Appendix 3

REAL VALUE

delivering value for money

City of Vancouver Service Priorities Research for the 2014 Budget

CITY OF VANCOUVER

Table of Contents

Executive Summary

Executive Summary

- In the context of its budget planning process for 2014, the City of Vancouver sought to gauge perceptions of the services it provides to City Residents and Businesses. The results are a snapshot in time and help inform budget priority deliberations as City councillors initiate plans for the new budget.

- The City engaged with members of the general public via 3-1-1 and through a more in-depth Service Satisfaction Survey. The goal of the 3-1-1 Caller Outreach Survey was to capture service satisfaction among members of the public directly engaging with the City through 3-1-1. The goal of the Service Satisfaction Survey was to proactively survey a demographically reflective sample of residents and businesses, on specific issues and city-wide topics, to monitor satisfaction with civic services, identify spending priorities, and gather input on City activities.

3-1-1 Caller Outreach

- 3-1-1 Citizen Service Representatives asked **426** callers who identified themselves as Vancouver residents or business owners the following three questions pulled from the service satisfaction survey.

Most important Issues for the City of Vancouver:

- For 3-1-1 callers the Top 5 Issues for the City were Transportation, Housing and Homelessness, Garbage and clean streets, Social service (community centres, mental health, schools) and Crime/criminal activity.

Stability of quality of services

- Approximately 70% of 3-1-1 callers thought that the overall quality of services provided by the City of Vancouver has gotten better or stayed the same, while 12% had no comment, and 18% believe services have gotten worse.

Value of services for tax dollars

- Just over half of 3-1-1 callers (54%) believe that they receive overall good value for their tax dollars, while 46% do not.

Executive Summary

Service Satisfaction Survey

- The research addressed the following objectives:
  - Identify issues Residents and Businesses feel the City should give top priority to;
  - Gauge satisfaction with City services and infrastructure, overall and with respect to specific services;
  - Explore Residents’ and Businesses’ perceptions of and sensitivities to taxation levels and value for dollar of services; and
  - Examine Residents’ and Businesses’ preferred options for balancing City budget.

- To meet these objectives, The City of Vancouver conducted an online survey using the following sample sources:

  Resident (n=989, margin of error 3.14)
  - ✓ Talk Vancouver (n=357)
  - ✓ Angus Reid Forum (n=219)
  - ✓ Anonymous link posted on the City of Vancouver website (n=413)

  Business (n=404, 4.86)
  - ✓ Talk Vancouver (n=103)
  - ✓ Angus Reid Forum (n=48)
  - ✓ Anonymous link posted on the City of Vancouver website (n=253)

- Data for the Residents and Businesses sample was weighted to reflect the actual distribution of City of Vancouver Residents based on the census.

Most Important Issues for City of Vancouver

- Vancouver residents and businesses identified a similar set of issues they feel should receive the greatest attention from City Council. While they generally agree which issues are their top five concerns, as in past years, they differ in the degree to which these issues are important. One key area of difference is that for residents, Social Issues/Social Services emerged as a top concern, whereas for businesses, the Economy and Economic Issues were among their top concerns.

  - **Residents' Top Five Issues** are Infrastructure/transportation (61%), Housing/Accommodation (44%), Social Issues/Social Services (36%), Cost of Living (17%) and Development (17%)

  - **Businesses' Top Five Issues** are Infrastructure/transportation (56%), Cost of living (34%), Housing/Accommodation (21%), followed by Development (15%) Economy/Economic Issues (15%).

CITY OF VANCOUVER

Use of City Services (Among Residents Only)

- Parks related City offerings are used most frequently by Residents; Some community facilities enjoy frequent use as well.

  - City offerings related to **Parks** are used most frequently, with 61% of Residents utilizing walking paths 1-4 times per week for example. Among **Community Facilities**, community centers and libraries are used most frequently, with approximately a quarter using them 1-4 times per week.
  - **Arts, Museums and Culture** tend to be used on an occasional or seldom basis, with 34% on average reporting that they use these services 1-2 times per month, and another 41% on average using them 1-2 times per year.
  - Similar to the use of some Community facilities, **transportation infrastructure - bike lanes and City parking** are utilized by about a quarter of residents on a regular basis (1-4 times/week).

- **Essential services,** although important, are utilized infrequently, with over 90% reporting they use these services 1-2 times a year or not at all.

Executive Summary

Quality of Services

- Residents report **high levels of satisfaction** with the quality of City services, and are more satisfied than Businesses
  - City of Vancouver residents feel that service is generally good, with 71% of residents giving the City a somewhat satisfied or very satisfied rating.
  - Businesses are split in their satisfaction, with 52% giving a somewhat satisfied or very satisfied rating to the City, and 48% giving a dissatisfied rating (somewhat dissatisfied or very dissatisfied).
  - To better understand the satisfaction levels among businesses, an additional sample of 289 business owners in Vancouver were asked about their overall level of satisfaction with the City, this time using the same 5pt scale of satisfaction (with a neutral category) used in Budget 2013. With this new measure, 50% of businesses still reported being satisfied with the City, and was equivalent to the results for Budget 2013.

- Residents and Businesses **agree on the services the City delivers best - parks and green space top the list**.
  - Residents and Businesses rate the City as doing the best job (rating of excellent/good) in:
    - Providing and maintaining parks and green space (Residents 44% , Businesses 37%)
    - Providing access to library resources (Residents 42%, Businesses 32%)
    - Garbage services (Residents 41%, Businesses 31%)
    - Providing access to recreation facilities (Residents 36%, Businesses 27%)

- Residents and Businesses **show some divergence in their perceptions of the stability of the quality of services**, with Residents having more positive views.
  - Almost 40% of both residents and businesses feel the quality of City services has not significantly changed over the past two to three years (38% each). For those who felt that quality had changed, more residents saw an improvement (38%) vs. a deterioration (24%). For businesses that thought quality had changed, 22% saw an improvement vs. 40% who saw deterioration.

