



CITY OF VANCOUVER

2011 OPERATING BUDGET SURVEY

WAVE 13

NOVEMBER 2010

**Presented to the
City of Vancouver
Vancouver, B.C.**

Prepared by: **Market Dimensions**

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Executive Overview

Introduction

The City of Vancouver retained Market Dimensions to perform a survey of residents and businesses to understand perspectives on its annual budget. As required by law, the City must balance its budget each fiscal year.

The survey among residents has been executed every year since 1997. Businesses stakeholders were initially surveyed in 1997 and annually since 2006.

In 2011, random telephone surveys were conducted among 509 City residents aged 18 and over and among 250 businesses located within the City of Vancouver limits.

The data collection through the telephone survey was started on Oct. 21, 2010, and completed on Nov. 8, 2010.

Resident and business stakeholder opinions and preferences were gathered concerning approaches the City might use to deal with the 2011 budget shortfall, including various taxation levels and different strategies for service reductions and/or revenue streams. Key findings are summarized briefly in this Executive Overview. Further details are presented in the Detailed Findings section.

Please note: The years quote in this report reflect the corresponding **budget years**, not the actual dates of the surveys.



Key Findings

One issue needs the greatest attention from Vancouver's City Council

Businesses

City finances and property taxes, followed by the Economy, then Development and Planning, Crime and Personal Safety, and Public Transit.

Residents

Homelessness/Poverty, followed by Affordable Housing, then Public Transit, City Finances and Property Tax, and Traffic Congestion.

City finances and property taxes is the single *common issue* that needs the greatest attention from Vancouver's City Council.

Perceptions of City Services

Satisfaction with Overall Quality

- The majority of stakeholders are satisfied with the quality of services provided by the City of Vancouver.
- Currently, 80.9% of residents are "very or somewhat satisfied". In total, 25.7% are "very satisfied", representing a sign of recovery from 2010 (19%).
- Among City businesses, satisfaction is generally consistent with most tracking in the past five years. Slightly less than nine in 10 business operators (85.6%) are "very or somewhat satisfied" with the quality of City services. Total dissatisfaction (14.4%) is at a typical level at this time.

Change in Quality Over Past Few Years

- After a declining trend in the past two surveys, signs of recovery are evident in residents' perceptions about the change in quality of City services. Currently, while 28.1% of residents see a decline, 37.1% think the quality has improved in the past few years ("much" or "somewhat better").



- Likewise, among businesses, findings are now returning to more typical patterns. At this time, while 24.4% see a decline, 27.2% of business operators perceive an improvement in the quality of City services in the past few years (“much better” or “somewhat better”).

Opinion on Amount of Property Taxes Paid

- Businesses who pay property tax as a direct cost have a tendency to believe that their property taxes are too high.
- Among businesses, 65.8% say their property taxes are “too high” versus 32.6% “about right”.

Perceived Value for Tax Dollar

- Perceptions continue to be quite stable among homeowners with most having a good opinion of the value they receive for the City tax dollars they pay (76.6%).
- On the other hand, more than half (69%) of the businesses that pay property taxes as a direct cost believe they receive good value.

Importance of Services Provided by the City

Businesses

- Relatively, the two most important services are Policing and the Fire Department.

Residents

- The Fire Department and Policing are still important services provided by the City to the residents. Other important services include Libraries; Maintenance and development of City parks and beaches, community centres, ice rinks and swimming pools; and Garbage collection, composting and recycling.

Maintenance, cleaning and upgrading of streets and sidewalks; Support for arts and cultural organizations; Support for community service organizations that help people in need; Support for green projects; Planning for the future development of Vancouver; and Management of traffic in the City are relatively less important for both businesses and residents.



Fiscal Management Options

Three Broad Fiscal Management Options

- On the whole, both stakeholder groups disapprove of using property tax increases exclusively to deal with the budget shortfall.
- Residents are evenly split on the choice between using “increase residential property taxes” versus using “reduce city services, hours, staffing and/ or user fees). However, half of the homeowners prefer a mix of “property tax increase” and “service or other reduction”.
- Half of the businesses that pay property taxes directly tend to favour a mixed approach, whereas almost four in 10 prefer a reduction in services.

General Approach to Service Cuts

- Similar to past tracking on this topic, a majority of businesses and residents prefer higher cuts in only some service areas rather than across all areas.

Mix of service reduction and increase in taxes

- Businesses and home owners were consistent in choosing the option of a mix of service reduction and increase in taxes. Half of businesses and residents expressed this feeling.



Acceptability of Property Tax Increases

Residents

- Findings for all residents combined are quite typical of past tracking, with a majority accepting property tax increases in order to maintain the same level of City services.
- Overall, 69.4% (both homeowners and renters) who expressed an opinion have more tolerance for a tax hike.

62.8% of homeowners said YES to the acceptability of a tax hike among the total number of homeowners expressing an opinion.

78.7% of renters said YES to the acceptability of a tax hike among the total number of renters expressing an opinion.

Businesses that Pay Taxes as a Direct Cost

- Given the economic situation of the past year, it is not surprising that businesses are highly resistant at this time to property tax increases.

Importance of Services and Attention of City Council Desired

Police and Fire Departments are the services that residents and businesses feel the City need not pay more attention to. On the other hand, both businesses and residents feel the following services are important to them, and City Council should pay more attention to:

- Support for green projects or infrastructure, such as homeowner grants to improve energy efficiency, reducing greenhouse-gas emissions, retrofitting City buildings or placing charging stations in public areas for electric vehicles
- Support for arts and cultural organizations (e.g., museums, art galleries, performing groups)
- Support for community service organizations that help people in need (e.g., shelters for the homeless, shelters for battered women and childcare facilities)



Opinions on Possible Service Reduction Measures

Stakeholder priorities were assessed in a general way by asking for opinions on possible service changes or reductions. Respondents were assured that the City would maintain all appropriate health and safety standards and were also told that any changes made would be planned to minimize the impact on the public.

Support significantly outweighs opposition on the following general types of reductions, if needed to balance the 2011 budget.

Businesses are generally more willing than residents to support some of these measures. But, on the whole, support is mixed among both stakeholder groups, indicating the degree to which the public appreciates the services provided by the City.

Except for the categories of “Reduce funding or grants to social, arts or cultural groups” and “Reduce “green” initiatives”, residents and business feel the same about the other measures.

Residents

Relative Opposition (Mean Score of 3.00 – 4.00)

Following are the measures to save costs and minimize tax increases that residents relatively opposed. They desire no compromise on these:

- Reduce public safety services while still maintaining minimum standards of safety (Mean Score 3.34)
- Reduce park and recreation programs (Mean Score 3.38)
- Reduce level of cleaning and maintenance of public buildings, properties and parks (Mean Score 3.61)
- Reduce frequency of garbage and recycling collection (3.71)
- Reduce infrastructure (roads and buildings) maintenance (3.80)
- Reduce funding or grants to social, arts or cultural groups (Mean Score 3.90)



Relative Support (Mean Score of 4.01 – 5.00)

Following are the measures to save costs and minimize tax increases that residents relatively supported. However, support was not too strong:

- Reduce enforcement of nuisance or minor City bylaws (e.g., noise, after-hours park, pet licensing (Mean Score 4.45)
- Reduce hours of operation at City facilities (Mean Score 4.31)
- Reduce the level of land-use planning and policy work (Mean Score 4.16)
- Reduce "green" initiatives (Mean Score 4.12)
- Hold fewer public consultations and hearings (Mean Score 4.04)

Businesses

Relative Opposition (Mean Score of 3.00 – 4.00)

Following are the measures to save costs and minimize tax increases that businesses relatively opposed. They desire no compromise on these:

- Reduce public safety services while still maintaining minimum standards of safety (Mean Score 3.52)
- Reduce park and recreation programs (Mean Score 3.72)
- Reduce level of cleaning and maintenance of public buildings, properties and parks (Mean Score 3.94)
- Reduce frequency of garbage and recycling collection (Mean Score 3.88)
- Reduce infrastructure (roads and buildings) maintenance (Mean Score 3.74)
- Reduce "green" initiatives (Mean Score 3.88)



Relative Support (Mean Score of 4.01 – 5.00)

Following are the measures to save costs and minimize tax increases that businesses relatively supported. However, support was not too strong:

- Reduce enforcement of nuisance or minor City bylaws (e.g., noise, after-hours park, pet licensing (Mean Score 4.43)
- Reduce hours of operation at City facilities (Mean Score 4.16)
- Reduce funding or grants to social, arts or cultural groups (Mean Score 4.08)
- Reduce the level of land-use planning and policy work (Mean Score 4.22)
- Hold fewer public consultations and hearings (Mean Score 4.07)

Public Consultation on the Budget

Surveys are the preferred method of providing input on the City's annual budget, with random telephone surveys being the most popular among residents. This group also prefers to use an online survey survey through the City's website, an online survey panel or contact via email, as well as attending public meetings or open houses.

Business people tend to prefer contact via email but also like the random telephone survey.

Slightly fewer respondents in both groups say they would participate in a mail survey.



Foreword

Background and Research Objectives

Since 1997, the City of Vancouver has consulted stakeholders in numerous ways to gauge opinion on budget priorities and on various methods of meeting shortfalls. Each year, the City is legally required to maintain a balanced budget, but fiscal pressures facing the City in recent years have increased significantly with rising costs for existing and new services and programs demanded by the public, downloading of responsibilities from senior governments and changes in previously anticipated revenues. To develop the most widely accepted course of action in such circumstances, the City seeks to understand the views of the public and business stakeholders on general and specific options for the types of cost reductions that may be required in 2011.

In 1997, the City gathered input from residents and businesses. From 1998 to 2005 only residents' opinions were polled in years of budget shortfalls. Since 2006, both businesses and residents have been surveyed. A set of core measures have been surveyed in each study, monitoring attitudes for shifts in and/or confirmation of public priorities and opinion. Accordingly, the research objectives are to track changes in resident and business attitudes on the following:

- Main local issues of concern
- Perceptions of City of Vancouver services
- Preference for fiscal approaches and options to deal with a budget shortfall
- Reaction to taxation alternatives



Methodology

The basic telephone methodology of past budget allocation surveys was replicated. However, advance notification of the survey and a budget flyer were not mailed to resident household and business samples, as had been done in the past few years.

Residential Survey

Random telephone interviews were conducted among residents of the City of Vancouver 18 years of age and over. A total of 509 interviews were completed, distributed equally across five regions of interest (Downtown/West End; plus the rest of the City divided into four quadrants, with 16th Avenue and Main Street defining the boundaries).

The regions were geo-mapped and random samples of households were drawn for each area, using a regularly updated database of published residential telephone listings. The “listed” telephone sample was augmented with a random-digit generated (RDG) sample in an attempt to include unlisted and cellphone-only phone numbers. Within each household, the eligible respondent was chosen at random (alternating male and female adult respondents, except in cases of same-sex households, in which one was selected at random). Up to five calls were made in attempting to complete an interview with each selected household/ respondent, a measure to minimize potential non-response bias.

At the data-processing stage, the residents’ sample was weighted into proper proportion on the basis of age within gender and region to match 2006 Canada census statistics for the City.



RESIDENTS Sample Distribution	
Total	509
Gender	
Male	245
Female	264
Age (years)	
18-24	28
25-34	71
35-44	92
45-54	121
55-64	109
65 and over	88

To ensure that this sample represented a typical cross-section of residents, the survey screened out households with anyone employed by the City, an elected City official or a member of a Business Investment Area (BIA). BIA members were included in the business survey sample.

In addition to English, alternative language interviewing was available to respondents in Chinese (Mandarin or Cantonese) and Punjabi.

Furthermore, based on a question about ethnic background / ancestry, 26% of the sample reports being of Chinese heritage. Other ethnic backgrounds include East Indian, European, First Nations, Anglo-Saxon, French, African and Middle Eastern.



Businesses

A random telephone survey was also conducted among a cross-section of businesses located in the City of Vancouver. Business owners and senior managers or others who made decisions about location planning were surveyed. Disproportionate sampling was used to enable examination of medium and large businesses, since 93% of businesses are small (fewer than 25 employees).

At the data-processing stage, the final sample was weighted back into proportion on the distribution of the sample frame based on business size (number of employees).

BUSINESSES Sample Distribution	
	<u>Actual</u>
	250
Company size (employees within Vancouver)	
Small (0-4 employees)	72
Medium I (5-9 employees)	90
Medium II (10-24 employees)	49
Medium III (25-99 employees)	30
Large (100 or more employees)	9
Company size (employees outside Vancouver)	
Small (0-4 employees)	185
Medium I (5-9 employees)	21
Medium II (10-24 employees)	20
Medium III (25-99 employees)	14
Large (100 or more employees)	10



Data Collection

All interviewing was conducted from the Market Dimensions CATI (computer-assisted telephone interviewing) facility in Toronto, at which telephone interviewing staff are supervised and monitored. In anticipation of the budget decision-making in December 2010, the fieldwork for the 2011 Budget Allocation study ran from Oct. 21 to Nov. 8, 2010, on weekdays among businesses from 8 a.m. to 5 p.m., and among residents between 4 p.m. and 9 p.m. and on Saturdays between 10 a.m. and 4 p.m. and Sundays between 1 and 7 p.m. Call-back appointments were scheduled to suit respondents, beginning at 8 a.m. and extending into the evenings and weekends as requested by businesses.

Copies of the questionnaires are appended (including the top-line results for each question and the past tracking data, where applicable).



Results

The results are presented here in the format of an Executive Overview summarizing the key findings, and a more comprehensive Detailed Findings section.

Statistical tolerance limits (or sampling margin of error) for a simple random sample at the 95% confidence level (or 19 times out of 20, if the study were to be repeated) are:

509 interviews +/- 4.2 percentage points

250 interviews +/- 6.1 percentage points

Base sizes shown in graphs and tables of this report reflect the actual (rather than weighted) number of interviews completed. Tracking results illustrated in the charts and graphs are presented for 1997 and for the most recent five years. The results for all years of tracking are shown in the top-line questionnaires appended to this report.



Detailed Findings

1. Most Important Issues Facing Vancouver

1.1 Top-of-Mind Issues

Survey respondents were asked to name, unprompted, the most noteworthy local issues — those that should receive the greatest attention from City Council.

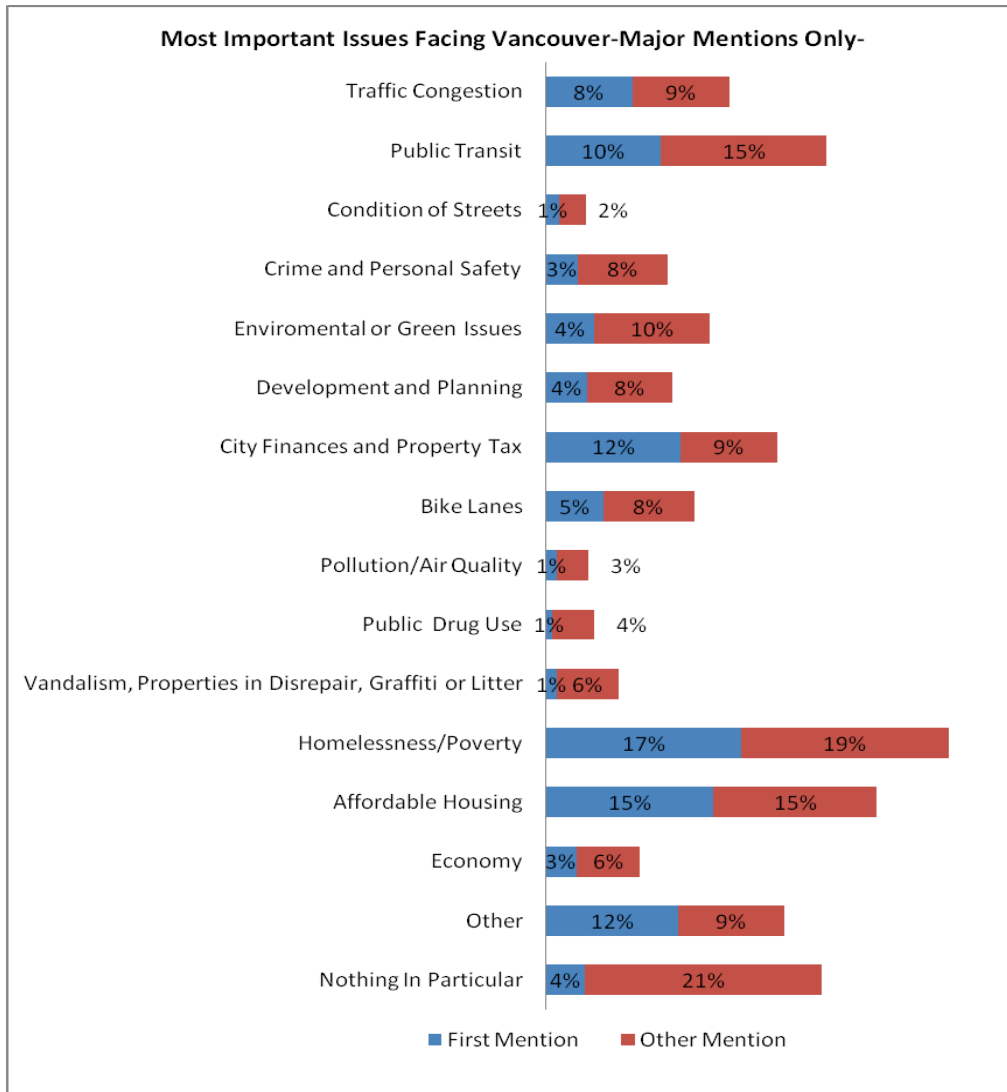
Overview

Residents and businesses agree on the one common issue of concern — City finances and property taxes. For residents, social issues continue to dominate their agenda, with Homelessness/Poverty being by far the most prominent — a consistent pattern since 2007. Affordable Housing emerges as residents' second concern for Council's attention.

Among business stakeholders, one major issue of concern raised by most of the respondents was taxation (City finances and taxes), followed by concerns about the Economy, Homelessness/Poverty, Development and Planning, Crime and Personal Safety, and Public Transit.

Residents

- Social issues continue to be the most pressing concern. Homelessness and Poverty specifically remain the focal point of social concerns, but other another aspect noted is the lack of Affordable housing. Since 2007, social issues are residents' foremost issue for City Council.
- Transportation, primarily public transit and traffic congestion, is another concern to residents (25%).
- Currently, taxation was a concern for residents, but the magnitude is not as high as it is for other issues.
- Crime was a third-level priority for residents last year. Specific issues raised range from personal safety to thefts/break-ins. However, concern for crime has declined significantly this year. Vandalism, property disrepair, graffiti and littering received minimal mention.



Base Residents: 509

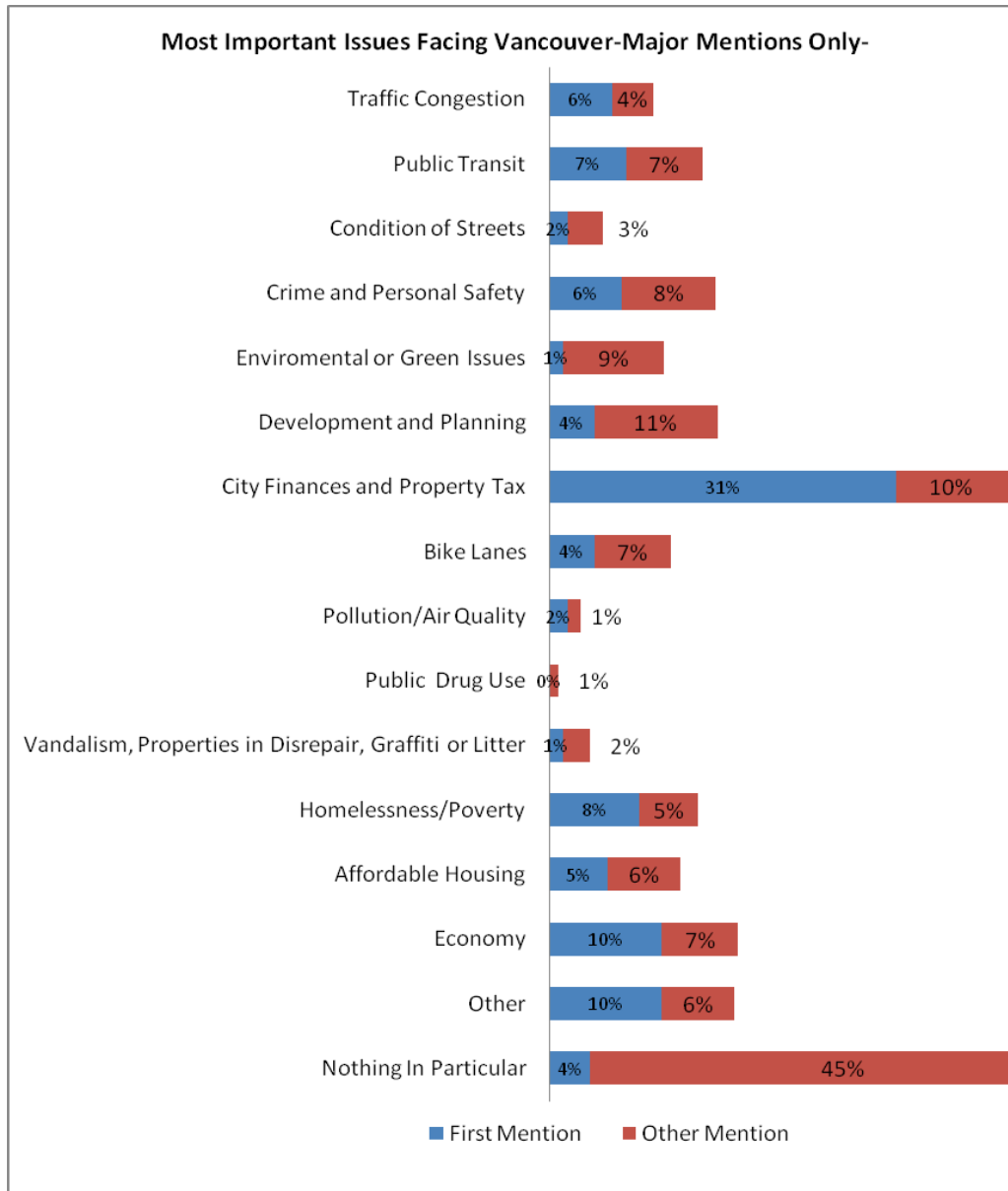
1a. Now, to begin our questions, in your view **as a resident of the community** in Vancouver, what is the most important local issue facing the City of Vancouver, that is the **one issue** you feel should receive the greatest attention from Vancouver's City Council? **(ONE RESPONSE ONLY)**

1b. PROBE...Are there any other important local issues? **(PROBE; ACCEPT 2 ANSWERS)**



Businesses

- Businesses express the greatest concern about taxation. Taxation concerns mainly reference City finances, property taxes and taxes in general.
- The Economy and Development and planning are among the concerns of businesses.
- Among social problems, Homelessness/Poverty is another concern reported by a few businesses.
- Concern over Crime and personal safety is at lower levels, as measured in the tracking. Crime covers the gamut of related issues, such as thefts/break-ins, personal safety and drug problems.
- Environmental concerns are stable, although rated far below other main issues of concern.
- Transportation issues are focused on traffic congestion more so than public transit or other transportation issues. Not seen as a major concern.



Base Business: 250

1a. Now, to begin our questions, in your view **as a member of the business community** in Vancouver, what is the most important local issue facing the City of Vancouver, that is the **one issue** you feel should receive the greatest attention from Vancouver's City Council? **(ONE RESPONSE ONLY)**

1b. **PROBE...**Are there any other important local issues? **(PROBE; ACCEPT 2 ANSWERS)**



2. Perceptions of City Services

Overview

Overall, the large majority of residents and businesses are at least “somewhat satisfied” with the quality of City services.

An overwhelming majority of businesses (86%) reported being “very satisfied” and “somewhat satisfied”. This is a significant improvement from previous years’ satisfaction levels. Businesses’ perceptions about the improved quality of City services have rebounded since 1997.

81% of residents were “very” or “somewhat satisfied”. This is a slight drop from last year, but a very consistent trend has been observed year-over-year.

2.1 Level of Satisfaction with City Services

Residents

Satisfaction with the overall quality of City services is similar to past years despite a small drop in 2011.

- Currently, 81% in total are “very or somewhat satisfied” with the quality of services provided by the City. 26% are “very satisfied”, which is a better rating than had been seen since 1997. Note that the “very satisfied” returns at this time to a higher level after lows in 2008, 2009 and 2010.
- Dissatisfaction remains low in 2011. The trend is consistent since 1997.

