2023 CIVIC SATISFACTION SURVEY

City of Vancouver

Final Report

February 28, 2023

Contents

INTRODUCTION

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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

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Dashboard – Residents

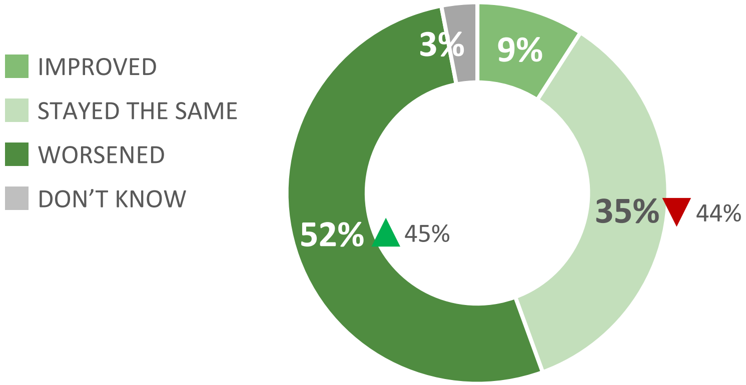
QUALITY OF LIFE

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



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

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

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

Dashboard – Residents (cont.)

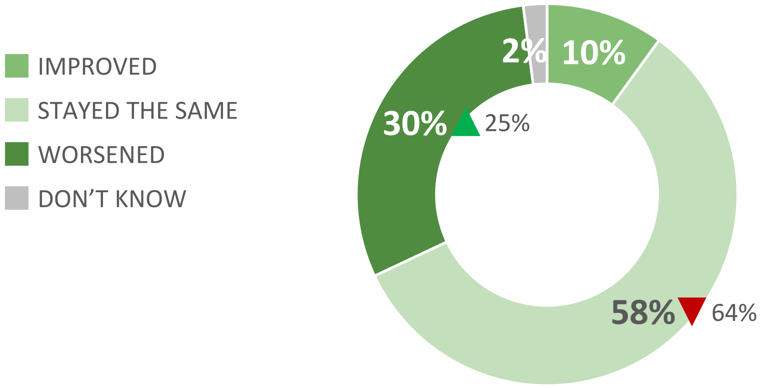
CITY SERVICES

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



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

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

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

Dashboard – Businesses

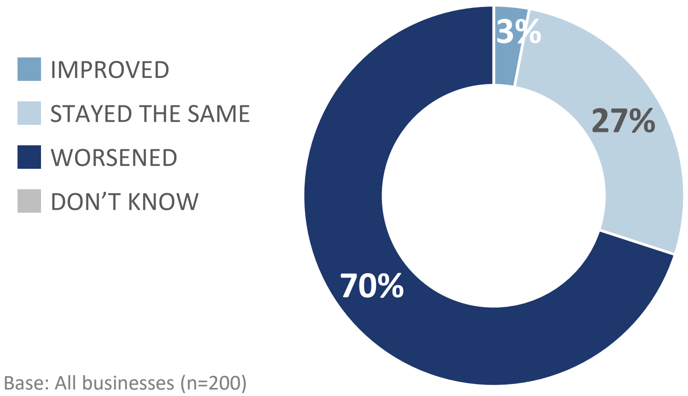
QUALITY OF LIFE

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.)

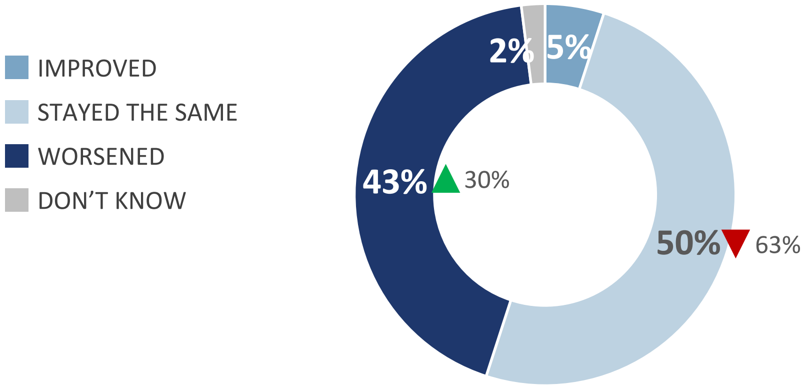
CITY SERVICES

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



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.

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

▲ / ▼ 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 change in the quality of life 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 high, 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

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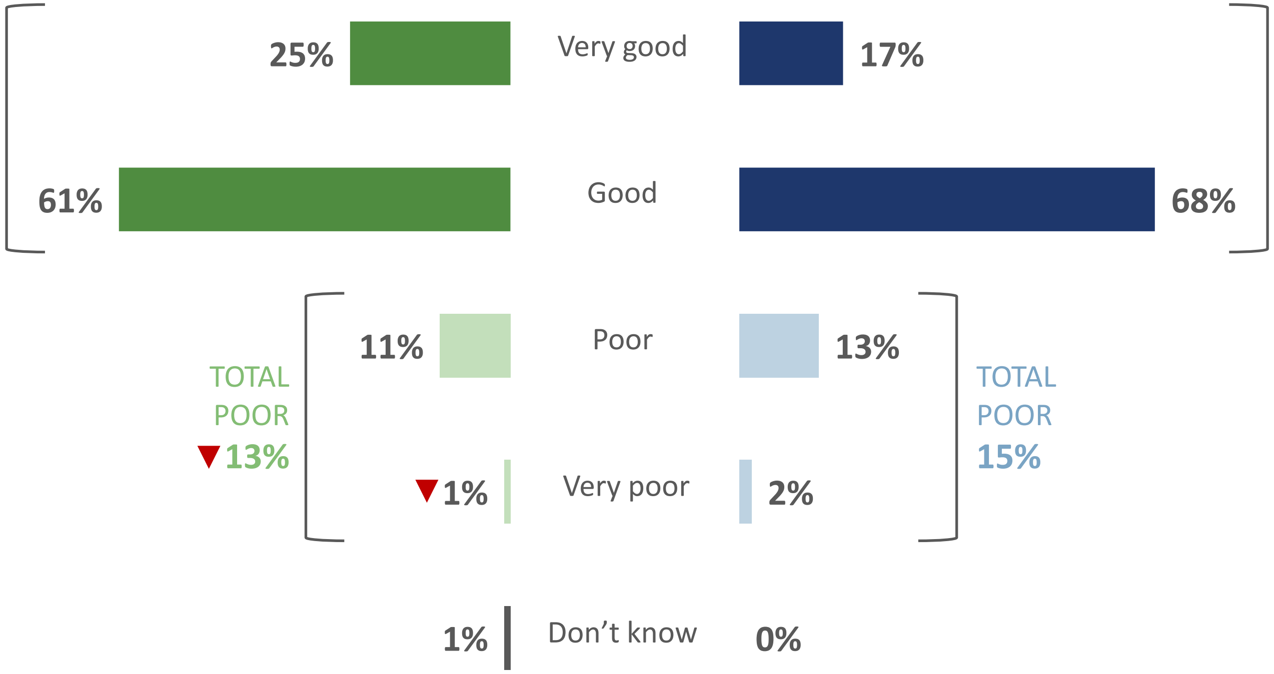
QUALITY OF LIFE

3.1

Overall Quality of Life

Overall perceptions of quality of life have rebounded from a pandemic low. In total, 87% of residents rate Vancouver's overall quality of life as 'very good' or 'good', up 6 points from 2021. Perceptions are similar among businesses, with 85% rating the overall quality of life as 'very good' or 'good'. While not statistically significant, this is a directional increase of 5 points. Despite these bumps, perceptions among both residents and businesses (particularly those saying 'very good') remain below pre-COVID levels.



NORM+	2018 (n=600)	2019 (n=602)	2021 (n=600)	RESIDENTS		BUSINESSES	2021 (n=200)	2019 (n=201)	2018 (n=200)
38%	32%	34%	22%	25%	Very good	17%	15%	38%	30%
93%	91%	89%	81%	TOTAL GOOD ▲87%		TOTAL GOOD 85%	80%	92%	88%
55%	59%	55%	59%	61%	Good	68%	65%	54%	57%
5%	7%	9%	14%	11%	Poor	13%	17%	7%	11%
6%	8%	10%	18%	TOTAL POOR ▼13%		TOTAL POOR 15%	20%	8%	12%
1%	1%	1%	4%	▼1%	Very poor	2%	2%	1%	1%
1%	1%	<1%	1%	1%	Don't know	0%	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.

Overall Quality of Life (Residents)

(by Gender, Age, and Neighbourhood)

Overall perceptions of quality of life (combined 'very good/good' responses) are higher among those living in the Southwest and Northwest and lower among those living in the Southeast and Northeast.

	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]
Very good	25%	29%	23%	24%	29%	23%	33% K	28%	28%	24%	19%
Good	61%	60%	62%	65%	57%	63%	53%	64%	55%	68% G	64%
Poor	11%	9%	13%	11%	11%	11%	12%	8%	14%	7%	14%
Very Poor	1%	2%	1%	0%	3% D	1%	2%	0%	3%	0%	2%
Don't know	1%	1%	1%	0%	0%	2% E	0%	1%	1%	1%	1%
TOTAL GOOD	87%	88%	86%	89%	86%	86%	87%	92%	83%	92% K	83%
TOTAL POOR	13%	11%	14%	11%	14%	13%	13%	8%	16%	7%	16% J

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 Own/Rent and Household Income)

Overall perceptions of quality of life (combined ‘very good/good’ responses) are also higher among those with household incomes of $100K+.

	TOTAL	OWN/RENT		HH INCOME		
		OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Very good	**25%**	**25%**	**26%**	**16%**	**26% D**	**34% D**
Good	**61%**	**63%**	**60%**	**66%**	**58%**	**57%**
Poor	**11%**	**9%**	**12%**	**15% F**	**13%**	**8%**
Very Poor	**1%**	**1%**	**2%**	**2%**	**2%**	**1%**
Don’t know	**1%**	**1%**	**<1%**	**1%**	**1%**	**0%**
TOTAL GOOD	**87%**	**88%**	**86%**	**83%**	**85%**	**92% D**
TOTAL POOR	**13%**	**11%**	**14%**	**17% F**	**14%**	**8%**

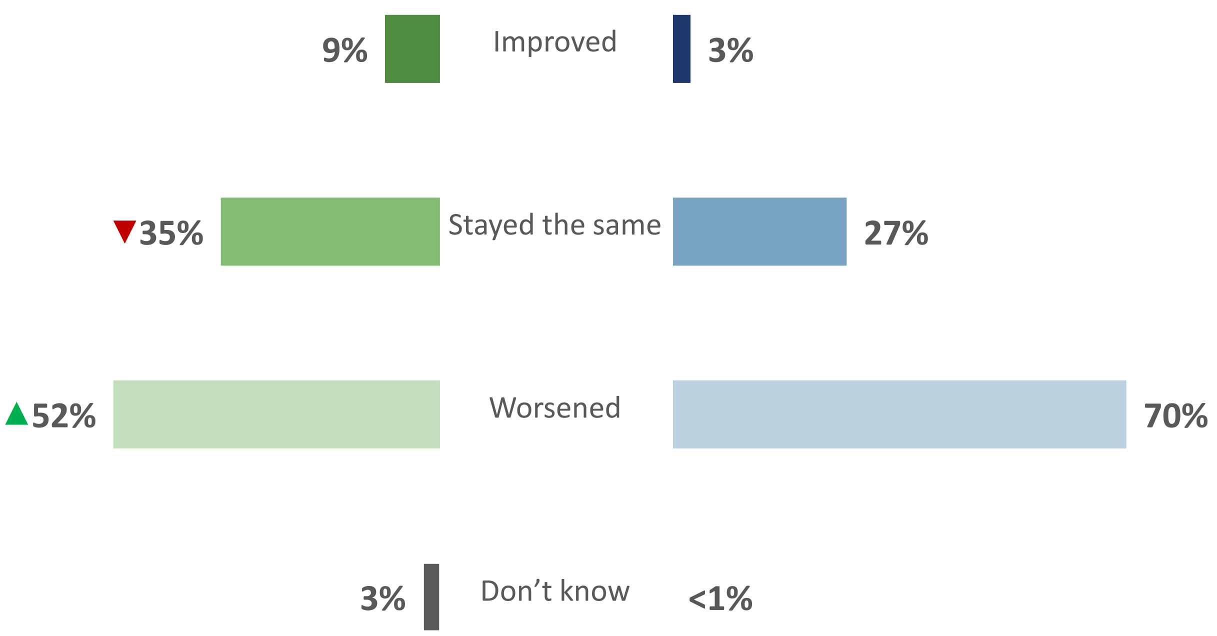
Base: All residents (n=600)
Q2. How would you rate the overall quality of life in the City of Vancouver today?

BCDEF 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

Perceptions of change in the quality of life continue to deteriorate, with a majority of residents (52%) and businesses (70%) saying this has ‘worsened’ over the past three years. Worsened perceptions are up 7 points among residents and a directional 8 points among businesses.

RESIDENTS **BUSINESSES**



	NORM+	2018 (n=600)	2019 (n=602)	2021 (n=600)	2021 (n=200)	2019 (n=201)	2018 (n=200)
Improved	17%	10%	13%	8%	6%	14%	12%
Stayed the same	48%	50%	48%	44%	32%	50%	41%
Worsened	33%	38%	36%	45%	62%	36%	46%
Don’t know	2%	2%	2%	3%	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.

