing”, “homelessness” and “social policies and projects”. Businesses’ top priorities for investment are “fire, rescue and medical response” and “street infrastructure”.

If you have any questions, please feel free to contact Maria Pontikis at maria.pontikis@vancouver.ca or Patrice Impey at patrice.impey@vancouver.ca. Both also will be available to answer questions at your February 22 briefing on the 2023 Draft Operating Budget.

Best,
Paul

Paul Mochrie (he/him)
City Manager
City of Vancouver
paul.mochrie@vancouver.ca

The City of Vancouver acknowledges that it is situated on the unceded traditional territories of the xʷməθkʷəy̓əm (Musqueam), Sḵwx̱wú7mesh (Squamish), and səlilwətaɬ (Tsleil-Waututh) Nations.

2023 CIVIC SATISFACTION SURVEY

City of Vancouver

Draft Topline Report

February 8, 2023

Contents

INTRODUCTION

1

Objectives and Methodology

This report presents the findings of the City of Vancouver's 2023 Civic Satisfaction Survey. The main purpose of this survey is to determine resident and business satisfaction with municipal services and to provide insight into service priorities. This is the fourth Civic Satisfaction Survey that Ipsos has conducted for the City (past surveys were conducted in 2021, 2019, and 2018; no surveys were conducted in 2022 or 2020).

Ipsos conducted a telephone survey with a randomly selected representative sample of Vancouver residents and businesses between January 4 and 20, 2023. Households with members who work for the City, belong to a City advisory committee, or are elected officials of the City were excluded from the survey via an upfront screening question.

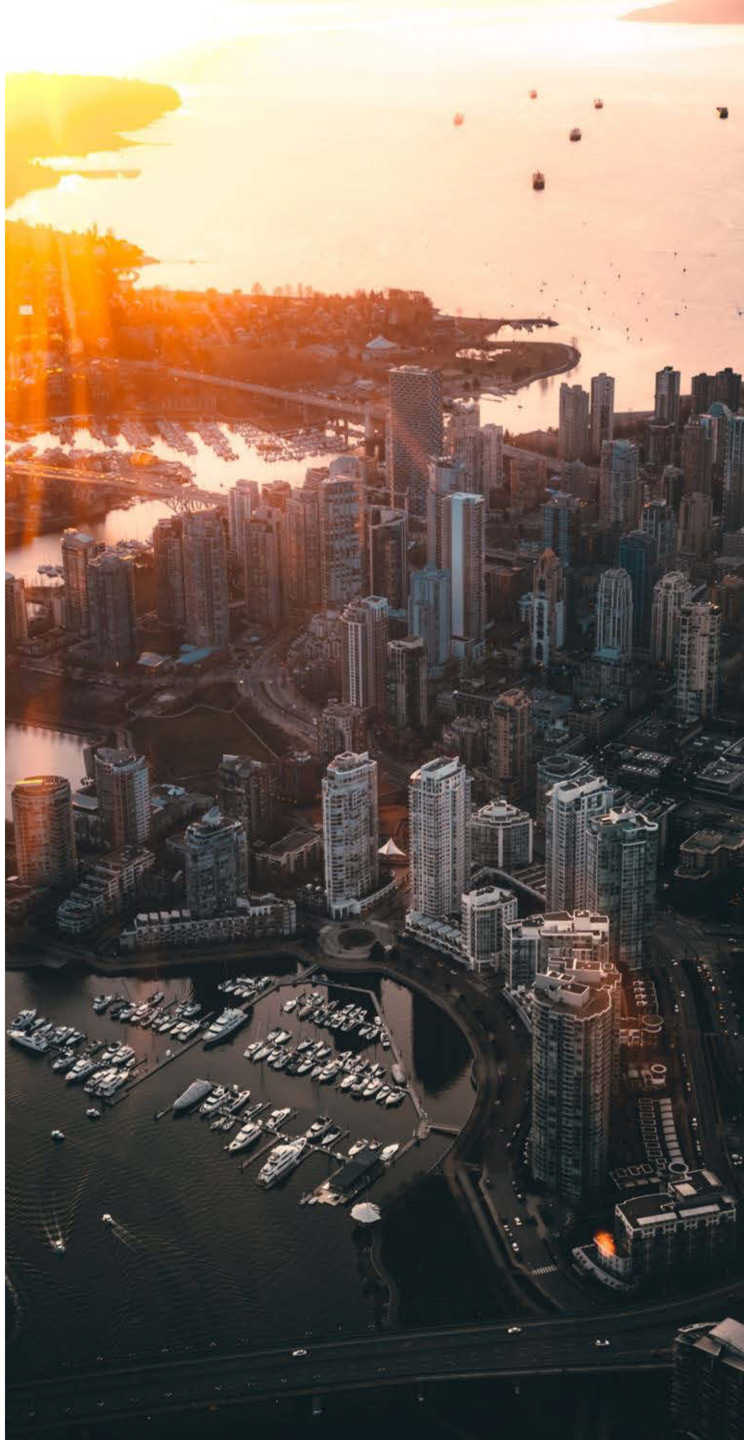
RESIDENTS

- 600 interviews with Vancouver residents aged 18 years or older
  - n=95 Downtown/West End
  - n=96 Northwest
  - n=101 Northeast
  - n=116 Southwest
  - n=192 Southeast
- Conducted on cellphones and landlines (55/45 split) in English, Cantonese, and Mandarin
- Final data weighted by gender/age and neighbourhood according to 2021 Census data
- Overall results accurate to within ±4.0%, 19 times out of 20 (margin of error will be larger for sample subgroups)

BUSINESSES

- 200 interviews with Vancouver businesses, conducted with the person responsible for the overall management and direction of their company at that location
  - n=130 small (<25 employees)
  - n=51 medium (25-99 employees)
  - n=19 large (100+ employees)
- Conducted on landlines in English
- Final data weighted by business size according to 2021 BC Stats data
- Overall results accurate to within ±6.9%, 19 times out of 20 (margin of error will be larger for sample subgroups)

NOTE ON THE NEIGHBOURHOODS REFERRED TO IN THIS REPORT:
16th Avenue is the North-South boundary.
Main Street is the West-East boundary.



Interpreting and Viewing the 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 possible, this year's results have been compared to past Civic Satisfaction Surveys conducted by the City. Comparing the year-over-year results allows the City to understand how 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 2023 and 2021.

NORMATIVE COMPARISONS

Where possible, 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 include a mix of pre-pandemic and pandemic data. Normative comparisons are available for residents only.

EXECUTIVE SUMMARY

2

Dashboard – Residents

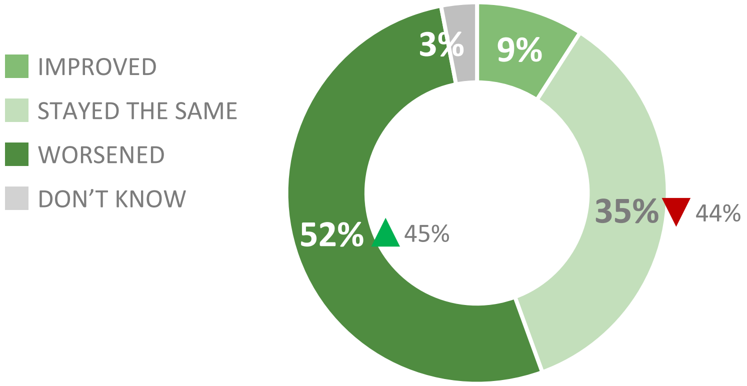
QUALITY OF LIFE

OVERALL QUALITY OF LIFE

87% ▲ 81%

Of residents rate the overall quality of life as Very Good (**25%**) or Good (**61%**)

CHANGE IN QUALITY OF LIFE



IMPORTANT LOCAL ISSUES

TOP 3 ISSUES

40% ▲ 19%
Housing/accommodations (including housing affordability)

29% ▲ 12%
Infrastructure/transportation

23%
Social issues (e.g., homelessness, poverty, childcare)

FINANCIAL PLANNING

VALUE FOR TAXES

75%

Of residents say they get good value for their tax dollars – Very Good Value (**14%**) and Fairly Good Value (**62%**)

WILLINGNESS TO PAY MORE USER FEES

64%

Of residents are willing to pay more in user fees for services – Very Willing (**11%**) and Somewhat Willing (**53%**)

WILLINGNESS TO PAY ADDITIONAL PROPERTY TAXES+

+ New question added in 2023.

52%

Of owners are willing to pay an additional $99 for next year's property taxes – Very Willing (**23%**) and Somewhat Willing (**28%**)

TOP 3 PREFERRED OPTIONS TO BALANCE BUDGET

++ Cannot be directly compared to 2021 due to differences in question wording..

44% ▼ 54%
Continue to offer the same services but not to the same level, for example reduced hours

34%
Increase business property taxes++

26%
Increase user fees for City services that currently have fees

Base: All residents (n=600)
Quality of Life – Q2, Q3
Important Local Issues – Q1
Financial Planning – Q13, Q13a, Q13b, Q13d
Base: Own current place of residence (n=338)
Willingness to Pay Additional Property Taxes– Q16a

▲ / ▼ Significantly higher/lower than 2021.
2021 value is indicated in black text beside each arrow.

Dashboard – Residents (cont.)

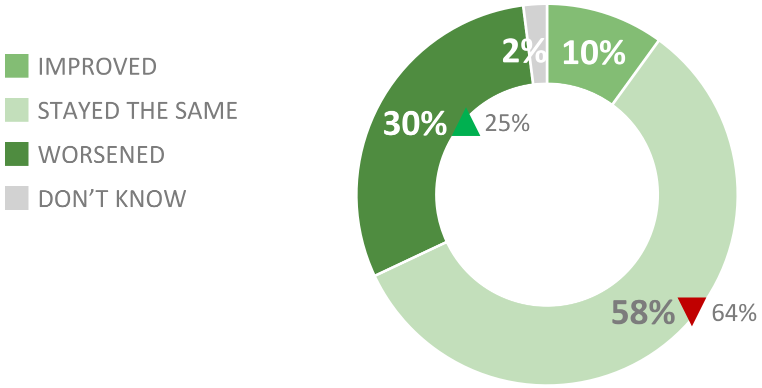
CITY SERVICES

OVERALL SATISFACTION WITH CITY SERVICES

75%

Of residents are satisfied with City services – Very Satisfied (**13%**) and Somewhat Satisfied (**62%**)

CHANGE IN LEVEL AND QUALITY OF SERVICES



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

TOP 3 SERVICES WITH HIGHEST SATISFACTION RATINGS – TOTAL SATISFIED

92%
Library services

88%
Provision and maintenance of parks and green spaces

88%
Provision of services to enhance parks and recreational experiences, such as golf courses, marinas and concessions

BOTTOM 3 SERVICES WITH LOWEST SATISFACTION RATINGS – TOTAL SATISFIED

46%
Social policies and projects that address issues such as poverty, mental health and addictions, and childcare

36%
Homelessness services, such as shelters, warming centres, and housing support

31%
Enabling affordable housing

TOP 3 SERVICES WHERE RESIDENTS FEEL THE CITY SHOULD INVEST MORE

75%
Enabling affordable housing

74%
Homelessness services, such as shelters, warming centres, and housing support

72%
Social policies and projects that address issues such as poverty, mental health and addictions, and childcare

▲ / ▼ Significantly higher/lower than 2021.
2021 value is indicated in black text beside each arrow.