Budget Allocation to City Services

- For both groups, approximately 40% of the City's budget, on average, would go to the same top 4 services, and in roughly the same order.
  - Enable affordable housing (Residents 8.0%; -Businesses 7.0%)
  - Reduce crime and maintain public safety (Residents 7.7%; Businesses 7.3%)
  - Provide transportation infrastructure for walking, bikes, transit, and vehicles (Residents - 7.4%; Businesses - 7.7%)
  - Provide and maintain parks and green spaces (Residents 6.2%; Businesses 5.7%)
  - Fire prevention and response to fire/medical calls (Residents 6.1%; Businesses 5.7%)
- For Residents however, the provision and maintenance of parks and green spaces made it into their Top 5 in terms of dollars allocated (6.2%). In contrast among Businesses, the promotion of economic development made it into their Top 5 (6.2%) and they were willing to allocate more dollars overall to that priority than Residents.

Preferred Options for Balancing the Budget

- The most preferred options for balancing the budget receive just over 50% support among Residents and Businesses, suggesting that there may be other options that are more appealing for them.
  - Residents prefer user fees for balancing the budget, Businesses emphasize reducing the level of City service
    - Residents do prefer user fee options, with 56% preferring the introduction of new user fees and 47% supporting the increase of current user fees. Businesses show the most support for reducing the level of City staffing (50%), followed by reducing the level of City services (34%).
    - Both groups show the least support for increasing property taxes or rent as a means to balance the City Budget

Openness to Tax Increases

- More than half of Resident/Business owners are willing to pay small increases in property taxes, but are less open to higher levels
  - Not surprisingly, Resident and Business Owners are most willing to pay the smallest increase in property taxes possible, with about 66% willing to pay a 1% increase and 54% of Residents and 50% of Businesses willing to pay an increase of 2%. This drops to 15% and 16% for the largest increase of 4%.

- Resident and Business renters differ significantly in their willingness to pay increased rent to retain the current level of services in the City.
  - The majority of Resident renters are willing to pay a $5 rent increase to retain programs and services at 63%, but only 36% of Businesses are willing to pay an increase of the same size.

Executive Summary

Contact with the City of Vancouver

- The majority of Residents (70%) and Businesses (77%) surveyed have contacted the City in the past 2 years.
  - Residents and Businesses have used a variety of means to contact the City in the past 2 years, with the telephone the most popular among both (44% and 50%) respectively. This is followed by email contact, the City website and in-person.
  - Businesses are more likely than Residents to have used email (40% vs. 33%) the City website (35% vs. 28%) in-person contact (35% vs. 21%), City facilities (24% vs. 15%) and mail (11% vs. 4%) to engage with the City.

Experience with City during Most Recent Contact

- Residents and Businesses evaluate City contact positively overall, with between 57% and 88% rating dimensions of their contact positively.
  - The highest ratings are received for the respectfulness of City employees (88% vs. 76%) the accessibility of services (83% vs. 75%) and the knowledge of employees (80% vs. 70%). The lowest ratings are for the ease of finding the right information.
  - Residents are evaluate their City contact as significantly more positive on all dimensions than Businesses.

Preferred Methods of Engagement

- Residents and Businesses are open to a variety of engagement methods; online questionnaires, email and the Talk Vancouver panel are the most popular.
  - Online methods of engaging with the City are the most preferred, ranging from online questionnaires (57%, 58%) to web-based discussion forums/blogs (31%, 30%) but more traditional methods such as in-person events (29%, 30%) and direct mail (15%, 20%) still figure prominently.
  - Residents prefer email contact (51% vs. 45%) engagement through Talk Vancouver (42% vs. 34%) and direct mail survey (20% vs. 15%) more than Businesses.

Detailed report

Background & Objectives

Background

- In the City's new approach to budgeting and service planning, we are following a three-year public engagement cycle, where Year 1 begins as a broader strategic planning session after the new council is elected. Year 2 and 3 are then subsequent check-ins on public satisfaction with service levels.

- Engagement for the 2014 Budget falls into the category of Year 3 Annual Check-In. It was designed to support the transition to the new three year engagement cycle. The 2014 Budget engagement process maintains consistency of engagement activities from previous years for high-level comparison, while proactively updating our tactics to test new modes of outreach.

- Public input informs recommendations at the staff level when budgets are being developed, and provides valuable information to Council when they receive the final draft budget for consideration. Throughout the year, the City makes it a priority to continually engage with citizens, partners and stakeholders. Public opinion shapes much of what directs our budget priorities as each departmental service plan is based on the needs of their clients and the feedback they receive from them throughout the year. Our annual check-in process is therefore a pulse-check on what we have been hearing throughout the year.

Objectives

- The results from two pieces of the public engagement process presented in this report are the 3-1-1 Caller Outreach Survey and the larger more in-depth Service Satisfaction Survey. The goal of the 3-1-1 Caller Outreach Survey was to produce a snapshot of service satisfaction among members of the public directly engaging with the City through 3-1-1.

- The goal of the Service Satisfaction Survey was to proactively survey a demographically reflective sample of residents and businesses, on specific issues and city-wide topics, to monitor satisfaction with civic services, identify spending priorities, and gather input on City activities.

3-1-1 Caller Outreach

Methodology : 3-1-1 Caller Outreach

- 3-1-1 Citizen Service Representatives (CSRs) supported budget engagement by asking random callers three questions pulled from the service satisfaction survey. CSRs prequalified callers by determining if they were residents or business owners in Vancouver. All the callers were calling for information or service requests that could be fulfilled by 3-1-1 rather than resolved by transferring to another staff member.

- 426 callers, who identified themselves as Vancouver residents or business owners, were asked the following three questions pulled from the service satisfaction survey. Below are the results and comparison to last year. The 2013 Budget and 2014 Budget are the first budget years where this tactic has been used.