Change in Quality of Life (Residents)

(by Gender, Age, and Neighbourhood)

Perceptions of a worsening quality of life are higher among those who are 35+ years of age.

		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	**9%**	**11%**	**8%**	**13% F**	**8%**	**6%**	**10%**	**7%**	**7%**	**4%**	**14% J**
Stayed the same	**35%**	**36%**	**35%**	**42%**	**31%**	**34%**	**32%**	**33%**	**39%**	**47% GK**	**30%**
Worsened	**52%**	**50%**	**55%**	**39%**	**59% D**	**58% D**	**52%**	**59%**	**50%**	**48%**	**54%**
Don't know	**3%**	**3%**	**3%**	**6% E**	**1%**	**2%**	**6%**	**1%**	**4%**	**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?

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 Own/Rent and Household Income)

Owners are more likely than renters to say the quality of life has worsened over the past three years.

		OWN/RENT		HH INCOME		
	TOTAL	OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Improved	**9%**	**6%**	**14% B**	**13%**	**11%**	**7%**
Stayed the same	**35%**	**35%**	**34%**	**31%**	**37%**	**35%**
Worsened	**52%**	**58% C**	**47%**	**52%**	**50%**	**54%**
Don't know	**3%**	**1%**	**5% B**	**4%**	**2%**	**3%**

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?

BCDEF 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

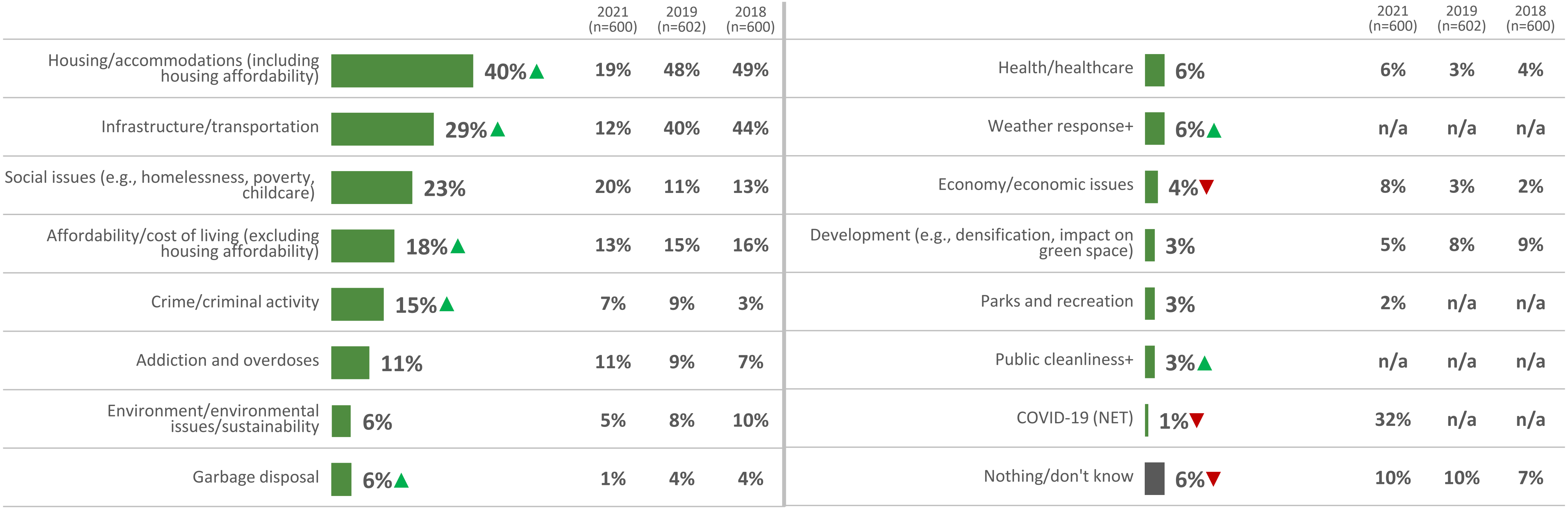
3.2

Important Local Issues (Residents)

(coded open-ends, multiple responses allowed)

The public issue agenda is evolving. While COVID-19 was residents’ top issue in 2021, it barely registers this year (1%, down 31 points). Housing/accommodations is the most frequently mentioned issue (40%, up 21 points), followed by infrastructure/transportation (29%, up 17 points) and social issues (23%, no significant change). Compared to pre-pandemic years, the emerging issues are social issues and crime/criminal activity.

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.

Top Ten Important Local Issues (Residents)

(by Gender, Age, and Neighbourhood)

There are some noteworthy gender, age, and neighbourhood differences in the issues that are important to residents. For example, men and older residents are more likely to mention infrastructure/transportation. Mentions of social issues are higher among women and those living in the Downtown/West End and the Northeast. Downtown/West End residents, along with those who are 35+ years of age, are also more likely to identify crime/criminal activity as an important local issue.

		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]
Housing/accommodations	40%	38%	41%	34%	41%	44%	38%	43%	40%	37%	40%
Infrastructure/transportation	29%	34% C	23%	29%	24%	34% E	27%	24%	23%	34%	32%
Social issues	23%	18%	27% B	21%	23%	25%	32% JK	22%	30% K	18%	17%
Affordability/cost of living	18%	17%	18%	20%	19%	14%	17%	19%	16%	16%	19%
Crime/criminal activity	15%	14%	15%	9%	17% D	17% D	24% JK	16%	17%	10%	10%
Addiction and overdoses	11%	10%	13%	13%	9%	12%	10%	11%	15%	12%	10%
Environment	6%	6%	7%	4%	7%	8%	5%	10%	5%	7%	5%
Garbage disposal	6%	9% C	4%	2%	9% D	8% D	3%	2%	7%	6%	10% GH
Health/healthcare	6%	5%	7%	4%	4%	10% DE	6%	3%	6%	6%	9%
Weather response	6%	4%	8% B	12% EF	4%	2%	5%	7%	2%	9% I	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 Own/Rent and Household Income)

Those with household incomes of $100K+ are more likely to mention all of this year's top three issues (housing/accommodations, infrastructure/transportation, and social issues). Affordability/cost of living is mentioned more often by renters.

		OWN/RENT		HH INCOME		
	TOTAL	OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Housing/accommodations	40%	43%	36%	30%	40%	44% D
Infrastructure/transportation	29%	33%	26%	28%	21%	35% E
Social issues	23%	23%	23%	17%	26%	27% D
Affordability/cost of living	18%	14%	22% B	21%	18%	17%
Crime/criminal activity	15%	17%	13%	16%	14%	15%
Addiction and overdoses	11%	10%	13%	12%	14%	8%
Environment	6%	8% C	4%	5%	4%	9%
Garbage disposal	6%	8%	5%	8%	6%	6%
Health/healthcare	6%	8%	4%	6%	7%	6%
Weather response	6%	4%	9% B	8%	6%	3%

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?

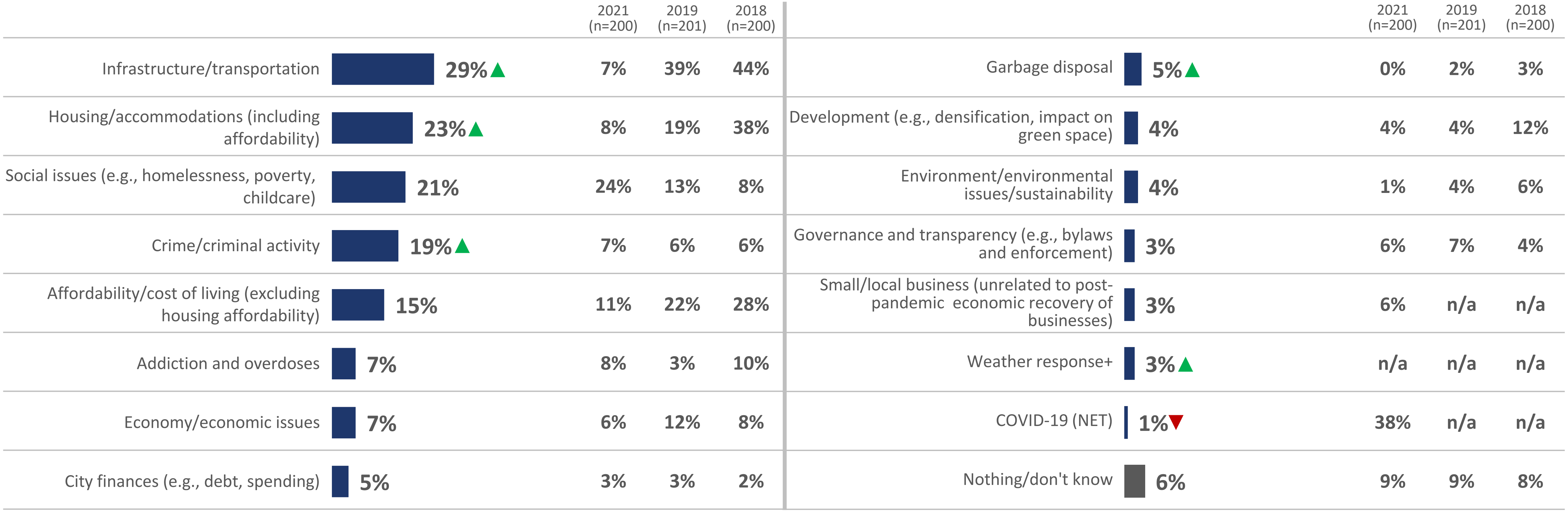
BCDEF A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Important Local Issues (Businesses)

(coded open-ends, multiple responses allowed)

The results are similar among businesses. Mentions of COVID-19 are now practically non-existent (1%, down 37 points), replaced by concerns around infrastructure/transportation (29%, up 22 points), housing/accommodations (23%, up 15 points), and social issues (21%, no significant change). Compared to pre-pandemic years, the emerging issues are social issues and crime/criminal activity.

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

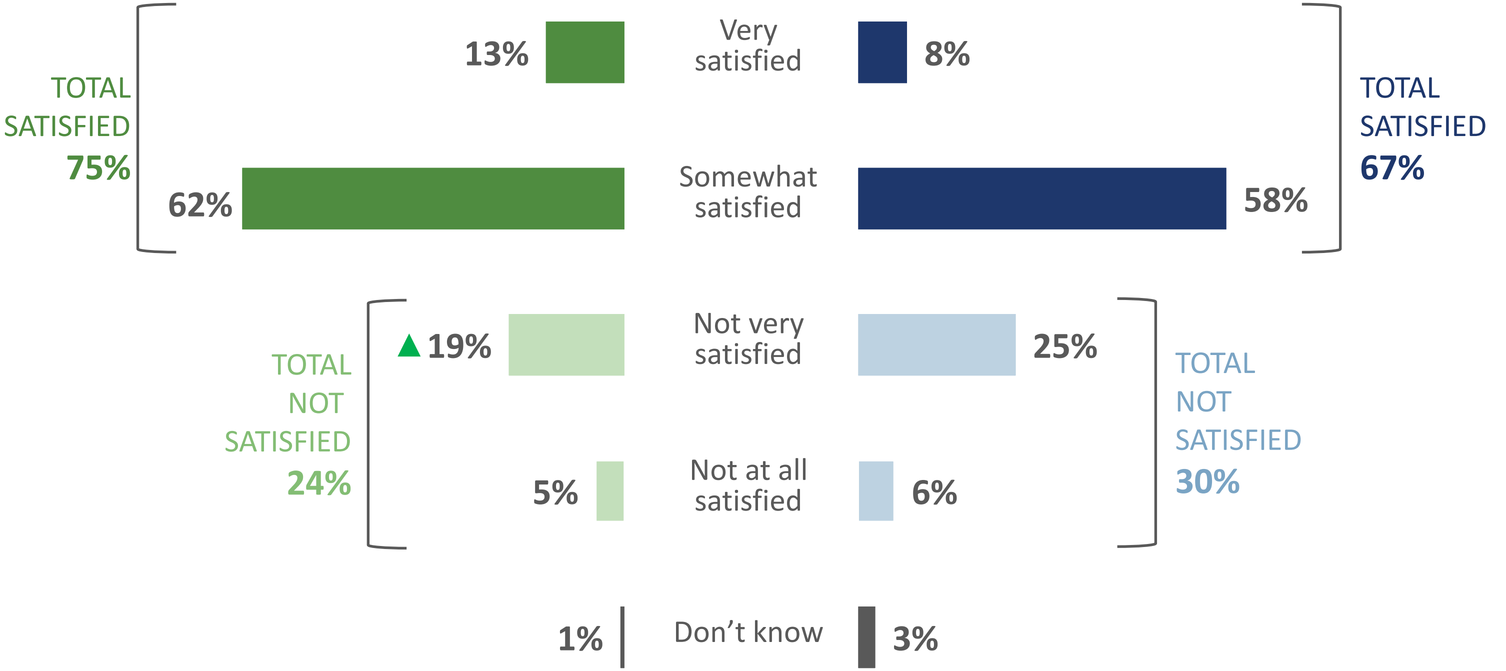
Overall satisfaction with City services is high, but lower than pre-pandemic years. In total, 75% of residents say they are satisfied (combined ‘very/somewhat satisfied’ responses) with the overall level and quality of City services, on par with 78% in 2021 but lower than 86% in 2019 and 83% in 2018. Two-thirds (67%) of businesses say they are satisfied, again on par with 2021 but down from 80% in both 2019 and 2018.