Dashboard – Businesses

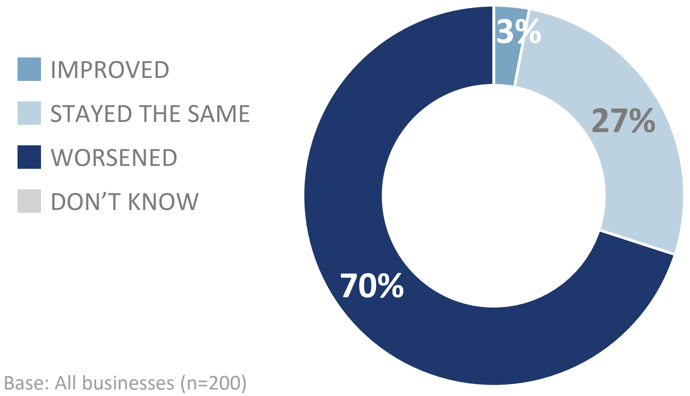
QUALITY OF LIFE

OVERALL QUALITY OF LIFE

85%

Of businesses rate the overall quality of life as Very Good (**17%**) or Good (**68%**)

CHANGE IN QUALITY OF LIFE



Base: All businesses (n=200)
Quality of Life – Q2, Q3
Important Local Issues – Q1
Financial Planning – Q13, Q13a, Q13b, Q13d
*Small base size (<100), interpret with caution.
Base: Own the space their business is in (n=60)*
Willingness to Pay Additional Property Taxes – Q16a

IMPORTANT LOCAL ISSUES

TOP 3 ISSUES

29% ▲ 7%
Infrastructure/transportation

23% ▲ 8%
Housing/accommodations (including housing affordability)

21%
Social issues (e.g., homelessness, poverty, childcare)

FINANCIAL PLANNING

VALUE FOR TAXES

65% ▼ 77%

Of businesses say they get good value for their tax dollars – Very Good Value (**8%**) and Fairly Good Value (**58%**)

WILLINGNESS TO PAY MORE USER FEES

57%

Of businesses are willing to pay more in user fees for services – Very Willing (**6%**) and Somewhat Willing (**51%**)

WILLINGNESS TO PAY ADDITIONAL PROPERTY TAXES+

+ New question added in 2023.

54%

Of owners are willing to pay an additional $256 for next year's property taxes – Very Willing (**17%**) and Somewhat Willing (**37%**)

TOP 3 PREFERRED OPTIONS TO BALANCE BUDGET

43%
Introduce new user fees for some City services that currently have no fees

35% ▼ 51%
Continue to offer the same services but not to the same level, for example reduced hours

22%
Increase user fees for City services that currently have fees

22%
Reduce the number/type of services the City offers i.e., no longer offer some services

▲ / ▼ Significantly higher/lower than 2021.
2021 value is indicated in black text beside each arrow.

Dashboard – Businesses (cont.)

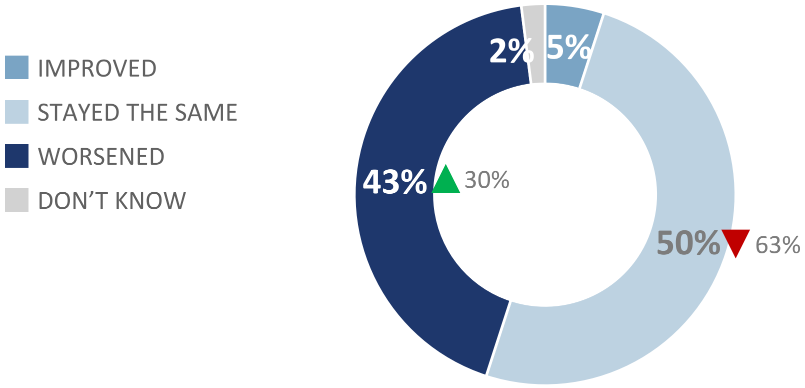
CITY SERVICES

OVERALL SATISFACTION WITH CITY SERVICES

67%

Of businesses are satisfied with City services – Very Satisfied (**8%**) and Somewhat Satisfied (**58%**)

CHANGE IN LEVEL AND QUALITY OF SERVICES



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

TOP 3 SERVICES WITH HIGHEST SATISFACTION RATINGS – TOTAL SATISFIED

94%	**87%**	**79%**
Online services for paying taxes, tickets, utility bills, etc.	Library services	Providing transportation infrastructure for walking, cycling and rolling

BOTTOM 3 SERVICES WITH LOWEST SATISFACTION RATINGS – TOTAL SATISFIED

62%	**61%**	**38%**
Promoting economic development	Street infrastructure and maintenance	Development & building permits

TOP 3 SERVICES WHERE BUSINESSES FEEL THE CITY SHOULD INVEST MORE

65% ▲ 49%	**64%** ▲ 51%	**58%**
Fire rescue and medical response	Street infrastructure and maintenance	Keeping public spaces clean - i.e., litter pick up, roads and sidewalks sweeping, receptacles etc.

▲ / ▼ Significantly higher/lower than 2021.
2021 value is indicated in black text beside each arrow.

Key Takeaways

QUALITY OF LIFE

- Overall perceptions of quality of life have rebounded from a pandemic low.
- However, perceptions of the direction quality of life is taking continue to deteriorate, with the majority saying this has worsened over the past three years. Businesses demonstrate a particularly negative outlook.

CITY SERVICES

- Overall satisfaction with City services is positive but lower than pre-pandemic years. Satisfaction is higher among residents than businesses.
- Perceptions of worsening City services have intensified.
- Compared to previous years (either 2021 or pre-pandemic), satisfaction with fire rescue and medical response and police services is down among both residents and businesses. Residents are also less satisfied with garbage and green bin collection and homelessness services; businesses with multi-channel service access and keeping public spaces clean.
- Residents prioritize investment in affordable housing, homelessness, and social policies most of all. However, there is growing desire for more investment in fire rescue and medical response, keeping public spaces clean, development and building permits, and garbage and green bin collection.
- Businesses' top priorities for investment are fire rescue and medical response and street infrastructure (both up from 2021). Development and building permits has also increased in priority.

IMPORTANT LOCAL ISSUES

- The public issue agenda is evolving. While COVID-19 was the top issue in 2021, it barely registers this year. Housing/accommodations, infrastructure/transportation, and social issues are this year's top three issues.
- Compared to pre-pandemic years, the emerging issues are social issues and crime/criminal activity.

FINANCIAL PLANNING

- Residents' overall perceptions of value for taxes hold steady with 2021 but are lower than pre-pandemic years. Perceptions have declined among businesses this year.
- Residents and businesses have different ideas around how to best balance the budget. Residents prefer continuing to offer the same services but at a reduced level, while businesses opt for introducing new user fees for some City services. However, residents and businesses agree that increasing residential property taxes is the least preferred option.
- Willingness to pay more user fees is higher than willingness to pay additional property taxes.

DETAILED RESULTS

3

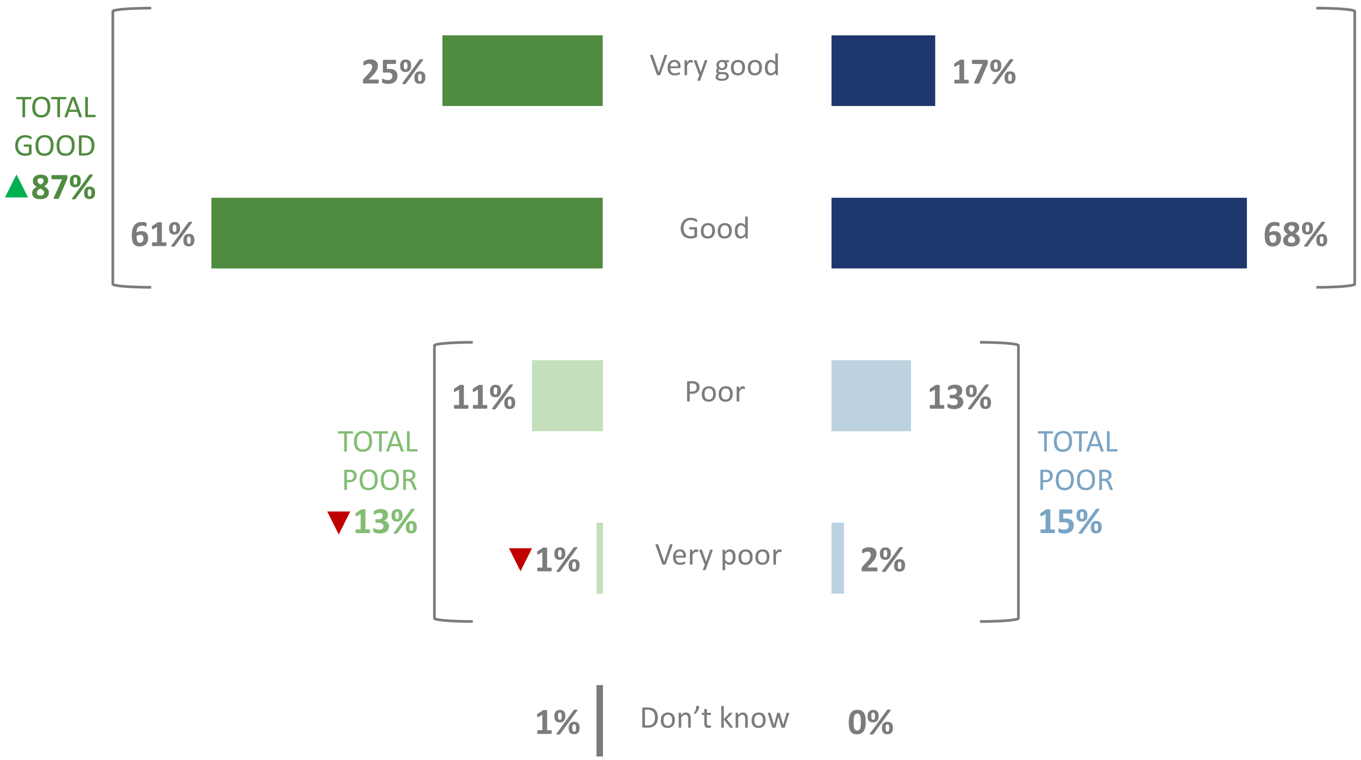
QUALITY OF LIFE

3.1

Overall Quality of Life

RESIDENTS | **BUSINESSES**

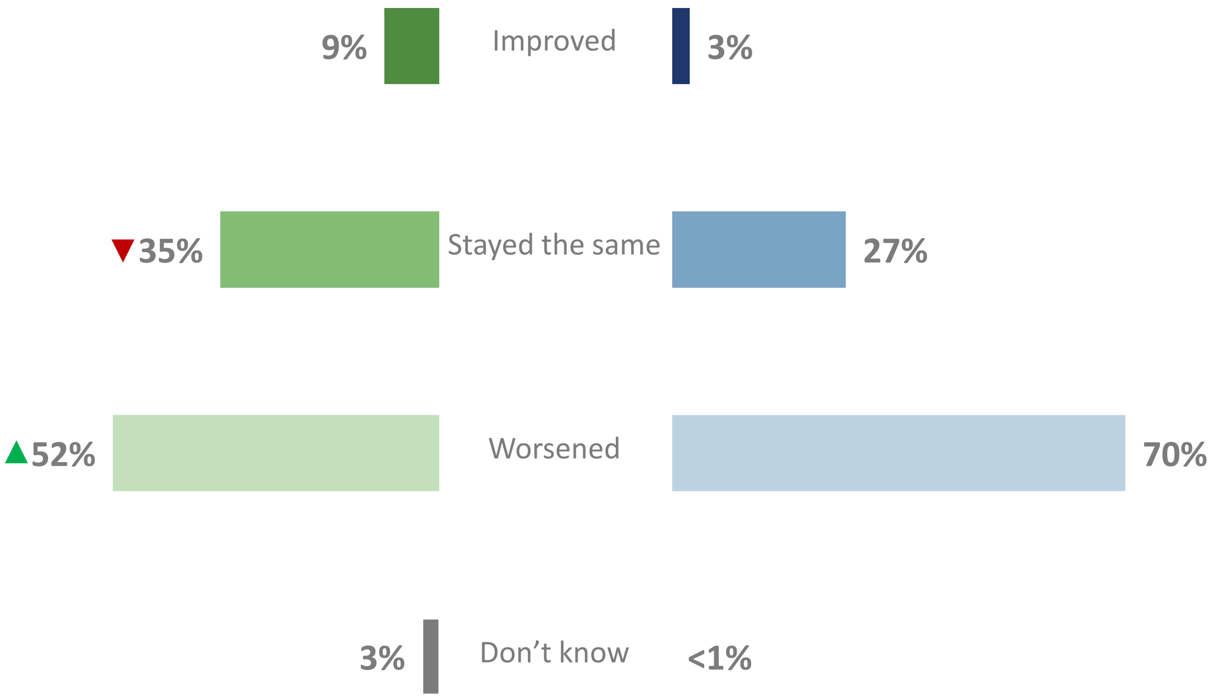
	NORM+	2018 (n=600)	2019 (n=602)	2021 (n=600)	2021 (n=200)	2019 (n=201)	2018 (n=200)
Very good	38%	32%	34%	22%	15%	38%	30%
TOTAL GOOD	93%	91%	89%	81%	80%	92%	88%
Good	55%	59%	55%	59%	65%	54%	57%
Poor	5%	7%	9%	14%	17%	7%	11%
TOTAL POOR	6%	8%	10%	18%	20%	8%	12%
Very poor	1%	1%	1%	4%	2%	1%	1%
Don't know	1%	1%	<1%	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 2021.