  - *What do you feel are the most important local issues facing the City at the present time?*
  - *Would you say that the overall quality of services provided by the City of Vancouver has got better, stayed the same, or got worse over the past few years?*
  - *Thinking about all of the programs and services you receive from the City of Vancouver, and the amount of property taxes or rent you pay, would you say that you get overall good value for your tax dollars?*

- The following three pages show the results and how they compare to the same questions asked by 3-1-1 the year before.

3-1-1 Caller Outreach

- Q1: What do you feel are the most important local issues facing the City at the present time?

Budget 2014 Top Five Issues:

1. Transportation: bike lanes, traffic, parking
2. Housing and homelessness
3. Garbage and clean streets
4. Social services: community centres, mental health, schools
5. Crime/criminal activity

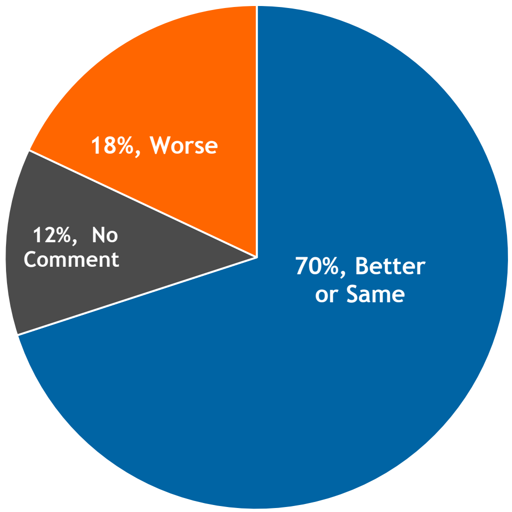
Budget 2013 Top Five Issues:

1. Housing and homelessness
2. Transportation: traffic, parking, road safety
3. Taxes
4. Garbage and clean streets
5. Safety

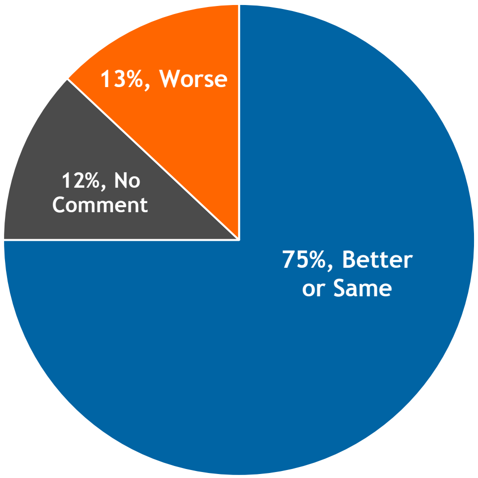
- Q2: Would you say that the overall quality of services provided by the City of Vancouver has got better, stayed the same, or got worse over the past few years?

Level of Satisfaction with Quality of City Services

Budget 2014 Survey Results: Overall Quality of Services



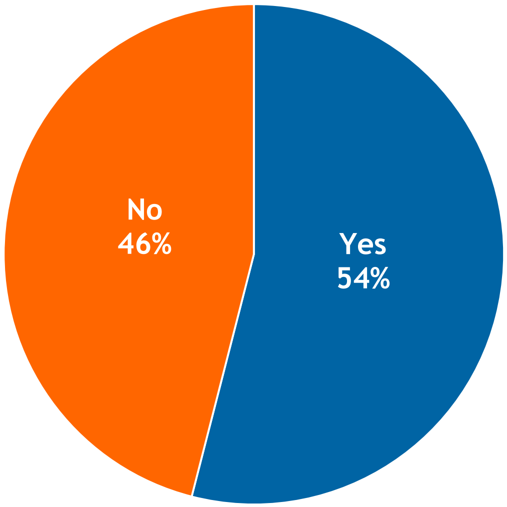
Budget 2013 Survey Results: Overall Quality of Services



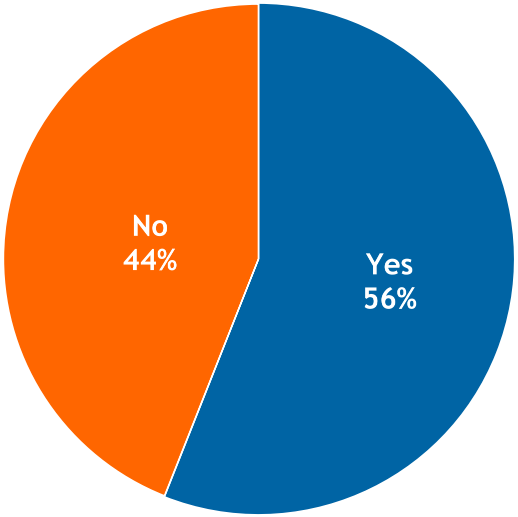
- Q3: Thinking about all of the programs and services you receive from the City of Vancouver, and the amount of property taxes or rent you pay, would you say that you get overall good value for your tax dollars?

Value of Services for Tax Dollars

Budget 2014 Survey Results:
Good Overall Value for Tax Dollars



Budget 2013 Survey Results:
Good Overall Value for Tax Dollars



Service Satisfaction Survey

- The service satisfaction survey was conducted using an online survey methodology and ran from October 10 – 28, 2013. Last year's survey, Budget 2013 utilized the online survey methodology for the first time, a departure from the telephone survey methodology of previous years.

- The survey is a snapshot in time, therefore it is worth noting that during the surveying period, the City was featured in the media on issues stirred up by community and bike lane planning.

- The survey was hosted on the City's online engagement platform, Talk Vancouver, using Vision Critical proprietary software, Sparq. Public engagement and participation are vital to strengthening our City and Talk Vancouver provides a convenient way for people to weigh in on City issues. While Talk Vancouver currently has over 1,700 members who reflect a diversity of people who live, work and learn in Vancouver, the panel is still in its infancy.

- To this end, three sample sources were utilized for the survey to reach our sample size targets and a total of 989 Residents (margin of error   3.14) and 404 Businesses (margin of error   4.86) completed it, with the following breakdown from each sample source:

  - *Talk Vancouver Community Panel* – 357 Residents, 103 Businesses
  - *External Supplier Panel* – 219 Residents, 48 Businesses
  - *General Public* — 413 residents and 253 businesses [reached through an open link at *vancouver.ca/budget* and direct social media outreach].