RESIDENTS

	NORM+	2018 (n=600)	2019 (n=602)	2021 (n=600)
Very satisfied	29%	20%	24%	17%
TOTAL SATISFIED	88%	83%	86%	78%
Somewhat satisfied	59%	63%	61%	62%
Not very satisfied	9%	12%	10%	15%
TOTAL NOT SATISFIED	11%	16%	14%	20%
Not at all satisfied	2%	4%	4%	6%
Don’t know	1%	1%	<1%	1%

BUSINESSES

	2021 (n=200)	2019 (n=201)	2018 (n=200)
Very satisfied	14%	17%	15%
TOTAL SATISFIED	72%	80%	80%
Somewhat satisfied	58%	62%	65%
Not very satisfied	20%	18%	12%
TOTAL NOT SATISFIED	28%	19%	19%
Not at all satisfied	8%	1%	7%
Don’t know	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.

Overall Satisfaction with City Services (Residents)

(by Gender, Age, and Neighbourhood)

Overall satisfaction (combined ‘very/somewhat satisfied’ responses) with City services is higher among younger residents and those living in the Downtown/West End, Northwest, and Southwest. One-third of those living in the Southeast say they are not satisfied with the City’s overall level and quality of services.

	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]
Very satisfied	**13%**	**15%**	**12%**	**15%**	**14%**	**12%**	**22% JK**	**17%**	**15%**	**9%**	**9%**
Somewhat satisfied	**62%**	**58%**	**67% B**	**74% EF**	**57%**	**56%**	**61%**	**67%**	**58%**	**72% K**	**56%**
Not very satisfied	**19%**	**20%**	**18%**	**10%**	**25% D**	**22% D**	**12%**	**13%**	**20%**	**16%**	**28% GHJ**
Not at all satisfied	**5%**	**6%**	**4%**	**2%**	**4%**	**8% D**	**4%**	**3%**	**7%**	**4%**	**6%**
Don’t know	**1%**	**1%**	**0%**	**0%**	**1%**	**1%**	**0%**	**0%**	**1%**	**0%**	**1%**
TOTAL SATISFIED	**75%**	**73%**	**79%**	**88% EF**	**70%**	**69%**	**84% K**	**84% K**	**73%**	**80% K**	**65%**
TOTAL NOT SATISFIED	**24%**	**26%**	**21%**	**12%**	**29% D**	**31% D**	**16%**	**16%**	**26%**	**20%**	**34% GHJ**

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 Own/Rent and Household Income)

Renters are more likely than owners to say they are satisfied (combined ‘very/somewhat satisfied’ responses) with the overall level and quality of City services.

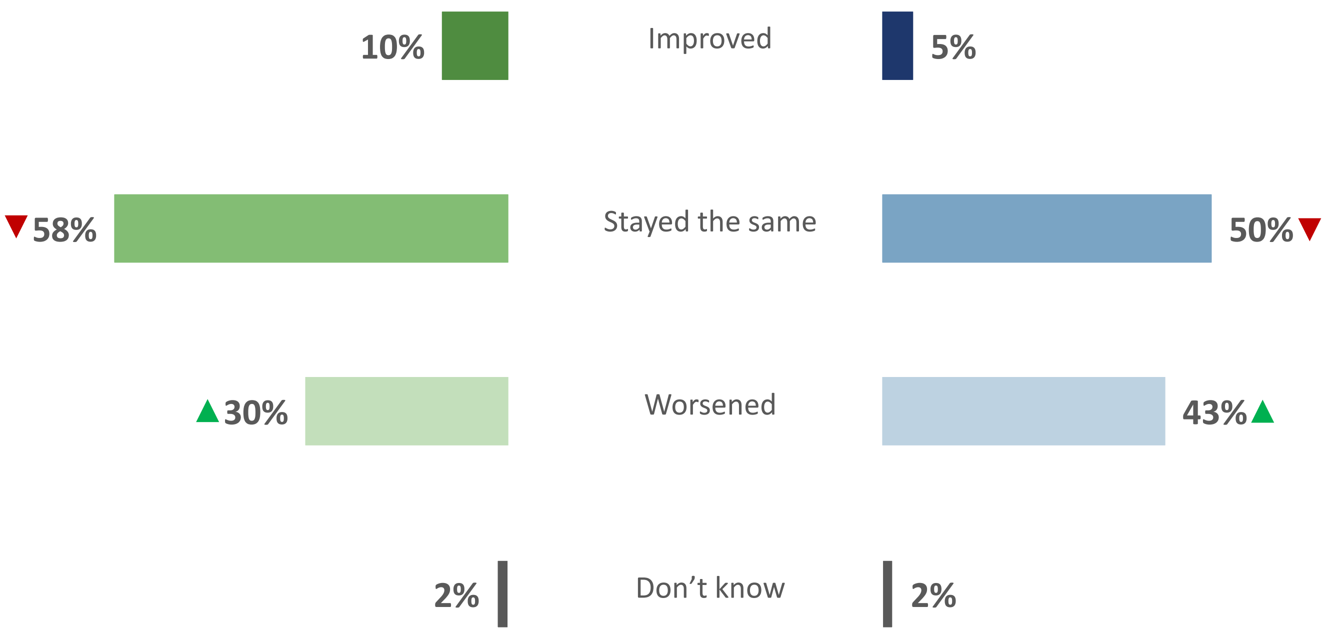
	TOTAL	OWN/RENT		HH INCOME		
		OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Very satisfied	**13%**	**11%**	**17%**	**14%**	**13%**	**15%**
Somewhat satisfied	**62%**	**59%**	**66%**	**64%**	**65%**	**59%**
Not very satisfied	**19%**	**23% C**	**14%**	**18%**	**18%**	**20%**
Not at all satisfied	**5%**	**6%**	**3%**	**3%**	**3%**	**6%**
Don’t know	**1%**	**<1%**	**1%**	**1%**	**1%**	**<1%**
TOTAL SATISFIED	**75%**	**70%**	**83% B**	**78%**	**78%**	**74%**
TOTAL NOT SATISFIED	**24%**	**30% C**	**17%**	**21%**	**21%**	**26%**

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

BCDEF 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

Perceptions of City services getting worse have intensified. While most (58%) residents say the level and quality of City services has 'stayed the same' over the past three years, this is down 6 points from 2021. Three-in-ten (30%) say services have 'worsened' (up 5 points) and one-in-ten (10%) say services have 'improved' (no significant change). Results are similar among businesses, with 50% saying 'stayed the same' (down 13 points), 43% saying 'worsened' (up 13 points), and 5% saying 'improved' (no significant change).



2018 (n=600)	2019 (n=602)	2021 (n=600)	**RESIDENTS**		**BUSINESSES**	2021 (n=200)	2019 (n=201)	2018 (n=200)
14%	13%	8%	10%	Improved	5%	6%	7%	9%
62%	69%	64%	▼58%	Stayed the same	50%▼	63%	73%	62%
22%	17%	25%	▲30%	Worsened	43%▲	30%	20%	29%
2%	2%	3%	2%	Don't know	2%	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.

Change in City Services (Residents)

(by Gender, Age, and Neighbourhood)

Older residents, particularly those who are 55+ years of age, are more likely to say City services have worsened over the past three years. Perceptions of worsening services are also more pronounced among those living in the Southeast and Southwest.

		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	10%	13% C	7%	10%	11%	7%	11%	7%	10%	8%	12%
Stayed the same	58%	54%	61%	75% EF	54% F	45%	58%	72% IJK	57%	58%	50%
Worsened	30%	31%	30%	11%	33% D	46% DE	25%	20%	33%	34% H	35% H
Don't know	2%	3%	2%	4%	1%	2%	6% J	1%	1%	1%	3%

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 Own/Rent and Household Income)

Owners are more likely than renters to say City services have worsened over the past three years.

	TOTAL	OWN/RENT		HH INCOME		
		OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Improved	**10%**	**6%**	**14% B**	**15% F**	**8%**	**8%**
Stayed the same	**58%**	**54%**	**62%**	**54%**	**63%**	**56%**
Worsened	**30%**	**40% C**	**19%**	**27%**	**28%**	**34%**
Don’t know	**2%**	**<1%**	**5% B**	**4%**	**1%**	**2%**

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?

BCDEF 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)

More than two-thirds of residents say they are satisfied (combined ‘very/somewhat satisfied’ responses) with 19 of the 23 services they evaluated.

The overall highest score goes to **library services**, with 92% of residents saying they are satisfied. Library services has consistently been the number one rated service among residents.

There are only four services this year that a minority of residents are satisfied with. These are **development and building permits** (48%), **social policies and projects** (46%), **homelessness services** (36%), and **enabling affordable housing** (31%).

Compared to 2021, residents this year are notably less satisfied with **fire rescue and medical response** (76%, down 13 points) and **garbage and green bin collection** (70%, down 18 points).

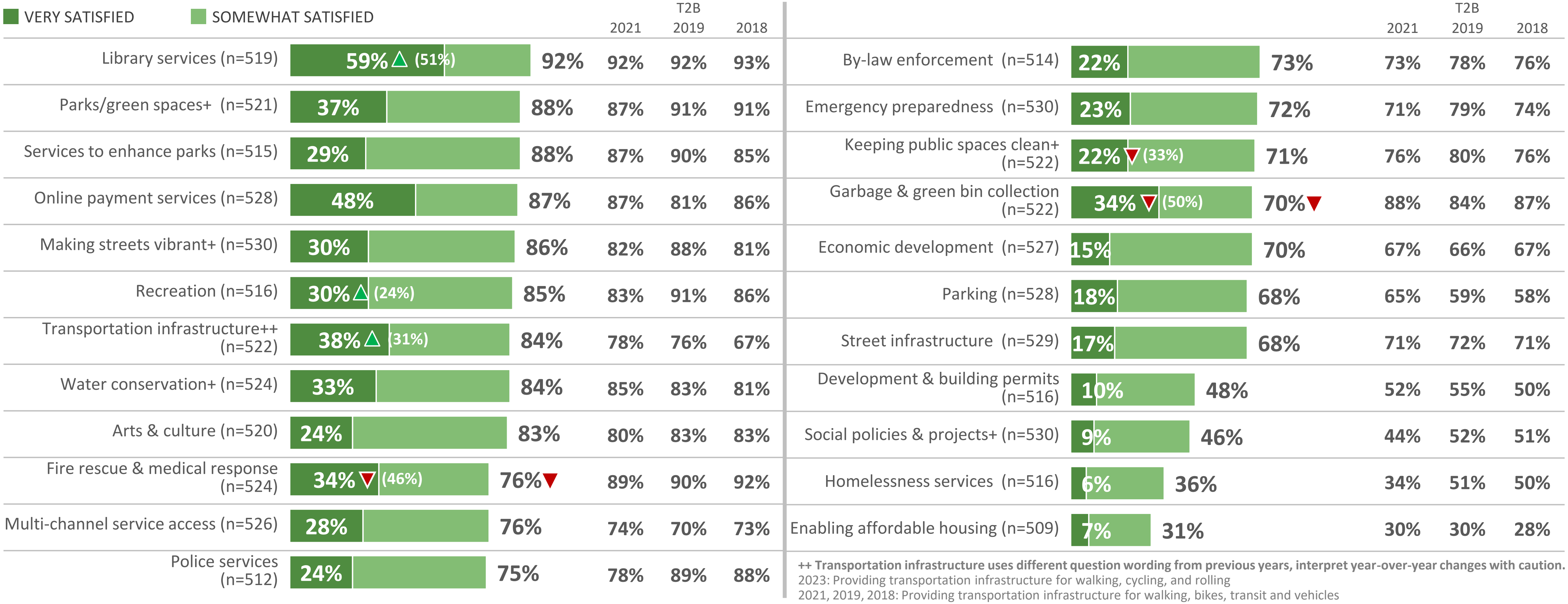
Satisfaction with **police services** and **homelessness services** also remain below pre-pandemic levels.

- Police services: 75% satisfied in 2023 and 78% in 2021 versus 89% in 2019 and 88% in 2018
- Homelessness services: 36% satisfied in 2023 and 34% in 2021 versus 51% in 2019 and 50% in 2018

NOTE ON THE SERVICES EVALUATED BY RESIDENTS:
Due to the number of services requiring feedback, each resident was randomly asked about 20 different services, resulting in an average base size of 522 respondents per service (actual base sizes range from 509 to 530).
Service wording bas been abbreviated for reporting purposes. Please see the Appendix for the full service wording.

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.)



++ Transportation infrastructure uses different question wording from previous years, interpret year-over-year changes with caution.
2023: Providing transportation infrastructure for walking, cycling, and rolling
2021, 2019, 2018: Providing transportation infrastructure for walking, bikes, transit and vehicles

+ 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 (Residents)

(by Gender, Age, and Neighbourhood)

Satisfaction (combined ‘very/somewhat satisfied’ responses) with specific services tends to be higher among those under 55 years of age.