Change in Quality of Life



NORM+	2018 (n=600)	2019 (n=602)	2021 (n=600)	RESIDENTS		BUSINESSES	2021 (n=200)	2019 (n=201)	2018 (n=200)
17%	10%	13%	8%	9%	Improved	3%	6%	14%	12%
48%	50%	48%	44%	▼35%	Stayed the same	27%	32%	50%	41%
33%	38%	36%	45%	▲52%	Worsened	70%	62%	36%	46%
2%	2%	2%	3%	3%	Don't know	<1%	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 2021.

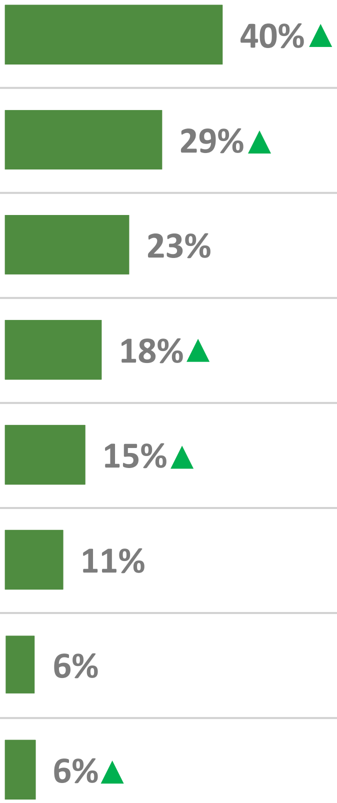
IMPORTANT LOCAL ISSUES

3.2

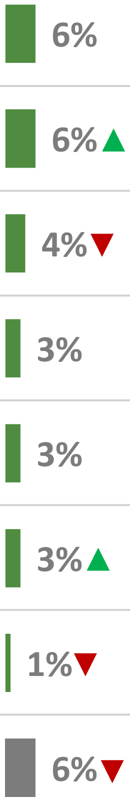
Important Local Issues (Residents)

(coded open-ends, multiple responses allowed)

RESIDENTS (With the exception of COVID-19, only mentions of 3% or more in current year shown)



		2021 (n=600)	2019 (n=602)	2018 (n=600)
Housing/accommodations (including housing affordability)	40%▲	19%	48%	49%
Infrastructure/transportation	29%▲	12%	40%	44%
Social issues (e.g., homelessness, poverty, childcare)	23%	20%	11%	13%
Affordability/cost of living (excluding housing affordability)	18%▲	13%	15%	16%
Crime/criminal activity	15%▲	7%	9%	3%
Addiction and overdoses	11%	11%	9%	7%
Environment/environmental issues/sustainability	6%	5%	8%	10%
Garbage disposal	6%▲	1%	4%	4%



		2021 (n=600)	2019 (n=602)	2018 (n=600)
Health/healthcare	6%	6%	3%	4%
Weather response+	6%▲	n/a	n/a	n/a
Economy/economic issues	4%▼	8%	3%	2%
Development (e.g., densification, impact on green space)	3%	5%	8%	9%
Parks and recreation	3%	2%	n/a	n/a
Public cleanliness+	3%▲	n/a	n/a	n/a
COVID-19 (NET)	1%▼	32%	n/a	n/a
Nothing/don't know	6%▼	10%	10%	7%

+ New this year.
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?

▲ / ▼ Significantly higher/lower than 2021.

Important Local Issues (Businesses)

(coded open-ends, multiple responses allowed)

BUSINESSES (With the exception of COVID-19, only mentions of 3% or more in current year shown)

		2021 (n=200)	2019 (n=201)	2018 (n=200)
Infrastructure/transportation	29%▲	7%	39%	44%
Housing/accommodations (including affordability)	23%▲	8%	19%	38%
Social issues (e.g., homelessness, poverty, childcare)	21%	24%	13%	8%
Crime/criminal activity	19%▲	7%	6%	6%
Affordability/cost of living (excluding housing affordability)	15%	11%	22%	28%
Addiction and overdoses	7%	8%	3%	10%
Economy/economic issues	7%	6%	12%	8%
City finances (e.g., debt, spending)	5%	3%	3%	2%

		2021 (n=200)	2019 (n=201)	2018 (n=200)
Garbage disposal	5%▲	0%	2%	3%
Development (e.g., densification, impact on green space)	4%	4%	4%	12%
Environment/environmental issues/sustainability	4%	1%	4%	6%
Governance and transparency (e.g., bylaws and enforcement)	3%	6%	7%	4%
Small/local business (unrelated to post-pandemic economic recovery of businesses)	3%	6%	n/a	n/a
Weather response+	3%▲	n/a	n/a	n/a
COVID-19 (NET)	1%▼	38%	n/a	n/a
Nothing/don't know	6%	9%	9%	8%

+ New this year.
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?

▲ / ▼ Significantly higher/lower than 2021.

CITY SERVICES

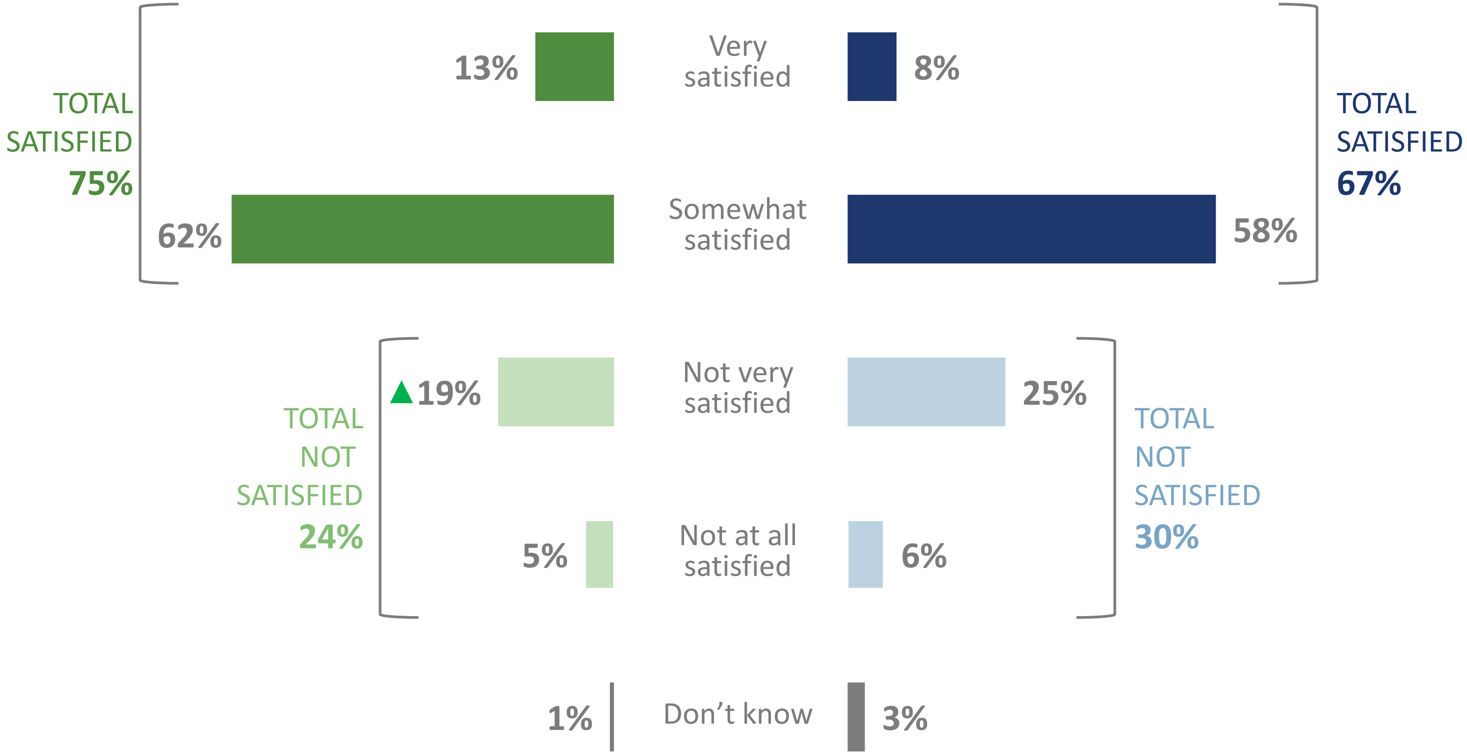
3.3

Overall Satisfaction with City Services

RESIDENTS

BUSINESSES

NORM+	2018 (n=600)	2019 (n=602)	2021 (n=600)
29%	20%	24%	17%
88%	**83%**	**86%**	**78%**
59%	63%	61%	62%
9%	12%	10%	15%
11%	**16%**	**14%**	**20%**
2%	4%	4%	6%
1%	1%	<1%	1%



2021 (n=200)	2019 (n=201)	2018 (n=200)
14%	17%	15%
72%	**80%**	**80%**
58%	62%	65%
20%	18%	12%
28%	**19%**	**19%**
8%	1%	7%
0%	2%	1%

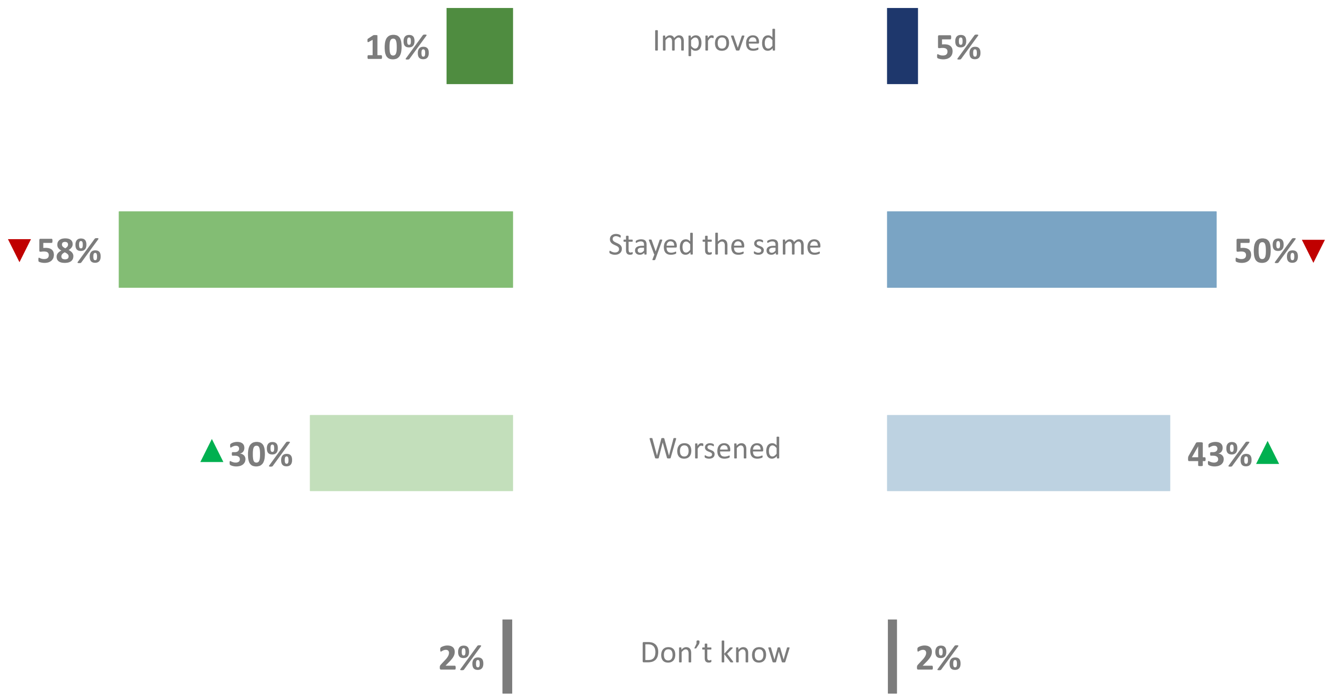
+ The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.
Base: All residents (n=600); All businesses (n=200)
Q6. How satisfied are you with the overall level and quality of services provided by the City of Vancouver?