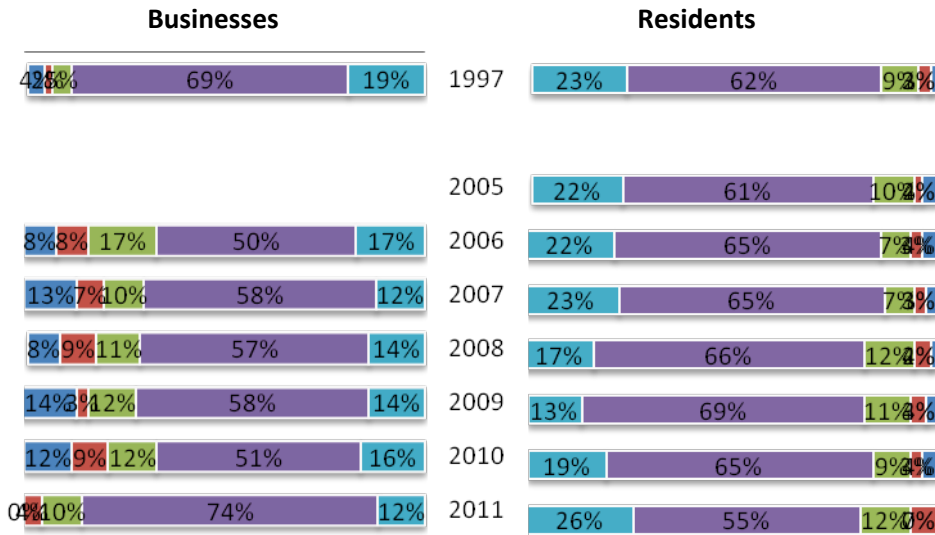
Businesses

Satisfaction has generally been quite stable among business operators in recent years, but the level of satisfaction has not reached that seen in the 1997 benchmark.

- The majority of the business operators (86%) are very or somewhat satisfied with the quality of city services. There has been a decreasing trend over time
- Dissatisfaction has returned to a typical level (14%), which was close to the benchmark year in 1997. However, there was a brief improvement noted in 2009 (15%).



Level of Satisfaction with City Services



Legends:

- Very Satisfied
- Somewhat Satisfied
- Somewhat Dissatisfied
- Very Dissatisfied
- Don't Know

Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

2. Generally speaking, are you satisfied or dissatisfied with the overall quality of services provided to *businesses* by the City of Vancouver? Probe...Would that be very satisfied/somewhat satisfied/dissatisfied?



2.2 Perceived Change in Quality of City Services over Past Few Years

Residents

Resident perceptions about the change in quality of City services are showing signs of recovery for 2011 after a declining trend seen in the past two surveys.

- Currently, 37% think the quality has improved in the past few years (“much better” or “somewhat better”), a positive sign and reaching the all-time high since 1997.
- At the same time 28% of residents perceive deteriorating quality (“somewhat worse” or “much worse”), similar to many past surveys. Surprisingly, 11% perceive quality of service being “much worse”, the highest response rate for this option over the past years. More likely to perceive a deterioration are longer-term residents (10 or more years).
- The proportion perceiving no change in quality of services is showing an increasing trend after a slight dip last year, and has returned to a more typical level (35%).

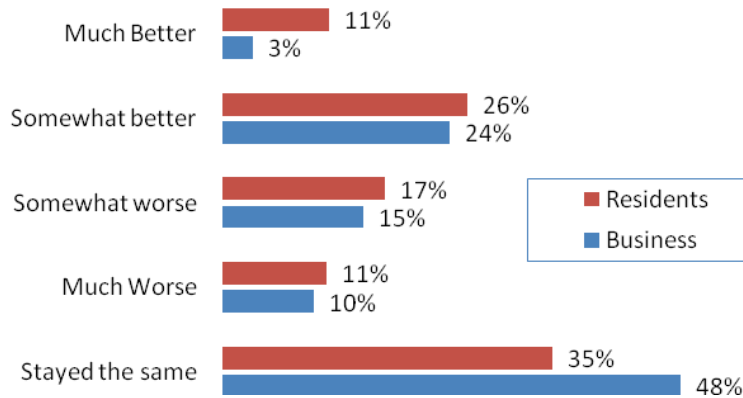
Businesses

Perceptions among business operators remain stable for 2011, with the significant improvement found in 2006 being maintained and the decline noted in March 2009 now reversed.

- At this time, 27% of business operators believe the quality of City services has improved (“much better” or “somewhat better”) in the past few years, rebounding from a drop in March 2009 (20%) and now more typical of prior recent tracking.
- Meanwhile, the proportion of businesses who consider the quality to have worsened (25%) is slightly higher than in previous years.
- 48% perceive no change, which is the highest level among all the past years.



Overall Quality of Service Provided



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

3. *And, would you say that the overall quality of service provided by the City of Vancouver has got better or worse over the past few years? Probe...Would that be much/somewhat better/worse?*



2.3 Perceived Value of Services

Perception is quite high among residents with most having a good opinion of the value they receive for the City tax dollars they pay. Businesses that pay property taxes as a direct cost also feel they get good value for the tax dollars they pay.

Residents

Among homeowners, there continues to be majority agreement that they receive “very” or “fairly good” value (77%), although 20% say ‘very good’ value. A record number of residents feel that they receive ‘very good value’ for the tax dollars they pay.

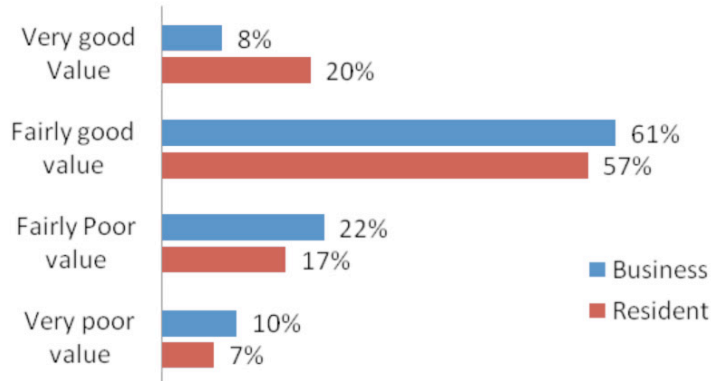
Businesses

Opinion on perceived value appears to be in high within the business community at this time. A record 61% of businesses feel they get “fairly good value”. The efforts made by City have shifted the gears of public perception, as is shown by the declining trend in the “poor value” ratings.

In this measure, the proportion of businesses rating the value from their City tax dollars as “very good” or “fairly good” is far superior than the rating “very poor” or “fairly poor” (69% versus 32%, respectively) .



**Overall Value of Services Received
from the City**



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)



3. Importance of Services and Attention of City Council Desired

The City of Vancouver provides a variety of services to businesses in the City. In recent tracking, the question was asked about the importance of each service offered to businesses and residents in Vancouver — that is, something they feel City Council should pay strong attention to.

Police and Fire Departments are services that both residents and businesses feel the City need not pay more attention to. On the other hand, both businesses and residents feel the following services are important to them, and City Council should pay more attention to:

- Support for green projects or infrastructure, such as homeowner grants to improve energy efficiency, reducing greenhouse-gas emissions, retrofitting City buildings or placing charging stations in public areas for electric vehicles
- Support for arts and cultural organizations (e.g., museums, art galleries, performing groups)
- Support for community service organizations that help people in need (e.g., shelters for the homeless, shelters for battered women and childcare facilities)

Please note: Businesses were more critical of most of the services provided by the City.

Residents

Need More Attention (Mean Score of 6.35 – 6.75)

The following services are important to residents, and they feel City Council should pay more attention to:

- Support for green projects or infrastructure (Mean Score 6.34), such as homeowner grants to improve energy efficiency, reducing greenhouse-gas emissions, retrofitting City buildings or placing charging stations in public areas for electric vehicles
- Support for community service organizations that help people in need (Mean Score 6.54), such as shelters for the homeless, shelters for battered women and childcare facilities
- Support for arts and cultural organizations (Mean Score 6.60), such as museums, art galleries, performing groups
- Management of the traffic in the city (Mean Score 6.68), such as the City plan, neighbourhood planning



Need Moderate Attention (Mean Score of 6.75 – 7.15)

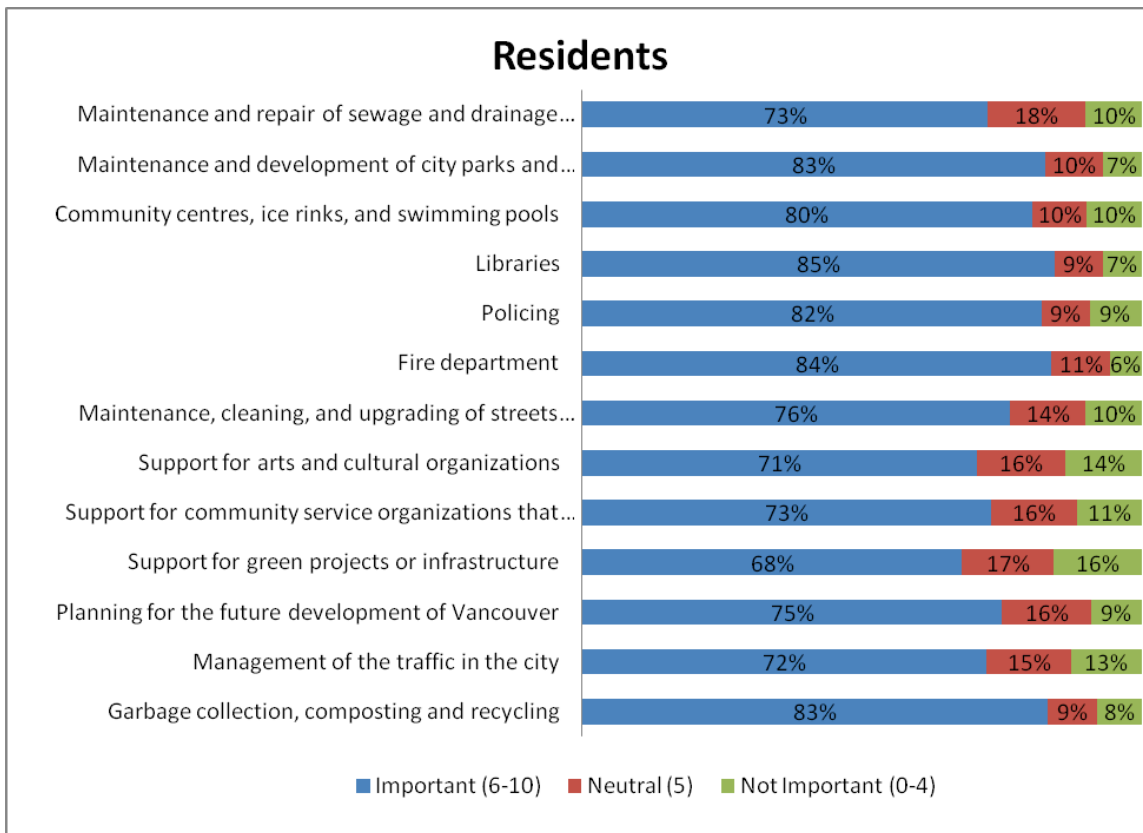
The following services are important to residents, and they feel City Council should pay moderate attention to:

- Maintenance, cleaning and upgrading of streets and sidewalks (Mean Score 6.90)
- Maintenance and repair of sewage and drainage systems (Mean Score 6.98)
- Planning for the future development of Vancouver (Mean Score 6.94)

Need Less Attention (Mean Score of 7.15 and above)

The following services are important to residents, and they feel City Council should pay less attention to.

- Community centres, ice rinks and swimming pools (Mean Score 7.26)
- Maintenance and development of City parks and beaches (Mean Score 7.42)
- Garbage collection, composting and recycling (Mean Score 7.45)
- Libraries (Mean Score 7.64)
- Policing (Mean Score 7.72)
- Fire department (Mean Score 7.87)



Base Residents
 1997 (n=1,000)
 1999(n=605)
 2001 (n=602)
 2002 (n=600)
 2003 (n=608)
 2004 (n=602)
 2005 (n=636)
 2006 (n=607)
 2007 (n=601)
 2008 (n=600)
 2009 (n=600)
 2010 (n=505)
 2011 (n=509)

Base Business
 1997 (n=300)
 2006(n=353)
 2007 (n=350)
 2008 (n=300)
 2009 (n=300)
 2010 (n=251)
 2011 (n=250)

5. As you may know, the City of Vancouver provides a variety of different services to you as a resident. I'm going to read a list of these services, and then ask how important each service is to you as a resident, that is, something you feel City Council should pay strong attention to.

Let's use a scale from 0 to 10, where "0" means the service is "Not at all important" to you, and should not be given any priority at all by City Council, "10" means the service is "Extremely important" to you, and should be given top priority, and a "5" means the service is neither important nor unimportant to you. Remember, you can pick any number between 0 and 10. The first service is **(READ ITEM – RANDOMIZE)**. How important is this to you as a resident? What about **(READ NEXT ITEM)?**



Businesses

Need More Attention (Mean Score of 6.35 – 6.75)

The following services are important to businesses, and they feel City Council should pay more attention to:

- Support for green projects or infrastructure (Mean Score 6.34), such as homeowner grants to improve energy efficiency, reducing greenhouse-gas emissions, retrofitting City buildings or placing charging stations in public areas for electric vehicles
- Support for arts and cultural organizations (Mean Score 6.36), such as museums, art galleries, performing groups
- Support for community service organizations that help people in need (Mean Score 6.60), such as shelters for the homeless, shelters for battered women and childcare facilities
- Community centres, ice rinks, and swimming pools (Mean Score 6.62)
- Management of the traffic in the City (Mean Score 6.59), such as the City plan, neighbourhood planning
- Libraries (Mean Score 6.64)
- Maintenance, cleaning and upgrading of streets and sidewalks (Mean Score 6.70)
- Planning for the future development of Vancouver (Mean Score 6.71)
- Garbage collection, composting and recycling (Mean Score 6.74)

Need Moderate Attention (Mean Score of 6.75 – 7.15)

The following services are important to businesses, and they feel City Council should pay moderate attention to:

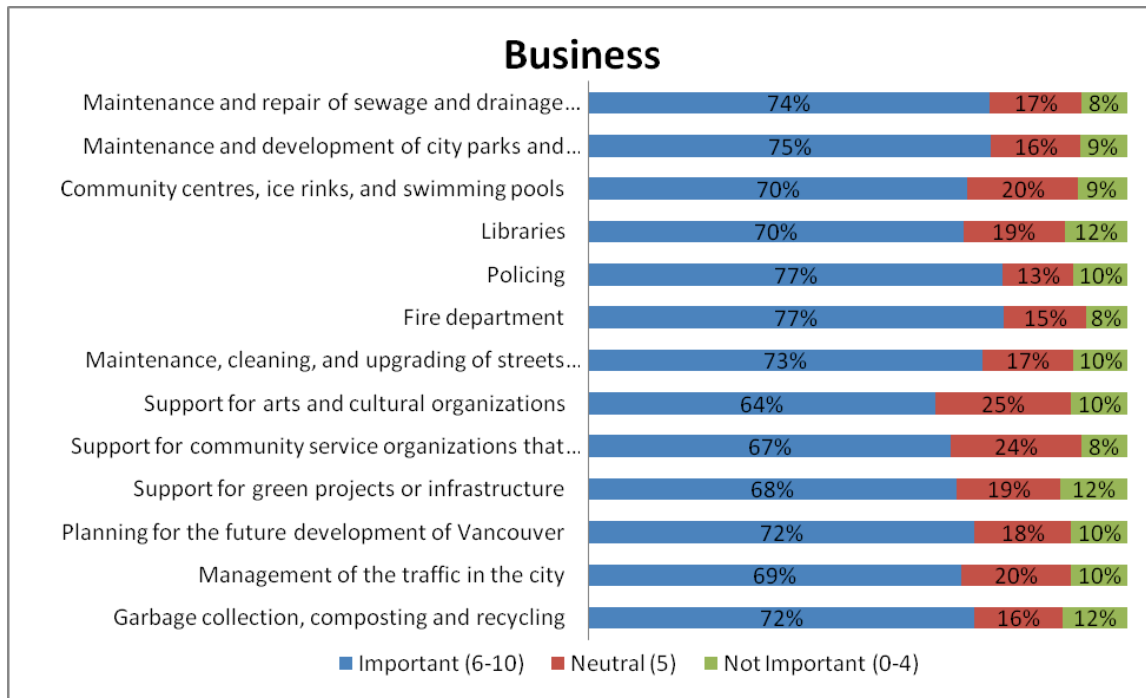
- Maintenance and development of City parks and beaches (Mean Score 6.80)
- Maintenance and repair of sewage and drainage systems (Mean Score 6.80)



Need Less Attention (Mean Score of 7.15 and above)

The following services are important to businesses, and they feel City Council should pay less attention to:

- Policing (Mean Score 7.32)
- Fire department (Mean Score 7.41)



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

5. As you may know, the City of Vancouver provides a variety of different services to *businesses in the city*. I'm going to read you a list of some of these services, and ask you how important each service is to you as a *member of the business community in Vancouver*, that is, something you feel City Council should pay strong attention to.

Let's use a scale from 0 to 10, where "0" means the service is "Not at all important" to you, and should not be given any priority at all by City Council, ... "10" means the service is "Extremely important" to you, and should be given top priority, ... and a "5" means the service is neither important nor unimportant to you. Remember, you can pick any number between 0 and 10. The first service is [READ ITEM – RANDOMIZE]. How important is this to you as a *member of the business community*? What about [READ NEXT ITEM]?



4. Reactions to Fiscal Options for Managing the City's Budget

4.1 Preferred Fiscal Management Option

Three fiscal management options were presented to respondents, who were then asked to choose which one would be most preferred to find further savings of up to \$20 million in order to balance the 2011 budget.

- Increase property taxes by up to 2%
- Reduce City services, hours, staffing and/or increase user fees
- Use a mix of property tax increases and service cuts and, if needed, increased user fees

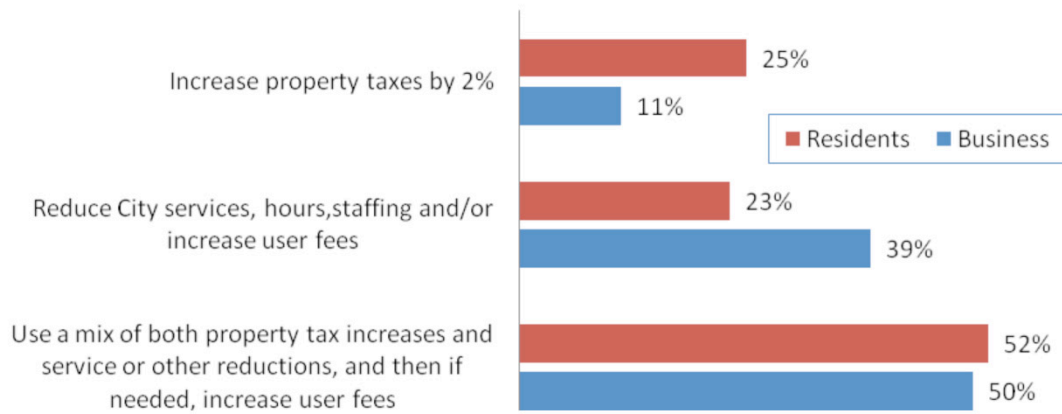
On the whole, both stakeholder groups do not approve of using property tax increases and reducing City services. However, the findings reveal that the third approach — the mix of both (tax increases and/or reducing City services) — have sizable support, as mentioned by half of the businesses and residents. Both residents and businesses would not like to reduce City services with increased fees. Both groups' ratings dropped by at least 5% from last year's ratings for this option.

There were mixed reactions from residents on a tax increase or reducing services. One-third of residents preferred to increase property taxes, while almost the same number preferred to reduce City services.

Among businesses that pay property taxes directly, there is a tendency to favour the service reductions with increased user fees (39%, versus 11% for a property tax increase). When looking at businesses in total, the pattern overall is similar, although those who pay only rent tend to be split in opinion.



Preferred Way for City to Find Savings up to \$20 million



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

7a. Now, to balance the 2011 budget as required by law, and after all savings have been identified by staff, the City may need to find further savings of up to \$20 million. To do this, which one of these three options would you prefer:

[READ STARTING AT* ACCEPT ONE ANSWER ONLY]

The first is ...; The next one is ...; the last one is **CONFIRM CHOICE & RE-READ RESPONSE.**

1. Increase **business** property taxes by up to **2 percent**?
2. Reduce city services, hours, staffing and/or increase user fees?
3. Use a mix of both (ROTATE) [property tax increases] AND [service or other reductions], and then if needed, increase user fees.

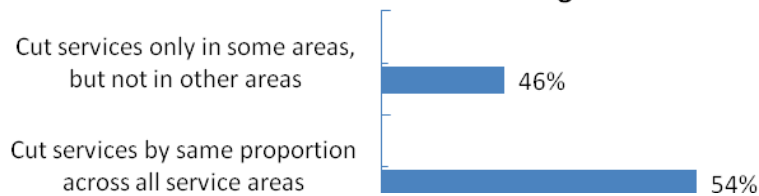


4.2 General Approach to Service Cuts

Businesses' views are essentially the same regarding the preferred approach for making service cuts if they were to be implemented. More than half of businesses would prefer to see higher cuts across all service areas, and almost half would prefer to cut services only in some areas but not in other areas.

Although not directly comparable, the findings are generally consistent with preferences seen in the past regarding the basic approach to service cuts.

Preference Method for Making Service Cuts



Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

7b. OPTIONAL: If City services need to be reduced, would you prefer that the City: ROTATE ORDER

1. *Cut services by same proportion across all service areas OR*
2. *Cut services only in SOME areas, but not in others.*



5. Taxation Alternatives

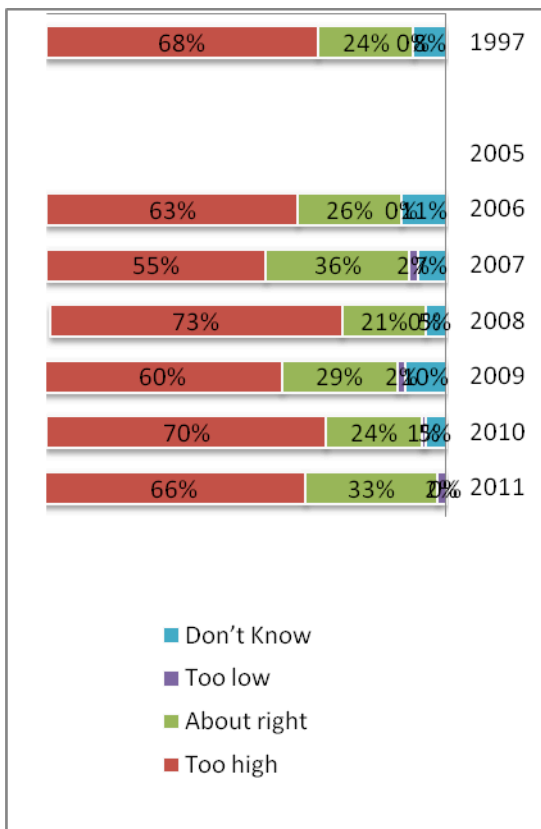
Overview

Homeowners and business operators who pay property taxes as a direct cost both have a tendency to believe that their property taxes are too high. Almost half of residents (44%) said taxes are too high, whereas 66% of businesses felt property taxes are too high. One-third (33%) of businesses said the property taxes they currently pay are “about right”, while slightly more than half (52%) of the residents said the same. Few businesses and residents (less than 5%) said that their property taxes are low.

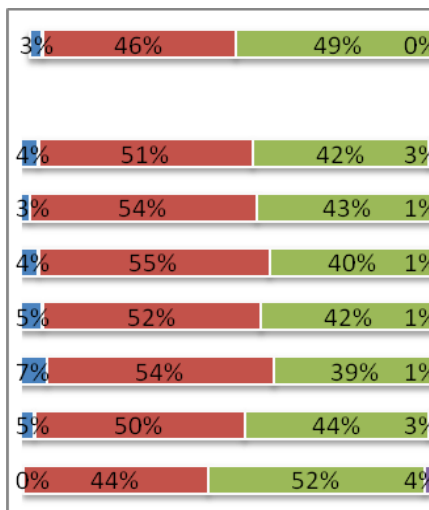


Among Those Who Pay Property Taxes Directly

Businesses



Residents



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

6. *And, in general, would you say that the property taxes you currently pay on your residence are too high, too low, or about right?*
Probe... *Would that be much too high/low?*



5.1 Assessment of Current Level of Taxes Paid

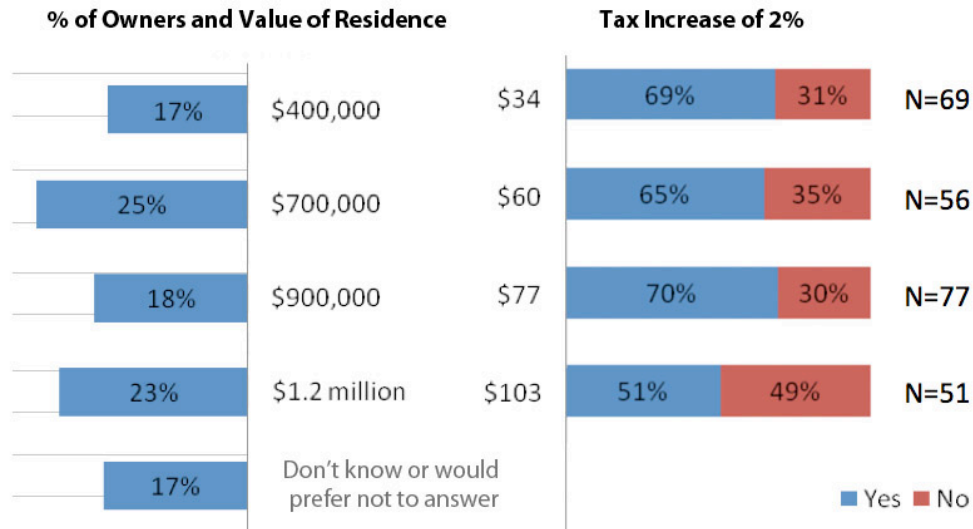
Homeowners were divided into four groups based on the approximate self-reported value of their home (closest to \$400K, \$700K, \$900K, \$1,200K). Due to rising property values in the past few years, note that the lower property values have had declining sample sizes. Hence, homeowners who have property worth \$1,200,000 are included for the first time in the survey.