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]
Library services	92%	93%	90%	89%	97% DF	89%	90%	92%	93%	92%	92%
Parks/green spaces	88%	88%	88%	93% F	93% F	79%	96% K	88%	90%	90%	82%
Services to enhance parks	88%	92% C	85%	93% F	92% F	79%	91%	85%	89%	92%	84%
Online payment services	87%	85%	88%	87%	92% F	82%	86%	90%	90%	87%	82%
Making streets vibrant	86%	84%	88%	94% F	89% F	76%	90%	87%	85%	84%	85%
Recreation	85%	86%	85%	87%	85%	83%	88%	87%	85%	86%	83%
Transportation infrastructure	84%	84%	83%	89% F	84%	78%	81%	86%	85%	88%	81%
Water conservation	84%	86%	81%	84%	89% F	78%	89%	88%	82%	81%	82%
Arts & culture	83%	84%	82%	85%	82%	82%	84%	80%	83%	88%	82%
Fire rescue & medical response	76%	80%	73%	76%	78%	74%	79%	75%	74%	74%	78%
Multi-channel service access	76%	75%	75%	79%	79% F	69%	79%	67%	78%	72%	79%
Police services	75%	77%	75%	71%	77%	78%	72%	78%	71%	81%	74%

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.

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.)

Satisfaction (combined ‘very/somewhat satisfied’ responses) with specific services tends to be higher among those under 55 years of age.

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]
By-law enforcement	73%	72%	75%	79% F	76% F	66%	71%	82%	70%	69%	75%
Emergency preparedness	72%	76%	69%	69%	76%	72%	76%	78%	76%	67%	69%
Keeping public spaces clean	71%	73%	67%	78% F	71%	64%	71%	77%	70%	73%	67%
Garbage & green bin collection	70%	67%	72%	84% EF	66%	60%	80% IK	72%	61%	74%	64%
Economic development	70%	75%	67%	77% F	69%	66%	75%	70%	68%	68%	72%
Parking	68%	72%	65%	74% F	73% F	59%	68%	70%	74%	71%	63%
Street infrastructure	68%	68%	69%	81% F	73% F	52%	82% JK	71%	70%	64%	61%
Development & building permits	48%	47%	50%	63% EF	47% F	36%	59% K	52%	44%	49%	42%
Social policies & projects	46%	50%	42%	51%	44%	41%	45%	39%	43%	45%	52%
Homelessness services	36%	41% C	31%	29%	44% D	36%	28%	41%	26%	42% I	39%
Enabling affordable housing	31%	34%	28%	25%	32%	35%	31%	26%	29%	30%	35%

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.

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 Own/Rent and Household Income)

Renters are more satisfied (combined 'very/somewhat satisfied' responses) than owners with a number of services, including parks/green spaces, recreation, by-law enforcement, keeping public spaces clean, garbage and green bin collection, street infrastructure, and development and building permits. Owners are more satisfied than renters with police services and enabling affordable housing.

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

		OWN/RENT		HH INCOME		
	TOTAL	OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Library services	92%	91%	93%	90%	93%	93%
Parks/green spaces	88%	84%	93% B	88%	92%	86%
Services to enhance parks	88%	86%	90%	83%	90%	94% D
Online payment services	87%	86%	88%	81%	89%	91% D
Making streets vibrant	86%	84%	88%	84%	92% F	84%
Recreation	85%	81%	90% B	85%	88%	85%
Transportation infrastructure	84%	83%	83%	82%	82%	87%
Water conservation	84%	82%	86%	85%	81%	87%
Arts & culture	83%	83%	83%	81%	82%	86%
Fire rescue & medical response	76%	75%	76%	73%	75%	78%
Multi-channel service access	76%	74%	76%	74%	78%	79%
Police services	75%	81% C	71%	72%	71%	83% DE

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.

BCDEF 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 Own/Rent and Household Income) (cont.)

Renters are more satisfied (combined 'very/somewhat satisfied' responses) than owners with a number of services, including parks/green spaces, recreation, by-law enforcement, keeping public spaces clean, garbage and green bin collection, street infrastructure, and development and building permits. Owners are more satisfied than renters with police services and enabling affordable housing.

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

		OWN/RENT		HH INCOME		
	TOTAL	OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
By-law enforcement	73%	69%	79% B	77%	73%	73%
Emergency preparedness	72%	75%	69%	71%	75%	74%
Keeping public spaces clean	71%	62%	82% B	71%	68%	72%
Garbage & green bin collection	70%	58%	82% B	69%	78%	67%
Economic development	70%	68%	73%	66%	76%	73%
Parking	68%	67%	69%	64%	70%	76% D
Street infrastructure	68%	60%	79% B	71%	71%	67%
Development & building permits	48%	42%	56% B	49%	59% F	45%
Social policies & projects	46%	42%	50%	55% F	43%	39%
Homelessness services	36%	40%	31%	36%	30%	37%
Enabling affordable housing	31%	39% C	22%	31%	28%	31%

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.

BCDEF 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)

More than six-in-ten businesses say they are satisfied (combined 'very/somewhat satisfied' responses) with 15 of the 16 services they evaluated.

The overall highest score goes to **online payment services**, with 94% of businesses saying they are satisfied.

The service scoring the lowest is **development and building permits** (38%).

Compared to 2021, businesses this year are notably less satisfied with **fire rescue and medical response** (70%, down 22 points) and **multi-channel service access** (66%, down 13 points).

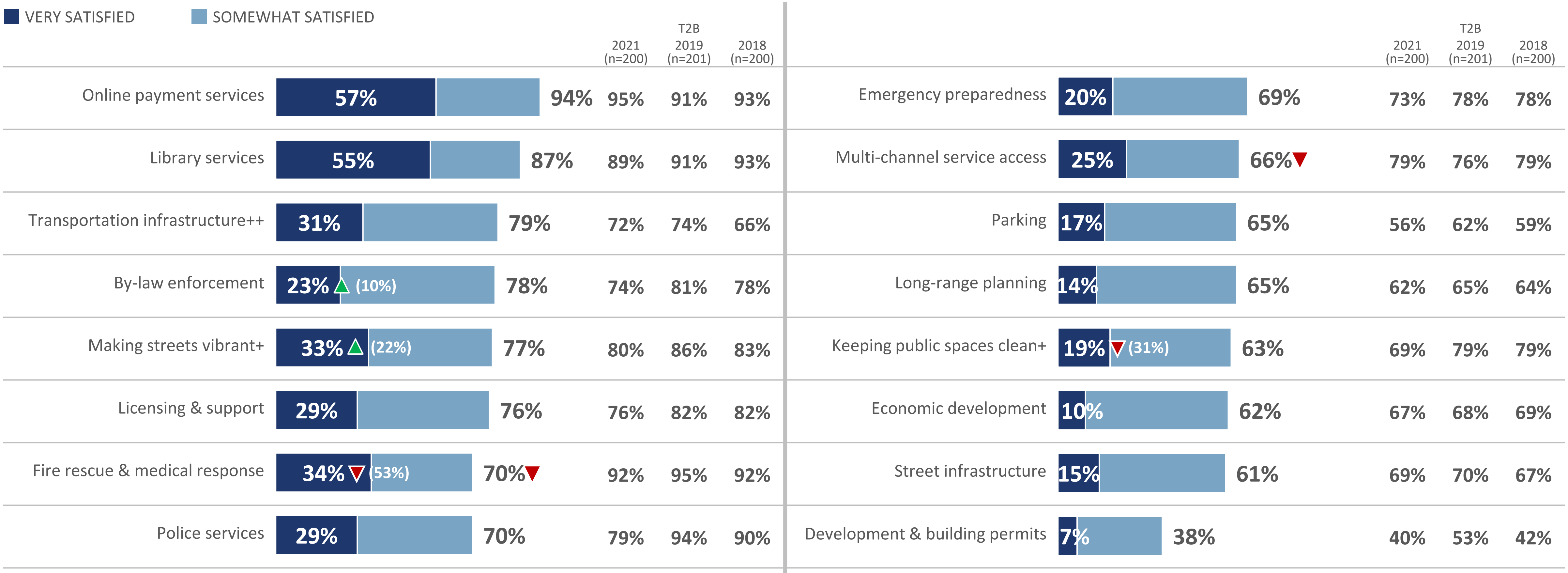
Satisfaction with **police services** and **keeping public spaces clean** also remain below pre-pandemic levels.

- Police services: 70% satisfied in 2023 and 79% in 2021 versus 94% in 2019 and 90% in 2018
- Keeping public spaces clean: 63% satisfied in 2023 and 69% in 2021 versus 79% in 2019 and 79% in 2018

NOTE ON THE SERVICES EVALUATED BY BUSINESSES:
Businesses were asked about fewer services than residents, allowing all businesses to provide feedback on all the evaluated services.
Service wording bas been abbreviated for reporting purposes. Please see the Appendix for the full service wording.

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

					T2B	
				2021 (n=200)	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%

					T2B	
				2021 (n=200)	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%

++ Transportation infrastructure uses different question wording from previous years, interpret year-over-year changes with caution.
2023: Providing transportation infrastructure for walking, cycling, and rolling
2021, 2019, 2018: Providing transportation infrastructure for walking, bikes, transit and vehicles

+ 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.

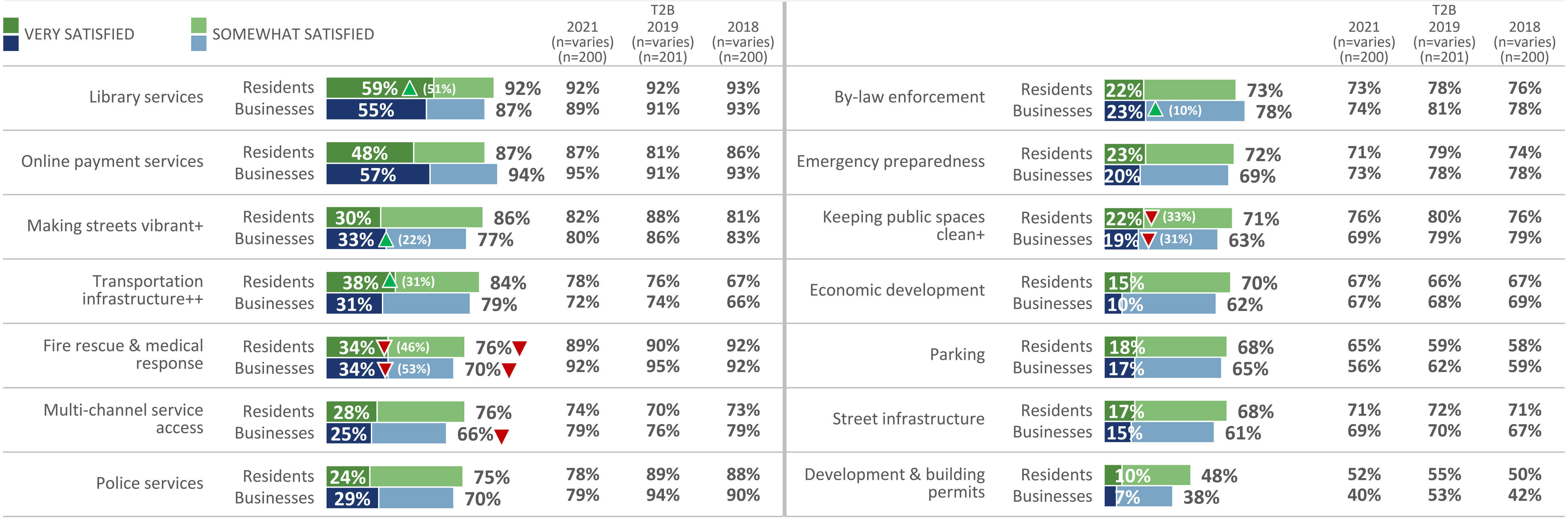
▲ / ▼ Significantly higher/lower than 2021.

Satisfaction with Specific Services

Summary of satisfaction for services asked of both residents and businesses

Residents are more satisfied than businesses with several services, including making streets vibrant (86% versus 77%), multi-channel service access (76% versus 66%), keeping public spaces clean (71% versus 63%), economic development (70% versus 62%), and development and building permits (48% versus 38%). Conversely, businesses are more satisfied than residents with online payments services (94% versus 87%).

RESIDENTS / **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=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%

				2021 (n=varies) (n=200)	T2B 2019 (n=varies) (n=201)	2018 (n=varies) (n=200)
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%

++ Transportation infrastructure uses different question wording from previous years, interpret year-over-year changes with caution.
2023: Providing transportation infrastructure for walking, cycling, and rolling
2021, 2019, 2018: Providing transportation infrastructure for walking, bikes, transit and vehicles

+ 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 think the City should invest ‘more’ or ‘the same’ in all the evaluated services. There are no services where a majority thinks the City should reduce investment. However, there are clearly some services that are a greater spending priority. While many of residents’ top investment priorities align with the services with which they are less satisfied, this is not always the case. In other words, satisfaction is not always a predictor of how much residents would like the City to invest in a specific service, suggesting that other factors (such as the priority attached to a service) likely also play a role.

Overall, residents continue to prioritize investment in affordable housing, homelessness, and social policies most of all. The percentage saying the City should invest ‘more’ in each of these services is 75% for **enabling affordable housing**, 74% for **homelessness services**, and 72% for **social policies and projects**.

While these are residents’ top investment priorities overall, there is also growing desire for increased investment in a number of other services. Four particularly noteworthy examples are **fire rescue and medical response** (56% invest ‘more’, up 12 points), **keeping public spaces clean** (54% invest ‘more’, up 13 points), **development and building permits** (41% invest ‘more’, up 9 points), and **garbage and green bin collection** (33% invest ‘more’, up 9 points).