▲ / ▼ Significantly higher/lower than 2021.

Change in City Services

RESIDENTS

	2018 (n=600)	2019 (n=602)	2021 (n=600)
Improved	14%	13%	8%
Stayed the same	62%	69%	64%
Worsened	22%	17%	25%
Don't know	2%	2%	3%



BUSINESSES

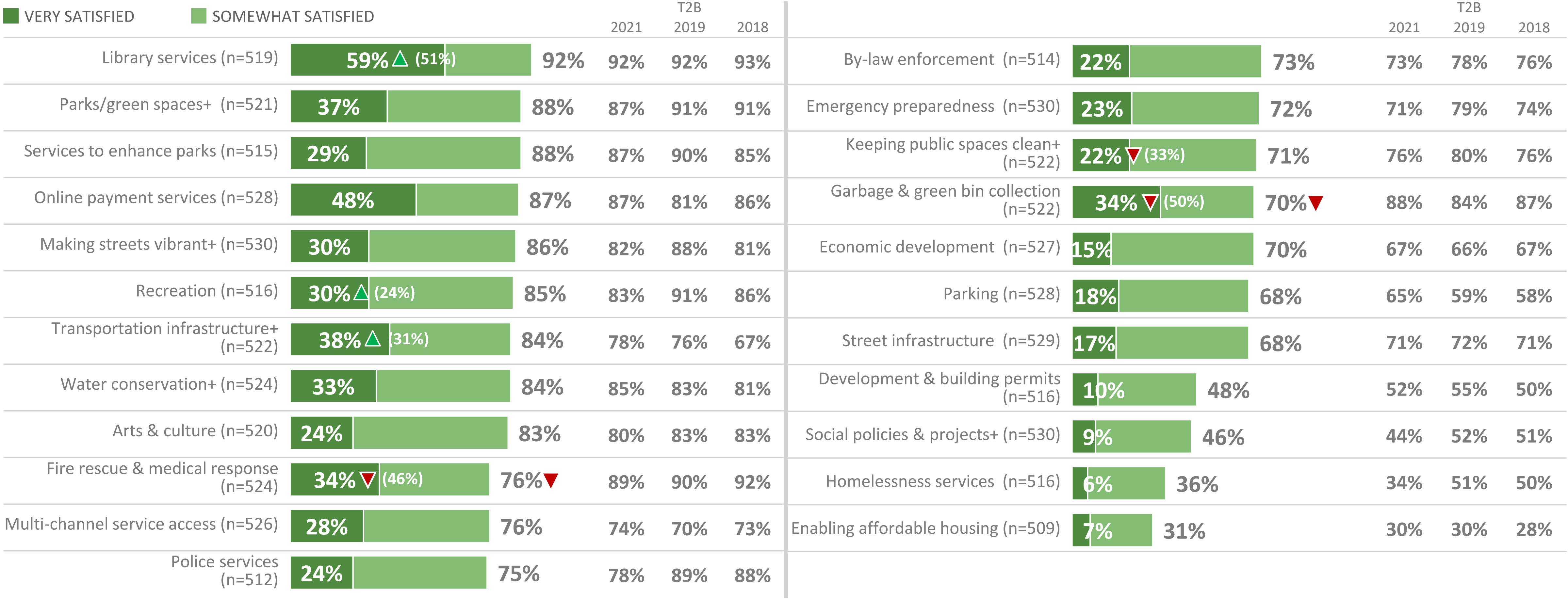
	2021 (n=200)	2019 (n=201)	2018 (n=200)
Improved	6%	7%	9%
Stayed the same	63%	73%	62%
Worsened	30%	20%	29%
Don't know	1%	0%	0%

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 2021.

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.)



🟩 VERY SATISFIED 🟩 SOMEWHAT SATISFIED

				T2B	
			2021	2019	2018
Library services (n=519)	59% △ (51%)	92%	92%	92%	93%
Parks/green spaces+ (n=521)	37%	88%	87%	91%	91%
Services to enhance parks (n=515)	29%	88%	87%	90%	85%
Online payment services (n=528)	48%	87%	87%	81%	86%
Making streets vibrant+ (n=530)	30%	86%	82%	88%	81%
Recreation (n=516)	30% △ (24%)	85%	83%	91%	86%
Transportation infrastructure+ (n=522)	38% △ (31%)	84%	78%	76%	67%
Water conservation+ (n=524)	33%	84%	85%	83%	81%
Arts & culture (n=520)	24%	83%	80%	83%	83%
Fire rescue & medical response (n=524)	34% ▼ (46%)	76% ▼	89%	90%	92%
Multi-channel service access (n=526)	28%	76%	74%	70%	73%
Police services (n=512)	24%	75%	78%	89%	88%

				T2B	
			2021	2019	2018
By-law enforcement (n=514)	22%	73%	73%	78%	76%
Emergency preparedness (n=530)	23%	72%	71%	79%	74%
Keeping public spaces clean+ (n=522)	22% ▼ (33%)	71%	76%	80%	76%
Garbage & green bin collection (n=522)	34% ▼ (50%)	70% ▼	88%	84%	87%
Economic development (n=527)	15%	70%	67%	66%	67%
Parking (n=528)	18%	68%	65%	59%	58%
Street infrastructure (n=529)	17%	68%	71%	72%	71%
Development & building permits (n=516)	10%	48%	52%	55%	50%
Social policies & projects+ (n=530)	9%	46%	44%	52%	51%
Homelessness services (n=516)	6%	36%	34%	51%	50%
Enabling affordable housing (n=509)	7%	31%	30%	30%	28%

+ Slight wording change this year.

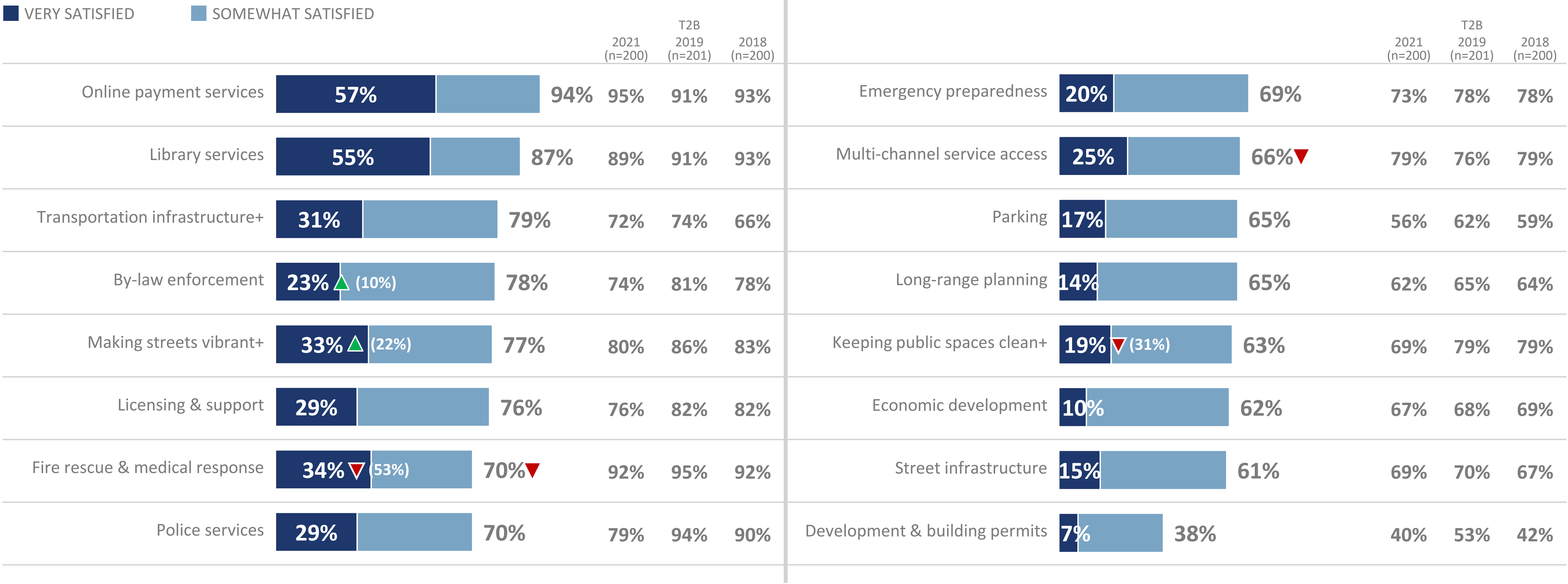
Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services)

Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please tell me how satisfied you are with the job the City is doing overall in providing each service, and if you think the City should invest more, less, or the same amount on this service.

▲ / ▼ Significantly higher/lower than 2021.

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.)



	VERY SATISFIED	SOMEWHAT SATISFIED		2021 (n=200)	T2B 2019 (n=201)	2018 (n=200)
Online payment services	57%		94%	95%	91%	93%
Library services	55%		87%	89%	91%	93%
Transportation infrastructure+	31%		79%	72%	74%	66%
By-law enforcement	23% △ (10%)		78%	74%	81%	78%
Making streets vibrant+	33% △ (22%)		77%	80%	86%	83%
Licensing & support	29%		76%	76%	82%	82%
Fire rescue & medical response	34% ▽ (53%)		70% ▼	92%	95%	92%
Police services	29%		70%	79%	94%	90%

	VERY SATISFIED	SOMEWHAT SATISFIED		2021 (n=200)	T2B 2019 (n=201)	2018 (n=200)
Emergency preparedness	20%		69%	73%	78%	78%
Multi-channel service access	25%		66% ▼	79%	76%	79%
Parking	17%		65%	56%	62%	59%
Long-range planning	14%		65%	62%	65%	64%
Keeping public spaces clean+	19% ▽ (31%)		63%	69%	79%	79%
Economic development	10%		62%	67%	68%	69%
Street infrastructure	15%		61%	69%	70%	67%
Development & building permits	7%		38%	40%	53%	42%

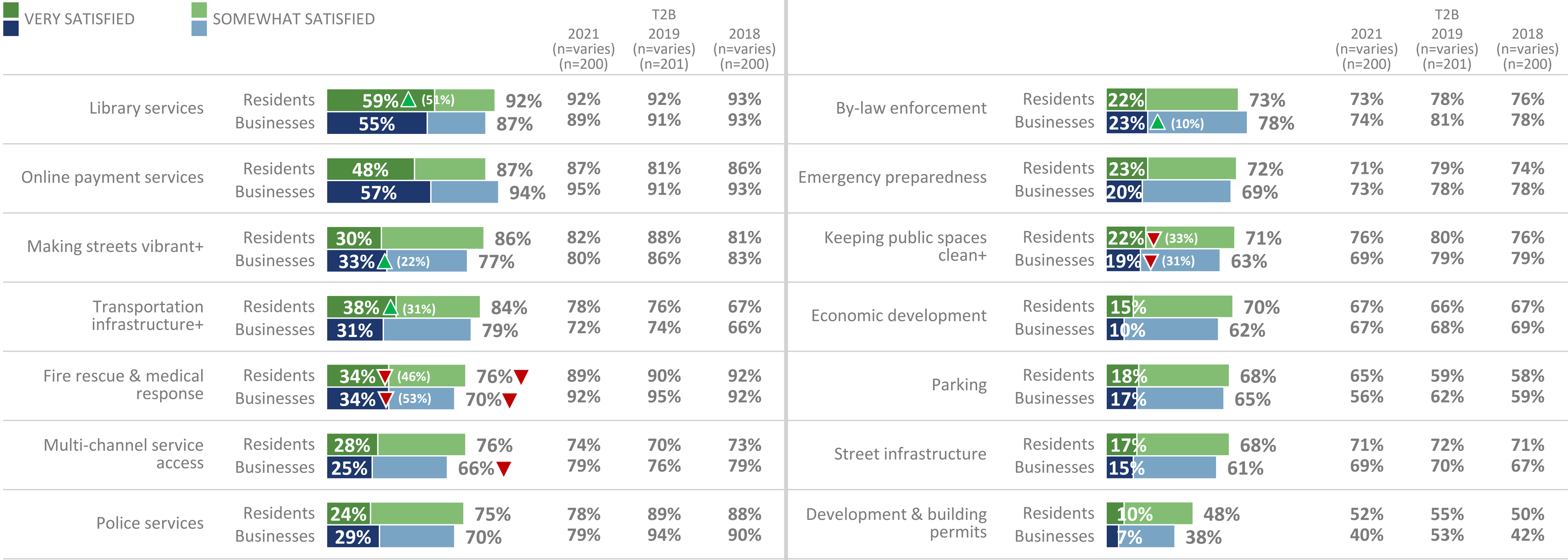
+ Slight wording change this year.
Base: All businesses (n=200)
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please tell me how satisfied you are with the job the City is doing overall in providing each service, and if you think the City should invest more, less, or the same amount on this service.