- Demographic distributions for age and gender within the total sample mirrored those of the City of Vancouver, but to ensure the statistical relevance of the survey, results were weighted to Statistics Canada data on these characteristics. Businesses were sampled to ensure representation of businesses of various sizes, and final results were then weighted to the business size data for the City of Vancouver from Statistics Canada.

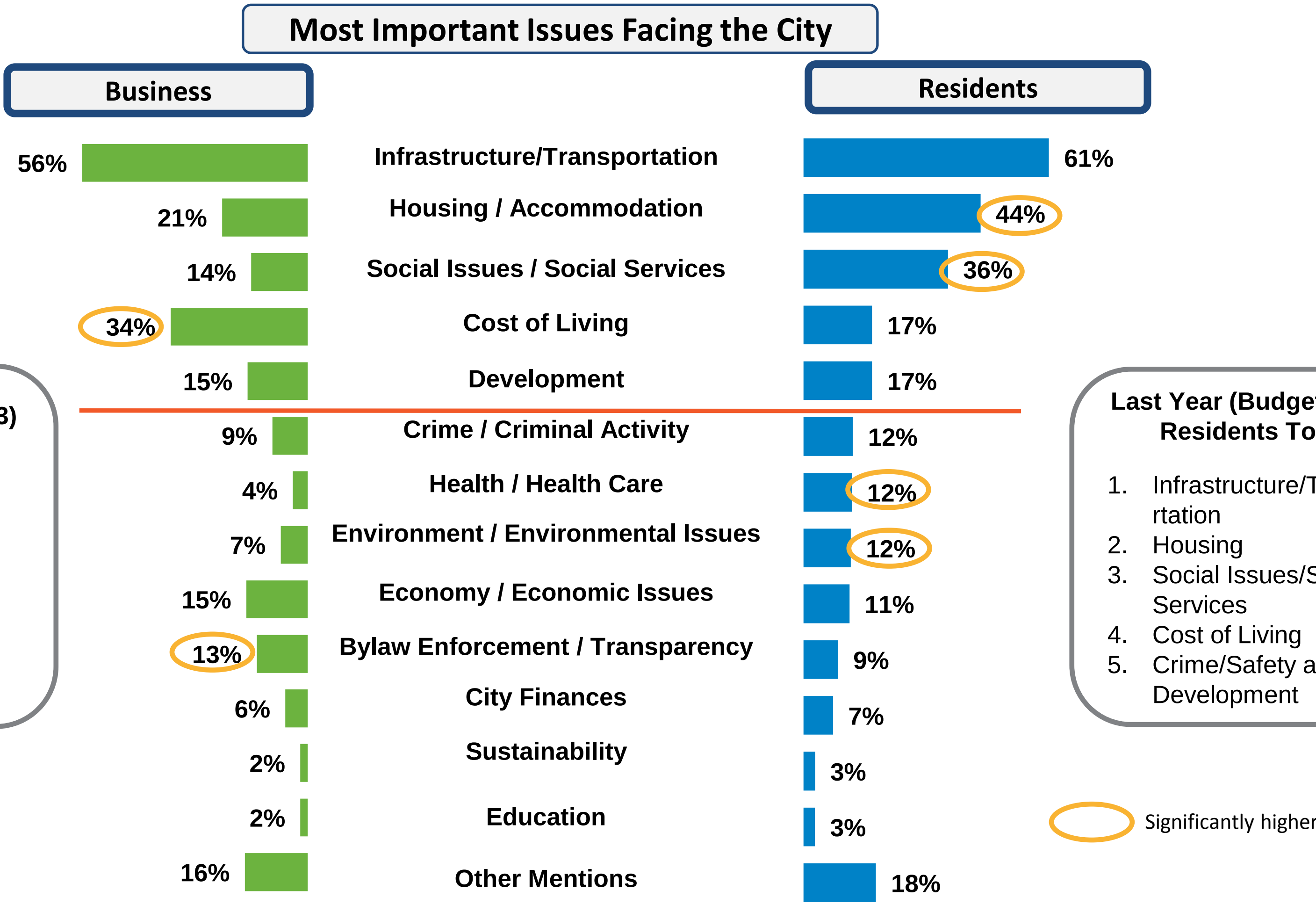
- The current report presents the detailed findings from the service satisfaction survey. For key measures, where feasible, the results are compared to the those of the Budget 2013 survey.

Perceptions of the Quality of City Services

Residents and Businesses single out similar top issues but differ in the degree to which they are emphasized.

CITY OF VANCOUVER

- Among Residents and Businesses, 4 of their Top 5 concerns are the same: Infrastructure/Transportation, Housing/Accommodations, Cost of Living, and Development, although they are often differentially emphasized. For example 44% of residents identified Housing/Accommodation as an issue for the City whereas 21% of Businesses felt the same way.
- But for Residents, Social Issues/Social Services were among their Top 5 concerns, whereas for Businesses, the Economy/Economic Issues made it into their Top 5.



Last Year (Budget 2013) Businesses Top 5

1. Cost of Living
2. Infrastructure /Transportation
3. Economy/Economic Issues
4. Housing
5. Crime and Safety

Last Year (Budget 2013) Residents Top 5

1. Infrastructure/Transpo rtation
2. Housing
3. Social Issues/Social Services
4. Cost of Living
5. Crime/Safety and Development

*Q1. As a [business owner or operator in / resident of] the City of Vancouver, what do you feel are the most important local issues facing the City at the present time? That is, the **two or three** issues you think should receive the greatest attention from Vancouver's Mayor and City Council.*

Within each issue category, Residents and Businesses often prioritize different elements

- Although Residents and Businesses both identified Housing as an important issue, Residents show greater concern about the cost of buying a home. Similarly, for Cost of Living, Businesses were more concerned about high property taxes.