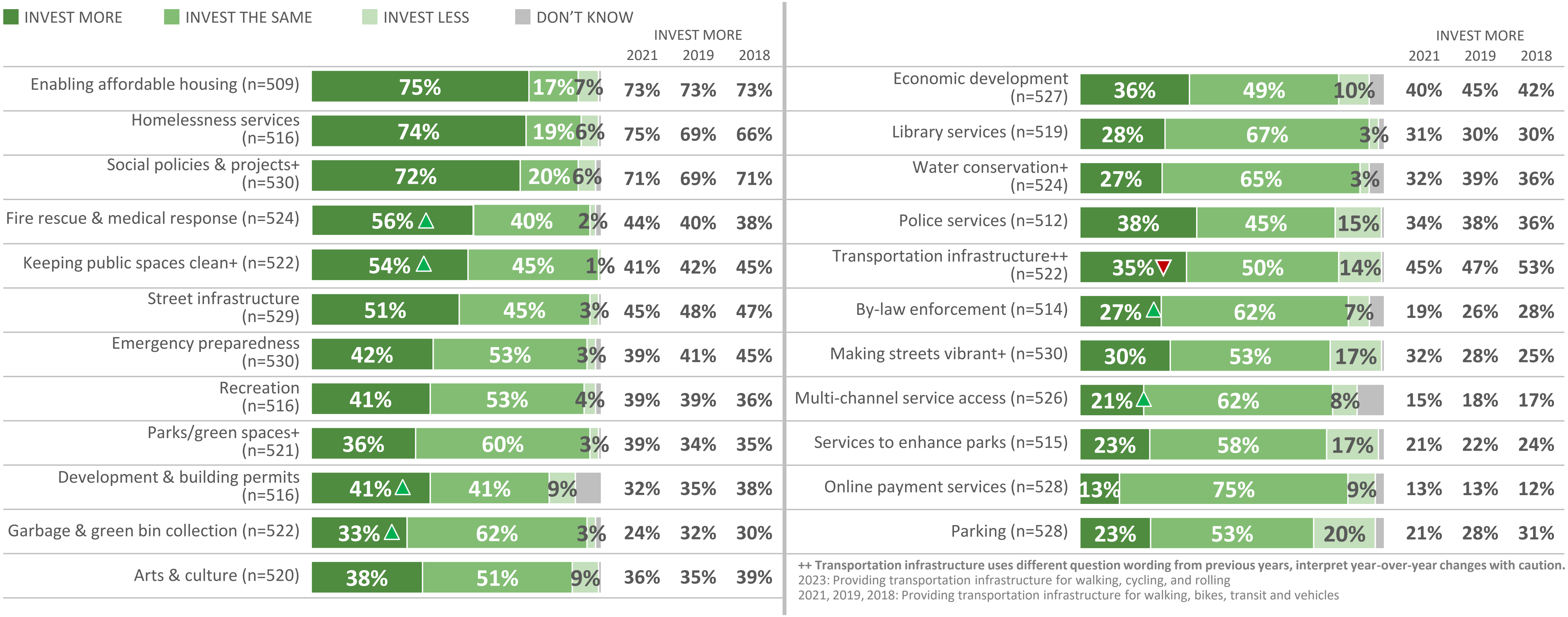
- While overall less of a priority, there has also been an increase in the percentage saying the City should invest ‘more’ in **by-law enforcement** (27%, up 8 points) and **multi-channel service access** (21%, up 6 points).

Conversely, the percentage of residents saying the City should invest ‘more’ in **transportation infrastructure** is down 10 points to currently sit at 35%. However, year-over-year comparisons for this service should be interpreted with caution due to differences in question wording.

NOTE ON THE SERVICES EVALUATED BY RESIDENTS:
Due to the number of services requiring feedback, each resident was randomly asked about 20 different services, resulting in an average base size of 522 respondents per service (actual base sizes range from 509 to 530).
Service wording bas been abbreviated for reporting purposes. Please see the Appendix for the full service wording.

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.



	INVEST MORE	INVEST THE SAME	INVEST LESS	INVEST MORE 2021	2019	2018
Enabling affordable housing (n=509)	75%	17%	7%	73%	73%	73%
Homelessness services (n=516)	74%	19%	6%	75%	69%	66%
Social policies & projects+ (n=530)	72%	20%	6%	71%	69%	71%
Fire rescue & medical response (n=524)	56% △	40%	2%	44%	40%	38%
Keeping public spaces clean+ (n=522)	54% △	45%	1%	41%	42%	45%
Street infrastructure (n=529)	51%	45%	3%	45%	48%	47%
Emergency preparedness (n=530)	42%	53%	3%	39%	41%	45%
Recreation (n=516)	41%	53%	4%	39%	39%	36%
Parks/green spaces+ (n=521)	36%	60%	3%	39%	34%	35%
Development & building permits (n=516)	41% △	41%	9%	32%	35%	38%
Garbage & green bin collection (n=522)	33% △	62%	3%	24%	32%	30%
Arts & culture (n=520)	38%	51%	9%	36%	35%	39%

	INVEST MORE	INVEST THE SAME	INVEST LESS	INVEST MORE 2021	2019	2018
Economic development (n=527)	36%	49%	10%	40%	45%	42%
Library services (n=519)	28%	67%	3%	31%	30%	30%
Water conservation+ (n=524)	27%	65%	3%	32%	39%	36%
Police services (n=512)	38%	45%	15%	34%	38%	36%
Transportation infrastructure++ (n=522)	35% ▼	50%	14%	45%	47%	53%
By-law enforcement (n=514)	27% △	62%	7%	19%	26%	28%
Making streets vibrant+ (n=530)	30%	53%	17%	32%	28%	25%
Multi-channel service access (n=526)	21% △	62%	8%	15%	18%	17%
Services to enhance parks (n=515)	23%	58%	17%	21%	22%	24%
Online payment services (n=528)	13%	75%	9%	13%	13%	12%
Parking (n=528)	23%	53%	20%	21%	28%	31%

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2023: Providing transportation infrastructure for walking, cycling, and rolling
2021, 2019, 2018: Providing transportation infrastructure for walking, bikes, transit and vehicles

\+ 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 (Residents)

(by Gender, Age, and Neighbourhood)

Women, those under the age of 55, and renters are generally more likely to say they would like the City to invest more in this year's top three priorities (affordable housing, homelessness, and social policies). Other demographic differences are highlighted in the table below.

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]
Enabling affordable housing	75%	70%	79% B	85% F	76% F	63%	79%	77%	81%	70%	70%
Homelessness services	74%	71%	76%	85% EF	71%	65%	79%	74%	76%	76%	68%
Social policies & projects	72%	67%	76% B	76% F	75% F	65%	75% K	76% K	81% K	74% K	61%
Fire rescue & medical response	56%	49%	64% B	52%	59%	58%	54%	53%	63%	52%	59%
Keeping public spaces clean	54%	52%	57%	53%	56%	51%	62% H	42%	50%	56%	54%
Street infrastructure	51%	52%	49%	42%	49%	61% DE	47%	44%	49%	53%	56%
Emergency preparedness	42%	37%	47% B	54% EF	33%	38%	41%	43%	33%	46%	43%
Recreation	41%	40%	42%	41%	46%	37%	40%	39%	54% J	32%	42%
Development & building permits	41%	45%	37%	37%	41%	44%	39%	41%	43%	38%	43%
Arts & culture	38%	36%	40%	37%	46% F	32%	45% J	45% J	43%	29%	34%
Police services	38%	40%	37%	30%	38%	48% DE	45%	35%	31%	43%	37%
Economic development	36%	38%	34%	43% F	34%	31%	48% H	31%	35%	33%	35%

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.)

Women, those under the age of 55, and renters are generally more likely to say they would like the City to invest more in this year’s top three priorities (affordable housing, homelessness, and social policies). Other demographic differences are highlighted in the table below.

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]
Parks/green spaces	36%	33%	39%	31%	35%	43% D	40%	43% J	42% J	26%	33%
Transportation infrastructure	35%	34%	36%	38%	38%	30%	44%	32%	43%	29%	31%
Garbage & green bin collection	33%	36%	29%	26%	38% D	35%	40%	26%	39%	29%	31%
Making streets vibrant	30%	33%	27%	31%	31%	29%	33%	34%	33%	30%	24%
Library services	28%	27%	28%	27%	28%	28%	29%	26%	36% J	20%	28%
Water conservation	27%	25%	28%	29%	24%	29%	34%	25%	26%	24%	27%
By-law enforcement	27%	26%	28%	28%	27%	26%	39% HI	19%	23%	26%	27%
Parking	23%	23%	23%	26%	22%	21%	29%	17%	17%	21%	27%
Services to enhance parks	23%	24%	22%	19%	21%	29%	21%	23%	19%	19%	28%
Multi-channel service access	21%	25% C	17%	22%	22%	20%	25%	21%	19%	20%	21%
Online payment services	13%	16%	10%	21% EF	9%	8%	9%	5%	10%	17% H	17% H

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 Own/Rent and Household Income)

Women, those under the age of 55, and renters are generally more likely to say they would like the City to invest more in this year's top three priorities (affordable housing, homelessness, and social policies). Other demographic differences are highlighted in the table below.

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

	TOTAL	OWN/RENT		HH INCOME		
		OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Enabling affordable housing	75%	64%	87% B	77%	79%	75%
Homelessness services	74%	68%	82% B	70%	85% DF	73%
Social policies & projects	72%	65%	79% B	71%	85% DF	73%
Fire rescue & medical response	56%	57%	55%	64% F	63% F	48%
Keeping public spaces clean	54%	56%	51%	56%	60%	50%
Street infrastructure	51%	54%	48%	53%	57% F	45%
Emergency preparedness	42%	33%	52% B	49% F	45%	36%
Recreation	41%	42%	42%	41%	43%	44%
Development & building permits	41%	43%	38%	40%	42%	47%
Arts & culture	38%	32%	46% B	45%	40%	35%
Police services	38%	40%	38%	40%	42%	35%
Economic development	36%	28%	45% B	40%	37%	37%

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?

BCDEF 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 Own/Rent and Household Income) (cont.)

Women, those under the age of 55, and renters are generally more likely to say they would like the City to invest more in this year's top three priorities (affordable housing, homelessness, and social policies). Other demographic differences are highlighted in the table below.

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

		OWN/RENT		HH INCOME		
	TOTAL	OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Parks/green spaces	36%	39%	35%	35%	41%	38%
Transportation infrastructure	35%	33%	40%	38%	31%	38%
Garbage & green bin collection	33%	34%	33%	35%	32%	33%
Making streets vibrant	30%	25%	36% B	34%	28%	32%
Library services	28%	22%	36% B	32%	29%	26%
Water conservation	27%	22%	35% B	33% F	37% F	18%
By-law enforcement	27%	24%	32%	29%	27%	25%
Parking	23%	21%	27%	26% F	31% F	14%
Services to enhance parks	23%	23%	23%	29% F	23%	18%
Multi-channel service access	21%	19%	25%	24%	27%	18%
Online payment services	13%	10%	15%	18% F	15%	8%

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?

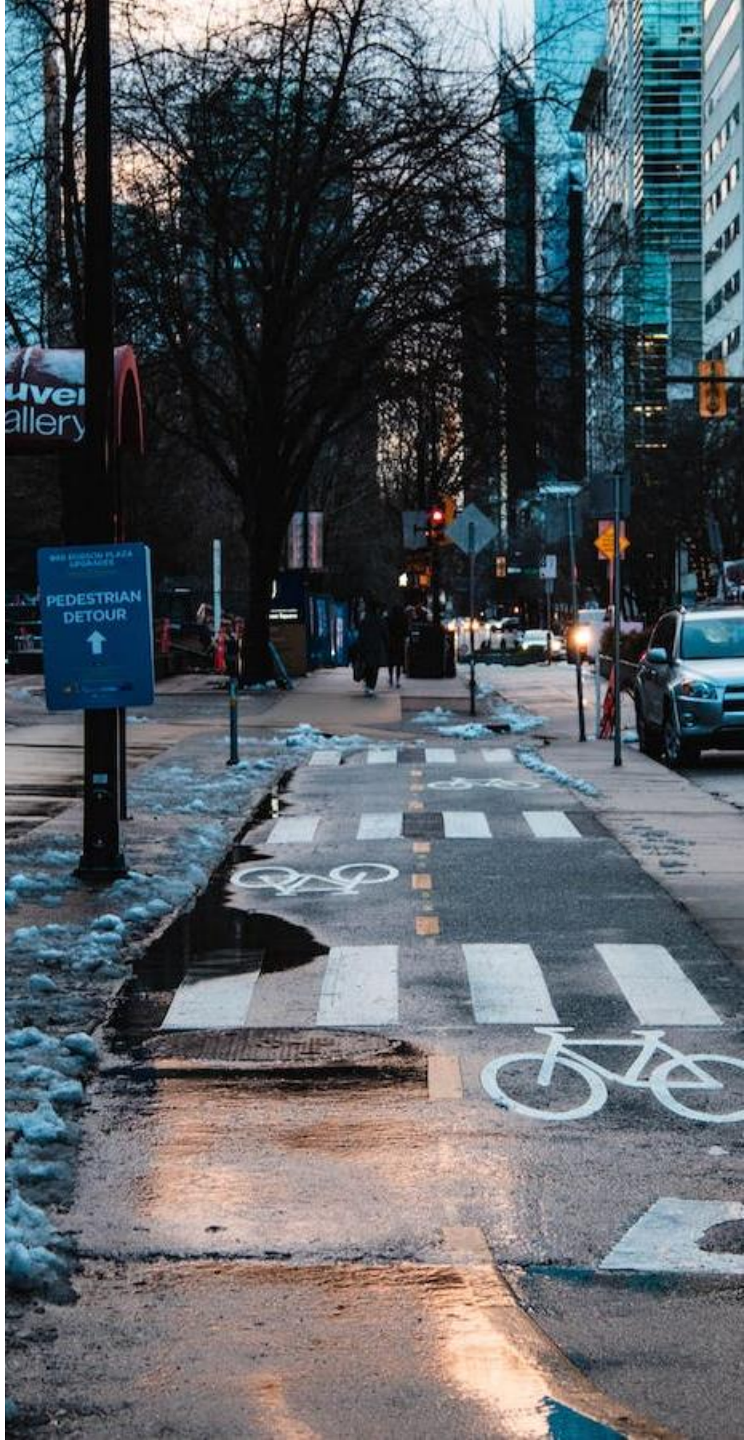
BCDEF A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Investment in Specific Services (Businesses)

Businesses’ top priorities for investment are **fire rescue and medical response** (65% invest ‘more’, up 16 points) and **street infrastructure** (64% invest ‘more’, up 13 points).