▲ / ▼ Significantly higher/lower than 2021.

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.)



				2021 (n=varies) (n=200)	T2B 2019 (n=varies) (n=201)	2018 (n=varies) (n=200)
Library services	Residents	59% ▲ (51%)	92%	92%	92%	93%
	Businesses	55%	87%	89%	91%	93%
Online payment services	Residents	48%	87%	87%	81%	86%
	Businesses	57%	94%	95%	91%	93%
Making streets vibrant+	Residents	30%	86%	82%	88%	81%
	Businesses	33% ▲ (22%)	77%	80%	86%	83%
Transportation infrastructure+	Residents	38% ▲ (31%)	84%	78%	76%	67%
	Businesses	31%	79%	72%	74%	66%
Fire rescue & medical response	Residents	34% ▼ (46%)	76% ▼	89%	90%	92%
	Businesses	34% ▼ (53%)	70% ▼	92%	95%	92%
Multi-channel service access	Residents	28%	76%	74%	70%	73%
	Businesses	25%	66% ▼	79%	76%	79%
Police services	Residents	24%	75%	78%	89%	88%
	Businesses	29%	70%	79%	94%	90%
By-law enforcement	Residents	22%	73%	73%	78%	76%
	Businesses	23% ▲ (10%)	78%	74%	81%	78%
Emergency preparedness	Residents	23%	72%	71%	79%	74%
	Businesses	20%	69%	73%	78%	78%
Keeping public spaces clean+	Residents	22% ▼ (33%)	71%	76%	80%	76%
	Businesses	19% ▼ (31%)	63%	69%	79%	79%
Economic development	Residents	15%	70%	67%	66%	67%
	Businesses	10%	62%	67%	68%	69%
Parking	Residents	18%	68%	65%	59%	58%
	Businesses	17%	65%	56%	62%	59%
Street infrastructure	Residents	17%	68%	71%	72%	71%
	Businesses	15%	61%	69%	70%	67%
Development & building permits	Residents	10%	48%	52%	55%	50%
	Businesses	7%	38%	40%	53%	42%

+ Slight wording change this year.

Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services); All businesses (n=200)

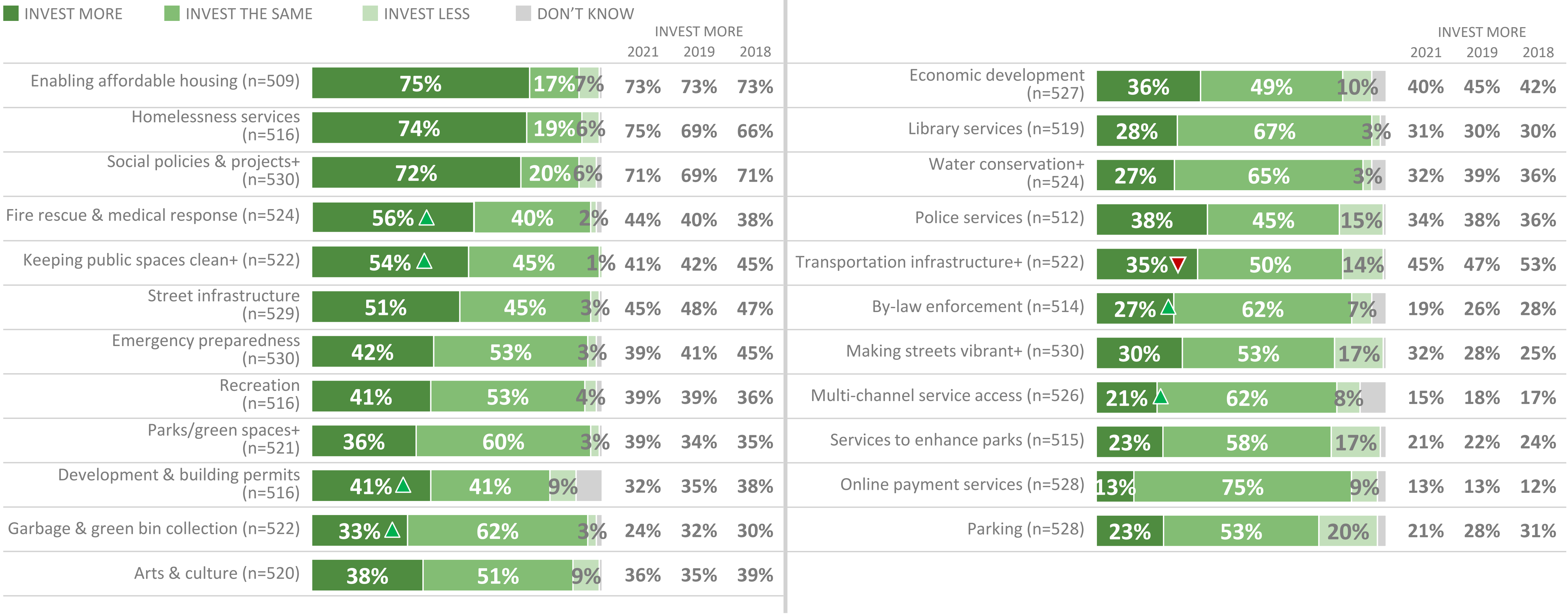
Q10. I'm now going to read a list of services provided to you by the City of Vancouver. Please tell me how satisfied you are with the job the City is doing overall in providing each service, and if you think the City should invest more, less, or the same amount on this service.

▲ / ▼ Significantly higher/lower than 2021.

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). Don't know percentages are not labelled.



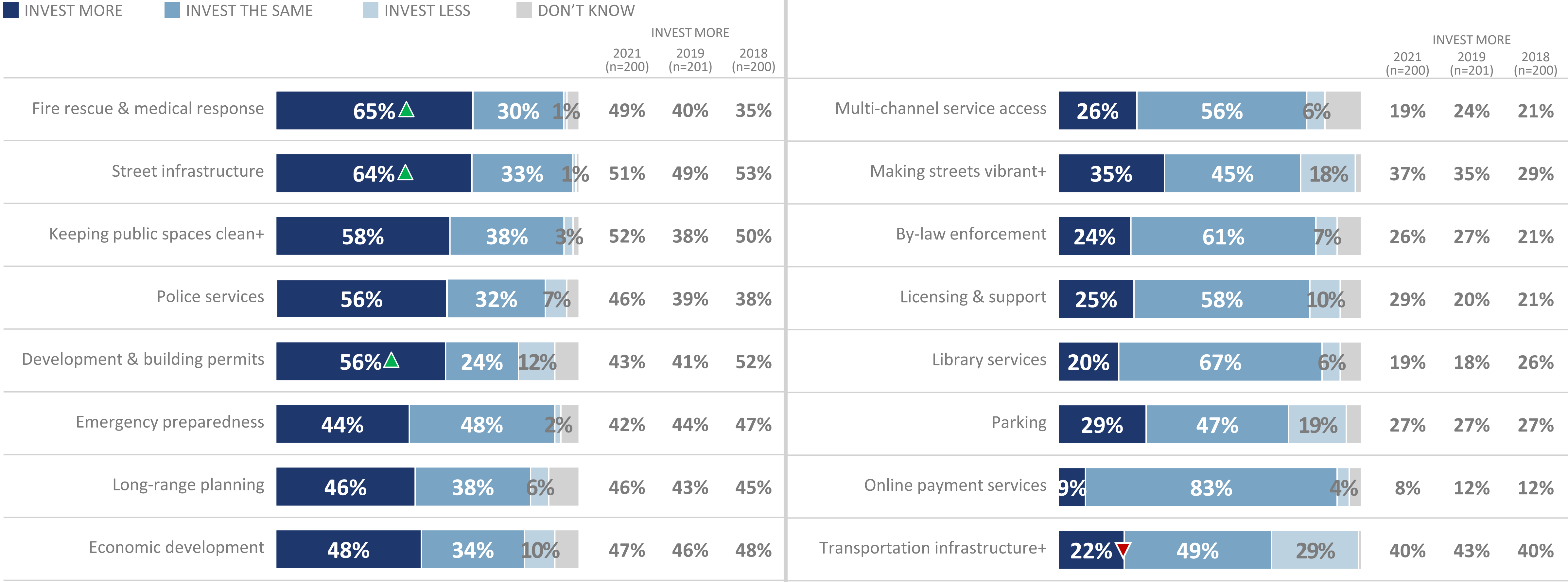
+ Slight wording change this year.
Base: Residents asked about a particular service (n varies, with each resident being randomly asked about 20 services)
Q11. And, should the City invest more, less, or the same amount on this service?

Only significant differences for invest more are shown.
▲ / ▼ Significantly higher/lower than 2021.

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). Don't know percentages are not labelled.



	INVEST MORE		
	2021 (n=200)	2019 (n=201)	2018 (n=200)
Fire rescue & medical response	49%	40%	35%
Street infrastructure	51%	49%	53%
Keeping public spaces clean+	52%	38%	50%
Police services	46%	39%	38%
Development & building permits	43%	41%	52%
Emergency preparedness	42%	44%	47%
Long-range planning	46%	43%	45%
Economic development	47%	46%	48%
Multi-channel service access	19%	24%	21%
Making streets vibrant+	37%	35%	29%
By-law enforcement	26%	27%	21%
Licensing & support	29%	20%	21%
Library services	19%	18%	26%
Parking	27%	27%	27%
Online payment services	8%	12%	12%
Transportation infrastructure+	40%	43%	40%

+ Slight wording change this year.
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.