Residents	<u>1997</u>	<u>1999</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
	(463)	(261)	(270)	(292)	(240)	(278)	(299)	(317)	(347)	(360)	(370)	(285)	(306)
	%	%	%	%	%	%	%	%	%	%	%	%	%
\$400,000	37	38	32	28	32	30	44	36	29	26	28	25	17
\$700,000	21	13	19	19	20	26	30	21	27	31	24	32	25
\$900,000	-	-	-	-	-	-	-	19	25	31	27	32	18
\$1,200,000	-	-	-	-	-	-	-	-	-	-	-	-	23
Don't know/refused	5	5	5	4	11	9	7	8	6	6	14	6	17

5.2 Acceptability of Different Levels of Property Tax Increases

The acceptability of property tax increases was measured for 2% increases in the context of maintaining the current level of services provided by the City. In each case, depending on the property value, an actual dollar value (\$34, \$60, \$77, \$103) corresponding to the value of the resident's home was also provided to survey respondents.

At the sample sizes in this study for each of the property value groupings, there are no statistically significant differences in the support of 2% increase in taxes — almost two-thirds of all the homeowners at most home values showed support for an increase. The exception was among homeowners with property worth \$1200K, of whom only half showed support for a 2% tax increase.



(Treat with caution, as the sample size for all the groups is very small.)

- Base Residents
- 1997 (n=1,000)
- 1999(n=605)
- 2001 (n=602)
- 2002 (n=600)
- 2003 (n=608)
- 2004 (n=602)
- 2005 (n=636)
- 2006 (n=607)
- 2007 (n=601)
- 2008 (n=600)
- 2009 (n=600)
- 2010 (n=505)
- 2011 (n=509)

9. Next, what is the approximate assessed value of your residence? Would it be closer to...**READ LIST**

Thinking about tax increases for the moment. In order for the City of Vancouver to cover the budget shortfall without any cuts in service. Would you be willing to pay this amount in order to maintain the current level of services provided by the City?

10. Increasing the amount you pay in property taxes by about 2 percent, or possibly an additional **\$34** next year.

11. Increasing the amount you pay in property taxes by about 2 percent, or possibly an additional **\$60** next year.

12. Increasing the amount you pay in property taxes by about 2 percent, or possibly an additional **\$77** next year.

13. Increasing the amount you pay in property taxes by about 2 percent, or possibly an additional **\$103** next year.

Among homeowners with \$400K (\$34 next year) to maintain present service levels.

Among homeowners with \$700K properties, almost two-thirds (70%) would also accept a 2% tax increase (\$60) to maintain the same level of City services.

Among those with \$900K homes, 65% of homeowners expressed their support for a property tax increase (\$77).



Among homeowners with \$1,200K properties, 51% would accept a 2% tax hike (\$103 next year) to maintain present service levels.

For all homeowners combined, we find that acceptance of property tax increases in order to maintain the same level of City services is quite typical this year: 62.8% of homeowners would accept a 2% tax hike to maintain present service levels.

Resident Home Renters

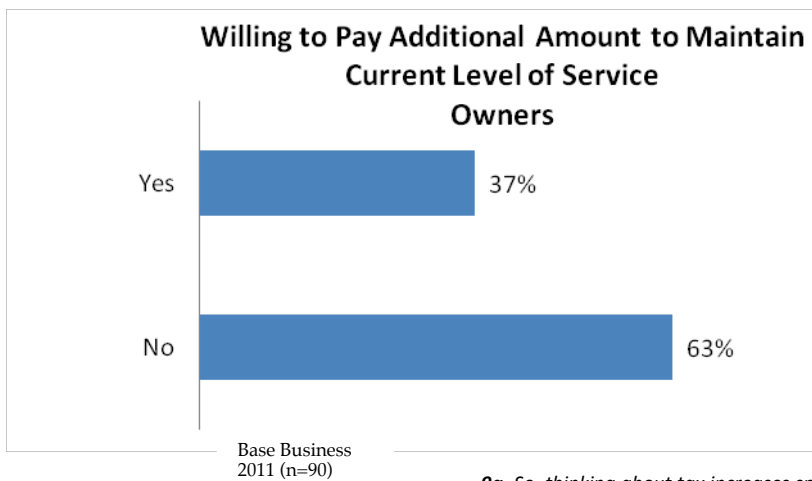
A large majority (79%) of home renters continue to support paying an extra \$2 per month in rent in order to maintain the current level of services provided by the City of Vancouver.

Residents	<u>1997</u>	<u>1999</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Base (renters)	(537)	(342)	(331)	(304)	(355)	(312)	(323)	(269)	(242)	(231)	(219)	(200)	(178)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	89	83	84	85	85	81	83	81	87	82	76	71	79
No/don't know/refused	11	17	16	15	15	17	15	19	13	18	24	25	21

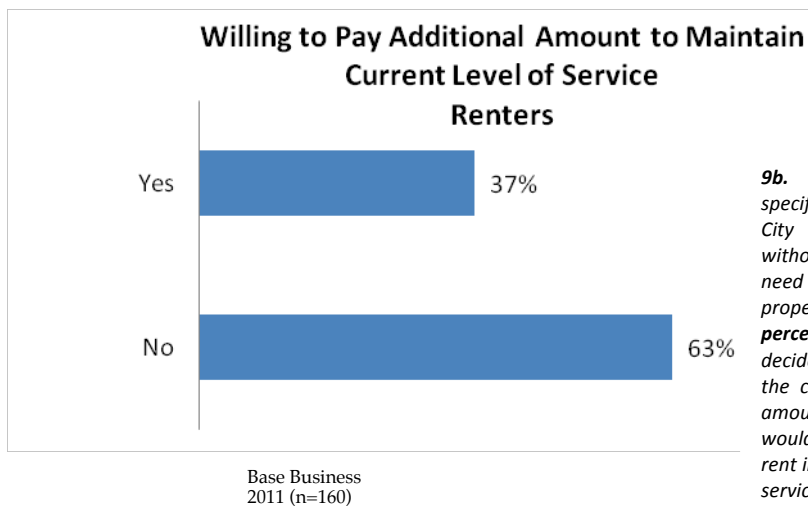
Overall, 69.4% of homeowners and renters combined would accept a 2% property tax hike to maintain present service levels.

Businesses that Pay Taxes as Direct Cost

Businesses are highly resistant at this time to property tax increases; slightly more than one-third (37%) are willing to accept a 2% property tax hike to maintain the current level of services — dramatically lower than seen in the past. The message from the business community is explicit: a large portion of businesses will not or cannot accept a 2% property tax increase.



9a. So, thinking about tax increases specifically for the moment, in order for the City of Vancouver to raise \$20 million without any cuts in service, it would possibly need to raise the amount you pay in property taxes by up to 2 percent. As a member of Vancouver's business community, would you be willing to pay this amount in order to maintain the current level of services provided by the City?



9b. So, thinking about tax increases specifically for the moment, in order for the City of Vancouver to raise \$20 million without any cuts in service, it would possibly need to raise the level of taxes your property owner pays by possibly up to 2 percent. Your property owner could in turn decide to pass on to you SOME OR ALL of the cost of a tax increase by raising the amount you pay in rent. Thinking about this, would you be willing to pay an increase in rent in order to maintain the current level of services provided by the City of Vancouver?

Businesses that rent their premises but do not pay property taxes directly have traditionally been divided on willingly incurring an additional 2% rent increase to maintain the current level of City services. In the context of the 2011 budget shortfall, this response rate is exactly the same as for the owners — i.e., slightly



more than one-third (37%) are willing to accept a 2% property tax hike to maintain the current level of services.

5.3 City's Approach Towards Taxes and Services

Three fiscal management options were presented to respondents, who were then asked to choose which one would be most preferred to find further savings of up to \$20 million in order to balance the 2011 budget. Then, respondents were asked later in the survey which option they would prefer that the City take.

Directionally, the trend is seen similar in both the replies for the following:

- Increase property taxes by up to 2%
- Reduce City services, hours, staffing and/or increase user fees
- Use a mix of property tax increases and service cuts and, if needed, increased user fees

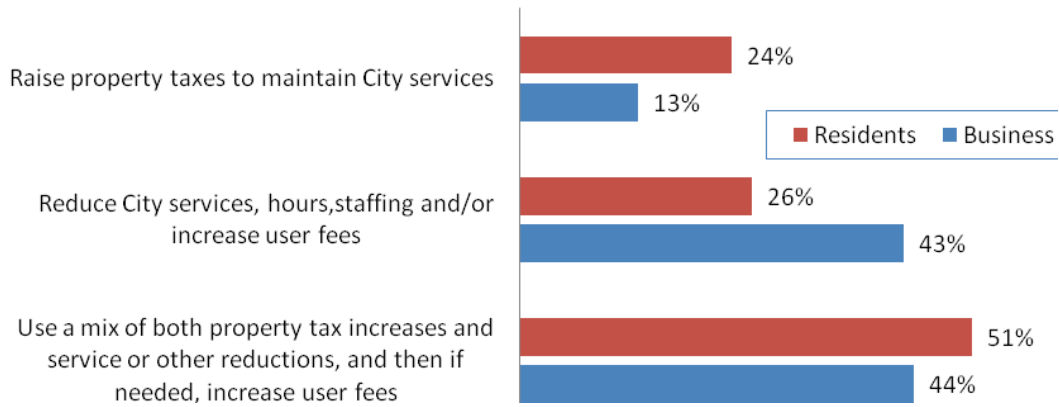
On the whole, both stakeholder groups do not approve of using property tax increases and reducing City services. However, the findings reveal that the third approach — a mix of both (tax increase and/or reduce City services) — has sizable support among both residents and businesses.

There were mixed reactions from the residents regarding a tax increase and reducing services. One-fourth of the residents preferred to increase property taxes, and the almost the same number preferred to reduce City services.

Among businesses that pay property taxes directly, there is a tendency to favour the service reductions with increased user fees (43%, versus 13% for a property tax increase).



Approach City should take



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

12. When it comes right down to it, which approach would you prefer that the City take? (READ & ROTATE ORDER; ACCEPT ONE ANSWER ONLY)



6. Support for Service Reductions to Save Costs and Minimize Tax Increases

Prior to discussing specific tax increase amounts, residents and businesses were asked about their priorities in a general way if the City needed to find cost savings by making changes to services. Respondents were assured that the City would maintain all appropriate health and safety standards and were also told that any changes made would be planned to minimize the impact on the public.

A list of possible cost saving measures was read to respondents (in random order). They were asked to rate their opinion of each item on a scale from zero to 10, where zero represented “strongly opposed” and 10 represented “strongly support”.

Businesses are generally more willing than residents to support some of these measures, but, on the whole, support is mixed among both stakeholder groups, indicating the degree to which the public appreciates the services provided by the City.

Except for the categories of “Reduce funding or grants to social, arts or cultural groups” and “Reduce “green” initiatives”, residents and business feel the same about the other measures.

Residents

Relative Opposition (Mean Score of 3.00 – 4.00)

Following are the measures to save costs and minimize tax increases that residents relatively opposed. They desire no compromise on these:

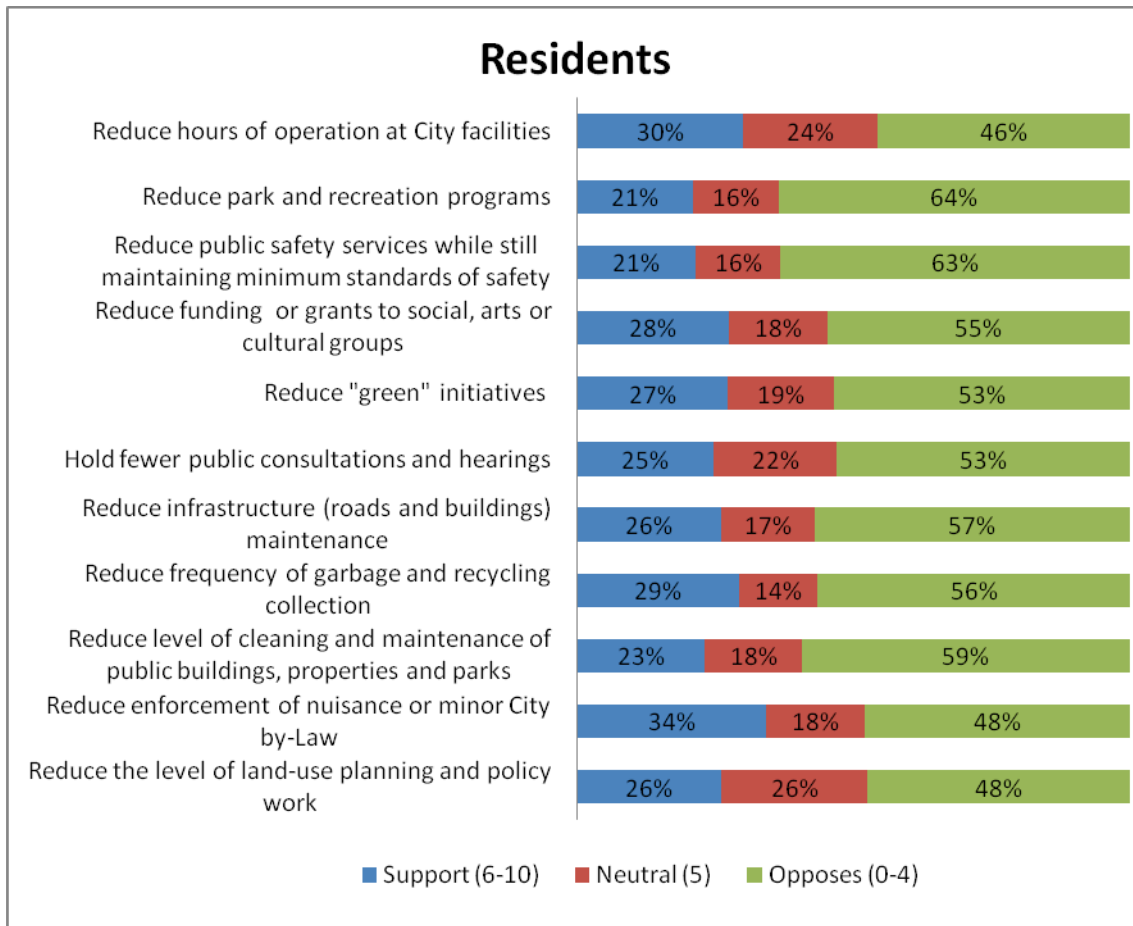
- Reduce public safety services while still maintaining minimum standards of safety (Mean Score 3.34)
- Reduce park and recreation programs (Mean Score 3.38)
- Reduce level of cleaning and maintenance of public buildings, properties and parks (Mean Score 3.61)
- Reduce frequency of garbage and recycling collection (Mean Score 3.71)
- Reduce infrastructure (roads and buildings) maintenance (Mean Score 3.80)
- Reduce funding or grants to social, arts or cultural groups (Mean Score 3.90)



Relative Support (Mean Score of 4.01 – 5.00)

Following are the measures to save costs and minimize tax increases that residents relatively supported. However, support was not too strong:

- Reduce enforcement of nuisance or minor City bylaws (e.g., noise, after-hours park, pet licencing (Mean Score 4.45)
- Reduce hours of operation at City facilities (Mean Score 4.31)
- Reduce the level of land-use planning and policy work (Mean Score 4.16)
- Reduce “green” initiatives (Mean Score 4.12)
- Hold fewer public consultations and hearings (Mean Score 4.04)



Base Residents
2011 (n=509)

8. Now, let's talk about priorities in a **general** way. Please keep in mind that any changes would be planned to **minimize** the impact on the public.

*I'm going to read a list of possible ways the City could find cost savings. For each one please tell me the extent to which you would support or oppose the City taking this measure to save costs and minimize tax increases. Please rate each on a scale from 0 to 10 where "0 means strongly oppose" and "10 means strongly support". Starting with [RANDOMIZE LIST]. **INTERVIEWER: CONFIRM UNDERSTANDING OF SCALE: IF '7-10', SAY: So you support? IF '0-3', SAY: So you oppose?***



Businesses

Relative Opposition (Mean Score of 3.00 – 4.00)

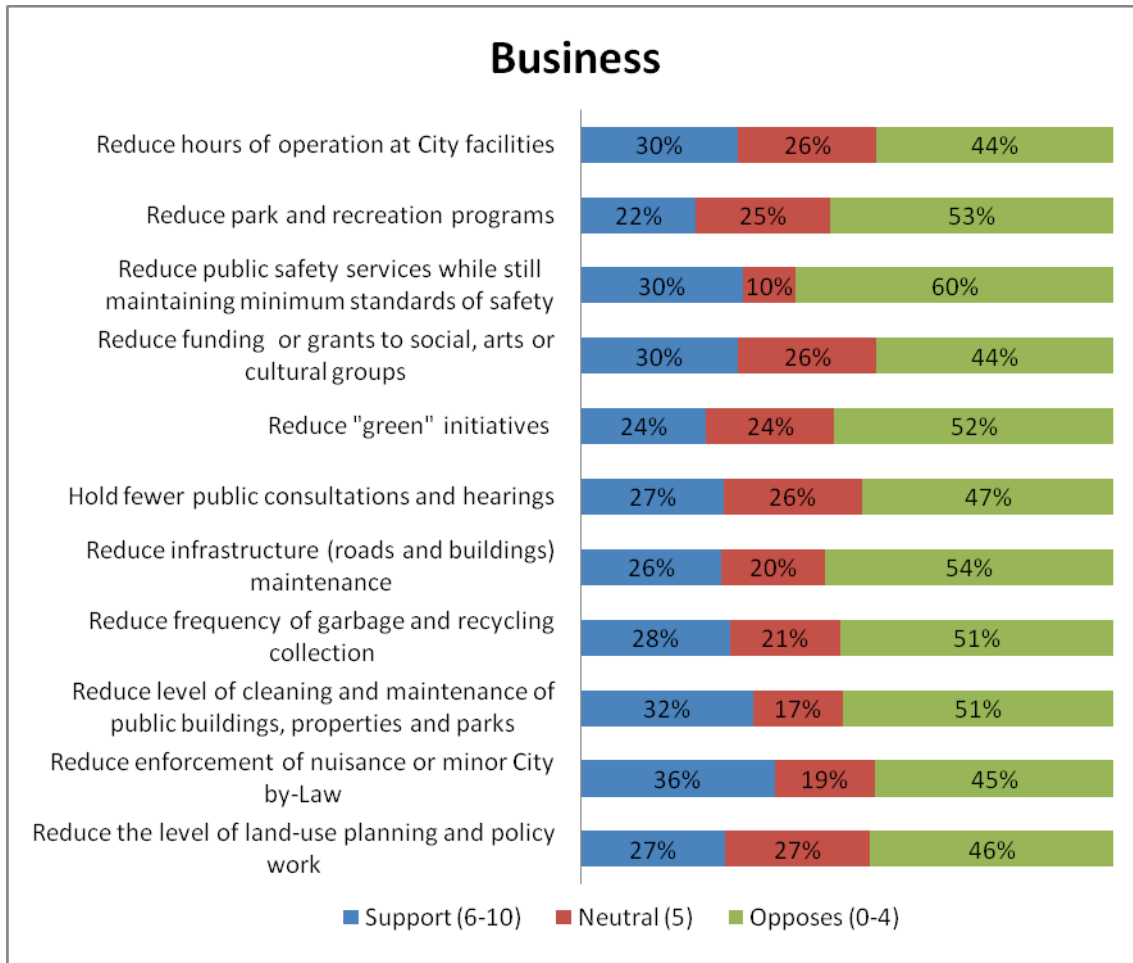
Following are the measures to save costs and minimize tax increases that residents relatively opposed. They desire no compromise on these:

- Reduce public safety services while still maintaining minimum standards of safety (Mean Score 3.52)
- Reduce park and recreation programs (Mean Score 3.72)
- Reduce level of cleaning and maintenance of public buildings, properties and parks (Mean Score 3.94)
- Reduce frequency of garbage and recycling collection (Mean Score 3.88)
- Reduce infrastructure (roads and buildings) maintenance (Mean Score 3.74)
- Reduce “green” initiatives (Mean Score 3.88)

Relative Support (Mean Score of 4.01 – 5.00)

Following are the measures to save costs and minimize tax increases that residents relatively supported. However, support was not too strong:

- Reduce enforcement of nuisance or minor City bylaws (e.g., noise, after-hours park, pet licencing) (Mean Score 4.43)
- Reduce hours of operation at City facilities (Mean Score 4.16)
- Reduce funding or grants to social, arts or cultural groups (Mean Score 4.08)
- Reduce the level of land-use planning and policy work (Mean Score 4.22)
- Hold fewer public consultations and hearings (Mean Score 4.07)



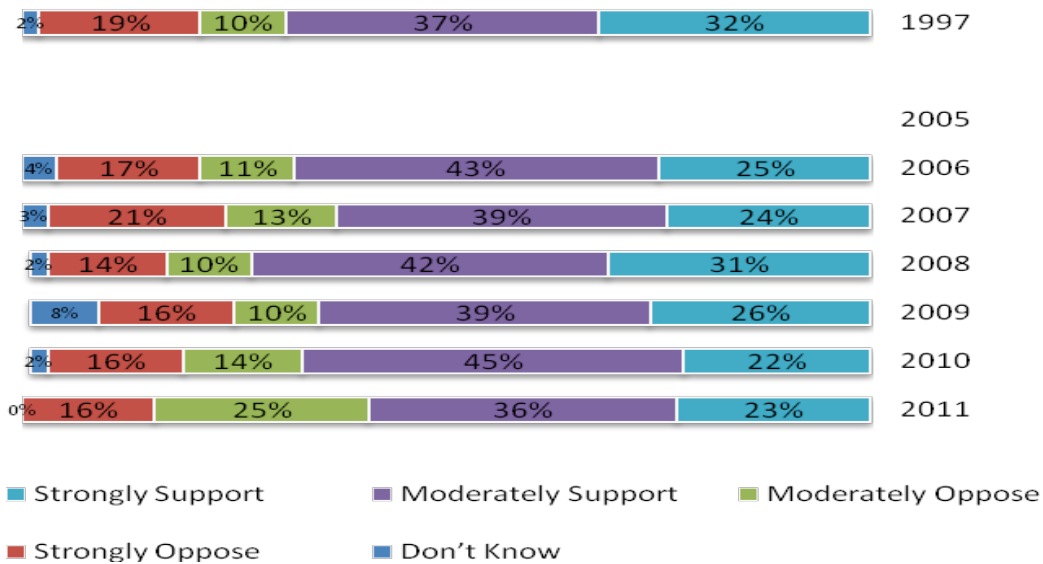
Base Business
2011 (n=250)

8. Now, let's talk about priorities in a **general** way. Please keep in mind that any changes would be planned to **minimize** the impact on the public.

*I'm going to read a list of possible ways the City could find cost savings. For each one please tell me the extent to which you would support or oppose the City taking this measure to save costs and minimize tax increases. Please rate each on a scale from 0 to 10 where "0 means strongly oppose" and "10 means strongly support". Starting with [RANDOMIZE LIST]. **INTERVIEWER: CONFIRM UNDERSTANDING OF SCALE: IF '7-10', SAY: So you support? IF '0-3', SAY: So you oppose?***



Businesses were also asked if they support or oppose the City charging higher user fees for these services and using the extra money to help pay for other City services. User fees are currently used to help recover the costs of providing certain City services, such as permits and licences, recreation programs or sewer and water fees.



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

10. As you may know, user fees are currently used to help recover the costs of providing certain City services such as permits and licenses, recreation programs, or sewer and water fees. Would you *support* or *oppose* the City charging higher user fees for these services and using the extra money to help pay for other city services?

PROBE...Would that be strongly or moderately support/oppose?

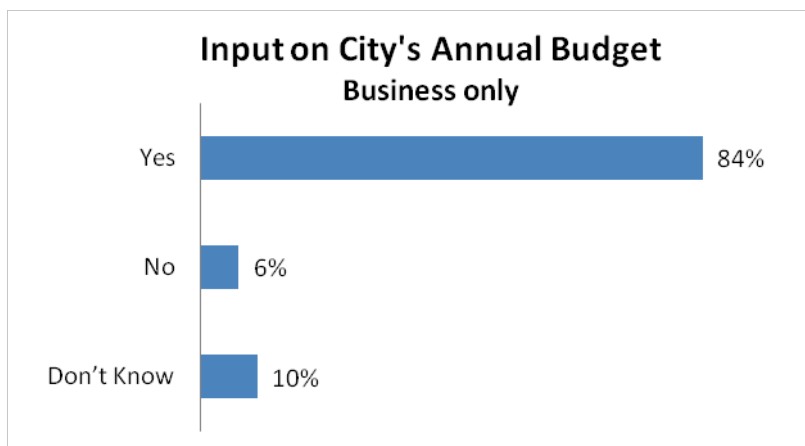
More than half of the businesses support the City charging higher user fees for these services and using the extra money to help pay for other City services. At the same time, 41% of the businesses oppose the same.