A majority of businesses also say the City should invest ‘more’ in **keeping public spaces clean** (58%), **police services** (56%), and **development and building permits** (56%). The percentage prioritizing investment in development and building permits is up 13 points from 2021.

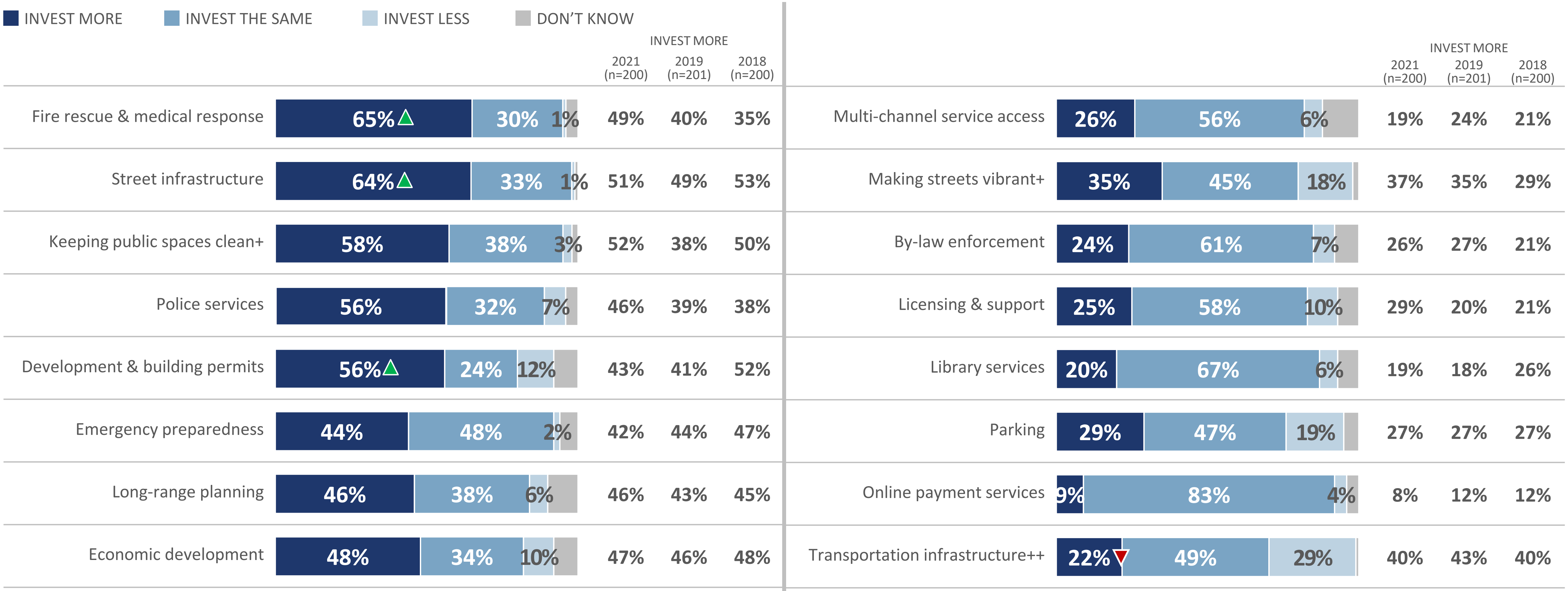
Similar to residents, there is only one service this year that has dropped in investment priority, and that is **transportation infrastructure** (22% invest ‘more’, down 18 points from 2021). Again, however, year-over-year comparisons for this service should be interpreted with caution due to differences in question wording.



NOTE ON THE SERVICES EVALUATED BY BUSINESSES:
Businesses were asked about fewer services than residents, allowing all businesses to provide feedback on all the evaluated services.
Service wording bas been abbreviated for reporting purposes. Please see the Appendix for the full service wording.

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	INVEST THE SAME	INVEST LESS	INVEST MORE 2021 (n=200)	INVEST MORE 2019 (n=201)	INVEST MORE 2018 (n=200)
Fire rescue & medical response	65% ▲	30%	1%	49%	40%	35%
Street infrastructure	64% ▲	33%	1%	51%	49%	53%
Keeping public spaces clean+	58%	38%	3%	52%	38%	50%
Police services	56%	32%	7%	46%	39%	38%
Development & building permits	56% ▲	24%	12%	43%	41%	52%
Emergency preparedness	44%	48%	2%	42%	44%	47%
Long-range planning	46%	38%	6%	46%	43%	45%
Economic development	48%	34%	10%	47%	46%	48%

	INVEST MORE	INVEST THE SAME	INVEST LESS	INVEST MORE 2021 (n=200)	INVEST MORE 2019 (n=201)	INVEST MORE 2018 (n=200)
Multi-channel service access	26%	56%	6%	19%	24%	21%
Making streets vibrant+	35%	45%	18%	37%	35%	29%
By-law enforcement	24%	61%	7%	26%	27%	21%
Licensing & support	25%	58%	10%	29%	20%	21%
Library services	20%	67%	6%	19%	18%	26%
Parking	29%	47%	19%	27%	27%	27%
Online payment services	9%	83%	4%	8%	12%	12%
Transportation infrastructure++	22% ▼	49%	29%	40%	43%	40%

++ Transportation infrastructure uses different question wording from previous years, interpret year-over-year changes with caution.
2023: Providing transportation infrastructure for walking, cycling, and rolling
2021, 2019, 2018: Providing transportation infrastructure for walking, bikes, transit and vehicles

+ 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.

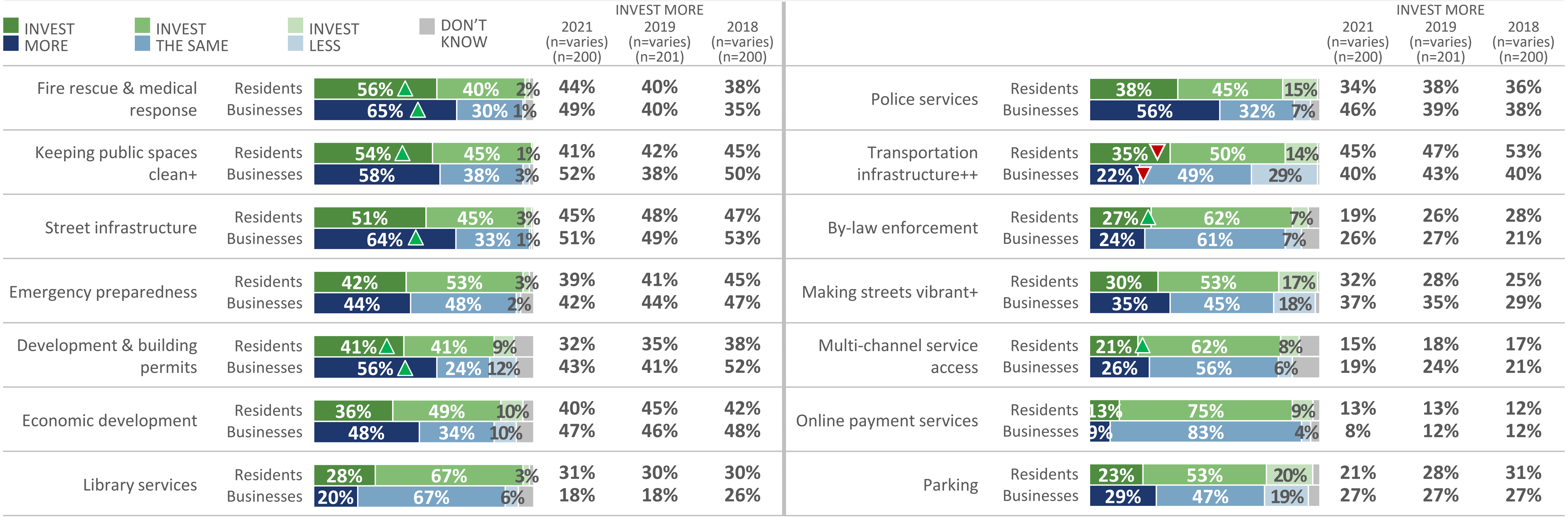
Investment in Specific Services

Summary of investment in services asked of both residents and businesses

Businesses are more likely than residents to say the City should invest ‘more’ in a number of services, including fire rescue and medical response (65% versus 56%), street infrastructure (64% versus 51%), development and building permits (56% versus 41%), economic development (48% versus 36%), and police services (56% versus 38%). Conversely, residents are more likely than businesses to say the City should invest ‘more’ in library services (28% versus 20%) and transportation infrastructure (35% versus 22%).

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	INVEST THE SAME	INVEST LESS	INVEST MORE 2021 (n=varies) (n=200)	INVEST MORE 2019 (n=varies) (n=201)	INVEST MORE 2018 (n=varies) (n=200)
Fire rescue & medical response	Residents	56% ▲	40%	2%	44%	40%	38%
	Businesses	65% ▲	30%	1%	49%	40%	35%
Keeping public spaces clean+	Residents	54% ▲	45%	1%	41%	42%	45%
	Businesses	58%	38%	3%	52%	38%	50%
Street infrastructure	Residents	51%	45%	3%	45%	48%	47%
	Businesses	64% ▲	33%	1%	51%	49%	53%
Emergency preparedness	Residents	42%	53%	3%	39%	41%	45%
	Businesses	44%	48%	2%	42%	44%	47%
Development & building permits	Residents	41% ▲	41%	9%	32%	35%	38%
	Businesses	56% ▲	24%	12%	43%	41%	52%
Economic development	Residents	36%	49%	10%	40%	45%	42%
	Businesses	48%	34%	10%	47%	46%	48%
Library services	Residents	28%	67%	3%	31%	30%	30%
	Businesses	20%	67%	6%	18%	18%	26%

		INVEST MORE	INVEST THE SAME	INVEST LESS	INVEST MORE 2021 (n=varies) (n=200)	INVEST MORE 2019 (n=varies) (n=201)	INVEST MORE 2018 (n=varies) (n=200)
Police services	Residents	38%	45%	15%	34%	38%	36%
	Businesses	56%	32%	7%	46%	39%	38%
Transportation infrastructure++	Residents	35% ▼	50%	14%	45%	47%	53%
	Businesses	22% ▼	49%	29%	40%	43%	40%
By-law enforcement	Residents	27% ▲	62%	7%	19%	26%	28%
	Businesses	24%	61%	7%	26%	27%	21%
Making streets vibrant+	Residents	30%	53%	17%	32%	28%	25%
	Businesses	35%	45%	18%	37%	35%	29%
Multi-channel service access	Residents	21% ▲	62%	8%	15%	18%	17%
	Businesses	26%	56%	6%	19%	24%	21%
Online payment services	Residents	13%	75%	9%	13%	13%	12%
	Businesses	9%	83%	4%	8%	12%	12%
Parking	Residents	23%	53%	20%	21%	28%	31%
	Businesses	29%	47%	19%	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?

++ Transportation infrastructure uses different question wording from previous years, interpret year-over-year changes with caution.
2023: Providing transportation infrastructure for walking, cycling, and rolling
2021, 2019, 2018: Providing transportation infrastructure for walking, bikes, transit and vehicles

Only significant differences for invest more are shown.

▲ / ▼ Significantly higher/lower than 2021.