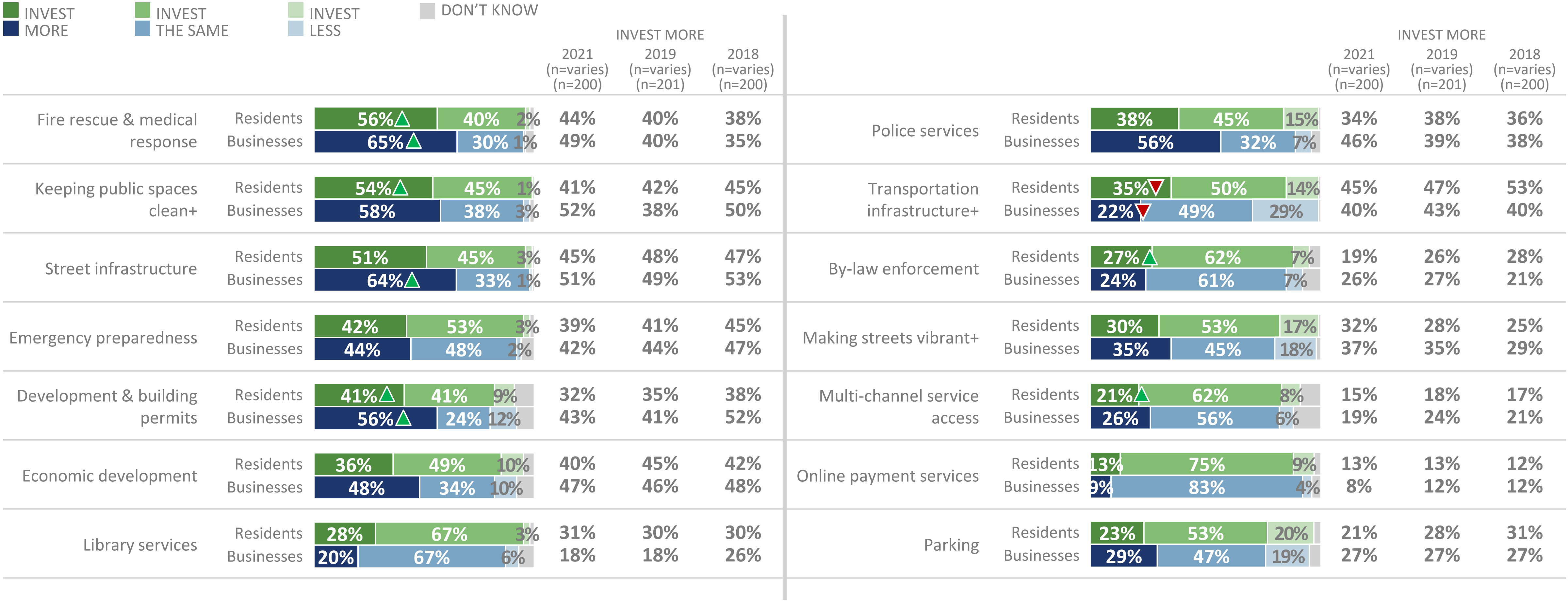
▲ / ▼ Significantly higher/lower than 2021.

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). Don't know percentages are not labelled.



		INVEST MORE 2021 (n=varies) (n=200)	2019 (n=varies) (n=201)	2018 (n=varies) (n=200)
Fire rescue & medical response	Residents	44%	40%	38%
	Businesses	49%	40%	35%
Keeping public spaces clean+	Residents	41%	42%	45%
	Businesses	52%	38%	50%
Street infrastructure	Residents	45%	48%	47%
	Businesses	51%	49%	53%
Emergency preparedness	Residents	39%	41%	45%
	Businesses	42%	44%	47%
Development & building permits	Residents	32%	35%	38%
	Businesses	43%	41%	52%
Economic development	Residents	40%	45%	42%
	Businesses	47%	46%	48%
Library services	Residents	31%	30%	30%
	Businesses	18%	18%	26%

		INVEST MORE 2021 (n=varies) (n=200)	2019 (n=varies) (n=201)	2018 (n=varies) (n=200)
Police services	Residents	34%	38%	36%
	Businesses	46%	39%	38%
Transportation infrastructure+	Residents	45%	47%	53%
	Businesses	40%	43%	40%
By-law enforcement	Residents	19%	26%	28%
	Businesses	26%	27%	21%
Making streets vibrant+	Residents	32%	28%	25%
	Businesses	37%	35%	29%
Multi-channel service access	Residents	15%	18%	17%
	Businesses	19%	24%	21%
Online payment services	Residents	13%	13%	12%
	Businesses	8%	12%	12%
Parking	Residents	21%	28%	31%
	Businesses	27%	27%	27%

\+ Slight wording change this year.
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 2021.

FINANCIAL PLANNING

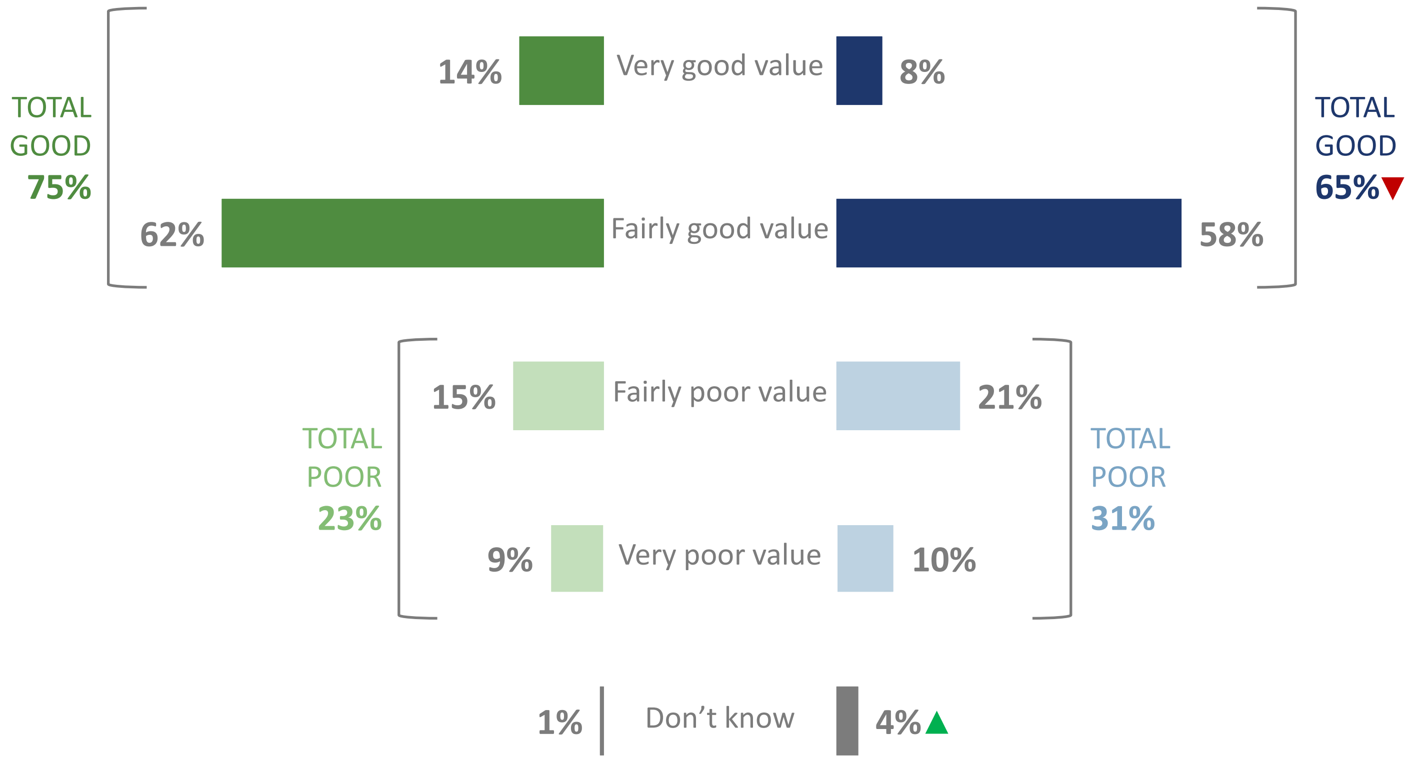
3.4

Value for Taxes

RESIDENTS

NORM+	2018 (n=600)	2019 (n=602)	2021 (n=600)
19%	20%	21%	15%
80%	**79%**	**81%**	**76%**
61%	59%	60%	61%
13%	13%	13%	15%
18%	**20%**	**18%**	**22%**
5%	6%	5%	7%
2%	1%	1%	2%

BUSINESSES

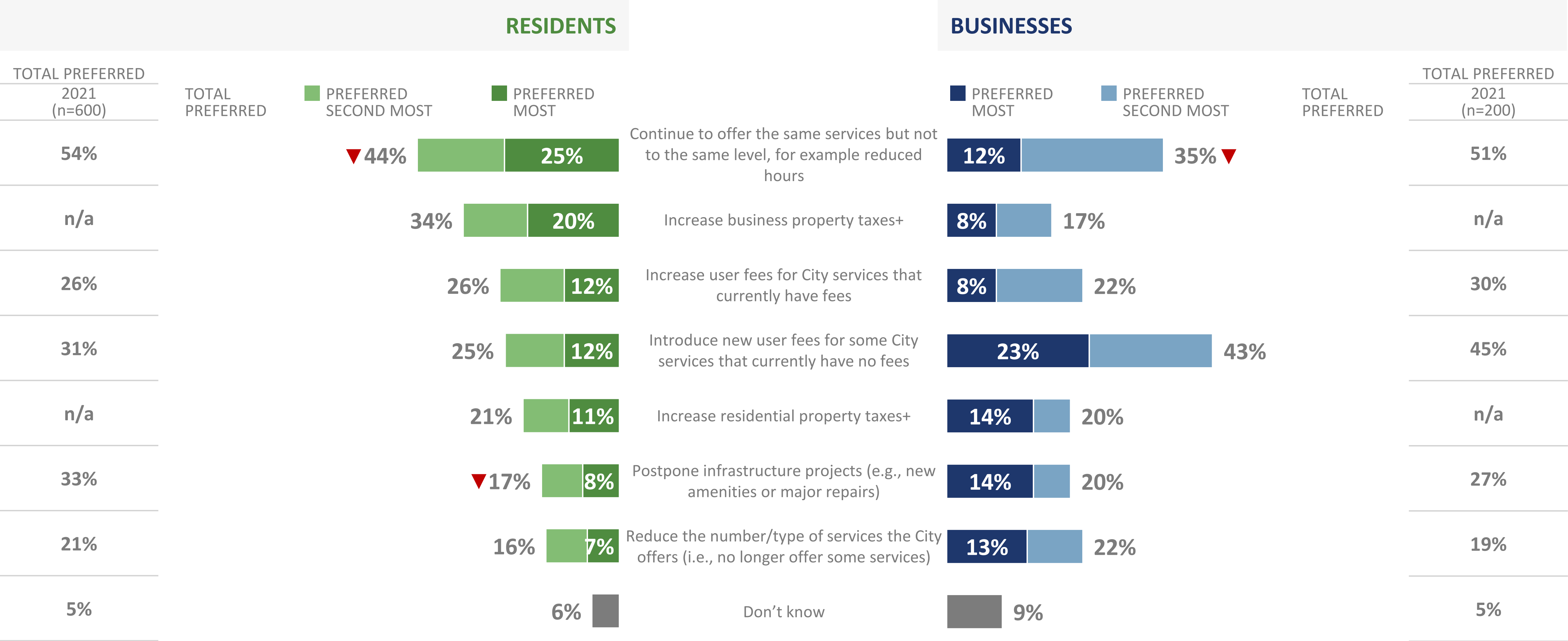


2021 (n=200)	2019 (n=201)	2018 (n=200)
11%	13%	12%
77%	**76%**	**72%**
66%	64%	60%
16%	16%	16%
23%	**23%**	**26%**
7%	7%	11%
<1%	1%	2%

\+ 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 2021.

Preferred Options to Balance Budget



RESIDENTS TOTAL PREFERRED 2021 (n=600)	RESIDENTS TOTAL PREFERRED	RESIDENTS 🟩 PREFERRED SECOND MOST	RESIDENTS 🟩 PREFERRED MOST		BUSINESSES 🟦 PREFERRED MOST	BUSINESSES 🟦 PREFERRED SECOND MOST	BUSINESSES TOTAL PREFERRED	BUSINESSES TOTAL PREFERRED 2021 (n=200)
54%	▼44%		25%	Continue to offer the same services but not to the same level, for example reduced hours	12%		35% ▼	51%
n/a	34%		20%	Increase business property taxes+	8%		17%	n/a
26%	26%		12%	Increase user fees for City services that currently have fees	8%		22%	30%
31%	25%		12%	Introduce new user fees for some City services that currently have no fees	23%		43%	45%
n/a	21%		11%	Increase residential property taxes+	14%		20%	n/a
33%	▼17%		8%	Postpone infrastructure projects (e.g., new amenities or major repairs)	14%		20%	27%
21%	16%		7%	Reduce the number/type of services the City offers (i.e., no longer offer some services)	13%		22%	19%
5%	6%			Don't know			9%	5%

+ Cannot be directly compared to 2021 due to differences in question wording (in 2021, residential and business property taxes were asked as a single item - increase residential and business property taxes). A total of 23% of residents and 17% of businesses selected this as their preferred option in 2021.