Most Important Issues, Residents and Business Operators

	Business	Residents
Infrastructure/Transportation (Net)	**56%**	**61%**
Transportation (Sub-net)	36%	43%
-Public transit / better public transit	16%	28%
-Traffic congestion / improve city traffic	14%	10%
-Easier transportation / easier car access	10%	9%
Bike Lanes / cycling infrastructure	17%	16%
Development and planning / city planning	3%	6%
Aging / old infrastructure / road repairs	3%	5%
Housing/Accommodations (Net)	**21%**	**44%**
Affordable housing/real estate/cost of buying	10%	30%
Affordable rental housing	5%	7%
Available accommodation/housing	2%	4%
Affordable housing for low/middle income people	-	4%
Social Issues/Social Services (Net)	**14%**	**36%**
Homelessness/Poverty	7%	26%
Community services / resources	4%	4%
Cost of Living/Taxes (Net)	**34%**	**17%**
Taxes (Sub-net)	24%	8%
-Lower taxes / taxes are too high	10%	6%
-Property taxes / high property taxes	9%	3%
Cost of Living/Affordability/Affordable living	5%	6%

	Business	Residents
Development (Net)	**15%**	**17%**
Densification / density / over densification	5%	6%
Lack of green space (e.g. parks , beaches, etc.)	2%	5%
Crime/Criminal Activity (Net)	**9%**	**12%**
Crime and personal safety/theft	4%	6%
Public drug use/addiction	2%	5%
Health /Health Care (Net)	**4%**	**12%**
Mental health / dealing with mental health	3%	10%
Environment /Environmental Issues (Net)	**7%**	**12%**
Environmental or green issues/environmental sustainability	4%	7%
Economy/Economic Issues (Net)	**15%**	**11%**
Lack of jobs/unemployment/job creation	1%	4%
Lack of business support/climate for small businesses	6%	1%
Bylaw Enforcement & Transparency (Net)	**13%**	**9%**
Enforcement of bylaws (Sub-net)	4%	3%
Government honest/transparency/openness	2%	2%
City Finances	**6%**	**7%**
City Finances (e.g. deficit, spending etc.)	4%	4%
Other Mentions (Net)	**16%**	**18%**
Consult / listen to the community / residents / people	3%	6%
Funding for programs / art and culture programs / services	4%	5%

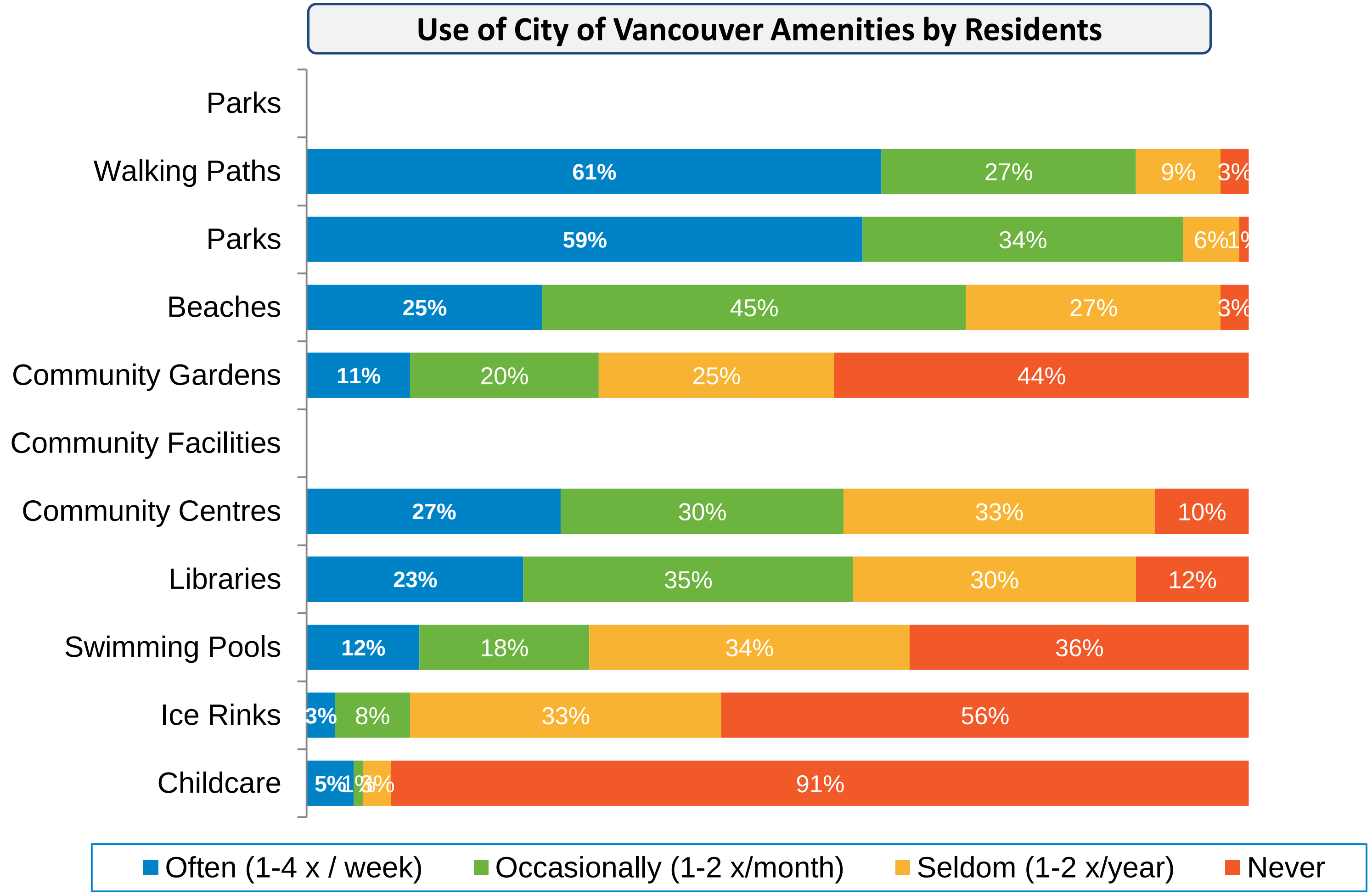
* Note: Categories included have at least 5% of the respondents answering.