FINANCIAL PLANNING

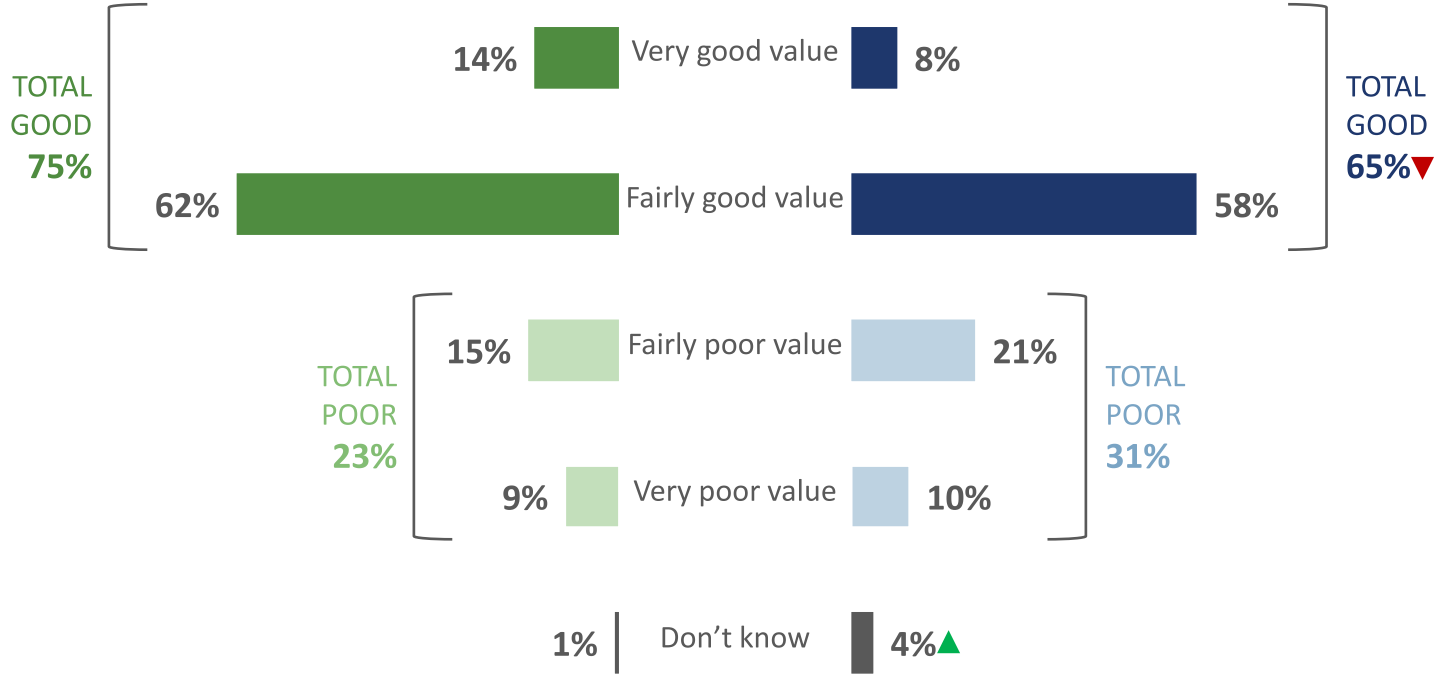
3.4

Value for Taxes

Residents' overall perceptions of value for taxes hold steady with 2021 but are lower than pre-pandemic years. Overall, 75% of residents say they receive 'very' or 'fairly' good value for their tax dollars, on par with 2021 but lower than the high of 81% reported in 2019. Perceptions have declined among businesses this year (65%, down 12 points from 2021).

RESIDENTS **BUSINESSES**

NORM+	2018 (n=600)	2019 (n=602)	2021 (n=600)	2021 (n=200)	2019 (n=201)	2018 (n=200)
19%	20%	21%	15%	11%	13%	12%
80%	79%	81%	76%	77%	76%	72%
61%	59%	60%	61%	66%	64%	60%
13%	13%	13%	15%	16%	16%	16%
18%	20%	18%	22%	23%	23%	26%
5%	6%	5%	7%	7%	7%	11%
2%	1%	1%	2%	<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.

Value for Taxes (Residents)

(by Gender, Age, and Neighbourhood)

Overall perceptions of value for taxes (combined ‘very/fairly good value’ responses) are statistically consistent across 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]
Very good value	14%	16%	12%	10%	15%	17%	22% JK	16% J	21% JK	5%	10%
Fairly good value	62%	61%	63%	69% F	60%	57%	57%	65%	54%	72% GI	60%
Fairly poor value	15%	11%	17% B	15%	15%	14%	13%	13%	18%	13%	17%
Very poor value	9%	10%	7%	6%	9%	10%	9%	6%	8%	7%	12%
Don’t know	1%	1%	1%	1%	1%	2%	0%	1%	0%	2%	2%
TOTAL GOOD VALUE	75%	77%	74%	78%	75%	74%	79%	81%	75%	77%	70%
TOTAL POOR VALUE	23%	22%	24%	21%	24%	24%	21%	18%	25%	21%	28%

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 Own/Rent and Household Income)

Overall perceptions of value for taxes (combined ‘very/fairly good value’ responses) are also statistically consistent by own/rent and household income.

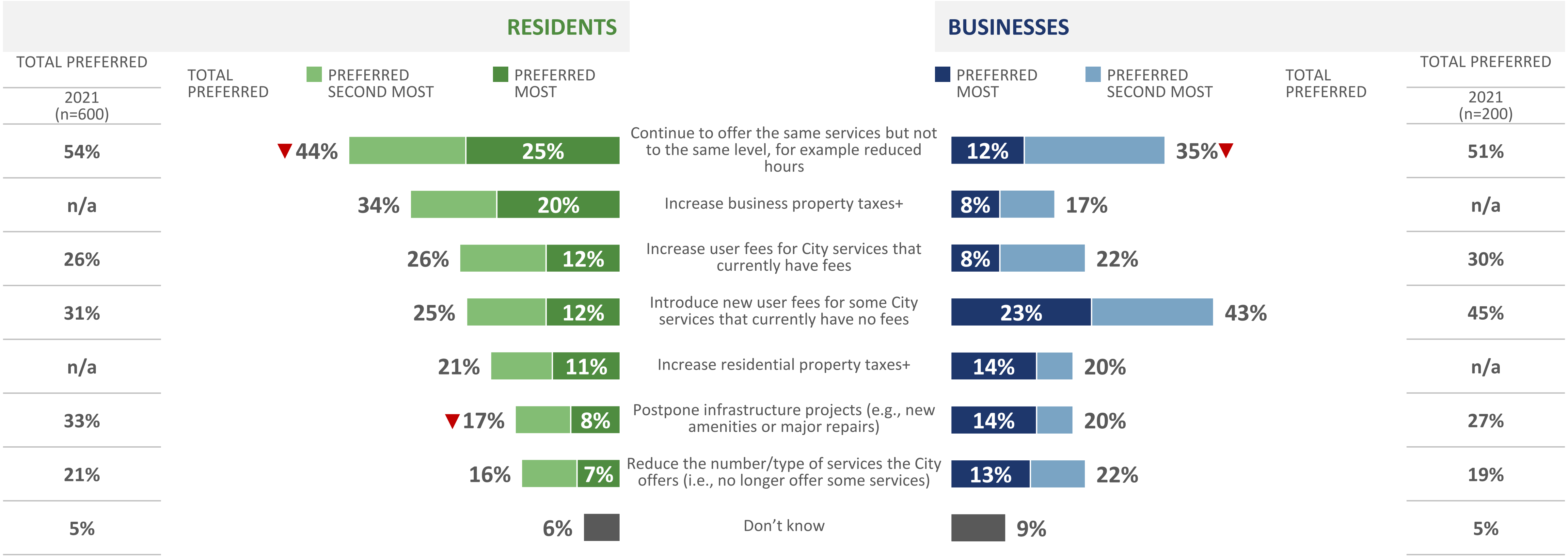
		OWN/RENT		HH INCOME		
	TOTAL	OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Very good value	**14%**	**13%**	**12%**	**16%**	**13%**	**14%**
Fairly good value	**62%**	**59%**	**67%**	**63%**	**64%**	**62%**
Fairly poor value	**15%**	**16%**	**14%**	**12%**	**17%**	**15%**
Very poor value	**9%**	**11%**	**6%**	**8%**	**5%**	**10%**
Don’t know	**1%**	**2%**	**1%**	**2%**	**1%**	**0%**
TOTAL GOOD VALUE	**75%**	**72%**	**79%**	**79%**	**77%**	**76%**
TOTAL POOR VALUE	**23%**	**27%**	**20%**	**20%**	**22%**	**24%**

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?)

BCDEF 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 and businesses have different ideas around how to best balance the budget. Residents prefer ‘continue to offer the same services but not to the same level, for example reduced hours’ (44%), while businesses opt for ‘introduce new user fees for some City services that currently have no fees’ (43%). The preference for continuing to offer the same services but at a reduced level is down 10 points among residents and 16 points among businesses although year-over-year comparisons should be interpreted with caution due to differences in question wording.



+ 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.

Preferred Options to Balance Budget (Residents)

(by Gender, Age, and Neighbourhood)

Preferred options to balance the budget are largely consistent across gender, age, and neighbourhood, with some exceptions highlighted below. For example, younger residents are more likely to opt for an increase in business property taxes.

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	**44%**	**42%**	**48%**	**48%**	**41%**	**44%**	**43%**	**49%**	**38%**	**45%**	**45%**
Increase business property taxes	**34%**	**35%**	**33%**	**43% F**	**32%**	**28%**	**38%**	**33%**	**39%**	**31%**	**32%**
Increase user fees for City services that currently have fees	**26%**	**26%**	**26%**	**30%**	**26%**	**21%**	**33% K**	**25%**	**24%**	**28%**	**21%**
Introduce new user fees for some City services that currently have no fees	**25%**	**27%**	**24%**	**22%**	**30%**	**24%**	**30%**	**24%**	**18%**	**32% I**	**23%**
Increase residential property taxes	**21%**	**23%**	**18%**	**24%**	**22%**	**18%**	**12%**	**26% G**	**30% G**	**20%**	**20%**
Postpone infrastructure projects (e.g., new amenities or major repairs)	**17%**	**14%**	**18%**	**17%**	**17%**	**17%**	**13%**	**20%**	**19%**	**14%**	**18%**
Reduce the number/type of services the City offers (i.e., no longer offer some services)	**16%**	**19%**	**14%**	**13%**	**18%**	**18%**	**19%**	**11%**	**13%**	**18%**	**19%**
Don't know	**6%**	**5%**	**7%**	**2%**	**4%**	**11% DE**	**5%**	**4%**	**7%**	**5%**	**6%**

Base: All residents (n=600)

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?

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 Own/Rent and Household Income)

Renters are more likely than owners to opt for an increase in taxes (both business property taxes and residential property taxes).

TOTAL PREFERRED

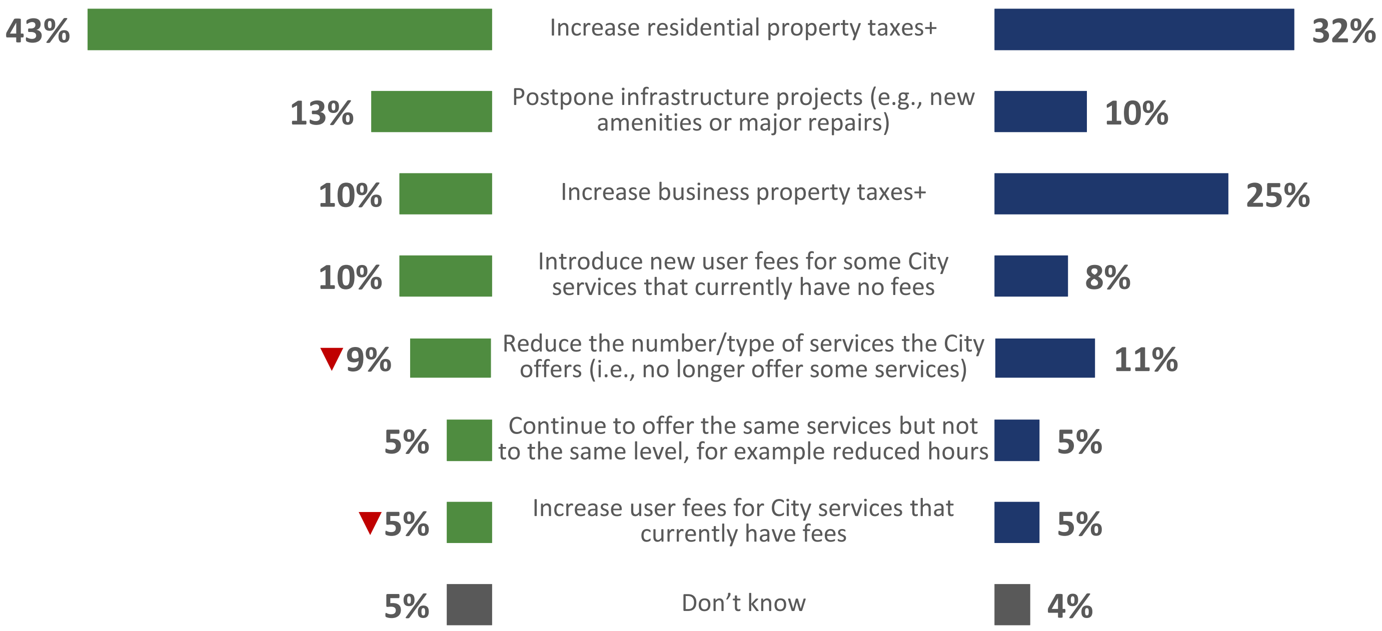
		OWN/RENT		HH INCOME		
	TOTAL	OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Continue to offer the same services but not to the same level, for example reduced hours	**44%**	**48%**	**43%**	**44%**	**46%**	**40%**
Increase business property taxes	**34%**	**29%**	**41% B**	**33%**	**43%**	**35%**
Increase user fees for City services that currently have fees	**26%**	**26%**	**27%**	**23%**	**27%**	**30%**
Introduce new user fees for some City services that currently have no fees	**25%**	**28%**	**23%**	**21%**	**28%**	**28%**
Increase residential property taxes	**21%**	**17%**	**26% B**	**20%**	**21%**	**25%**
Postpone infrastructure projects (e.g., new amenities or major repairs)	**17%**	**15%**	**16%**	**19%**	**11%**	**19%**
Reduce the number/type of services the City offers (i.e., no longer offer some services)	**16%**	**17%**	**14%**	**21% E**	**10%**	**14%**
Don't know	**6%**	**7%**	**4%**	**7%**	**4%**	**4%**

Base: All residents (n=600)
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?