7. Communications

7.1 Importance of Providing Input to Annual Budget Process

Once again, the vast majority of residents and business owners/operators surveyed appreciate the opportunity to provide input to the annual budget process, saying that it is important to them to do so. This sentiment is shared by large majorities in all segments of the two stakeholder groups.



Base Business
2011 (n=250)

13. *Is providing input on the City's annual budget important to you, such as you are doing right now with this survey?*



7.2 Public Consultation Preferences

Surveys are the preferred method of providing input on the City’s annual budget with random telephone surveys being the most popular among residents. This group also prefers to use an online through the City’s website, an online survey panel or contact via email, as well as attending public meetings or open houses.

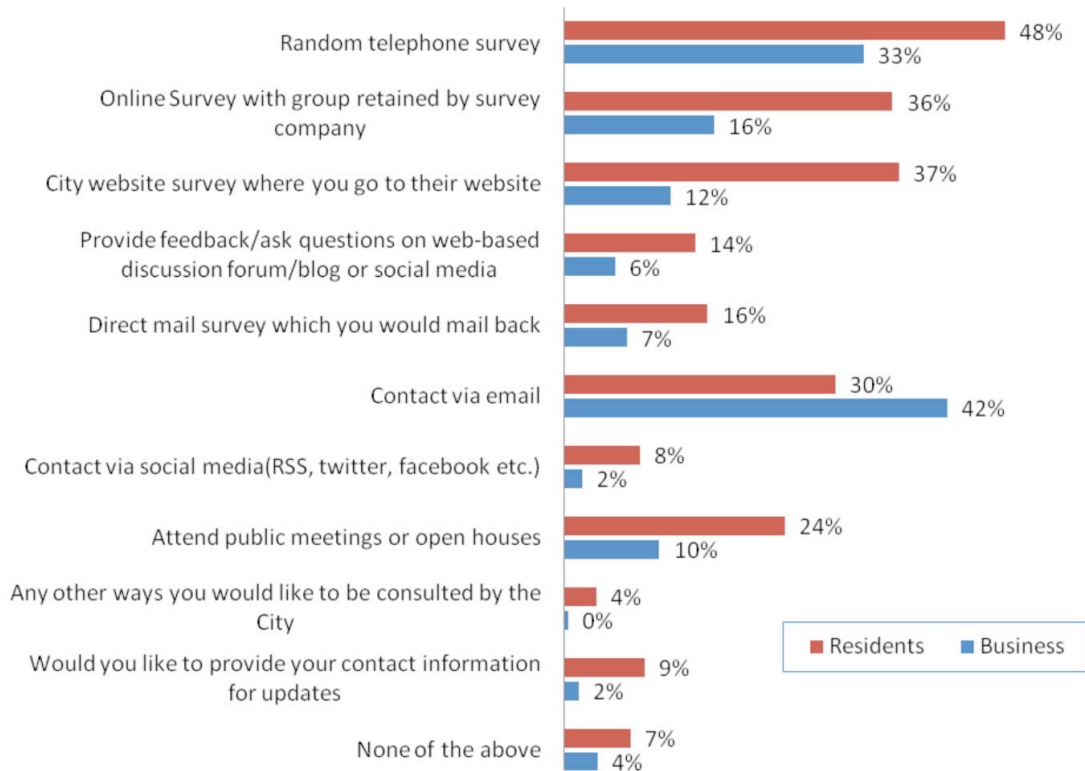
Business people tend to prefer contact via email but also like the random telephone survey.

Slightly fewer respondents in both groups say they would participate in a mail survey.

Preferred Methods of Participation								
	Businesses				Residents			
	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
	(263)	(217)	(211)	(250)	(522)	(509)	(417)	(509)
Online survey panel	-	-	65	41	-	-	53	183
Random telephone survey	61	45	54	82	59	47	63	246
City website survey, where you go to the website	60	47	58	29	50	49	52	187
Direct-mail survey, which you would mail back	52	38	43	17	54	44	50	80
Attend public meetings or open houses	23	15	36	26	27	21	30	123
Contact via email				105				151
Contact via social media				5				42
Provide feedback/ask questions on a web-based discussion forum/blog	-	21	43	14	-	17	36	73



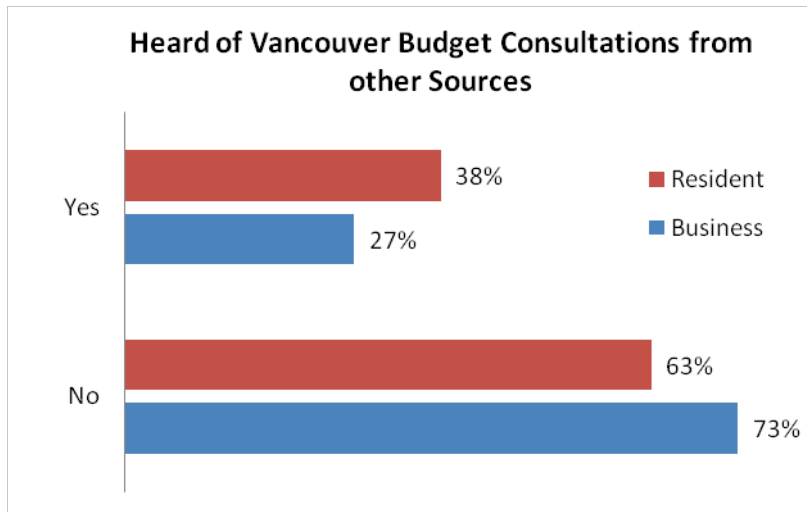
Preferred Option in How to be Consulted by City in the Future



Base Business
2011 (n=250)

Base Residents
2011 (n=509)

14. Next, how would you like to be consulted by the City in the future? In which of the following ways would you be **the most likely to participate**?



Base Business
2011 (n=250)

Base Residents
2011 (n=509)

14. Other than this phone call, have you heard about the Vancouver Budget Consultations?

More residents (38%) heard about the Vancouver Budget Consultations from sources other than the survey than did businesses (27%).

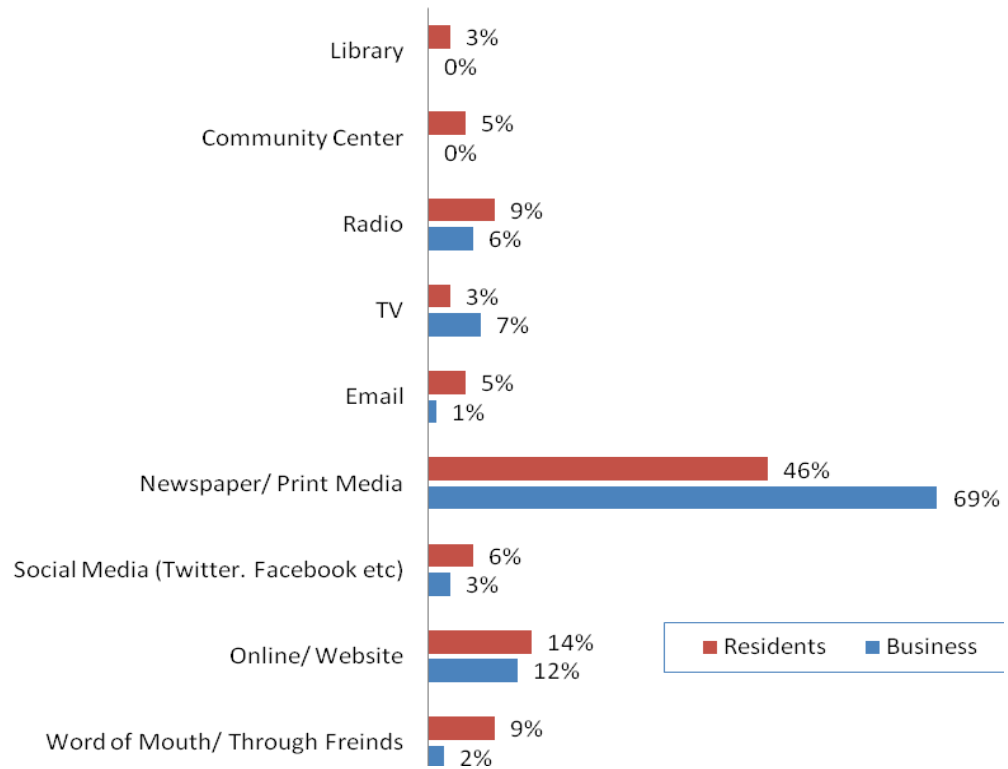
However, most businesses and residents had heard about the consultations through newspaper and print media.

Other media through which businesses and residents heard about the Vancouver Budget Consultations were online and radio. A few mentioned that they had heard about it from the community and social media such as Facebook, Twitter, etc. A few residents also mentioned “word of mouth”.

Not many businesses or residents mentioned television, email or the library.



Heard in Media



Caution: The sample size is too small in most cases below:

Type	Residents	Business
Word of Mouth/Through Friends	16	1
Online/Website	26	8
Social Media (Twitter, Facebook, etc.)	11	2
Newspaper/Print Media	88	47
Email	9	0
TV	5	5
Radio	17	4
Community Centre	9	0
Library	5	0
Total	186	67



Appendix A

TOP-LINE RESULTS — BUSINESS SURVEY

TRACKING SECTION

1a. Now, to begin our questions, in your view **as a member of the business community** in Vancouver, what is the most important local issue facing the City of Vancouver, that is the **one issue** you feel should receive the greatest attention from Vancouver’s City Council?
(ONE RESPONSE ONLY) DO NOT READ

1b. PROBE...Are there any other important local issues? **(PROBE; ACCEPT 2 ANSWERS) DO NOT READ**

Business	First Mention	First Mention	Other Mention
	2010 (251) %	2011 (250) %	2011 (250) %
City finances and property tax	12	31	10
Traffic congestion	9	6	4
Public transit	4	7	7
Homelessness/ poverty	14	8	5
Affordable housing	2	5	6
Crime and personal safety	3	6	8
Vandalism, properties in disrepair, graffiti or litter	-	1	2
Pollution/ air quality	1	2	1
Environmental or Green Issues	-	1	4
Development and planning	1	4	4
Condition of Streets	-	2	3
Bike Lanes	-	4	7
Economy	2	10	7
Public Drug Use	-	-	<1

2. Generally speaking, are you *satisfied* or *dissatisfied* with the overall quality of services provided to businesses by the City of Vancouver? Probe...Would that be very satisfied/somewhat satisfied/dissatisfied?

Business	1997 (300) %	2006 (353) %	2007 (350) %	2008 (300) %	2009 (300) %	2010 (251) %	2011 (250) %
Very Satisfied	19	17	12	14	14	16	12
Somewhat Satisfied	69	50	58	57	58	51	74
Somewhat Dissatisfied	5	17	10	11	12	12	10
Very Dissatisfied	2	8	7	9	3	9	4
Don't Know	4	8	13	8	14	12	0



3. And, would you say that the overall quality of service provided to businesses by the City of Vancouver has got *better* or *worse* over the past few years? **Probe...**Would that be much better/somewhat better/worse/about the same...?

Business	<u>1997</u> (300) %	<u>2006</u> (353) %	<u>2007</u> (350) %	<u>2008</u> (300) %	<u>2009</u> (300) %	<u>2010</u> (251) %	<u>2011</u> (250) %
Much better	1	3	4	4	4	2	3
Somewhat better	13	22	23	24	16	24	24
Stayed the same	45	34	37	38	44	39	48
Somewhat worse	18	17	13	13	13	13	15
Much worse	5	7	6	7	3	6	10

4. About one-half of property taxes go to the City of Vancouver, and the other half to the GVRD/Metro and the provincial government. 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 dollar? **PROBE...**Would that be very or fairly good/poor value?

Business	<u>1997</u> (n/a) %	<u>2006</u> (201) %	<u>2007</u> (247) %	<u>2008</u> (175) %	<u>2009</u> (175) %	<u>2010</u> (158) %	<u>2011</u> (250) %
Very good value	3	6	5	2	7	7	8
Fairly good value	50	47	47	43	41	36	61
Fairly poor value	24	27	23	39	29	27	22
Very poor value	18	9	13	12	11	17	10
Don't know	4	11	12	5	12	13	0

5. And, in general, would you say that the City of Vancouver property taxes you currently pay for your business are too high, too low, or about right? **Probe...**Would that be much too high/low?

Business	<u>1997</u> (n/a) %	<u>2006</u> (201) %	<u>2007</u> (247) %	<u>2008</u> (175) %	<u>2009</u> (175) %	<u>2010</u> (158) %	<u>2011</u> (190) %
Much too high	-	27	25	31	24	32	6
Too high	68	36	30	42	36	38	60
About right	24	26	34	21	29	24	33
Too low	-	-	2	4	2	-	2
Much too low	-	-	<1	-	-	1	-
Don't know	8	11	7	5	10	5	-

6. As you may know, the City of Vancouver provides a variety of different services to businesses in the city. I'm going to read you a list of some of these services, and ask you how important each service is to you as a member of the business community in Vancouver, that is, something you feel City Council should pay strong attention to.



Let's use a scale from 0 to 10, where "0" means the service is "Not at all important" to you, and should not be given any priority at all by City Council,... "10" means the service is "Extremely important" to you, and should be given top priority, ... and a "5" means the service is neither important nor unimportant to you. Remember, you can pick any number between 0 and 10. The first service is [READ ITEM – RANDOMIZE]. How important is this to you as a member of the business community? What about [READ NEXT ITEM]?

Business	<u>Average</u> <u>Score</u> (1-10) #	<u>6-10</u> <u>Important</u> %	<u>5</u> <u>Neutral</u> %	<u>0-4</u> <u>Not</u> <u>Important</u> %
Maintenance and repair of sewage and drainage systems	6.80	74	17	8
Maintenance and development of city parks and beaches	6.80	75	16	9
Community centers, ice rinks, and swimming pools	6.62	70	20	9
Libraries	6.64	70	19	12
Policing	7.32	77	13	10
Fire department	7.41	73	15	8
Maintenance, cleaning, and upgrading of streets and sidewalks	6.70	73	17	10
Support for arts and cultural organizations	6.36	64	25	10
Support for community service organizations that help people in need	6.60	67	24	8
Support for green projects or infrastructure	6.34	68	19	12
Planning for the future development of Vancouver	6.71	72	18	10
Management of the traffic in the city	6.59	69	20	10
Garbage collection, composting and recycling	6.74	72	16	12

7.

a) Now, to balance the 2011 budget as required by law, *and after all savings have been identified by staff*, the City may need to find further savings of up to \$20 million. To do this, which one of these three options would you prefer:

[READ STARTING AT* ACCEPT ONE ANSWER ONLY]

The first is ...; The next one is ...; the last one is **CONFIRM CHOICE & RE-READ RESPONSE.**

Business	<u>1997</u> (300) %	<u>2006</u> (353) %	<u>2007</u> (350) %	<u>2008</u> (300) %	<u>2009</u> (300) %	<u>2010</u> (251) %	<u>2011</u> (250) %
Increase business property Taxes by 2%	7	14	13	21	11	11	-
Increase business property Taxes by 2%	-	-	-	-	-	-	11
Reduce city services, hours, staffing and/or increase user fees	n/a	n/a	n/a	n/a	n/a	44	39
Cut city services by amount of Shortfall	31	27	30	29	18	n/a	-
Use a mix of both property tax increase service or other reductions, and then if needed, increase user fees	58	49	47	43	56	38	50
Don't know /refused	4	9	11	7	15	8	-



- b) OPTIONAL: If City services need to be reduced, would you prefer that the City: ROTATE ORDER
1. Cut services by same proportion across all service areas OR
 2. Cut services only in SOME areas, but not in others.

Business	2011 (250) %
Cut services by same proportion across all service areas	46
Cut services only in SOME areas, but not in others	54

8. Now, let's talk about *priorities* in a **general** way.
(IF ASKED: Specific City services will be discussed in an upcoming question.) Please keep in mind that the City will maintain all appropriate health and safety standards, and any changes would be planned to **minimize** the impact on the public.

I'm going to read a list of possible ways the City could find cost savings. For each one please tell me the extent to which you would support or oppose the City taking this type of measure to save costs and minimize tax increases. Please rate each on a scale from 0 to 10 where "0 means strongly oppose" and "10 means strongly support". Starting with [RANDOMIZE LIST]. INTERVIEWER: TO CONFIRM UNDERSTANDING OF SCALE: IF '7-10', SAY: So you support? IF '0-3', SAY: So you oppose?

Business	Average Score (1-10) #	6-10 Support %	5 Neutral %	0-4 Oppose %
a) Reduce hours of operation at City facilities	4.16	30	26	44
b) Reduce park and recreation programs	3.72	22	25	53
c) Reduce public safety services while still maintaining minimum standards of safety	3.52	30	10	60
d) Reduce funding or grants to social, arts or cultural groups	4.08	30	26	44
e) Reduce "green" initiatives	3.88	24	24	52
f) Hold fewer public consultations and hearings	4.07	27	26	47
g) Reduce infrastructure (roads and buildings) maintenance	3.74	26	20	54
h) Reduce frequency of garbage and recycling collection	3.88	28	21	51
i) Reduce level of cleaning and maintenance of public buildings, properties and parks	3.94	32	17	51
j) Reduce enforcement of nuisance or minor City by-Law	4.43	36	19	45
k) Reduce the level of land-use planning and policy work	4.22	27	27	46



10. As you may know, user fees are currently used to help recover the costs of providing certain City services such as permits and licenses, recreation programs, or sewer and water fees. Would you *support* or *oppose* the City charging higher user fees for these services and using the extra money to help pay for other city services?

PROBE...Would that be strongly or moderately support/oppose?

Business	<u>1997</u> (300) %	<u>2006</u> (353) %	<u>2007</u> (350) %	<u>2008</u> (300) %	<u>2009</u> (300) %	<u>2010</u> (251) %	<u>2011</u> (250) %
Strongly Support	32	25	24	31	26	22	23
Moderately Support	37	43	39	42	39	45	36
Moderately Oppose	10	11	13	10	10	14	25
Strongly Oppose	19	17	21	14	16	16	16
Don't know	2	4	3	2	8	2	-



BASIC DATA

Business	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
	(353)	(350)	(300)	(300)	(251)	(250)
	%	%	%	%	%	%
Gender						
Male	74	70	69	64	72	68
Female	27	30	31	36	28	32
Building Ownership						
Rent	77	78	81	78	78	64
Own	22	21	18	22	20	36
Don't know / refused	1	1	1	-	2	-
Position in Company						
Owner / President / CEO	69	74	61	52	60	41
Senior Manager	26	19	39	37	40	52
Department Manager / Office Manager	3	4	-	4	-	-
Director / Director of Marketing etc.	1	1	-	2	-	-
Miscellaneous	1	3	-	4	-	8
Employees Based in Vancouver						
0-4 Employees	48	56	46	53	42	29
5-9 Employees	24	20	21	17	19	36
10-24 Employees	20	18	26	18	33	20
25-99 Employees	7	6	5	6	5	12
100 or more Employees	1	1	1	3	1	4
Don't know / Refused	n/a	n/a	n/a	n/a	1	n/a
Employees Based Outside Vancouver						
0-4 Employees	83	84	77	81	83	74
5-9 Employees	7	4	4	7	3	8
10-24 Employees	5	5	12	3	6	8
25-99 Employees	4	4	5	3	2	6
100 or more Employees	1	2	1	2	4	4
Don't know / Refused	1	1	1	3	1	-
Number of Years Operating Business in Vancouver						
5 or less	25	29	20	17	17	17
6 - 19 years	43	26	44	41	46	47
20+ years	32	35	36	40	37	36
Don't Know	1	-	-	3	-	-
Resident of the City of Vancouver						
Yes	69	67	64	62	61	100
No	31	33	36	36	39	-
Refused	<1	-	-	2	-	-
Language of Interview						
English	93	95	97	94	97	100
Cantonese	7	5	2	3	1	-
Mandarin	1	-	2	3	2	-



Appendix B

TOP-LINE RESULTS — RESIDENTS SURVEY

- 1a.** Now, to begin our questions, in your view as a resident of Vancouver, what is the most important local issue facing the City of Vancouver, that is, the one issue you feel should receive the greatest attention from Vancouver’s City Council? **(ONE RESPONSE ONLY)**
DO NOT READ LIST
- 1b. Probe...**Are there any other important local issues? **(PROBE; ACCEPT 2 ANSWERS)**
DO NOT READ LIST

Residents	First Mention	First Mention	Other Mention
	2010 (509) %	2011 (509) %	2011 (509) %
City finances and property tax	7	12	9
Traffic congestion	7	8	9
Public transit	5	10	15
Homelessness/ poverty	26	17	19
Affordable housing	6	15	15
Crime and personal safety	5	3	8
Vandalism, properties in disrepair, graffiti or litter	-	1	6
Pollution/ air quality	1	1	3
Environmental or Green Issues	1	4	10
Development and planning	2	4	8
Condition of Streets	1	1	2
Bike Lanes	-	5	8
Economy	3	3	6
Public Drug Use	2	<1	4

- 2.** Generally speaking, are you satisfied or dissatisfied with the overall quality of services provided to you by the City of Vancouver? Probe...Would that be very/somewhat satisfied/dissatisfied?

Residents	1997 (1,000) %	1999 (605) %	2001 (602) %	2002 (600) %	2003 (608) %	2004 (602) %	2005 (636) %	2006 (607) %	2007 (601) %	2008 (600) %	2009 (600) %	2010 (505) %	2011 (509) %
Very Satisfied	23	18	19	12	22	21	22	22	23	17	13	19	26
Somewhat Satisfied	62	63	60	69	64	65	61	65	65	66	69	65	55
Somewhat dissatisfied	9	12	13	9	7	9	10	7	7	12	11	9	12
Very dissatisfied	3	4	6	6	2	3	4	3	3	4	4	3	7
Don't Know	2	3	2	5	5	2	4	4	4	2	3	4	-



3. And, would you say that the overall quality of service provided by the City of Vancouver has got better or worse over the past few years? **Probe...**Would that be much/somewhat better/worse?

Residents	<u>1997</u> (1,000) %	<u>1999</u> (605) %	<u>2001</u> (602) %	<u>2002</u> (600) %	<u>2003</u> (608) %	<u>2004</u> (602) %	<u>2005</u> (636) %	<u>2006</u> (607) %	<u>2007</u> (601) %	<u>2008</u> (600) %	<u>2009</u> (600) %	<u>2010</u> (505) %	<u>2011</u> (509) %
Much better	3	4	2	1	4	3	4	3	4	1	2	5	11
Somewhat better	22	19	21	20	18	23	24	27	29	25	18	25	26
Stayed the same	35	27	34	32	34	31	30	30	33	33	43	31	17
Somewhat worse	24	27	27	26	21	23	19	19	16	21	20	21	11
Much worse	6	8	7	7	4	6	4	4	7	8	4	4	35
Don't Know	10	15	9	13	19	14	20	17	11	12	13	14	-

4. And, in general, would you say that the property taxes you currently pay on your residence are too high, too low, or about right? **Probe...**Would that be much too high/low?

Residents Base(Owners)	<u>1997</u> (463) %	<u>1999</u> (261) %	<u>2001</u> (270) %	<u>2002</u> (292) %	<u>2003</u> (240) %	<u>2004</u> (268) %	<u>2005</u> (299) %	<u>2006</u> (317) %	<u>2007</u> (347) %	<u>2008</u> (360) %	<u>2009</u> (368) %	<u>2010</u> (285) %	<u>2011</u> (306) %
Much too high	-	13	14	11	6	9	11	15	12	16	12	14	8
Too high	46	42	32	42	34	39	40	39	43	36	42	36	36
About right	49	42	52	40	53	48	40	43	40	42	39	44	52
Too low	1	-	-	1	2	1	2	1	1	1	1	2	4
Much too low	-	-	-	-	-	<1	1	<1	-	-	-	-	<1
Don't know	3	3	2	5	5	2	4	3	4	5	7	5	-

5. As you may know, the City of Vancouver provides a variety of different services to you as a resident. I'm going to read a list of these services, and then ask how important each service is to you as a resident, that is, something you feel City Council should pay strong attention to.

Let's use a scale from 0 to 10, where "0" means the service is "Not at all important" to you, and should not be given any priority at all by City Council, "10" means the service is "Extremely important" to you, and should be given top priority, and a "5" means the service is neither important nor unimportant to you. Remember, you can pick any number between 0 and 10. The first service is **(READ ITEM – RANDOMIZE)**. How important is this to you as a resident? What about **(READ NEXT ITEM)**?