Significantly higher

*Q1. As a [business owner or operator in / resident of] the City of Vancouver, what do you feel are the most important local issues facing the City at the present time? That is, the **two or three** issues you think should receive the greatest attention from Vancouver's Mayor and City Council.*

Parks related City offerings are used most frequently by Residents; Some community facilities enjoy frequent use as well.

- City offerings related to Parks are used most frequently, with 61% of Residents utilizing walking paths 1-4 times per week for example. Among Community Facilities, community centers and libraries are used most frequently, with approximately a quarter using them 1-4 times per week.

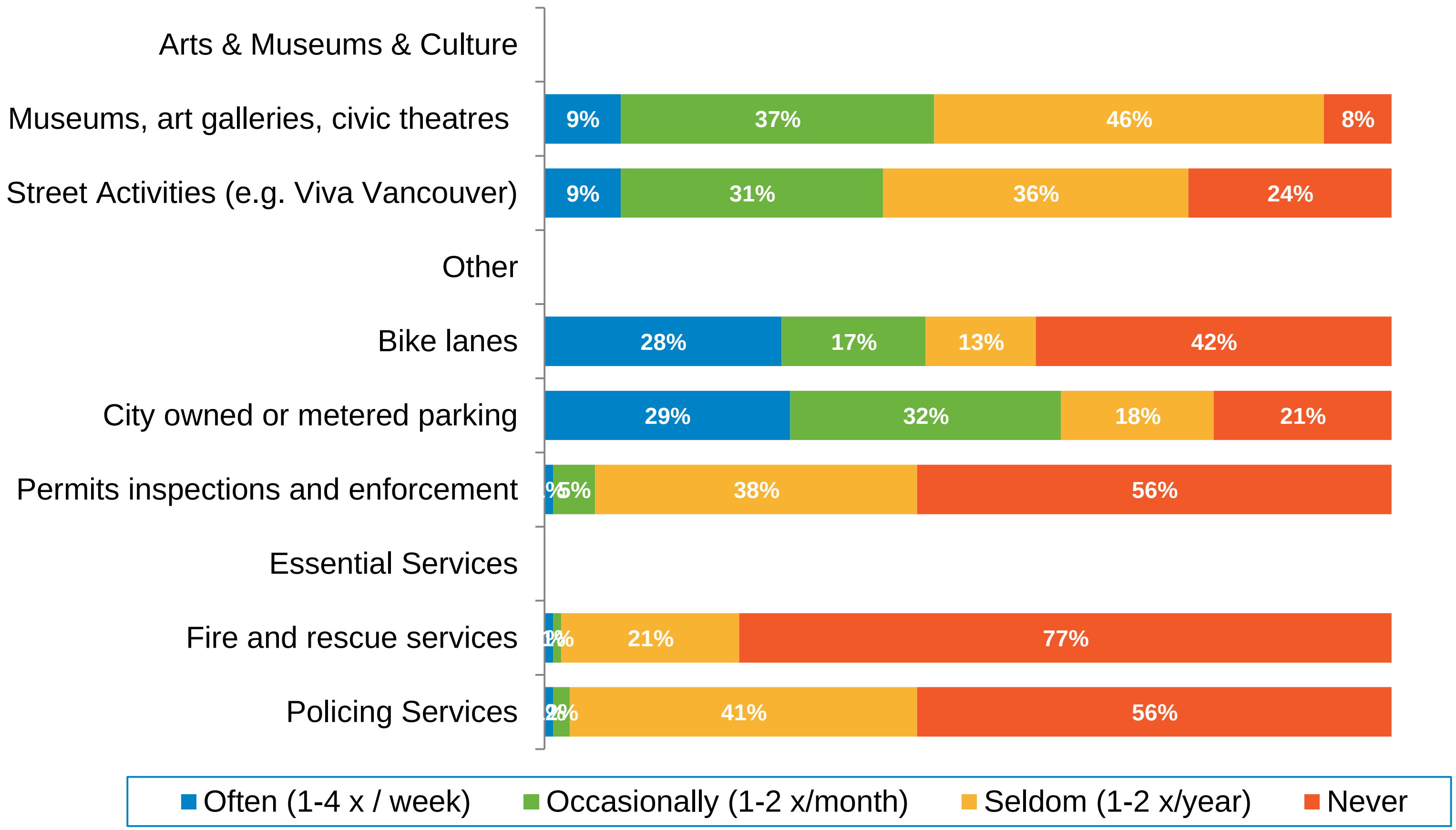


Q2.How often would you say you make use of each of the following City of Vancouver services?

Bike lanes and City parking are used on a frequent basis, while essential services are used rarely.

- Similar to the use of some Community facilities, transportation infrastructure - bike lanes and City parking are utilized by about a quarter of residents on a regular basis (1-4 times/week). Essential services, although important, are utilized infrequently, with over 90% reporting they use these services 1-2 times a year or not at all.