BCDEF 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 and businesses agree that increasing residential property taxes is the least preferred option overall (includes 43% of residents and 32% of businesses).



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.

Least Preferred Options to Balance Budget (Residents)

(by Gender, Age, and Neighbourhood)

Those living in the Northeast are less opposed to increasing residential property taxes.

		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 property taxes	43%	40%	46%	45%	40%	43%	45% I	45% I	28%	46% I	46% I
Postpone infrastructure projects (e.g., new amenities or major repairs)	13%	15%	12%	15%	12%	12%	9%	10%	17%	10%	17%
Increase business property taxes	10%	12%	8%	9%	9%	11%	13%	11%	10%	9%	8%
Introduce new user fees for some City services that currently have no fees	10%	9%	12%	11%	12%	8%	9%	11%	13%	14%	7%
Reduce the number/type of services the City offers (i.e., no longer offer some services)	9%	9%	9%	7%	13% F	8%	11%	13%	12%	5%	7%
Continue to offer the same services but not to the same level, for example reduced hours	5%	5%	4%	5%	8% F	3%	6%	2%	7%	6%	5%
Increase user fees for City services that currently have fees	5%	4%	5%	6%	3%	5%	3%	4%	8%	4%	4%
Don't know	5%	5%	5%	2%	4%	9% DE	3%	3%	6%	6%	7%

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 Own/Rent and Household Income)

Owners are more opposed than renters to an increase in residential property taxes.

	TOTAL	OWN/RENT		HH INCOME		
		OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Increase residential property taxes	**43%**	**49% C**	**34%**	**43%**	**40%**	**44%**
Postpone infrastructure projects (e.g., new amenities or major repairs)	**13%**	**12%**	**15%**	**8%**	**18% D**	**16% D**
Increase business property taxes	**10%**	**9%**	**10%**	**12%**	**8%**	**10%**
Introduce new user fees for some City services that currently have no fees	**10%**	**8%**	**13%**	**12%**	**7%**	**10%**
Reduce the number/type of services the City offers (i.e., no longer offer some services)	**9%**	**9%**	**10%**	**8%**	**10%**	**9%**
Continue to offer the same services but not to the same level, for example reduced hours	**5%**	**4%**	**7%**	**6%**	**7%**	**5%**
Increase user fees for City services that currently have fees	**5%**	**4%**	**6%**	**5%**	**5%**	**4%**
Don’t know	**5%**	**5%**	**5%**	**5%**	**5%**	**2%**

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

BCDEF 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

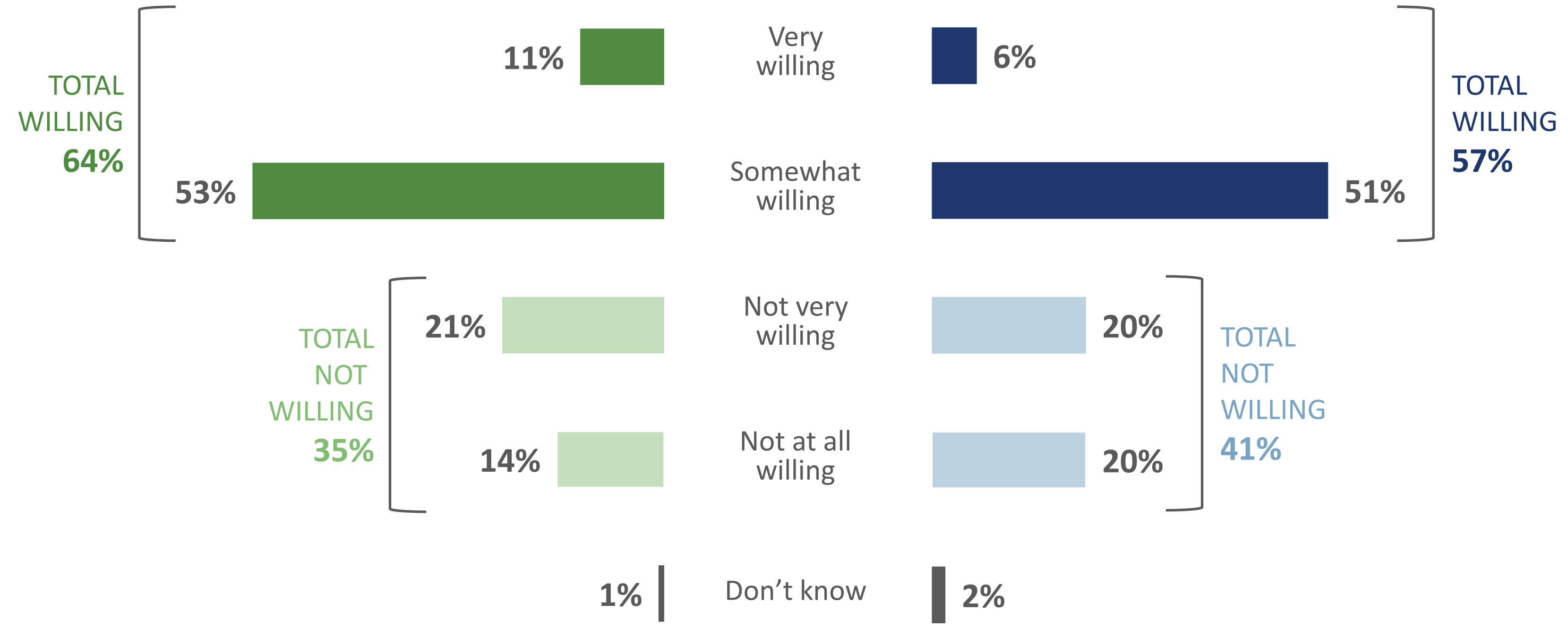
Overall, 64% of residents and 57% of businesses say they would be willing (combined ‘very/somewhat willing’ responses) to pay more in user fees for the services they use, on par with 2021. However, residents’ overall willingness to pay is lower than what was reported pre-pandemic (in 2019, 72% said they would be willing to pay more user fees).

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 More User Fees for Services (Residents)

(by Gender, Age, and Neighbourhood)

Overall willingness to pay more user fees (combined ‘very/somewhat willing’ responses) is highest among those living in the Southwest and lowest in the Southeast.

		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	11%	14% C	8%	10%	14%	10%	17% J	12% J	13% J	3%	12% J
Somewhat willing	53%	52%	54%	59%	47%	52%	52%	49%	51%	70% GHIK	44%
Not very willing	21%	18%	22%	21%	23%	19%	19%	25%	22%	17%	22%
Not at all willing	14%	16%	14%	10%	15%	18% D	12%	13%	12%	7%	22% IJ
Don’t know	1%	1%	1%	0%	1%	2%	0%	1%	1%	2%	0%
TOTAL WILLING	64%	66%	62%	69%	61%	62%	69% K	61%	64%	74% K	56%
TOTAL NOT WILLING	35%	34%	37%	31%	38%	36%	31%	38% J	34%	24%	44% GJ

Base: All residents (n=600)
Q13d. 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 Own/Rent and Household Income)

Overall willingness to pay more user fees (combined 'very/somewhat willing' responses) does not significantly vary by own/rent and household income.

		OWN/RENT		HH INCOME		
	TOTAL	OWN [B]	RENT [C]	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Very willing	11%	10%	13%	7%	12%	17% D
Somewhat willing	53%	52%	53%	53%	58%	51%
Not very willing	21%	21%	20%	23%	20%	19%
Not at all willing	14%	15%	14%	16%	10%	12%
Don't know	1%	1%	<1%	1%	0%	1%
TOTAL WILLING	64%	63%	66%	60%	70%	68%
TOTAL NOT WILLING	35%	36%	34%	39%	30%	31%

Base: All residents (n=600)
Q13d. 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?

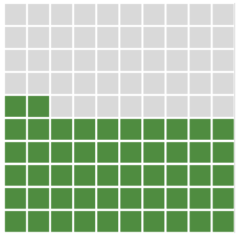
BCDEF A percentage with a letter beside it is significantly higher than the subgroup in the column labelled with that letter (at 95% confidence level).

Willingness to Pay Additional Property Taxes

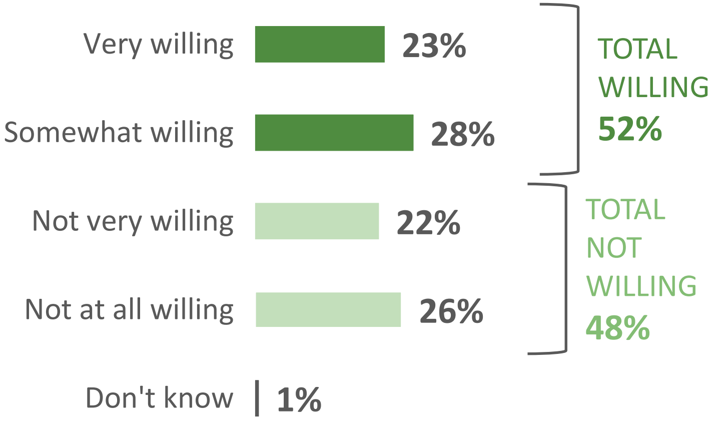
New Question Added in 2023

Just over half (52%) of residential owners say they would be willing (combined ‘very/somewhat willing’ responses) to pay an additional $99 for next year’s property taxes to maintain existing programs and services as costs rise. Willingness to pay is similar among business owners, with 54% saying they would be willing to pay an additional $256 for next year’s property taxes.

RESIDENTS

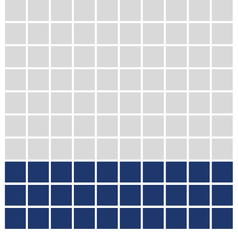


52% OWN THEIR CURRENT PLACE OF RESIDENCE

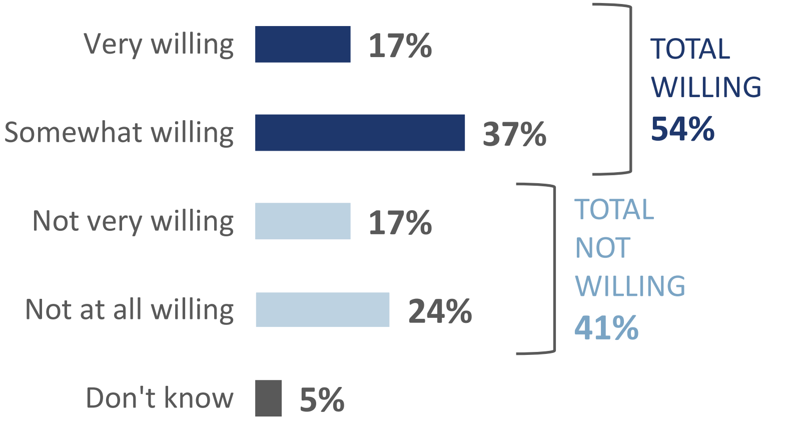


Base: All residents (n=600)
Q16. Do you own or rent your current place of residence?
Base: Those who own their current place of residence (n=338)
Q16a. Increasing property taxes and fees are often needed to maintain existing programs and services as costs rise. For example, based on a median residential 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



30% OWN THE SPACE THEIR BUSINESS IS IN



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?

Willingness to Pay Additional Property Taxes (Residents)

(by Gender, Age, and Neighbourhood)

Overall willingness to pay (combined ‘very/somewhat willing’ responses) is statistically similar across 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	**23%**	**25%**	**21%**	**13%**	**19%**	**28%**	**25%**	**34% JK**	**37% JK**	**17%**	**13%**
Somewhat willing	**28%**	**29%**	**28%**	**26%**	**30%**	**28%**	**32%**	**17%**	**24%**	**34% H**	**32% H**
Not very willing	**22%**	**19%**	**25%**	**33%**	**27% F**	**16%**	**26%**	**21%**	**18%**	**24%**	**23%**
Not at all willing	**26%**	**26%**	**25%**	**27%**	**24%**	**26%**	**18%**	**26%**	**21%**	**24%**	**32%**
Don’t know	**1%**	**1%**	**1%**	**0%**	**0%**	**1%**	**0%**	**3%**	**0%**	**1%**	**0%**
TOTAL WILLING	**52%**	**55%**	**49%**	**39%**	**50%**	**56%**	**57%**	**50%**	**61%**	**51%**	**45%**
TOTAL NOT WILLING	**48%**	**45%**	**50%**	**61%**	**50%**	**42%**	**43%**	**47%**	**39%**	**48%**	**55%**

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?

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 Additional Property Taxes (Residents)

(by Household Income)

Overall willingness to pay (combined ‘very/somewhat willing’ responses) is higher among those with household incomes of $100K+.

		HH INCOME		
	TOTAL	<$60K [D]	$60K-<$100K [E]	$100K+ [F]
Very willing	23%	15%	26%	27% D
Somewhat willing	28%	28%	26%	33%
Not very willing	22%	18%	28%	18%
Not at all willing	26%	39% EF	19%	21%
Don’t know	1%	0%	0%	1%
TOTAL WILLING	52%	43%	52%	61% D
TOTAL NOT WILLING	48%	57% F	48%	39%

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?

DEF 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

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

About Ipsos

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“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.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

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.