Residents	<u>Average</u> <u>Score</u> (1-10) #	<u>6-10</u> <u>Important</u> %	<u>5</u> <u>Neutral</u> %	<u>0-4</u> <u>Not</u> <u>Important</u> %
Maintenance and repair of sewage and drainage systems	6.98	73	18	10
Maintenance and development of city parks and beaches	7.42	83	10	7
Community centers, ice rinks, and swimming pools	7.26	80	10	10
Libraries	7.64	85	9	7
Policing	7.72	82	9	9
Fire department	7.87	84	11	6
Maintenance, cleaning, and upgrading of streets and sidewalks	6.90	76	14	10
Support for arts and cultural organizations	6.60	71	16	14
Support for community service organizations that help people in need	6.84	73	16	11
Support for green projects or infrastructure	6.34	68	17	16
Planning for the future development of Vancouver	6.94	75	16	9
Management of the traffic in the city	6.68	72	15	13
Garbage collection, composting and recycling	7.45	83	9	8

6. About one-half of the services on a typical property tax bill goes to the City of Vancouver, and the other half to the GVRD/Metro (regional), as well as the provincial government. Thinking about all the programs and services you receive from the *City of Vancouver*, would you say that overall, citizens get good value or poor value for their tax dollar (whether you pay directly as a property owner or indirectly as a renter)?
Probe...Would that be very or fairly good/poor value?

Residents	<u>1997</u> (463) %	<u>1999</u> (261) %	<u>2001</u> (270) %	<u>2002</u> (292) %	<u>2003</u> (240) %	<u>2004</u> (268) %	<u>2005</u> (299) %	<u>2006</u> (317) %	<u>2007</u> (347) %	<u>2008</u> (360) %	<u>2009</u> (368) %	<u>2010</u> (285) %	<u>2011</u> (509) %
Very good value	12	8	9	5	11	9	10	11	8	9	6	9	20
Fairly good value	57	49	51	53	54	48	52	55	56	59	58	58	57
Fairly poor value	20	27	27	24	21	24	28	22	24	18	17	19	17
Very poor value	6	8	8	9	6	7	4	3	5	8	9	6	7
Don't know	5	7	4	9	9	12	7	8	8	7	10	7	-

6. Now, to balance the 2011 budget as required by law, *and after all savings have been identified by staff (new)*, the City may need to find further savings of up to \$20 million. To do this, which one of these three options would you prefer: **[READ STARTING AT* ACCEPT ONE ANSWER ONLY]** The first is ...; The next one is ...; the last one is
CONFIRM CHOICE & RE-READ RESPONSE.



Residents	<u>1997</u> (1,000) %	<u>1999</u> (605) %	<u>2001</u> (602) %	<u>2002</u> (600) %	<u>2003</u> (608) %	<u>2004</u> (602) %	<u>2005</u> (636) %	<u>2006</u> (607) %	<u>2007</u> (601) %	<u>2008</u> (600) %	<u>2009</u> (600) %	<u>2010</u> (508) %	<u>2011</u> (509) %
Increase residential property Taxes by 7%	17	19	20	22	23	20	21	25	21	25	18	14	-
Increase residential property Taxes by 2%	-	-	-	-	-	-	-	-	-	-	-	-	25
Reduce city services, hours, staffing and/or increase user fees	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	33	23
Cut city services by amount of Shortfall	20	22	25	21	20	18	19	19	21	21	16	n/a	-
Use a mix of both property tax increase service or other reductions, and then if needed, increase user fees	56	49	46	47	44	47	47	46	45	43	54	42	52
Don't know/refused	6	10	9	10	14	15	14	10	13	11	12	11	-

- 8.** Now, let's talk about priorities in a **general** way. Please keep in mind that any changes would be planned to **minimize** the impact on the public.
I'm going to read a list of possible ways the City could find cost savings. For each one please tell me the extent to which you would support or oppose the City taking this measure to save costs and minimize tax increases. Please rate each on a scale from 0 to 10 where "0 means strongly oppose" and "10 means strongly support". Starting with [RANDOMIZE LIST] . **INTERVIEWER:** CONFIRM UNDERSTANDING OF SCALE: IF '7-10', SAY: So you support? IF '0-3', SAY: So you oppose?

Residents	<u>Average</u> <u>Score</u> (1-10) #	<u>6-10</u> <u>Support</u> %	<u>5</u> <u>Neutral</u> %	<u>0-4</u> <u>Oppose</u> %
a. Reduce hours of operation at City facilities	4.31	30	24	46
b. Reduce park and recreation programs	3.38	21	16	64
c. Reduce public safety services while still maintaining minimum standards of safety	3.34	21	16	63
d. Reduce funding or grants to social, arts or cultural groups	3.90	28	18	55
e. Reduce "green" initiatives	4.12	27	19	53
f. Hold fewer public consultations and hearings	4.04	25	22	53
g. Reduce infrastructure (roads and buildings) maintenance	3.80	26	17	57
h. Reduce frequency of garbage and recycling collection	3.71	29	14	56
i. Reduce level of cleaning and maintenance of public buildings, properties and parks	3.61	23	18	59
j. Reduce enforcement of nuisance or minor City by-Law	4.45	34	18	48
k. Reduce the level of land-use planning and policy work	4.16	26	26	48



9. Next, what is the approximate assessed value of your residence? Would it be closer to...READ LIST (removed "200 thousand dollars" price point as this is irrelevant in Vancouver)

Residents	1997	1999	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
	(463)	(261)	(270)	(292)	(240)	(278)	(299)	(317)	(347)	(360)	(370)	(285)	(306)
	%	%	%	%	%	%	%	%	%	%	%	%	%
\$400,000	37	38	32	28	32	30	44	36	29	26	28	25	17
\$700,000	21	13	19	19	20	26	30	21	27	31	24	32	25
\$900,000	-	-	-	-	-	-	-	19	25	31	27	32	18
\$1,200,000	-	-	-	-	-	-	-	-	-	-	-	-	23
Don't know / refused	5	5	5	4	11	9	7	8	6	6	14	6	17

IF "400 THOUSAND DOLLARS" IN Q.9, THEN ASK:

10. Thinking about tax increases for the moment. In order for the City of Vancouver to cover the budget shortfall without any cuts in service, it could mean increasing the amount you pay in property taxes by about 2 percent, or possibly an additional \$34 next year. Would you be willing to pay this amount in order to maintain the current level of services provided by the City?

YES/NO, IF YES AT ANY POINT IN a-d SERIES → SKIP TO Q16. IF NO/DK → CONTINUE; AT END → GO TO Q.16

Removed – "b. 6 percent, c. 4 percent, etc." ((tax shift included but not mentioned – is this OK?))

Residents	Willing To Pay												
	1997	1999	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Base(owners claiming their home is worth \$400,000)	(156)	(89)	(75)	(78)	(73)	(83)	(120)	(108)	(102)	(96)	(99)	(72)	(51)
	%	%	%	%	%	%	%	%	%	%	%	%	%
An 8% increase which is about \$_ per year	61	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	61	n/a	n/a
A 7 percent increase which is about \$59 next year	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	65	n/a
A 6 percent increase which is about \$51 next year	71	54	63	53	58	59	52	64	74	78	74	72	n/a
A 4 percent increase which is about \$34 next year	78	63	78	69	72	73	67	75	81	86	79	78	n/a
A 2 percent increase which is about \$17 next year	89	80	89	85	84	84	84	89	89	94	84	85	n/a
A 2 percent increase which is about \$34 next year	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	67



IF “700 THOUSAND DOLLARS” IN Q.9, THEN ASK:

- 11.** Thinking about tax increases for the moment. In order for the City of Vancouver to cover the budget shortfall without any cuts in service, it could mean increasing the amount you pay in property taxes by about 2 percent, or possibly an additional **\$60** next year. Would you be willing to pay this amount in order to maintain the current level of services provided by the City?

YES/NO, **IF YES AT ANY POINT IN a-d SERIES → SKIP TO Q16. IF NO/DK → CONTINUE; AT END → GO TO Q.16**

Removed – “b. 6 percent, c. 4 percent, etc.” ((tax shift included but not mentioned))

Residents	Willing To Pay												
	1997	1999	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Base(owners claiming their home is worth \$700,000)	(96) %	(34) %	(53) %	(56) %	(50) %	(72) %	(94) %	(66) %	(82) %	(106) %	(93) %	(84) %	(77) %
An 8% increase which is about \$__per year	60	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	51	n/a	n/a
A 7 percent increase which is about \$104 next year	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	53	n/a
A 6 percent increase which is about \$89 next year	65	48	57	97	53	54	60	54	62	56	63	57	n/a
A 4 percent increase which is about \$59 next year	82	50	70	76	73	68	74	69	75	82	75	73	n/a
A 2 percent increase which is about \$29 next year	88	71	79	87	88	81	90	89	91	95	79	90	n/a
A 2 percent increase which is about \$60 next year	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	65

IF “900 THOUSAND DOLLARS” IN Q.9, THEN ASK:

- 12.** Thinking about tax increases for the moment. In order for the City of Vancouver to cover the budget shortfall without any cuts in service, it could mean increasing the amount you pay in property taxes by about 2 percent, or possibly an additional **\$77** next year. Would you be willing to pay this amount in order to maintain the current level of services provided by the City?

YES/NO, **IF YES AT ANY POINT IN a-d SERIES → SKIP TO Q16. IF NO/DK → CONTINUE; AT END → GO TO Q.16**



Residents	Willing To Pay					
	2006	2007	2008	2009	2010	2011
Base(owners claiming their home is worth \$900,000)	(66) %	(96) %	(120) %	(95) %	(96) %	(56) %
An 8% increase which is about \$__per year	n/a	n/a	n/a	51	n/a	n/a
A 7 percent increase which is about \$104 next year	n/a	n/a	n/a	n/a	53	n/a
A 6 percent increase which is about \$89 next year	54	62	56	63	57	n/a
A 4 percent increase which is about \$59 next year	69	75	82	75	73	n/a
A 2 percent increase which is about \$29 next year	89	91	95	79	90	n/a
A 2 percent increase which is about \$77 next year	n/a	n/a	n/a	n/a	n/a	70

IF “1.2 Million DOLLARS” IN Q.9, THEN ASK:

- 13.** Thinking about tax increases for the moment. In order for the City of Vancouver to cover the budget shortfall without any cuts in service, it could mean increasing the amount you pay in property taxes by about 2 percent, or possibly an additional **\$103** next year. Would you be willing to pay this amount in order to maintain the current level of services provided by the City?

YES/NO, IF YES AT ANY POINT IN a-d SERIES→SKIP TO Q.16. IF NO/DK→CONTINUE; AT END→GO TO Q.16

Residents	Willing To Pay					
	2006	2007	2008	2009	2010	2011
Base(owners claiming their home is worth \$1200,000)	(66) %	(96) %	(120) %	(95) %	(96) %	(69) %
A 8 percent increase	n/a	n/a	n/a	n/a	n/a	n/a
A 7 percent increase	n/a	n/a	n/a	n/a	n/a	n/a
A 6 percent increase	n/a	n/a	n/a	n/a	n/a	n/a
A 4 percent increase	n/a	n/a	n/a	n/a	n/a	n/a
A 2 percent increase which is about \$103 next year	n/a	n/a	n/a	n/a	n/a	51

IF “RENT” IN D, THEN ASK:

- 14.** Now, in order for the City of Vancouver to cover the budget shortfall without any cuts in service, it could need to raise the level of taxes your property owner pays by about 2 percent. Your property owner could in turn decide to pass on to you SOME OR ALL of the cost of a tax increase by raising the amount you pay in rent. For the average renter, this could mean an increase in rent of about **\$2** per month (Budgets – please confirm). Thinking about this, would you be willing to pay **\$2** more per month in order to maintain the current level of services provided by the City of Vancouver?



Residents	<u>1997</u>	<u>1999</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Base (renters)	(537)	(342)	(331)	(304)	(355)	(312)	(323)	(269)	(242)	(231)	(219)	(200)	(178)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes	89	83	84	85	85	81	83	81	87	82	76	71	79
No/ don't know/ refused	11	17	16	15	15	17	15	19	13	18	24	25	21

**16. When it comes right down to it, which approach do you think is best for the City take?
(READ & ROTATE ORDER; ACCEPT ONE ANSWER ONLY)**

Residents	<u>1997</u>	<u>1999</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
	(96)	(34)	(53)	(56)	(50)	(72)	(94)	(66)	(82)	(106)	(93)	(84)	(509)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Reducing City services and/or increasing fess	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	49	26
Charging people user fees on SOME City services to help cover the costs of these services	68	67	66	67	60	58	64	60	65	61	66	n/a	n/a
Raising property taxes to be able t maintain all City services	26	24	27	24	30	28	27	32	26	34	23	41	24
Use a mix of both property tax increases AND service or other reduction, and then if needed, increase user fees	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	51
Don't know	6	9	7	9	10	14	9	8	9	6	11	11	-

PUBLIC CONSULTATION PREFERENCES

17. Next, how would you like to be consulted by the City in the future? In which of the following ways would you be the most likely to participate?
You may choose more than one.

Residents	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
	(522)	(509)	(417)	(509)
	%	%	%	%
Random telephone survey	59	47	63	48
Online survey panel	-	-	53	-
Online survey with group retained by survey company	-	-	-	36
City website survey where you go to their website	50	49	52	37
Direct mail survey which you would mail back	54	44	50	16
Attend public meetings or open houses	27	21	30	24
Survey in Flyer distributed through newspapers or at community centers which you would mail or fax back	24	-	-	-
Provide feedback/ ask questions on a web-based discussion forum/ blog	-	17	36	14
Contact via email	-	-	-	30
Contact via social media (RSS, twitter, facebook etc)	-	-	-	8
Any other ways you would link to be consulted by the City? (please specify)	15	1	-	4
NONE OF ABOVE/ DON'T KNOW	1	3	-	7

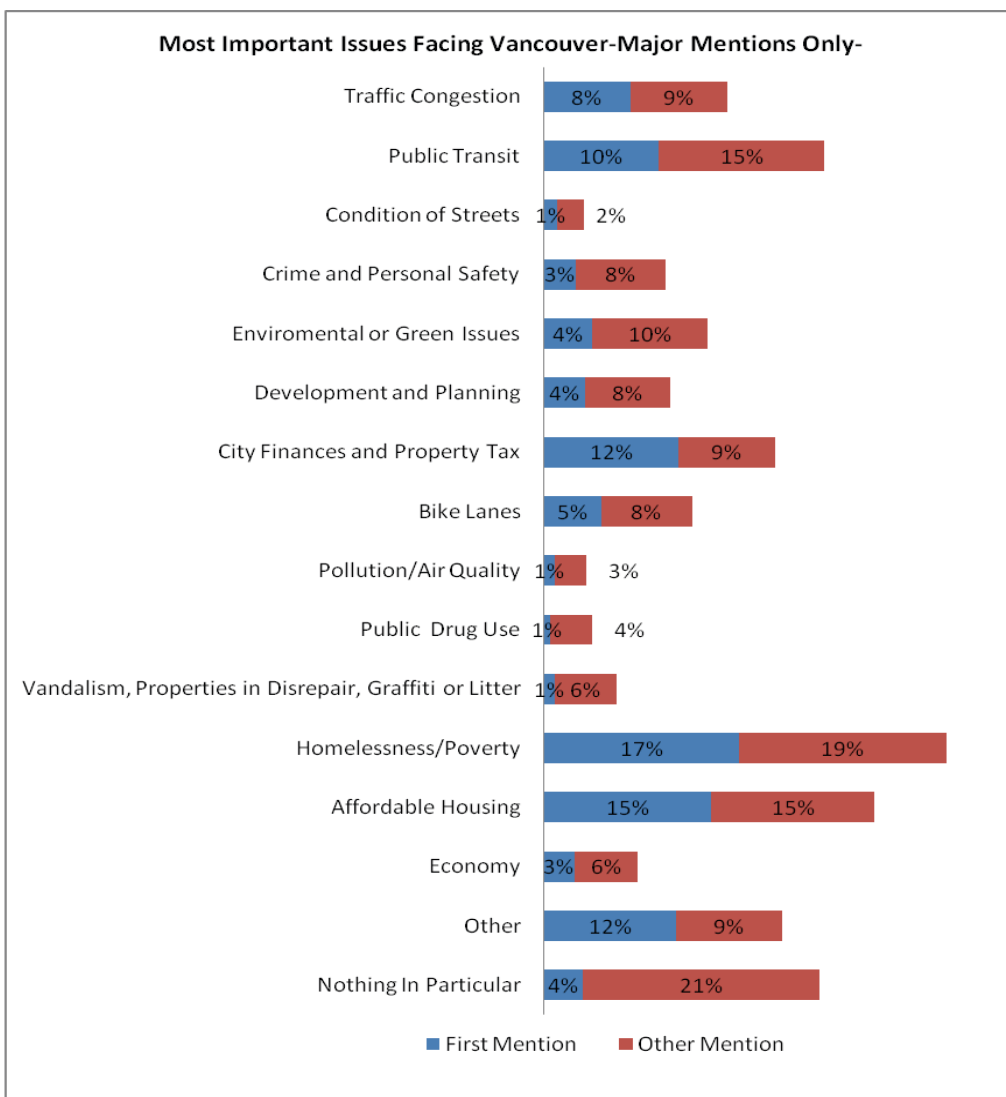


BASIC DATA

Residents	<u>1997</u>	<u>1999</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
	(1,000)	(605)	(602)	(600)	(608)	(602)	(636)	(607)	(601)	(600)	(600)	(505)	(509)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Gender													
Male	49	48	50	49	49	49	49	49	49	48	-	48	48
Female	51	52	50	51	52	52	52	52	51	52	-	52	52
Home Ownership													
Rent	50	52	50	47	55	52	50	46	40	39	-	40	35
Own	50	48	50	52	43	46	47	50	57	58	-	55	60
Other/DK	-	-	-	-	-	-	-	-	-	-	-	5	5
Age													
18-24	13	10	10	10	12	12	12	12	10	12	10	12	6
25-34	26	23	23	23	23	23	23	23	24	21	23	17	14
35-44	20	23	23	23	21	21	21	21	22	21	21	21	18
45-54	13	16	16	16	18	18	18	18	18	18	18	20	24
55-64	11	11	11	11	10	10	10	10	10	13	12	14	21
65 or older	16	17	17	17	15	15	15	15	16	16	15	16	17
Ethnic Background													
Chinese (Hong Kong, China, Taiwan, or other)	22	22	19	31	26	21	23	25	25	28	26	23	26
British	36	35	39	29	29	36	34	30	32	34	29	28	20
East European	8	8	9	9	12	8	9	10	8	10	9	5	3
Canadian	7	7	7	6	9	7	6	8	9	9	8	23	7
German	6	4	7	5	6	6	4	4	5	6	4	4	5
East Indian	3	3	4	5	3	4	3	1	2	2	3	3	9
French	4	3	3	4	5	4	4	3	2	3	4	2	4
Scandinavian	1	2	3	2	2	2	2	-	2	-	-	-	-
Italian	2	3	2	2	1	1	1	3	3	2	3	1	5
First Nations	1	1	2	2	1	2	2	2	1	2	1	1	3
European (unspecified)	1	3	2	1	2	2	1	-	1	-	-	-	5
Asian - other (Indonesia, Malaysia, Thailand)	2	2	1	-	3	3	2	1	3	1	3	1	2
Filipino	1	1	2	1	2	2	1	1	2	2	3	2	1
Dutch	2	1	1	1	2	1	2	2	1	2	2	1	-
African	1	-	1	1	1	2	2	<1	<1	1	-	<1	1
Korean	-	-	-	1	-	<1	<1	<1	<1	1	-	<1	-
Middle East (unspecified)	-	-	1	-	1	1	1	-	1	-	-	-	<1
Greek	-	1	-	-	1	1	1	1	1	-	1	1	1
Spanish	-	1	-	-	1	1	1	1	<1	<1	<1	1	1
Other	2	3	2	1	1	1	7	12	4	5	8	9	5
Refused / don't know	2	2	1	2	2	3	3	2	3	2	3	2	2
Children in Household													
Yes	31	34	30	32	33	31	35	36	35	34	36	29	23
No	69	66	70	67	66	69	65	64	64	65	63	69	77
Refused	-	1	-	1	-	<1	1	1	<1	1	1	3	-
# of Years Been Resident of Vancouver													
0-9	33	34	32	34	41	41	41	41	32	34	29	26	27
10-19	17	21	20	23	23	20	17	22	23	25	26	23	24
20-29	16	16	18	16	16	14	14	12	17	14	16	18	18
30+	24	29	29	26	20	25	28	25	28	27	28	30	29
Whole life	9	-	-	-	-	-	-	-	-	-	-	-	-
Don't know / refused	1	1	-	1	-	<1	<1	1	<1	1	1	3	2
Avg. # of Years	20	22	21	21	18	19	19	19	21	21	21	22	21



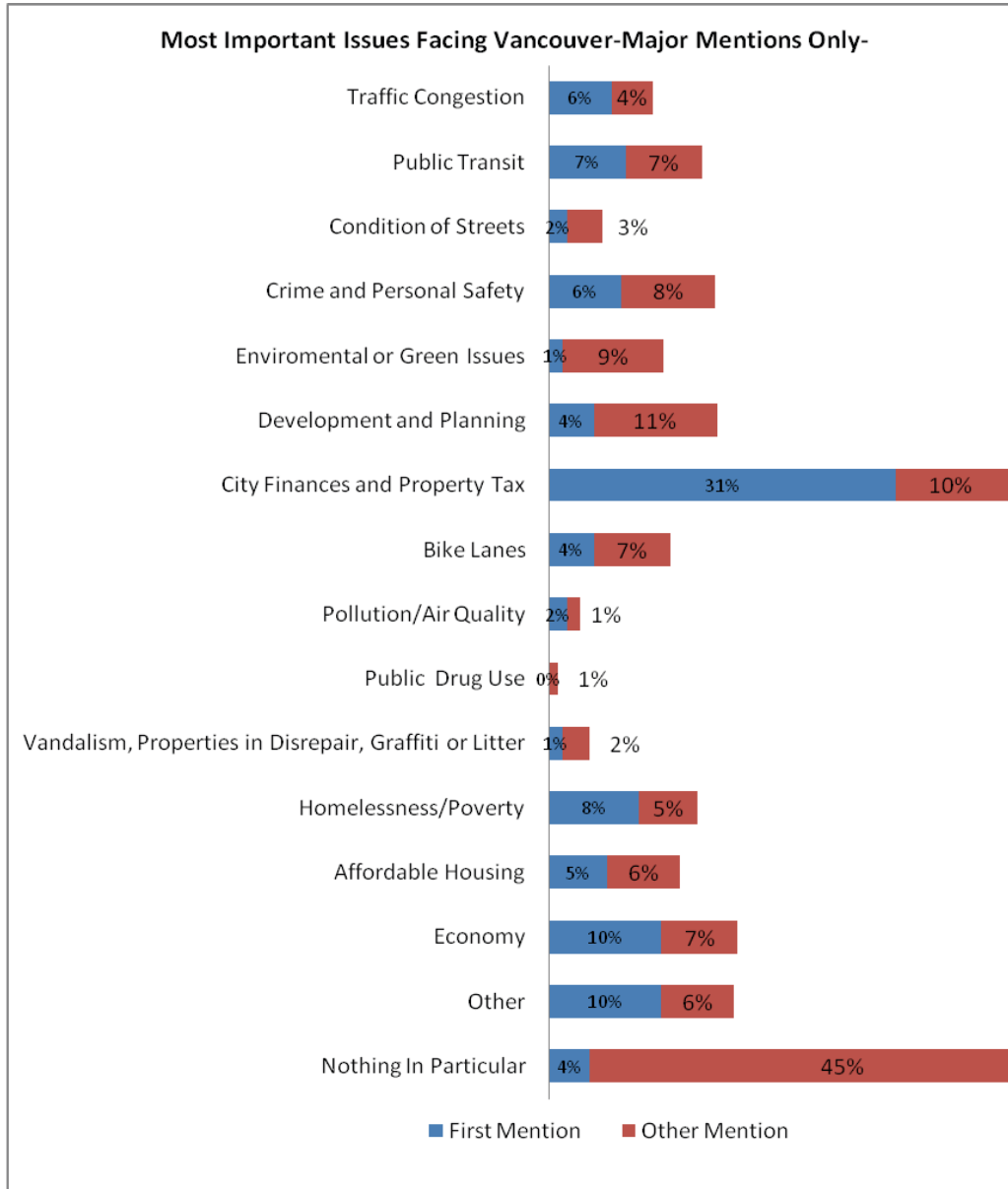
Residents	<u>1997</u>	<u>1999</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>	<u>2005</u>	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
	(1,000)	(605)	(602)	(600)	(608)	(602)	(636)	(607)	(601)	(600)	(600)	(505)	(509)
	%	%	%	%	%	%	%	%	%	%	%	%	%
Type of Dwelling													
Single, detached house	51	48	48	4+	46	44	48	45	51	50	50	49	41
Duplex or townhouse	9	8	9	8	8	8	9	10	9	8	9	8	20
Apartment or condo	38	41	40	40	44	43	42	43	38	38	40	36	35
Other / refused	1	3	2	3	2	6	1	3	2	3	1	4	4
Language of Interview													
English	-	-	-	-	-	-	-	-	-	-	-	88	100
Cantonese	-	-	-	-	-	-	-	-	-	-	-	7	-
Mandarin	-	-	-	-	-	-	-	-	-	-	-	4	-
Punjabi	-	-	-	-	-	-	-	-	-	-	-	1	-
Landline at home													
Yes	-	-	-	-	-	-	-	-	-	-	-	97	-
No	-	-	-	-	-	-	-	-	-	-	-	3	-
Household Income													
Under \$10,000	6	5	4	7	6	5	7	5	3	2	2	31	17
\$10,000-\$19,999	12	10	8	8	11	11	9	6	9	7	5		
\$20,000-\$29,999	16	13	10	12	13	12	12	12	10	7	5		
\$30,000-\$39,999	13	14	11	13	10	10	11	9	14	12	5	31	28
\$40,000-\$49,999	11	9	11	8	9	8	9	9	9	10	8		
\$50,000-\$59,999	8	8	9	7	7	7	7	10	8	8	7		
\$60,000-\$69,999	6	6	6	8	4	7	6	6	7	9	7	23	20
\$70,000-\$79,999	4	4	5	3	4	6	6	4	4	5	3		
\$80,000-\$99,999	5	4	6	5	6	8	7	5	10	6	8		
\$100,000+	7	7	10	9	9	11	10	17	14	19	19	15	19
Don't know / refused	11	8	21	18	22	16	16	17	13	15	32	15	19



Base Residents: 509

1a. Now, to begin our questions, in your view **as a resident of the community** in Vancouver, what is the most important local issue facing the City of Vancouver, that is the **one issue** you feel should receive the greatest attention from Vancouver's City Council? **(ONE RESPONSE ONLY)**

1b. PROBE...Are there any other important local issues? **(PROBE; ACCEPT 2 ANSWERS)**



Base Business: 250

1a. Now, to begin our questions, in your view **as a member of the business community** in Vancouver, what is the most important local issue facing the City of Vancouver, that is the **one issue** you feel should receive the greatest attention from Vancouver's City Council? **(ONE RESPONSE ONLY)**

1b. **PROBE...**Are there any other important local issues? **(PROBE; ACCEPT 2 ANSWERS)**



Level of Satisfaction with City Services



Legends:

- Very Satisfied
- Somewhat Satisfied
- Somewhat Dissatisfied
- Very Dissatisfied
- Don't Know

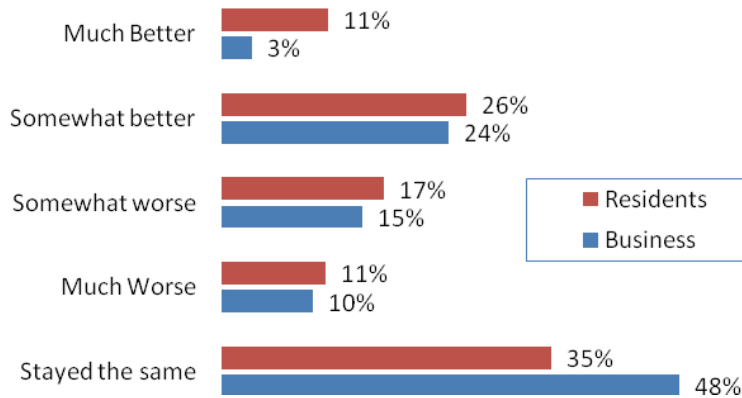
Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

2. Generally speaking, are you satisfied or dissatisfied with the overall quality of services provided to *businesses* by the City of Vancouver? Probe...Would that be very satisfied/somewhat satisfied/dissatisfied?