Use of City of Vancouver Amenities by Residents

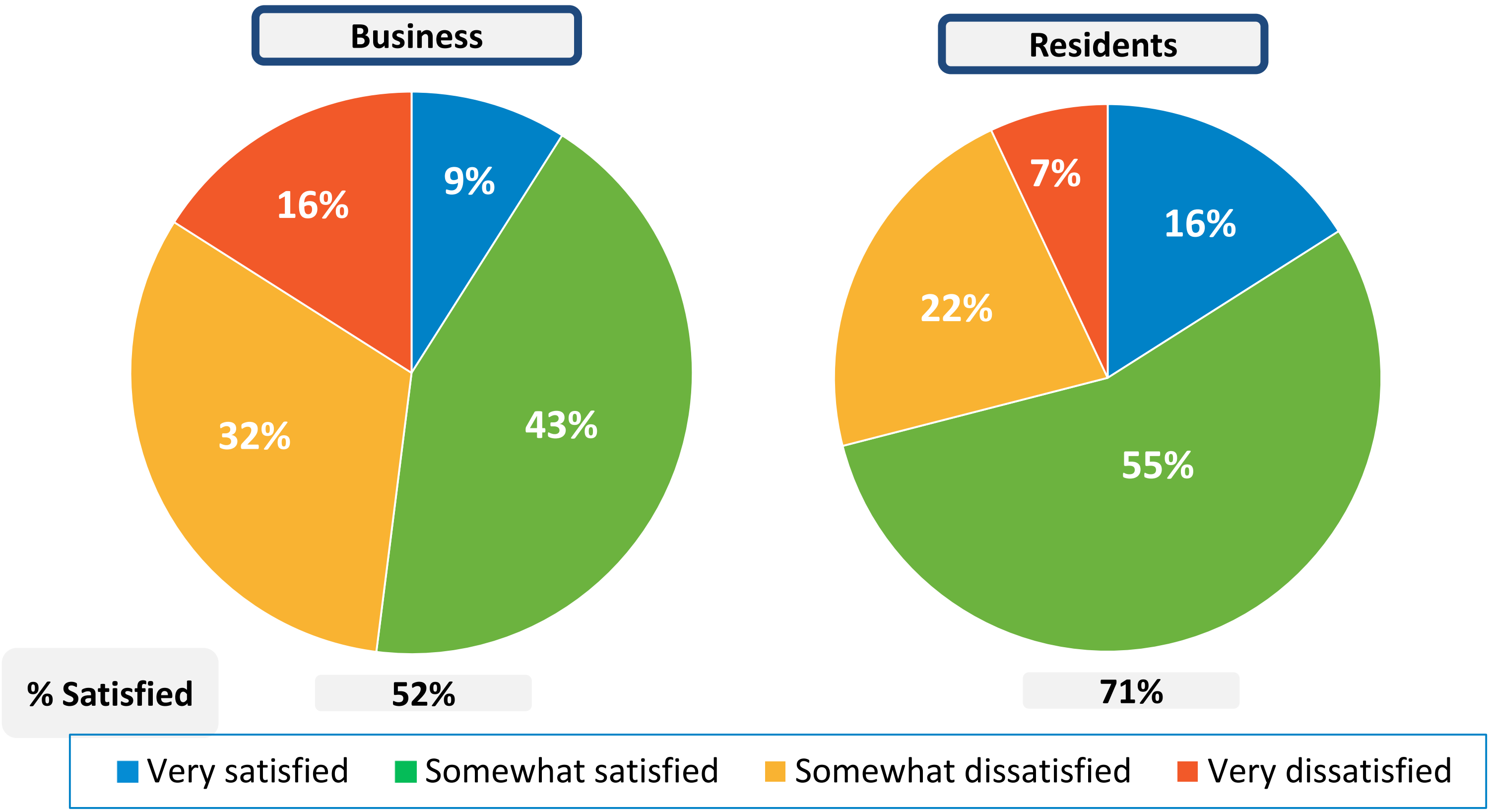


Q2.How often would you say you make use of each of the following City of Vancouver services?

Residents report high levels of satisfaction with the quality of City services, and are more satisfied than Businesses

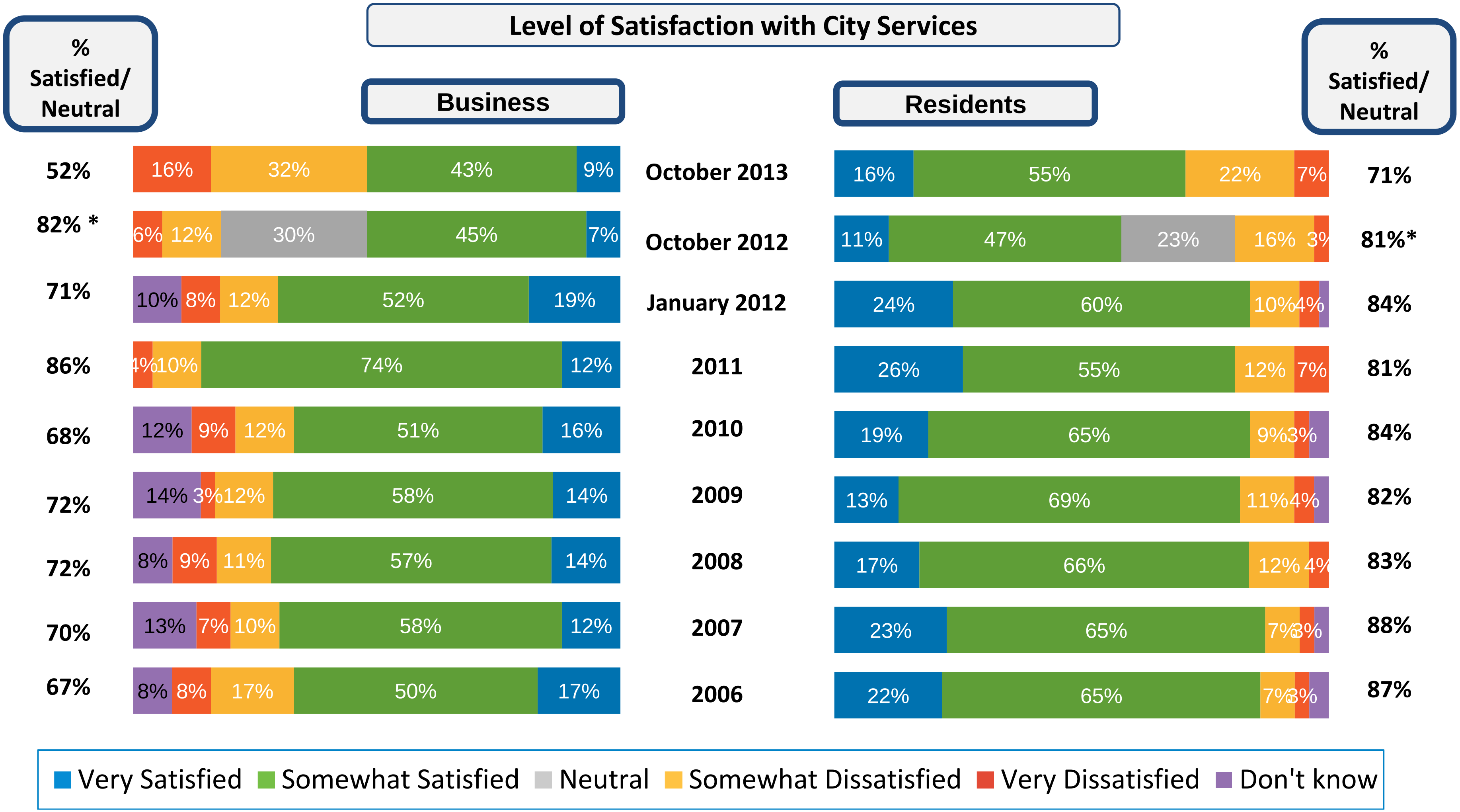
- Almost three quarters of Residents are satisfied with City services (71%) while just over half of Businesses satisfied (52%).
- Although Businesses are split in their satisfaction levels, their dissatisfaction rating is driven more by those who are somewhat dissatisfied versus very dissatisfied overall.