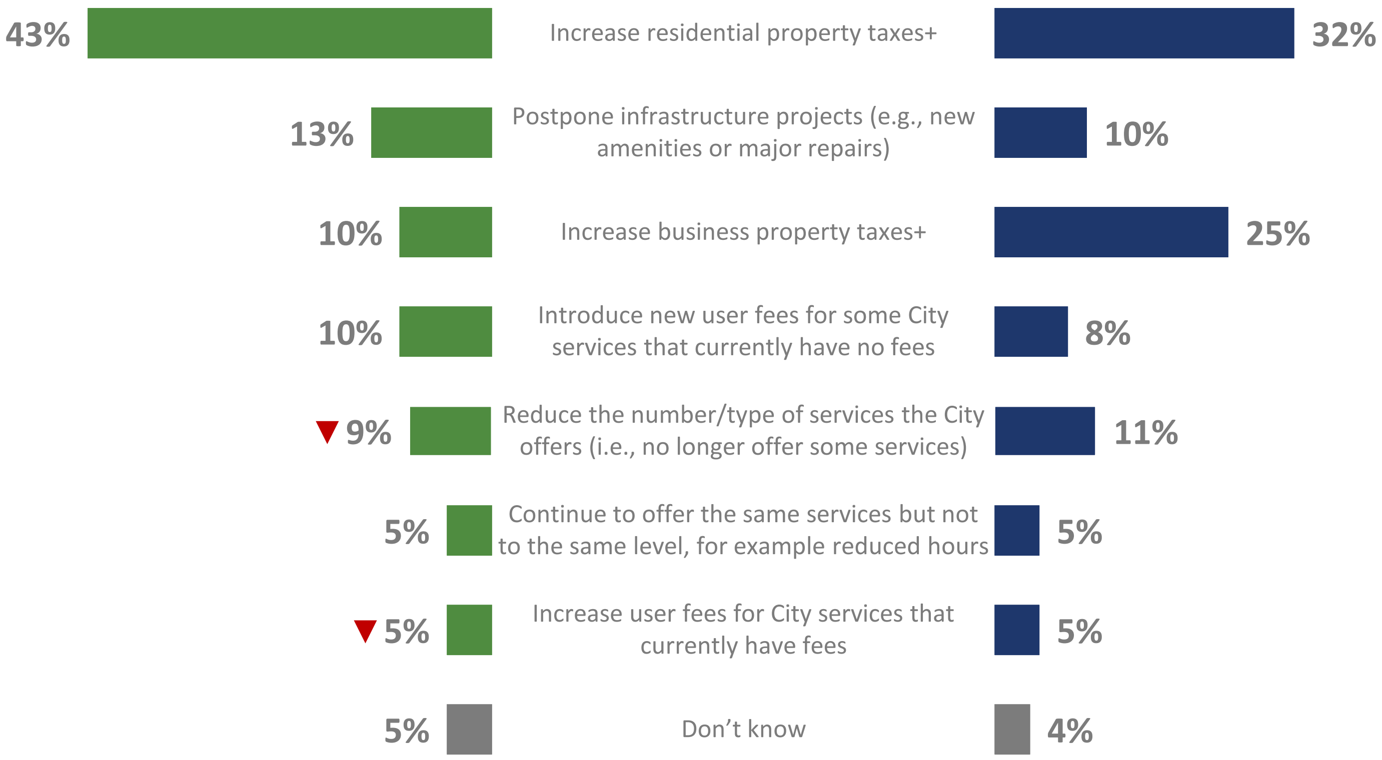
Base: All residents (n=600); All businesses (n=200)

Q13a. Now, to balance the 2023 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?

▲ / ▼ Significantly higher/lower than 2021.

Least Preferred Options to Balance Budget



TOTAL PREFERRED 2021 (n=600)	RESIDENTS		BUSINESSES	TOTAL PREFERRED 2021 (n=200)
n/a	43%	Increase residential property taxes+	32%	n/a
15%	13%	Postpone infrastructure projects (e.g., new amenities or major repairs)	10%	11%
n/a	10%	Increase business property taxes+	25%	n/a
12%	10%	Introduce new user fees for some City services that currently have no fees	8%	8%
14%	▼ 9%	Reduce the number/type of services the City offers (i.e., no longer offer some services)	11%	12%
5%	5%	Continue to offer the same services but not to the same level, for example reduced hours	5%	4%
9%	▼ 5%	Increase user fees for City services that currently have fees	5%	9%
5%	5%	Don't know	4%	2%

+ Cannot be directly compared to 2021 due to differences in question wording (in 2021, residential and business property taxes were asked as a single item - increase residential and business property taxes). A total of 40% of residents and 53% of businesses selected this as their least preferred option in 2021.

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

Q13c. And which one would you least prefer?

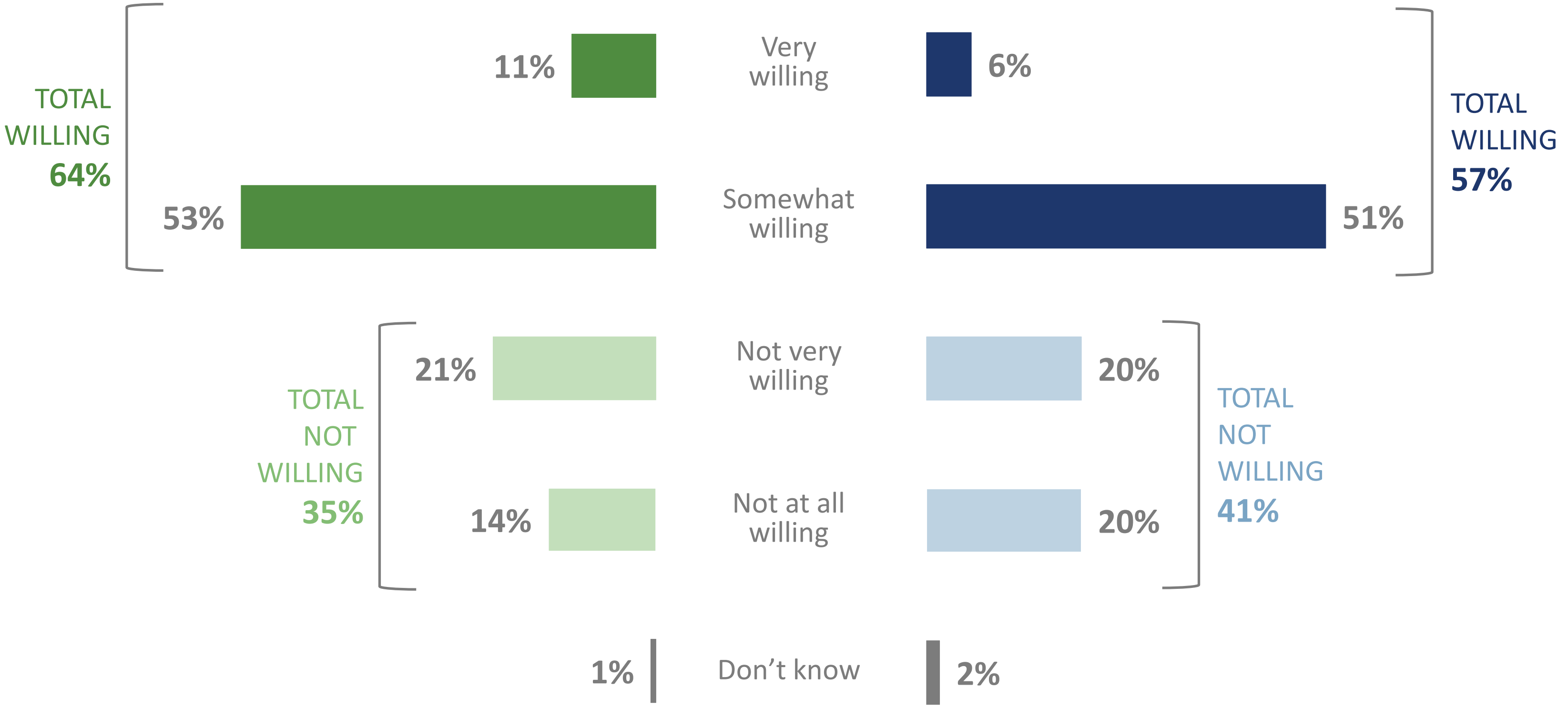
▲ / ▼ Significantly higher/lower than 2021.

Willingness to Pay More User Fees for Services

RESIDENTS

2019 (n=602)	2021 (n=600)
18%	14%
72%	67%
53%	53%
15%	19%
27%	32%
12%	14%
1%	1%

BUSINESSES



2021 (n=200)	2019 (n=201)
10%	16%
68%	67%
58%	50%
13%	23%
32%	33%
19%	10%
0%	0%

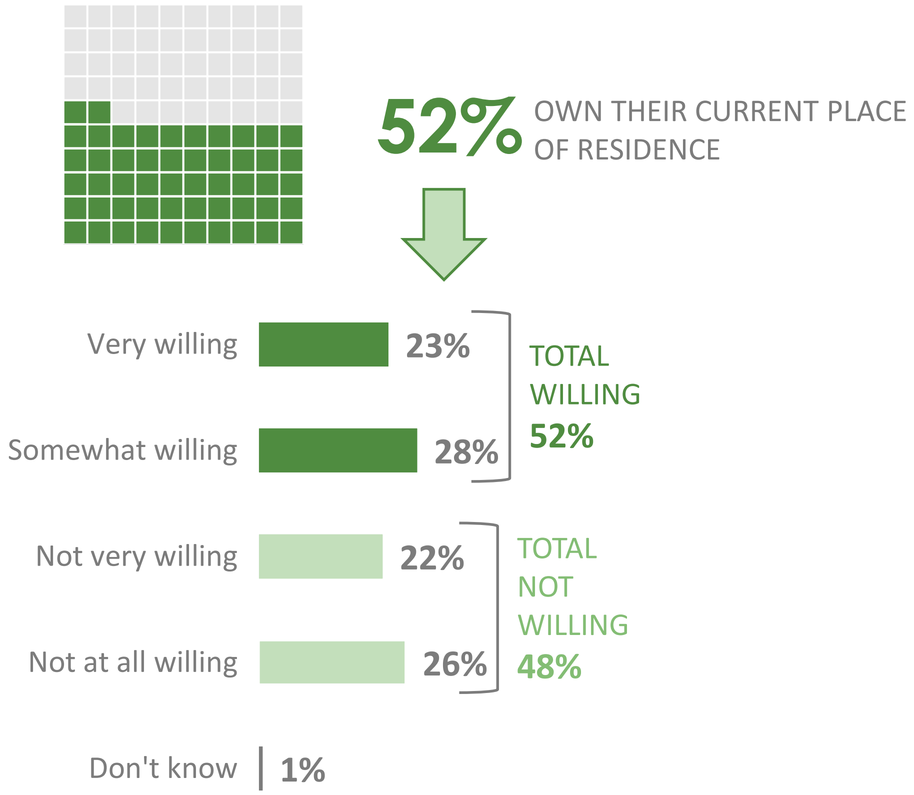
Base: All residents (n=600); All businesses (n=200)
Q13d. Now think about the City services that [RESIDENTS: you use] [BUSINESSES: your business uses]. How willing would you be to pay more in user fees for the services [RESIDENTS: you use] [BUSINESSES: your business uses] in order to maintain or improve them?

▲ / ▼ Significantly higher/lower than 2021.