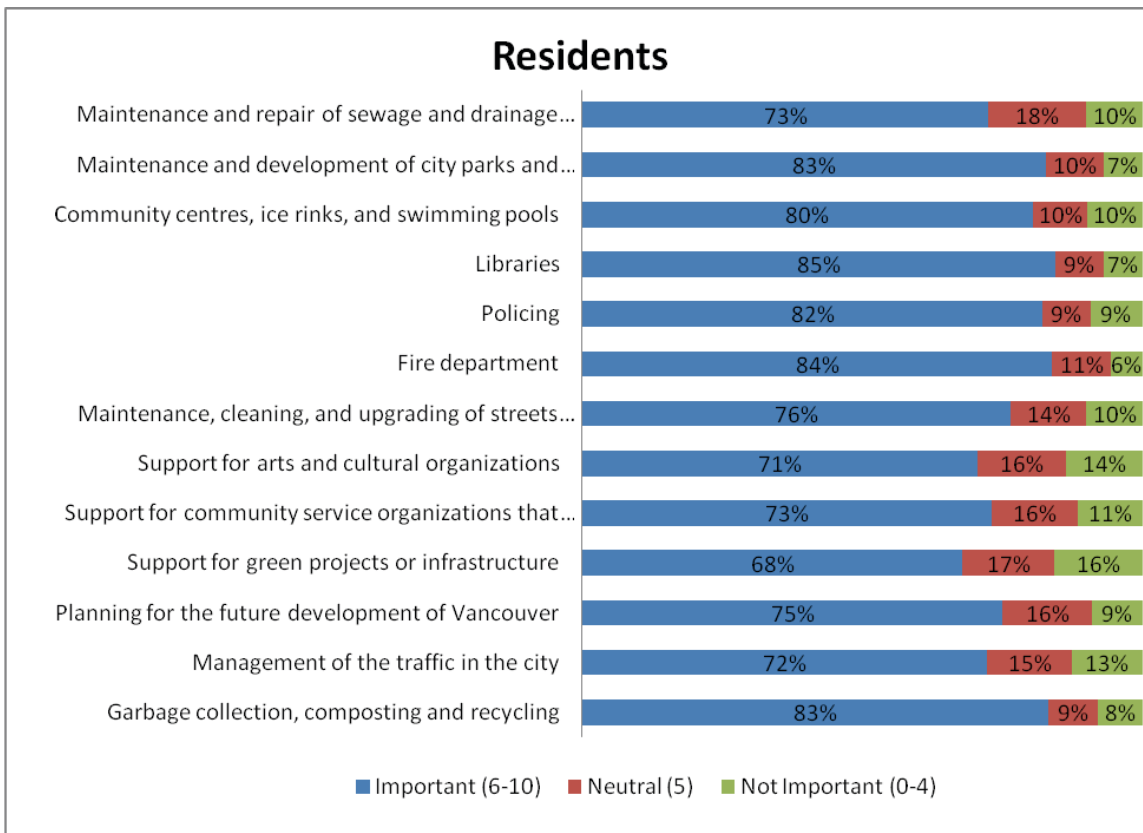
Overall Quality of Service Provided



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

3. *And, would you say that the overall quality of service provided by the City of Vancouver has got better or worse over the past few years? Probe...Would that be much/somewhat better/worse?*



Base Residents
 1997 (n=1,000)
 1999(n=605)
 2001 (n=602)
 2002 (n=600)
 2003 (n=608)
 2004 (n=602)
 2005 (n=636)
 2006 (n=607)
 2007 (n=601)
 2008 (n=600)
 2009 (n=600)
 2010 (n=505)
 2011 (n=509)

Base Business
 1997 (n=300)
 2006(n=353)
 2007 (n=350)
 2008 (n=300)
 2009 (n=300)
 2010 (n=251)
 2011 (n=250)

5. As you may know, the City of Vancouver provides a variety of different services to you as a resident. I'm going to read a list of these services, and then ask how important each service is to you as a resident, that is, something you feel City Council should pay strong attention to.

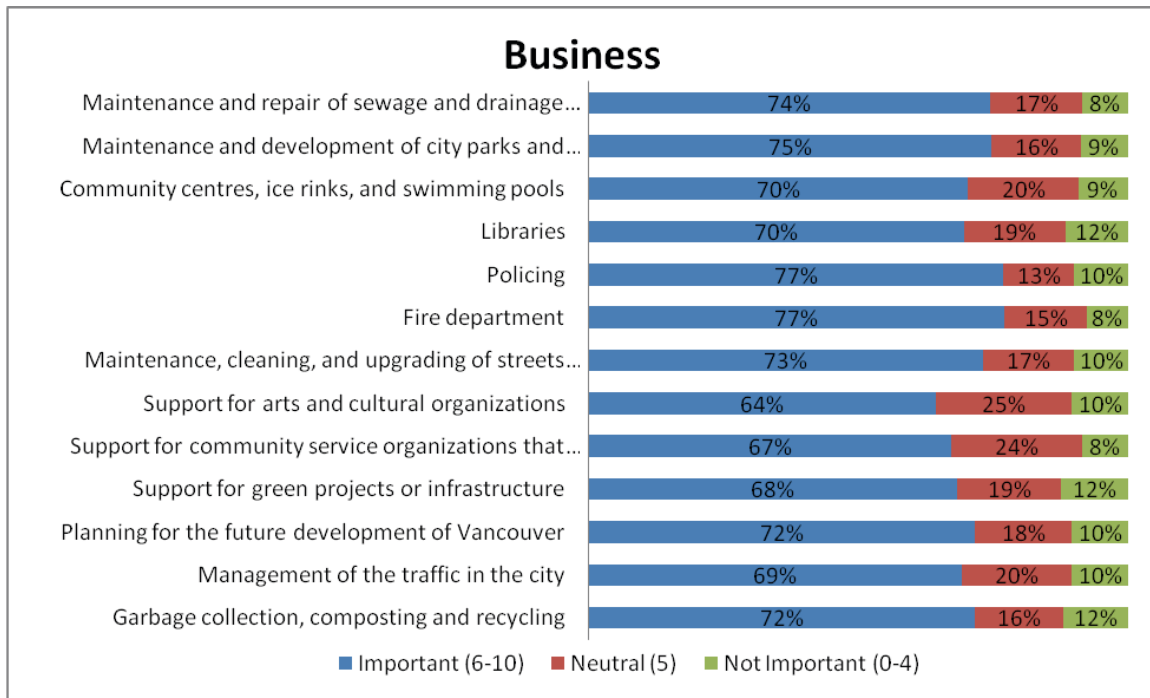
Let's use a scale from 0 to 10, where "0" means the service is "Not at all important" to you, and should not be given any priority at all by City Council, "10" means the service is "Extremely important" to you, and should be given top priority, and a "5" means the service is neither important nor unimportant to you. Remember, you can pick any number between 0 and 10. The first service is **(READ ITEM – RANDOMIZE)**. How important is this to you as a resident? What about **(READ NEXT ITEM)?**



Need Less Attention (Mean Score of 7.15 and above)

The following services are important to businesses, and they feel City Council should pay less attention to:

- Policing (Mean Score 7.32)
- Fire department (Mean Score 7.41)



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

5. As you may know, the City of Vancouver provides a variety of different services to *businesses in the city*. I'm going to read you a list of some of these services, and ask you how important each service is to you as a *member of the business community in Vancouver*, that is, something you feel City Council should pay strong attention to.

Let's use a scale from 0 to 10, where "0" means the service is "Not at all important" to you, and should not be given any priority at all by City Council,... "10" means the service is "Extremely important" to you, and should be given top priority, ... and a "5" means the service is neither important nor unimportant to you. Remember, you can pick any number between 0 and 10. The first service is [READ ITEM – RANDOMIZE]. How important is this to you as a *member of the business community*? What about [READ NEXT ITEM]?

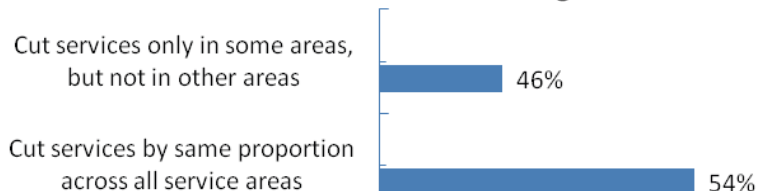


4.2 General Approach to Service Cuts

Businesses' views are essentially the same regarding the preferred approach for making service cuts if they were to be implemented. More than half of businesses would prefer to see higher cuts across all service areas, and almost half would prefer to cut services only in some areas but not in other areas.

Although not directly comparable, the findings are generally consistent with preferences seen in the past regarding the basic approach to service cuts.

Preference Method for Making Service Cuts



Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

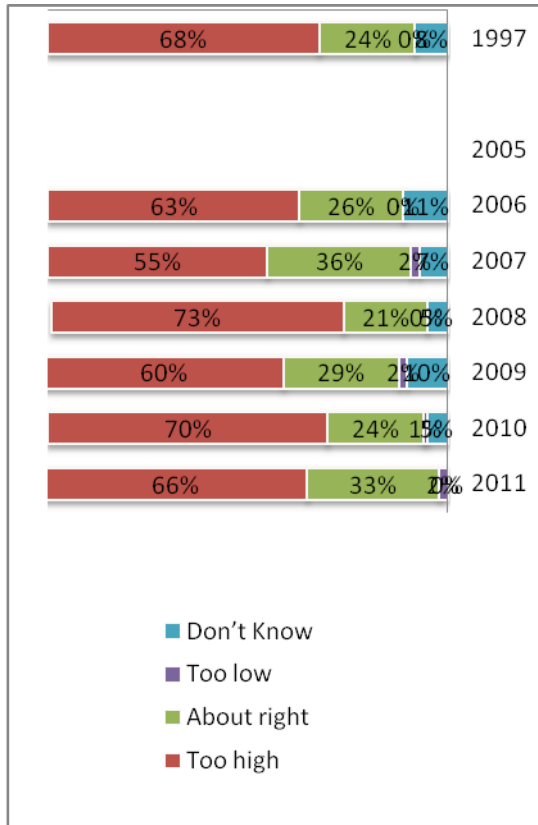
7b. OPTIONAL: If City services need to be reduced, would you prefer that the City: ROTATE ORDER

1. *Cut services by same proportion across all service areas OR*
2. *Cut services only in SOME areas, but not in others.*

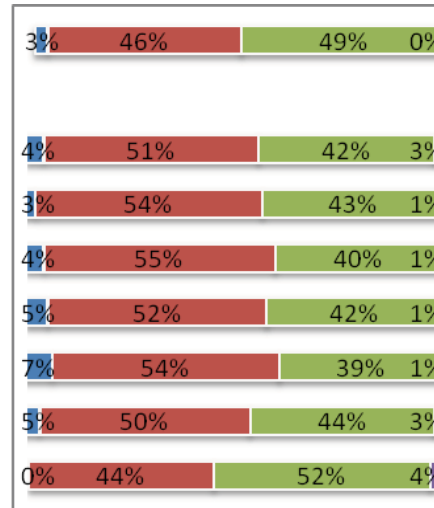


Among Those Who Pay Property Taxes Directly

Businesses



Residents



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

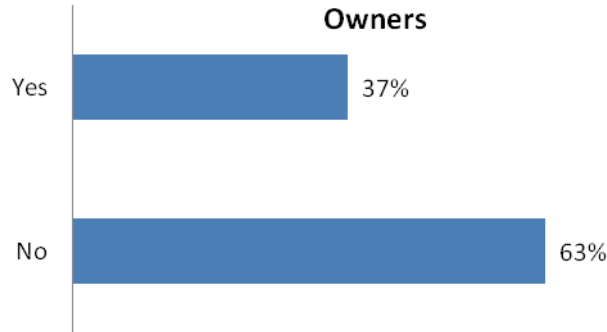
Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

6. *And, in general, would you say that the property taxes you currently pay on your residence are too high, too low, or about right?*
Probe...*Would that be much too high/low?*



**Willing to Pay Additional Amount to Maintain
Current Level of Service**

Owners

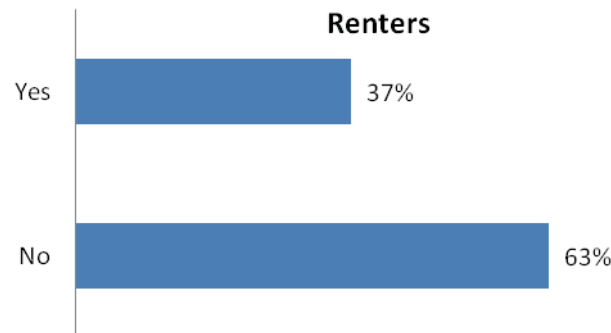


Base Business
2011 (n=90)

9a. So, thinking about tax increases specifically for the moment, in order for the City of Vancouver to raise \$20 million without any cuts in service, it would possibly need to raise the amount you pay in property taxes by up to 2 percent. As a member of Vancouver's business community, would you be willing to pay this amount in order to maintain the current level of services provided by the City?

**Willing to Pay Additional Amount to Maintain
Current Level of Service**

Renters



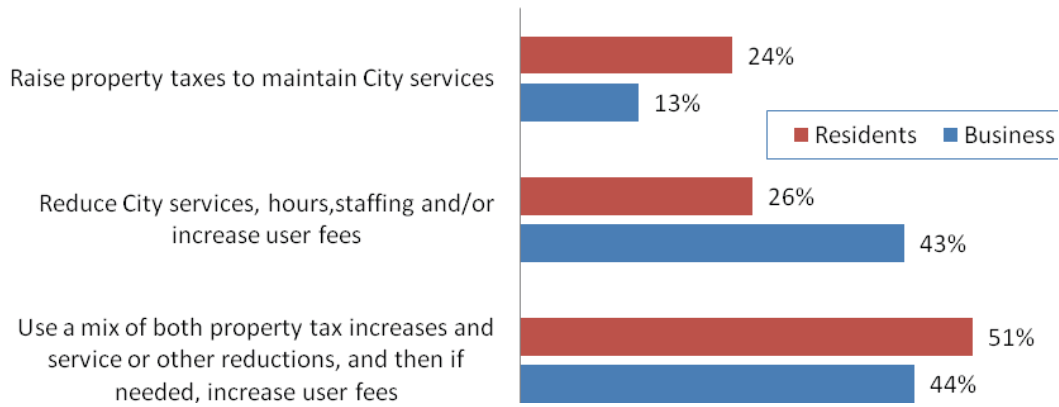
Base Business
2011 (n=160)

9b. So, thinking about tax increases specifically for the moment, in order for the City of Vancouver to raise \$20 million without any cuts in service, it would possibly need to raise the level of taxes your property owner pays by possibly up to 2 percent. Your property owner could in turn decide to pass on to you SOME OR ALL of the cost of a tax increase by raising the amount you pay in rent. Thinking about this, would you be willing to pay an increase in rent in order to maintain the current level of services provided by the City of Vancouver?

Businesses that rent their premises but do not pay property taxes directly have traditionally been divided on willingly incurring an additional 2% rent increase to maintain the current level of City services. In the context of the 2011 budget shortfall, this response rate is exactly the same as for the owners — i.e., slightly



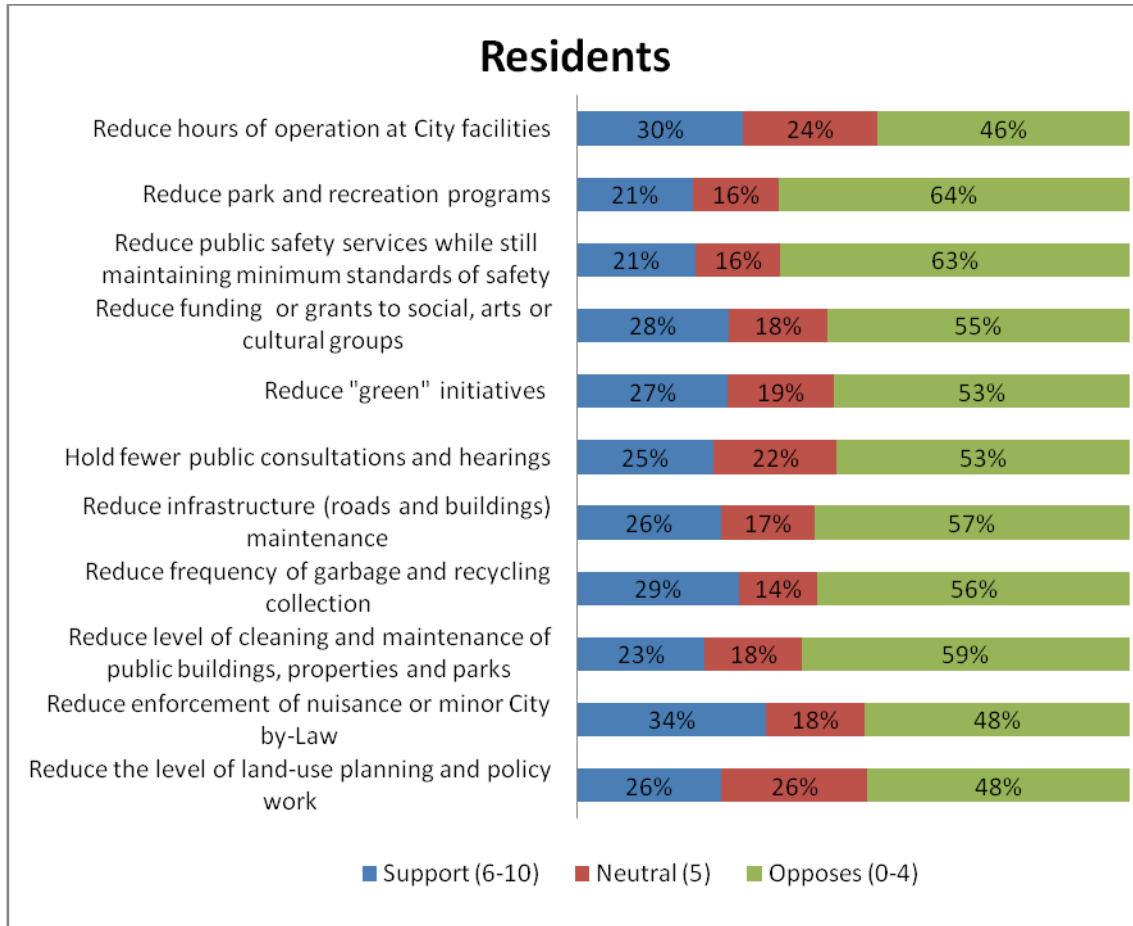
Approach City should take



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

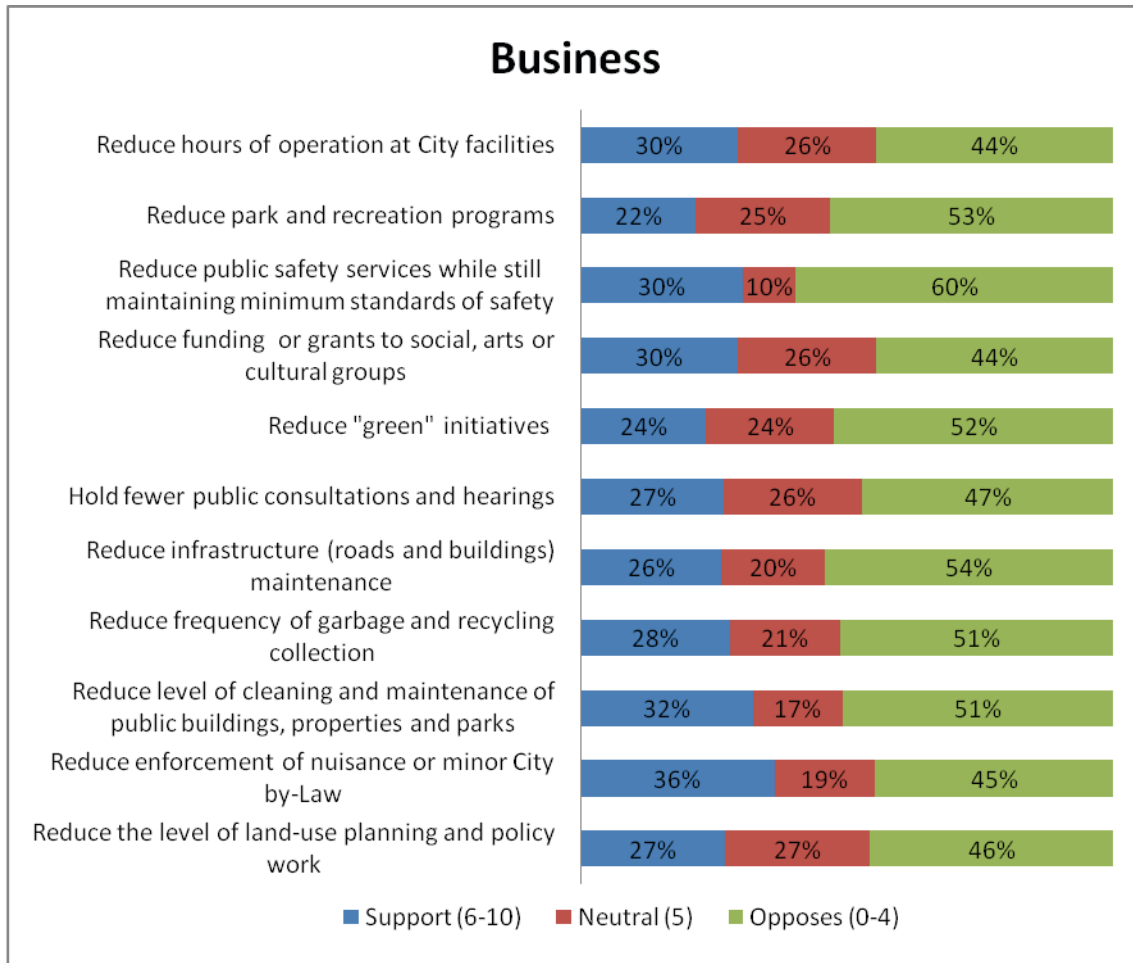
12. When it comes right down to it, which approach would you prefer that the City take? (READ & ROTATE ORDER; ACCEPT ONE ANSWER ONLY)



Base Residents
2011 (n=509)

8. Now, let's talk about priorities in a **general** way. Please keep in mind that any changes would be planned to **minimize** the impact on the public.

*I'm going to read a list of possible ways the City could find cost savings. For each one please tell me the extent to which you would support or oppose the City taking this measure to save costs and minimize tax increases. Please rate each on a scale from 0 to 10 where "0 means strongly oppose" and "10 means strongly support". Starting with [RANDOMIZE LIST]. **INTERVIEWER: CONFIRM UNDERSTANDING OF SCALE: IF '7-10', SAY: So you support? IF '0-3', SAY: So you oppose?***



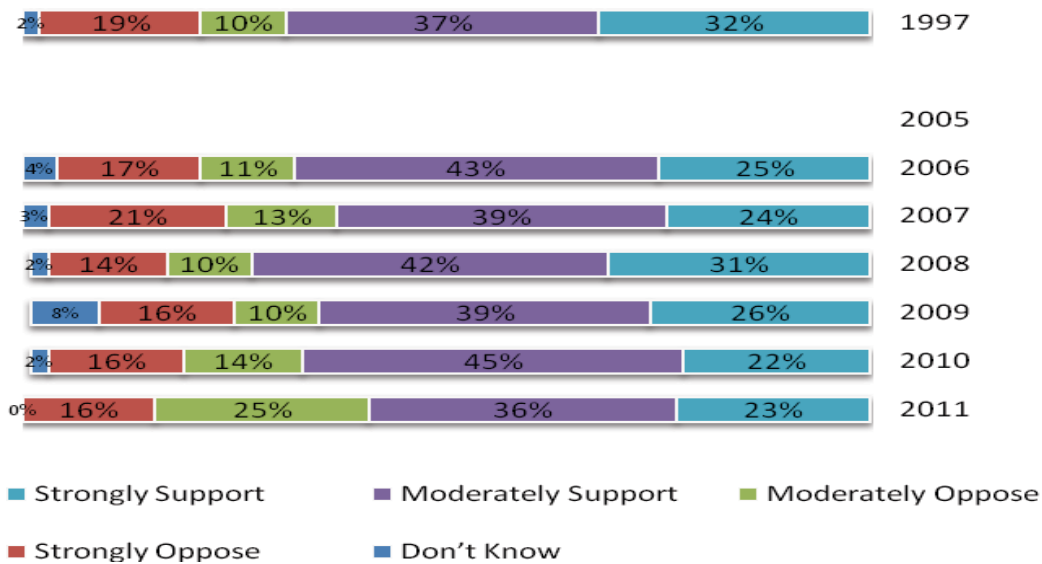
Base Business
2011 (n=250)

8. Now, let's talk about priorities in a **general** way. Please keep in mind that any changes would be planned to **minimize** the impact on the public.

*I'm going to read a list of possible ways the City could find cost savings. For each one please tell me the extent to which you would support or oppose the City taking this measure to save costs and minimize tax increases. Please rate each on a scale from 0 to 10 where "0 means strongly oppose" and "10 means strongly support". Starting with [RANDOMIZE LIST]. **INTERVIEWER: CONFIRM UNDERSTANDING OF SCALE: IF '7-10', SAY: So you support? IF '0-3', SAY: So you oppose?***



Businesses were also asked if they support or oppose the City charging higher user fees for these services and using the extra money to help pay for other City services. User fees are currently used to help recover the costs of providing certain City services, such as permits and licences, recreation programs or sewer and water fees.



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

10. As you may know, user fees are currently used to help recover the costs of providing certain City services such as permits and licenses, recreation programs, or sewer and water fees. Would you *support* or *oppose* the City charging higher user fees for these services and using the extra money to help pay for other city services?

PROBE...Would that be strongly or moderately support/oppose?

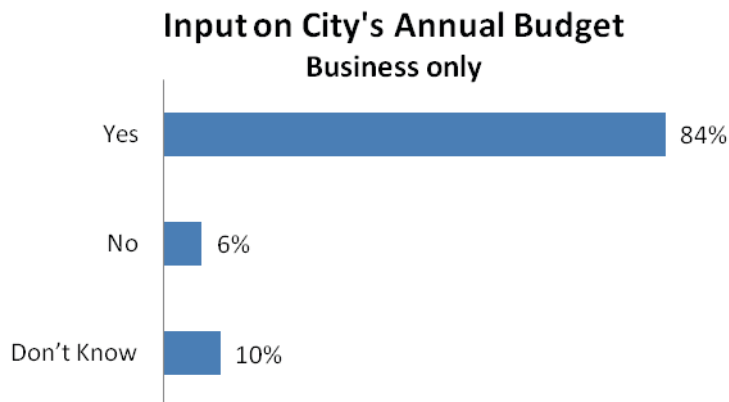
More than half of the businesses support the City charging higher user fees for these services and using the extra money to help pay for other City services. At the same time, 41% of the businesses oppose the same.



7. Communications

7.1 Importance of Providing Input to Annual Budget Process

Once again, the vast majority of residents and business owners/operators surveyed appreciate the opportunity to provide input to the annual budget process, saying that it is important to them to do so. This sentiment is shared by large majorities in all segments of the two stakeholder groups.

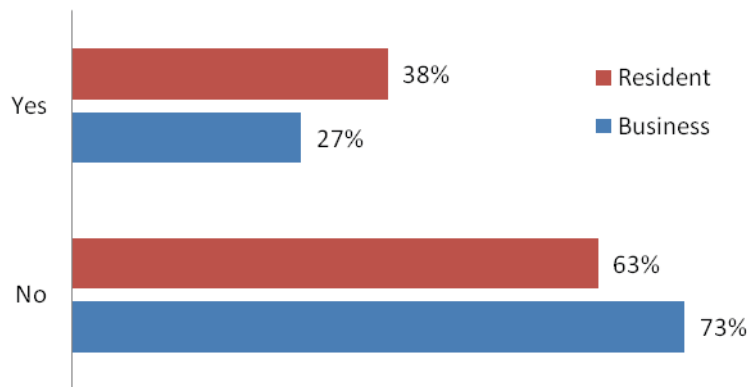


Base Business
2011 (n=250)

13. *Is providing input on the City's annual budget important to you, such as you are doing right now with this survey?*



Heard of Vancouver Budget Consultations from other Sources



Base Business
2011 (n=250)

Base Residents
2011 (n=509)

14. Other than this phone call, have you heard about the Vancouver Budget Consultations?

More residents (38%) heard about the Vancouver Budget Consultations from sources other than the survey than did businesses (27%).

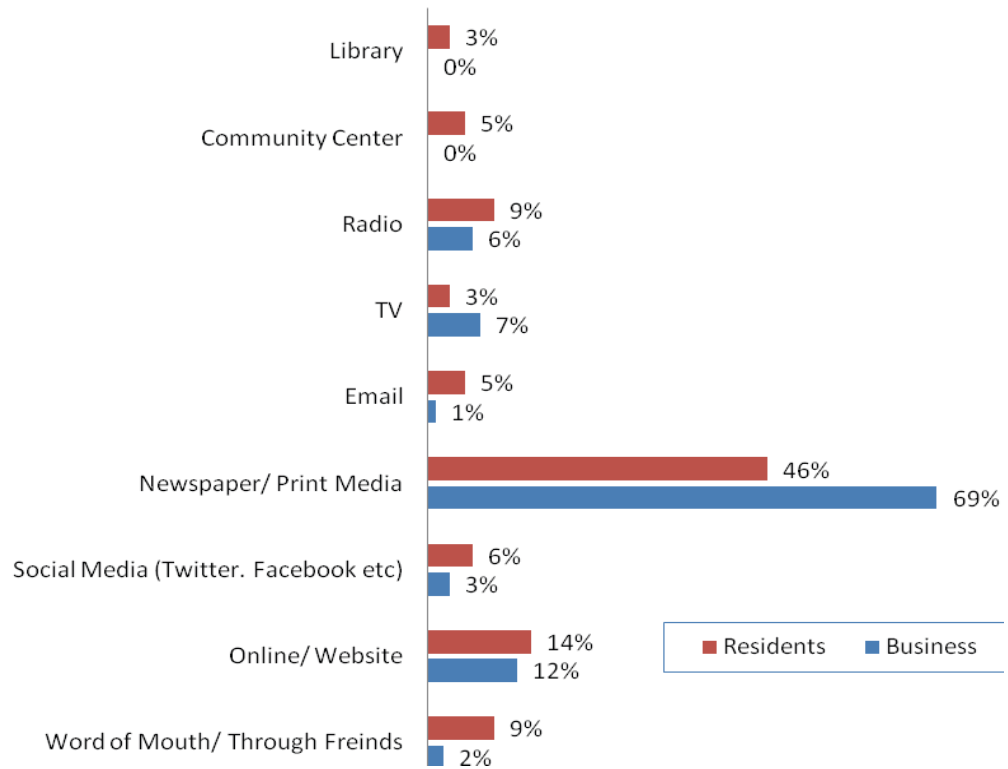
However, most businesses and residents had heard about the consultations through newspaper and print media.

Other media through which businesses and residents heard about the Vancouver Budget Consultations were online and radio. A few mentioned that they had heard about it from the community and social media such as Facebook, Twitter, etc. A few residents also mentioned “word of mouth”.

Not many businesses or residents mentioned television, email or the library.

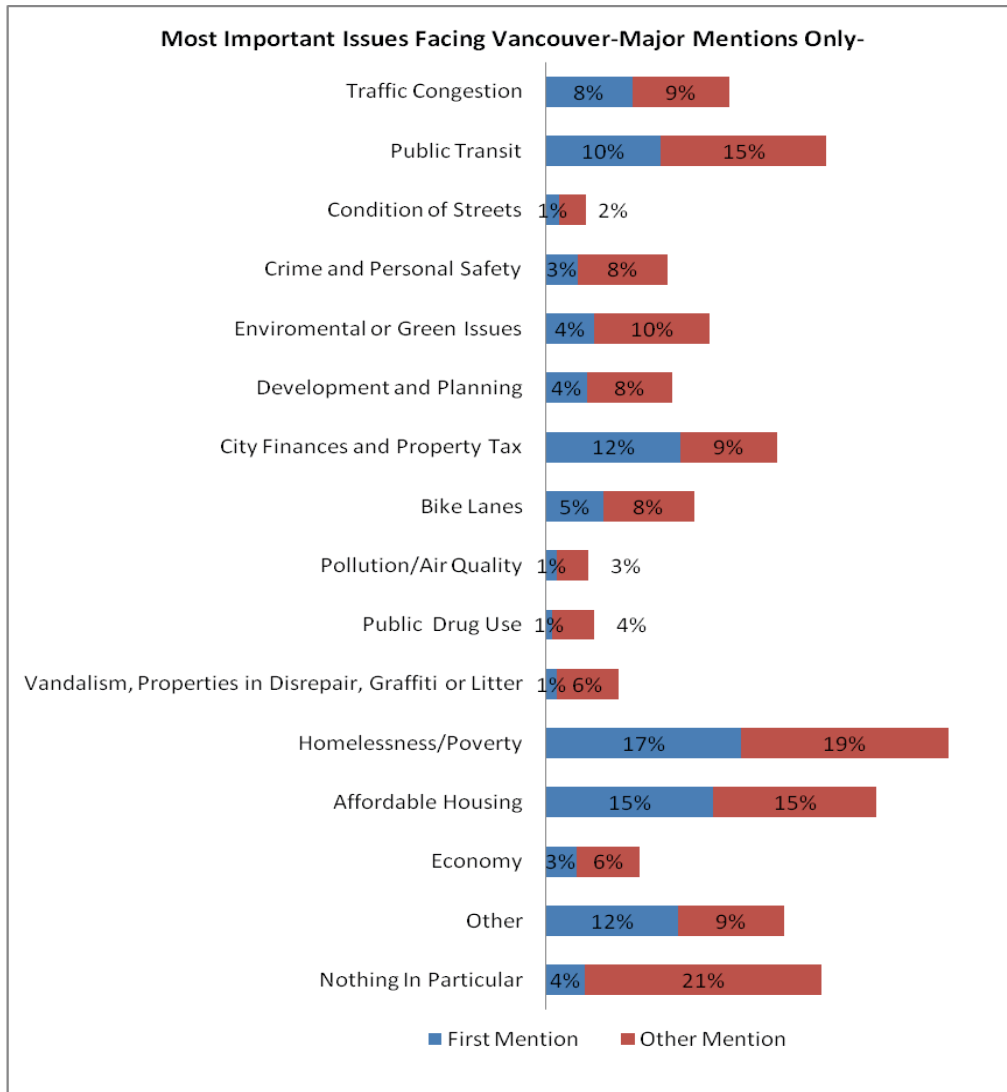


Heard in Media



Caution: The sample size is too small in most cases below:

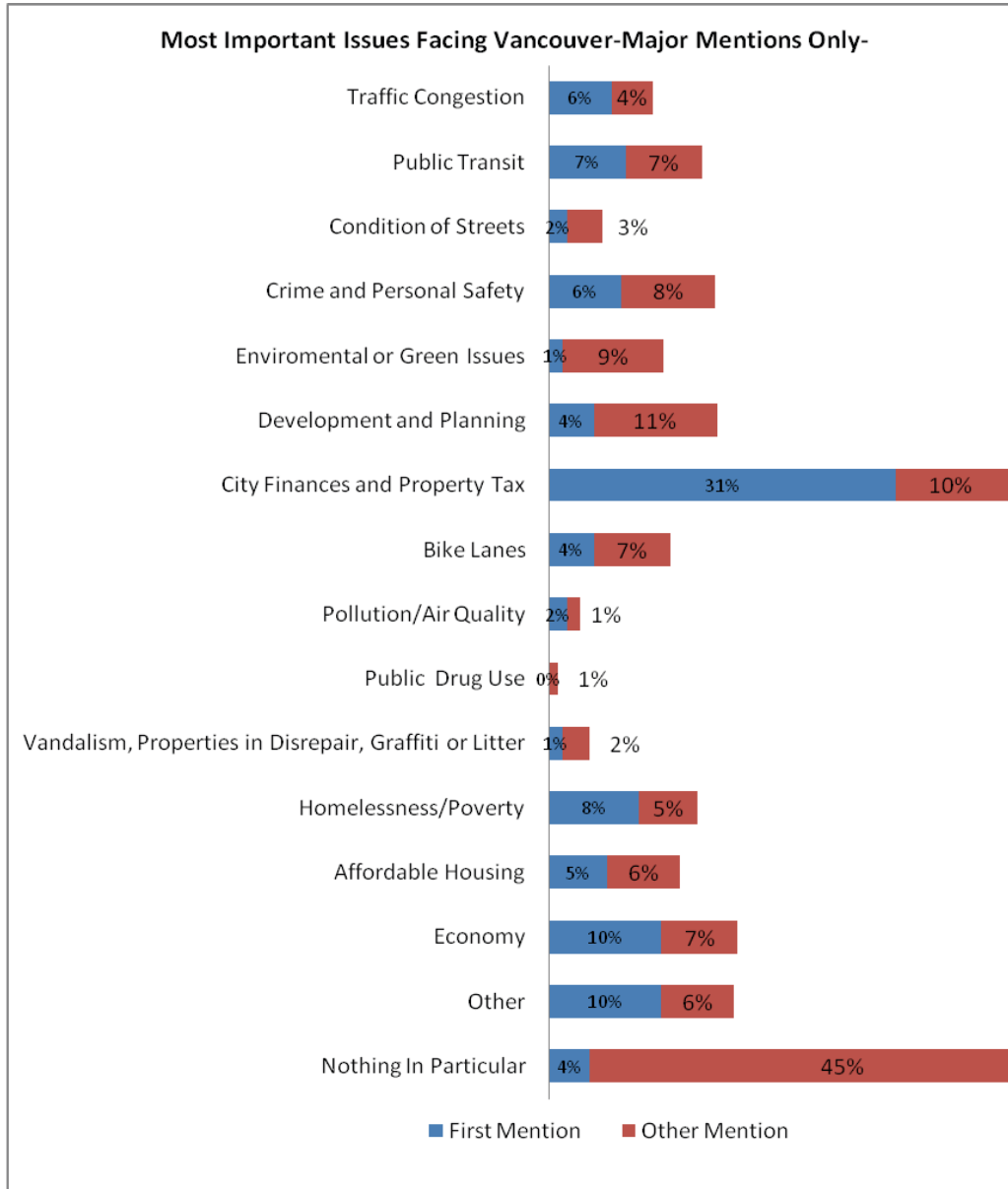
Type	Residents	Business
Word of Mouth/Through Friends	16	1
Online/Website	26	8
Social Media (Twitter, Facebook, etc.)	11	2
Newspaper/Print Media	88	47
Email	9	0
TV	5	5
Radio	17	4
Community Centre	9	0
Library	5	0
Total	186	67



Base Residents: 509

1a. Now, to begin our questions, in your view **as a resident of the community** in Vancouver, what is the most important local issue facing the City of Vancouver, that is the **one issue** you feel should receive the greatest attention from Vancouver's City Council? **(ONE RESPONSE ONLY)**

1b. PROBE...Are there any other important local issues? **(PROBE; ACCEPT 2 ANSWERS)**



Base Business: 250

1a. Now, to begin our questions, in your view **as a member of the business community** in Vancouver, what is the most important local issue facing the City of Vancouver, that is the **one issue** you feel should receive the greatest attention from Vancouver's City Council? **(ONE RESPONSE ONLY)**

1b. **PROBE...**Are there any other important local issues? **(PROBE; ACCEPT 2 ANSWERS)**



Level of Satisfaction with City Services



Legends:

- Very Satisfied
- Somewhat Satisfied
- Somewhat Dissatisfied
- Very Dissatisfied
- Don't Know

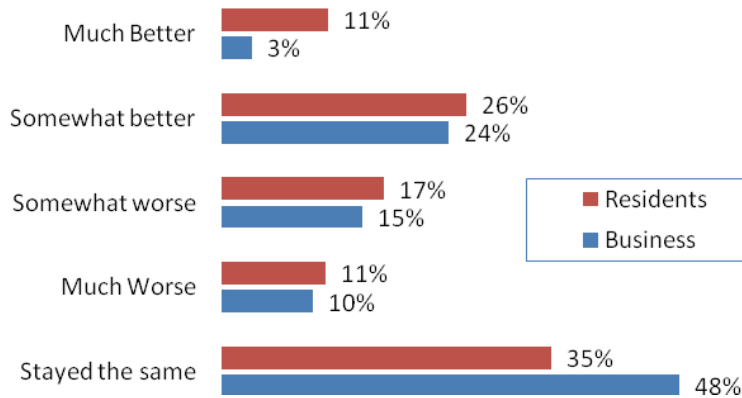
Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

2. Generally speaking, are you satisfied or dissatisfied with the overall quality of services provided to *businesses* by the City of Vancouver? Probe...Would that be very satisfied/somewhat satisfied/dissatisfied?



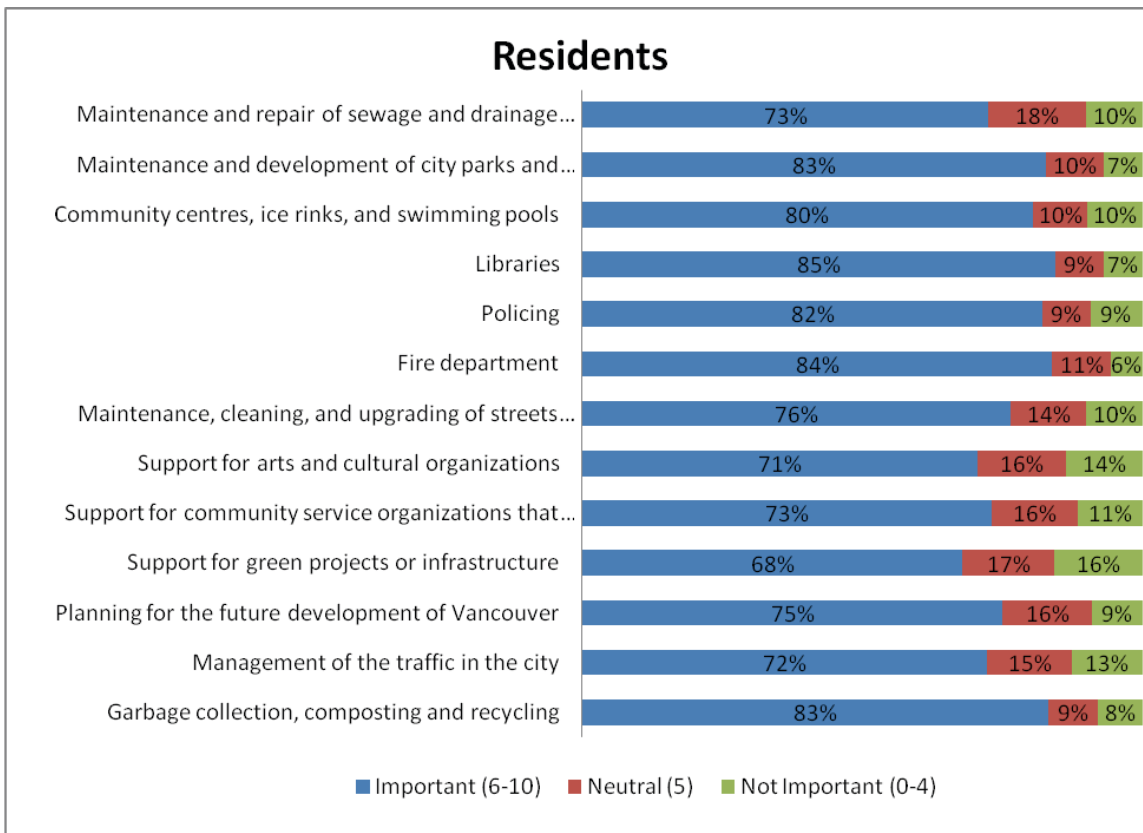
Overall Quality of Service Provided



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

3. *And, would you say that the overall quality of service provided by the City of Vancouver has got better or worse over the past few years? Probe...Would that be much/somewhat better/worse?*



Base Residents
 1997 (n=1,000)
 1999(n=605)
 2001 (n=602)
 2002 (n=600)
 2003 (n=608)
 2004 (n=602)
 2005 (n=636)
 2006 (n=607)
 2007 (n=601)
 2008 (n=600)
 2009 (n=600)
 2010 (n=505)
 2011 (n=509)

Base Business
 1997 (n=300)
 2006(n=353)
 2007 (n=350)
 2008 (n=300)
 2009 (n=300)
 2010 (n=251)
 2011 (n=250)

5. As you may know, the City of Vancouver provides a variety of different services to you as a resident. I'm going to read a list of these services, and then ask how important each service is to you as a resident, that is, something you feel City Council should pay strong attention to.

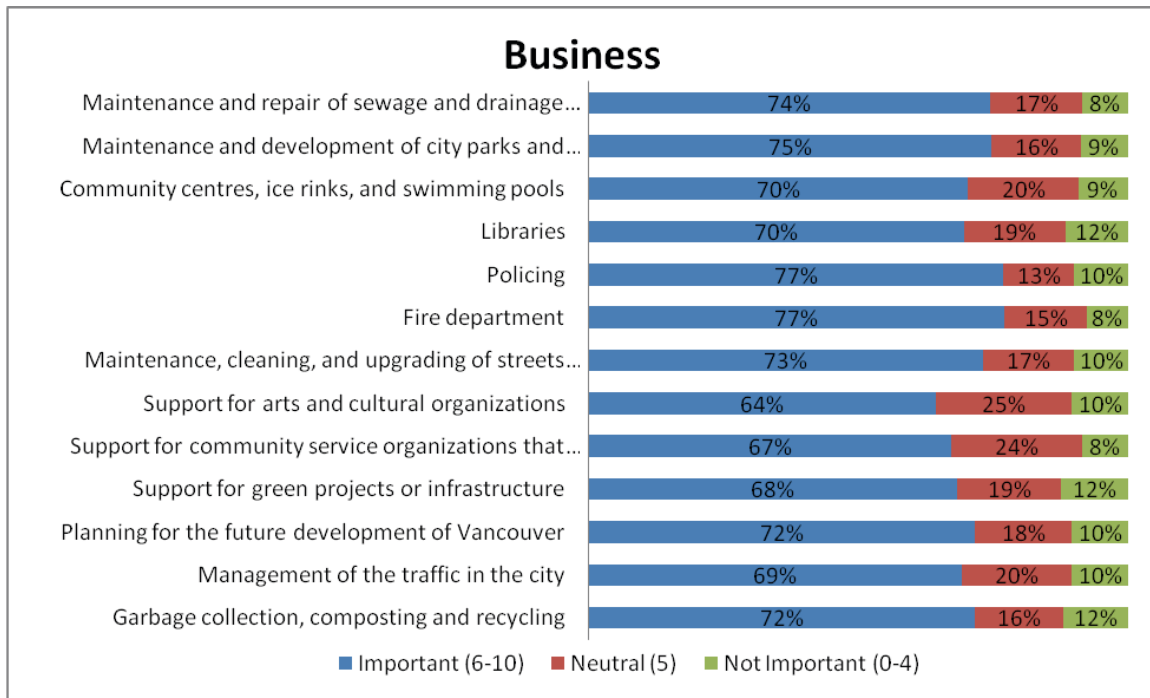
Let's use a scale from 0 to 10, where "0" means the service is "Not at all important" to you, and should not be given any priority at all by City Council, "10" means the service is "Extremely important" to you, and should be given top priority, and a "5" means the service is neither important nor unimportant to you. Remember, you can pick any number between 0 and 10. The first service is **(READ ITEM – RANDOMIZE)**. How important is this to you as a resident? What about **(READ NEXT ITEM)?**



Need Less Attention (Mean Score of 7.15 and above)

The following services are important to businesses, and they feel City Council should pay less attention to:

- Policing (Mean Score 7.32)
- Fire department (Mean Score 7.41)



Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
2005 (n=636)
2006 (n=607)
2007 (n=601)
2008 (n=600)
2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

5. As you may know, the City of Vancouver provides a variety of different services to *businesses in the city*. I'm going to read you a list of some of these services, and ask you how important each service is to you as a *member of the business community in Vancouver*, that is, something you feel City Council should pay strong attention to.