Willingness to Pay Additional Property Taxes

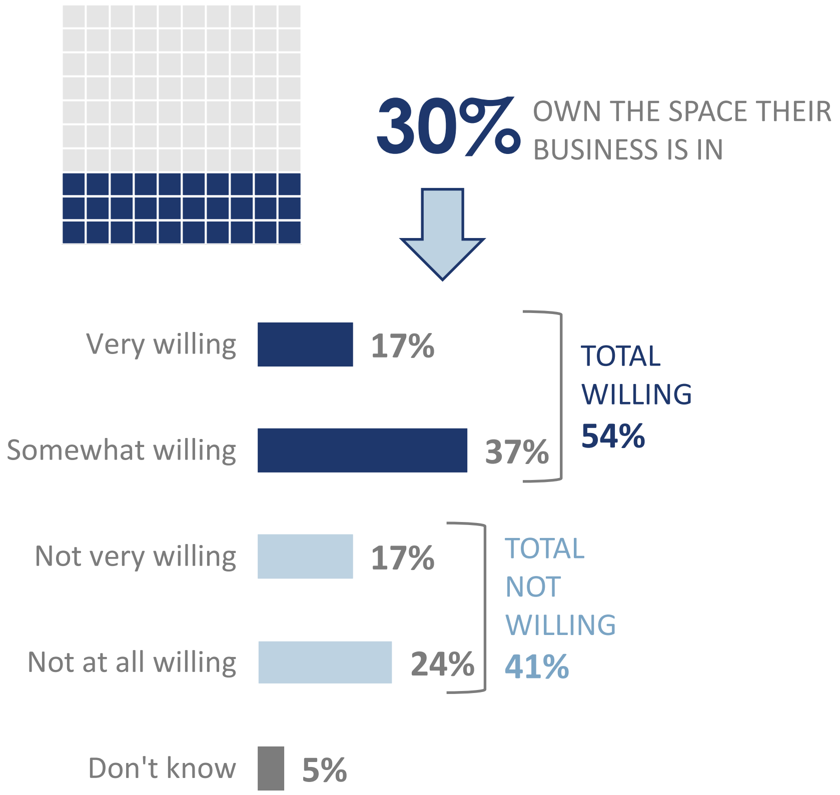
New Question Added in 2023

RESIDENTS



Base: All residents (n=600)
Q16. Do you own or rent your current place of residence?
Base: Those who own their current place of residence (n=338)
Q16a. Increasing property taxes and fees are often needed to maintain existing programs and services as costs rise. For example, based on a median residential unit valued at $1.3M, a 5% tax increase would be approximately $99 more in taxes for 2023. In this example, how willing would you be to pay an additional $99 for next year's property taxes?

BUSINESSES



Base: All businesses (n=200)
Q19. Do you own or rent the space your business is in?
*Small base size (<100), interpret with caution.
Base: Those who own the space their business is in (n=60)*
Q16a. Increasing property taxes and fees are often needed to maintain existing programs and services as costs rise. For example, based on a median business property valued at $1.1M, a 5% tax increase would be approximately $256 more in taxes for 2023. In this example, how willing would you be to pay an additional $256 for next year's property taxes?

WEIGHTED SAMPLE CHARACTERISTICS

4

Weighted Sample Characteristics

(weighted by gender/age and neighbourhood)

RESIDENTS

	2022 (n=600)	2021 (n=600)	2019 (n=602)	2018 (n=600)
Neighbourhood				
Downtown/West End	18%	17%	17%	17%
Northwest	16%	16%	16%	16%
Northeast	17%	17%	17%	17%
Southwest	19%	19%	19%	19%
Southeast	30%	31%	31%	31%
Gender				
Male	48%	47%	46%	48%
Female	50%	51%	51%	50%
Other	1%	<1%	1%	1%
Refused	1%	2%	1%	1%
Age				
18 to 34 years	33%	33%	33%	33%
35 to 54 years	33%	34%	34%	34%
55+ years	34%	32%	32%	32%

	2022 (n=600)	2021 (n=600)	2019 (n=602)	2018 (n=600)
Own/Rent				
Own	52%	53%	53%	54%
Rent	43%	39%	42%	41%
Other	4%	7%	5%	6%
Income				
<$60K	32%	32%	37%	35%
$60K to <$100K	24%	28%	26%	21%
$100K+	34%	32%	27%	33%
Refused	10%	9%	10%	11%
Ethnicity				
European	40%	42%	42%	46%
Asian	36%	38%	31%	31%
North American	22%	19%	23%	22%
Latin/South American	5%	4%	6%	2%
African	2%	1%	1%	1%
Other regions	5% ▲	2%	3%	5%
Refused	3%	3%	5%	3%

▲ / ▼ Significantly higher/lower than 2021.

Weighted Sample Characteristics

(weighted by business size)

BUSINESSES

	2022 (n=200)	2021 (n=200)	2019 (n=201)	2018 (n=200)
Neighbourhood				
Downtown/West End	36%	37%	34%	46%
Northwest	16%	13%	23%	13%
Northeast	18%	14%	14%	18%
Southwest	14%	16%	19%	9%
Southeast	14%	14%	6%	12%
Business Size				
<25 employees	89%	88%	88%	88%
25 to 99 employees	9%	10%	9%	9%
100+ employees	2%	2%	2%	2%
Own/Rent				
Own	30%	24%	23%	25%
Rent	68%	74%	76%	74%

▲ / ▼ Significantly higher/lower than 2021.

APPENDIX

5

Full Service Wording

Full Service Wording

CHART WORDING	FULL SERVICE WORDING
Parks/green spaces	Provision and maintenance 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, 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, cycling, and rolling
Parking	Parking and enforcement
Street infrastructure	Street infrastructure and maintenance
Making streets vibrant	Making streets vibrant through landscaping, art, furniture, patios and temporary installations
Keeping public spaces clean	Keeping public spaces clean - i.e. litter pick up, roads and sidewalks sweeping, receptacles etc.
Water conservation	Water conservation and 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
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
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” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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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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This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.
Ultimately, success comes down to a simple truth:
You act better when you are sure.

CITY OF VANCOUVER

CITY MANAGER’S OFFICE
Civic Engagement and Communications

MEMORANDUM

February 14, 2023

TO: Mayor and Council

CC: Paul Mochrie, City Manager
Armin Amrolia, Deputy City Manager
Karen Levitt, Deputy City Manager
Rosemary Hagiwara, Acting City Clerk
Maria Pontikis, Chief Communications Officer
Teresa Jong, Administration Services Manager, City Manager’s Office
Mellisa Morphy, Acting Chief of Staff, Mayor’s Office
Trevor Ford, Director of Operations, Mayor’s Office

FROM: Maria Pontikis
Chief Communications Officer

Patrice Impey
Chief Financial Officer

SUBJECT: 2023 Budget engagement and market research findings

Dear Mayor and Council,

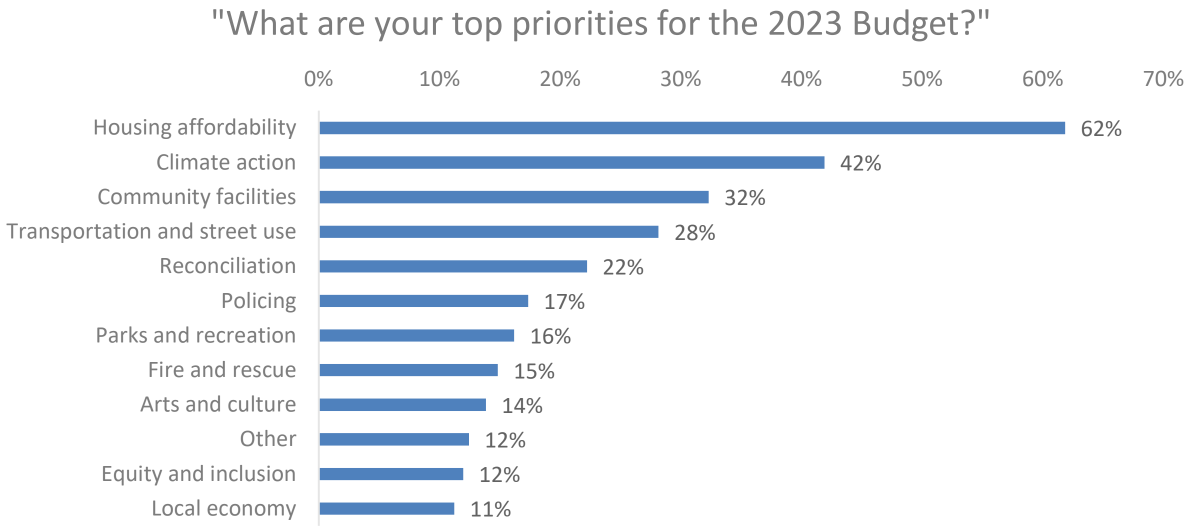
The purpose of this memo is to provide a summary of public engagement and market research findings for the 2023 Draft Current State Budget. Between January 4 and 24, members of the public could provide feedback on their priorities for City spending, using our Shape Your City (SYC) engagement platform. 3-1-1 callers were also invited to comment on their priorities for the 2023 Budget priorities over the phone. Comments reflect the opinions of those who chose to take part.

In parallel with budget engagement, the City had Ipsos conduct a randomly selected, representative survey of Vancouver residents and businesses to track satisfaction with City services and provide insight into service priorities. This is the fourth Civic Satisfaction Survey conducted by Ipsos for the City, following previous surveys conducted in 2018, 2019 and 2021. In 2021, the City moved to a bi-annual cadence, given the cost of market research and other considerations.

Preliminary results from Budget engagement

More than 3,200 responses were received during the three-week engagement period, via SYC and 3-1-1. There were also approximately 9,400 visits to the SYC page (as of February 10). Participation reflected a broad cross-section of Vancouver demographics.

A streamlined comment form asked three questions about the budget, including "What are your top priorities for the City's 2023 Budget? Select up to three." As shown in the following chart, **top priorities were "housing affordability", "climate action" and "community facilities** (e.g., community centres, libraries)".



Note: n = 3,200. Respondents could select up to three options.

A follow-up question asked respondents to explain why the priorities they selected were important to them. Responses were reviewed by staff and coded thematically. Top key themes, which reiterated respondents' priorities, included the following:

- 28% of respondents shared their concerns about housing not being affordable;
- 22% highlighted the importance of addressing climate change;
- 15% highlighted the importance of community amenities (e.g., community centres, libraries).

The final question asked respondents to share their ideas for balancing the budget in 2023. While respondents provided a broad range of suggestions, there were two key themes that emerged:

- 28% of respondents suggested decreasing the budget allocation for police services, an additional 12% suggested reallocating funds from policing to other service areas, and 3% of respondents suggested not increasing/keeping the same level of police funding.
- 12% suggested increasing property taxes (e.g. for higher-value properties, investment properties) and Empty Homes Tax.

More detailed findings will be shared as part of final Council report for Budget 2023.

Civic Satisfaction Survey findings

Between January 4 and 20, Ipsos interviewed 600 residents and 200 businesses. Interviews were conducted on cellphones and landlines in English, Cantonese and Mandarin. For residents, overall results are accurate to within ±4.0%, 19 times out of 20. Margin of error for businesses is ±6.9%,

Topline Civic Satisfaction Survey **findings are attached to this memo**, including additional information on quality of life, important local issues, City services and financial planning.
In brief:

- **Residents prioritize investment in affordable housing, homelessness, and social policies most of all**. However, there is growing desire for more investment in fire rescue and medical response, keeping public spaces clean, development and building permits, and garbage and green bin collection.

- **Businesses' top priorities** for investment are **fire rescue and medical response** and **street infrastructure**.

- Residents and businesses have different ideas around how to best balance the budget. **Residents prefer continuing to offer the same services but at a reduced level**, while **businesses opt for introducing new user fees for some City services**. However, residents and businesses agree that increasing residential property taxes is the least preferred option.

- Of those who own their current place of residence, **52% of residential respondents said they would be "very willing" or "somewhat willing" to pay a $99 tax increase** (which equates to a 5% tax increase, based on a median residential unit valued at $1.3M). This was a new question added in 2023.

Kyle Braid, Senior Vice President of Ipsos, will present Civic Satisfaction Survey findings at the Special Council meeting on February 28.

If you have any questions, please contact either one of us directly at maria.pontikis@vancouver.ca or patrice.impey@vancouver.ca.

Best,

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