Let's use a scale from 0 to 10, where "0" means the service is "Not at all important" to you, and should not be given any priority at all by City Council, ... "10" means the service is "Extremely important" to you, and should be given top priority, ... and a "5" means the service is neither important nor unimportant to you. Remember, you can pick any number between 0 and 10. The first service is [READ ITEM – RANDOMIZE]. How important is this to you as a *member of the business community*? What about [READ NEXT ITEM]?

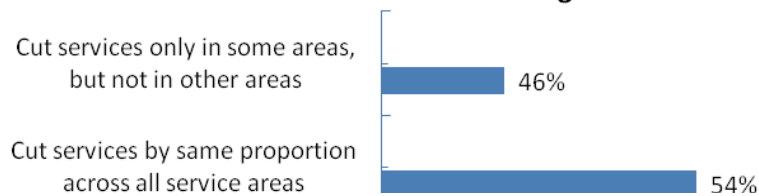


4.2 General Approach to Service Cuts

Businesses' views are essentially the same regarding the preferred approach for making service cuts if they were to be implemented. More than half of businesses would prefer to see higher cuts across all service areas, and almost half would prefer to cut services only in some areas but not in other areas.

Although not directly comparable, the findings are generally consistent with preferences seen in the past regarding the basic approach to service cuts.

Preference Method for Making Service Cuts



Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

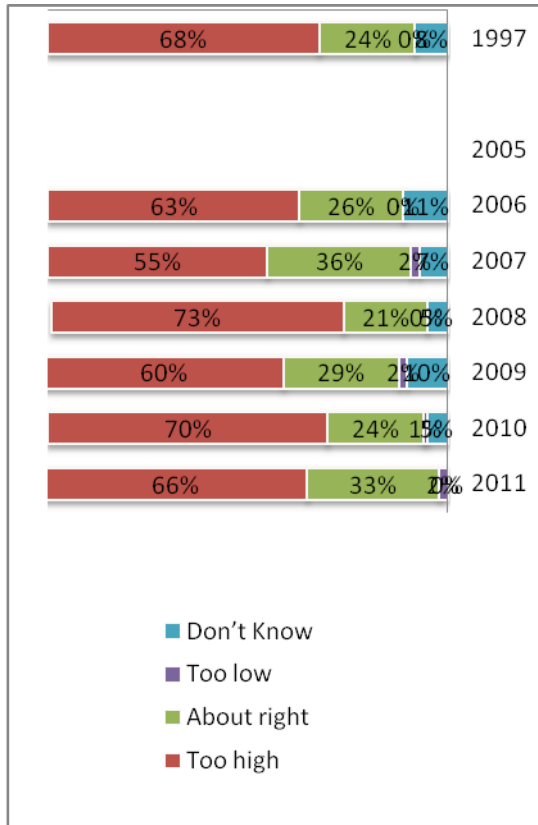
7b. OPTIONAL: If City services need to be reduced, would you prefer that the City: ROTATE ORDER

1. Cut services by same proportion across all service areas OR
2. Cut services only in SOME areas, but not in others.

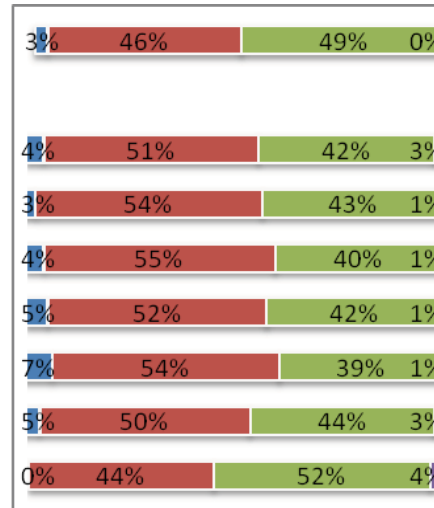


Among Those Who Pay Property Taxes Directly

Businesses



Residents



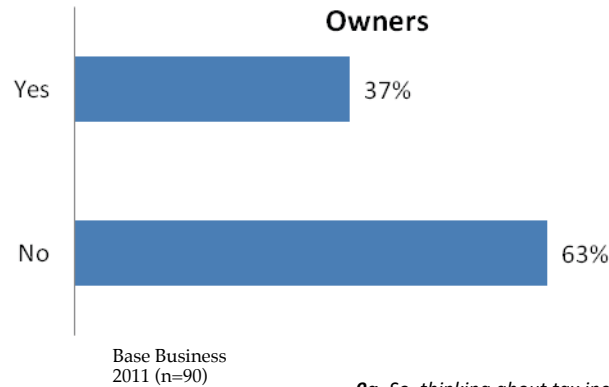
Base Residents
1997 (n=1,000)
1999(n=605)
2001 (n=602)
2002 (n=600)
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2005 (n=636)
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Base Business
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2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

6. *And, in general, would you say that the property taxes you currently pay on your residence are too high, too low, or about right?*
Probe...*Would that be much too high/low?*

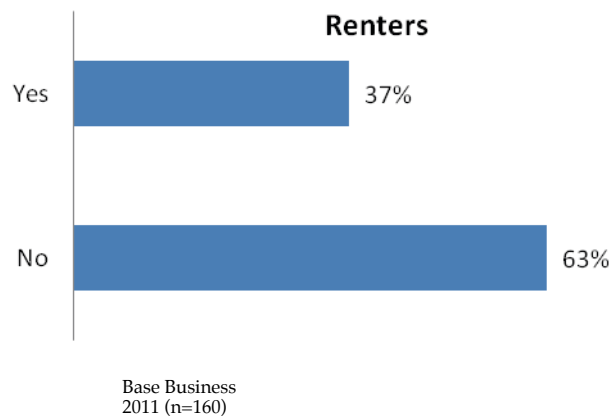


**Willing to Pay Additional Amount to Maintain
Current Level of Service**



9a. So, thinking about tax increases specifically for the moment, in order for the City of Vancouver to raise \$20 million without any cuts in service, it would possibly need to raise the amount you pay in property taxes by up to 2 percent. As a member of Vancouver's business community, would you be willing to pay this amount in order to maintain the current level of services provided by the City?

**Willing to Pay Additional Amount to Maintain
Current Level of Service**

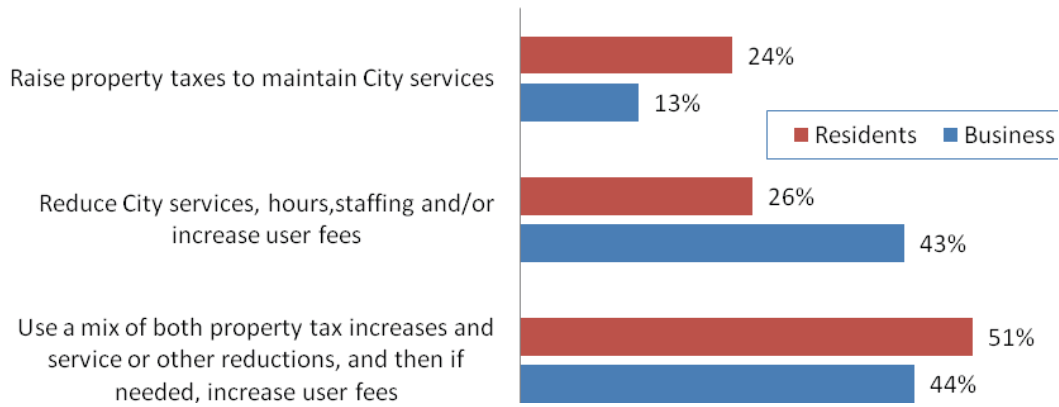


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Businesses that rent their premises but do not pay property taxes directly have traditionally been divided on willingly incurring an additional 2% rent increase to maintain the current level of City services. In the context of the 2011 budget shortfall, this response rate is exactly the same as for the owners — i.e., slightly



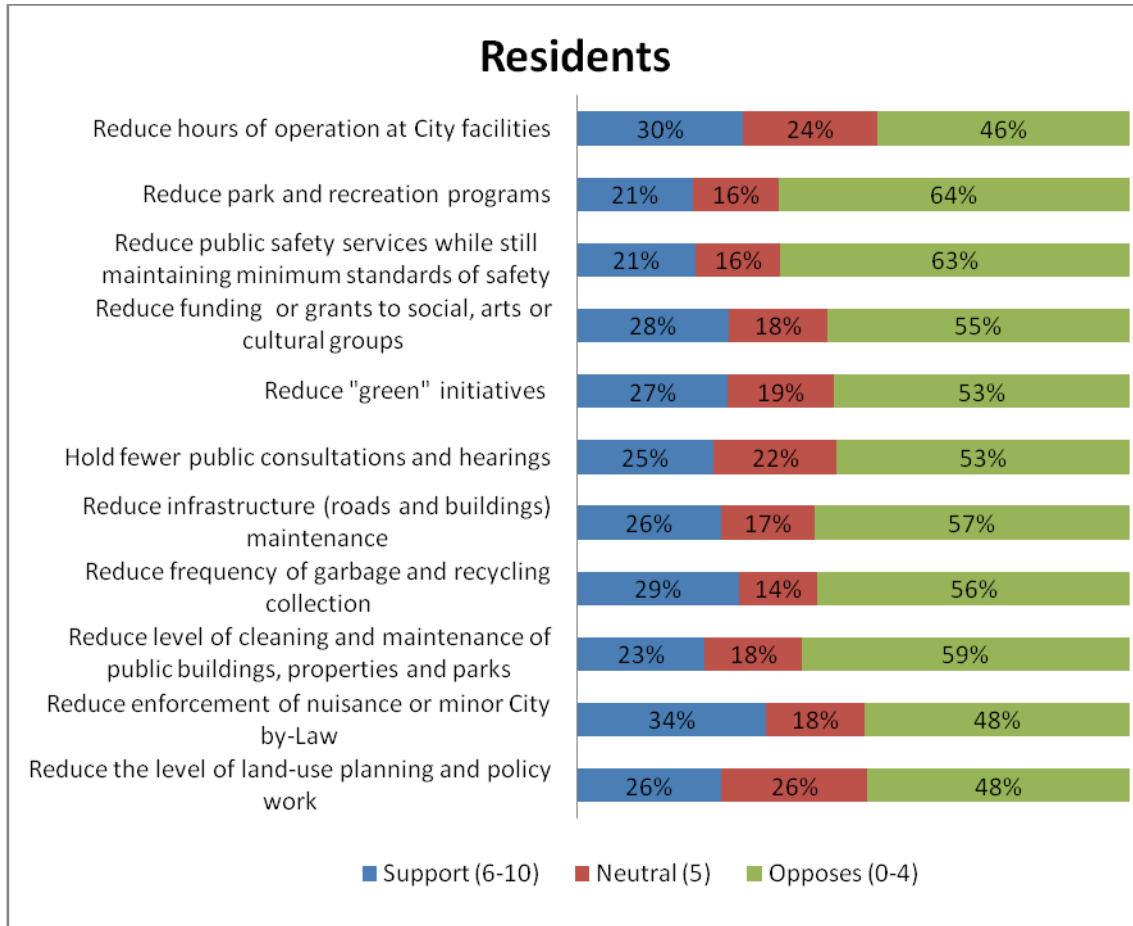
Approach City should take



Base Residents
1997 (n=1,000)
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2001 (n=602)
2002 (n=600)
2003 (n=608)
2004 (n=602)
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2009 (n=600)
2010 (n=505)
2011 (n=509)

Base Business
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2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

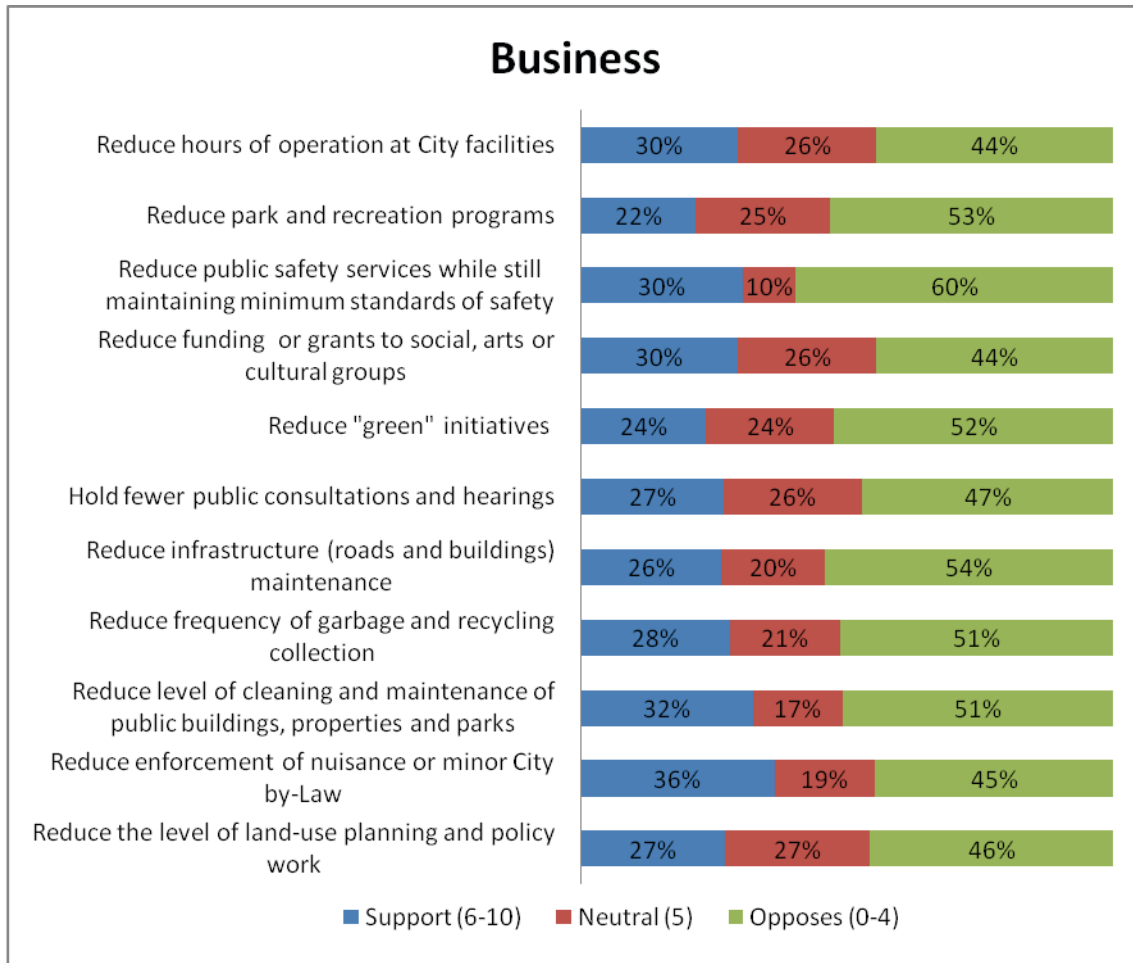
12. When it comes right down to it, which approach would you prefer that the City take? (READ & ROTATE ORDER; ACCEPT ONE ANSWER ONLY)



Base Residents
2011 (n=509)

8. Now, let's talk about priorities in a **general** way. Please keep in mind that any changes would be planned to **minimize** the impact on the public.

*I'm going to read a list of possible ways the City could find cost savings. For each one please tell me the extent to which you would support or oppose the City taking this measure to save costs and minimize tax increases. Please rate each on a scale from 0 to 10 where "0 means strongly oppose" and "10 means strongly support". Starting with [RANDOMIZE LIST]. **INTERVIEWER: CONFIRM UNDERSTANDING OF SCALE: IF '7-10', SAY: So you support? IF '0-3', SAY: So you oppose?***



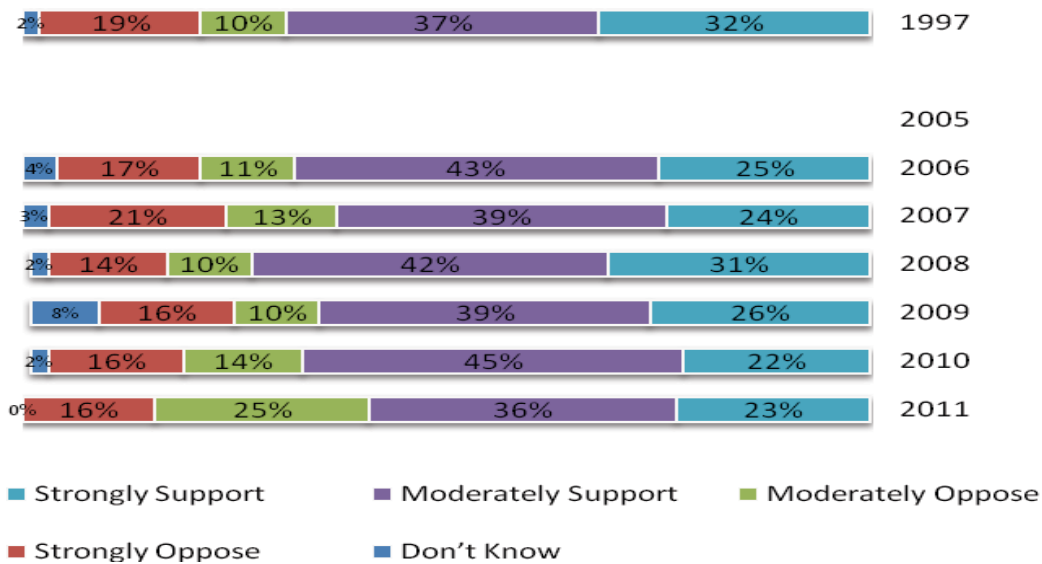
Base Business
2011 (n=250)

8. Now, let's talk about priorities in a **general** way. Please keep in mind that any changes would be planned to **minimize** the impact on the public.

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Businesses were also asked if they support or oppose the City charging higher user fees for these services and using the extra money to help pay for other City services. User fees are currently used to help recover the costs of providing certain City services, such as permits and licences, recreation programs or sewer and water fees.



Base Residents
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1999(n=605)
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2006 (n=607)
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2008 (n=600)
2009 (n=600)
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2011 (n=509)

Base Business
1997 (n=300)
2006(n=353)
2007 (n=350)
2008 (n=300)
2009 (n=300)
2010 (n=251)
2011 (n=250)

10. As you may know, user fees are currently used to help recover the costs of providing certain City services such as permits and licenses, recreation programs, or sewer and water fees. Would you *support* or *oppose* the City charging higher user fees for these services and using the extra money to help pay for other city services?

PROBE...Would that be strongly or moderately support/oppose?

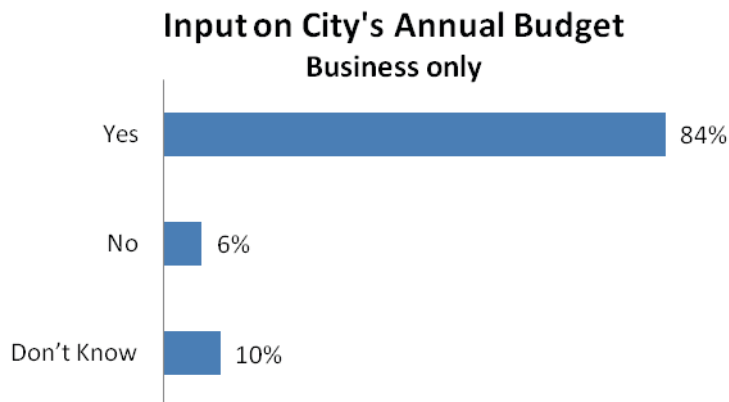
More than half of the businesses support the City charging higher user fees for these services and using the extra money to help pay for other City services. At the same time, 41% of the businesses oppose the same.



7. Communications

7.1 Importance of Providing Input to Annual Budget Process

Once again, the vast majority of residents and business owners/operators surveyed appreciate the opportunity to provide input to the annual budget process, saying that it is important to them to do so. This sentiment is shared by large majorities in all segments of the two stakeholder groups.

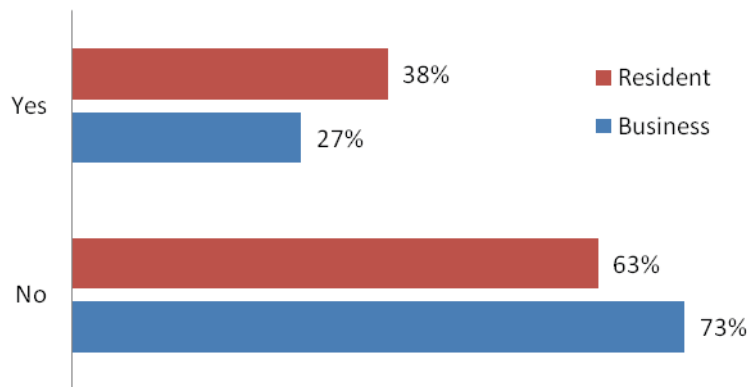


Base Business
2011 (n=250)

13. *Is providing input on the City's annual budget important to you, such as you are doing right now with this survey?*



Heard of Vancouver Budget Consultations from other Sources



Base Business
2011 (n=250)

Base Residents
2011 (n=509)

14. Other than this phone call, have you heard about the Vancouver Budget Consultations?

More residents (38%) heard about the Vancouver Budget Consultations from sources other than the survey than did businesses (27%).

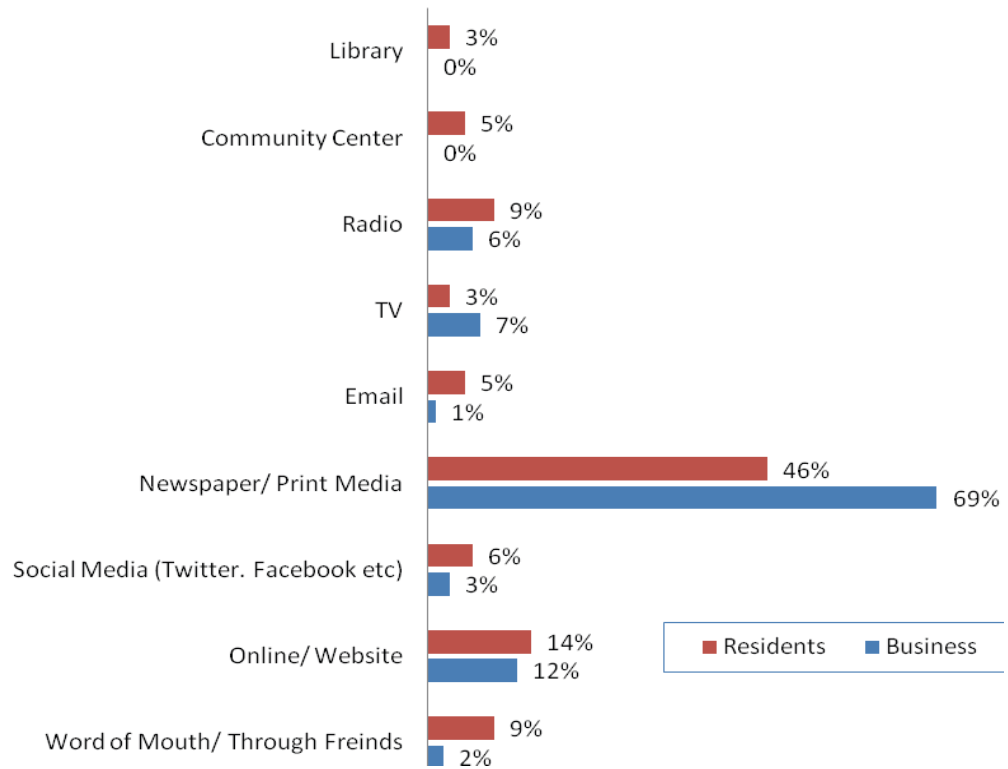
However, most businesses and residents had heard about the consultations through newspaper and print media.

Other media through which businesses and residents heard about the Vancouver Budget Consultations were online and radio. A few mentioned that they had heard about it from the community and social media such as Facebook, Twitter, etc. A few residents also mentioned “word of mouth”.

Not many businesses or residents mentioned television, email or the library.



Heard in Media



Caution: The sample size is too small in most cases below:

Type	Residents	Business
Word of Mouth/Through Friends	16	1
Online/Website	26	8
Social Media (Twitter, Facebook, etc.)	11	2
Newspaper/Print Media	88	47
Email	9	0
TV	5	5
Radio	17	4
Community Centre	9	0
Library	5	0
Total	186	67