Level of Satisfaction with Quality of City Services



Q4. Now, thinking about all of the various types of services the City of Vancouver provides [businesses in the City / its residents], would you say you are generally satisfied or dissatisfied with the overall quality of services provided to [your business \ you] by the City of Vancouver?

Resident satisfaction remains high; Businesses show some decline in satisfaction, similar to levels in 2010 and 2006



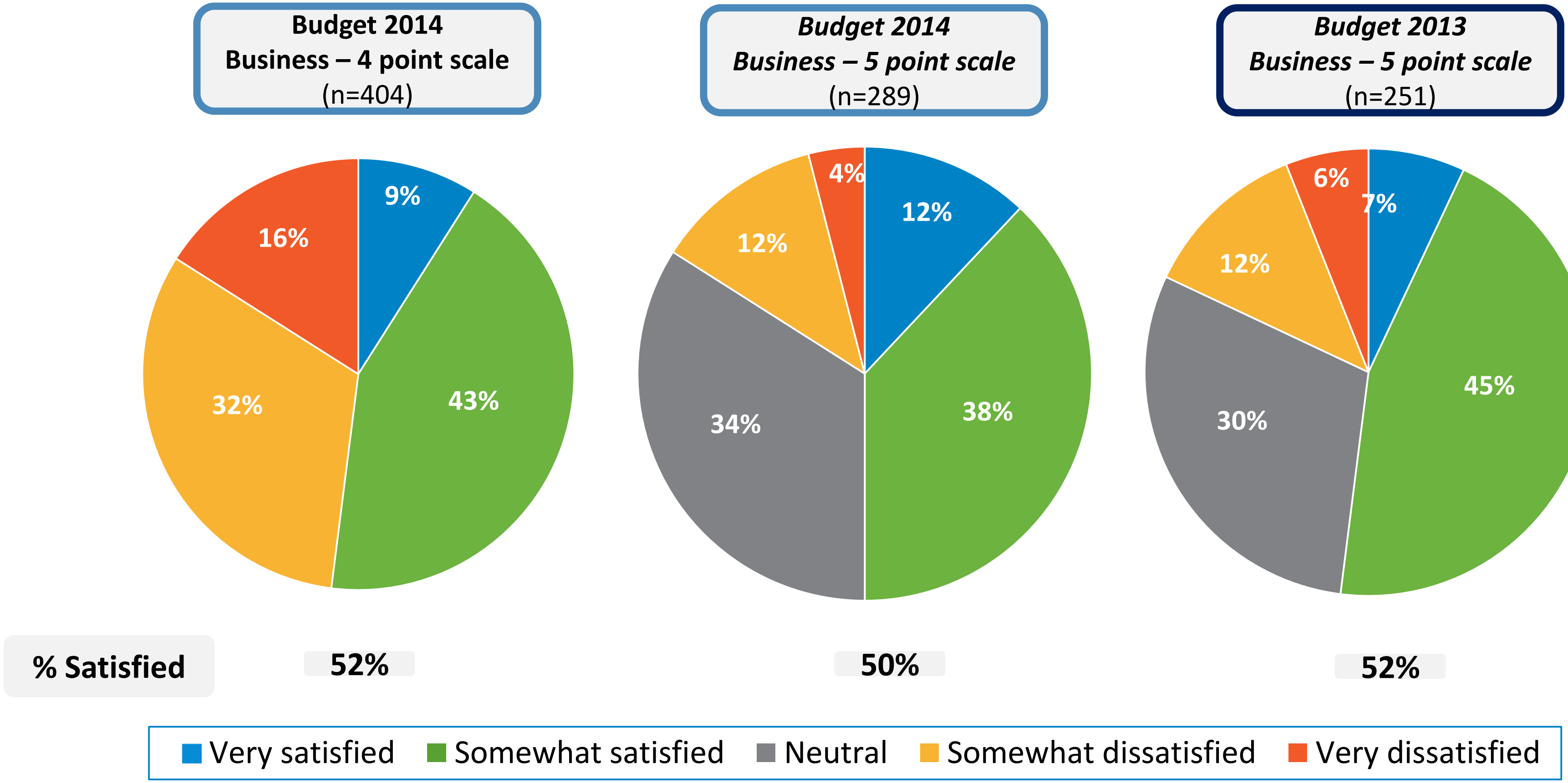
** Note: A 5- point scale was used in October 2012. In 2013 and in prior years, a 4-point scale was used, with "Don't know" as an option by phone as an alternative.*

Q3.Below is a list of the specific services the City of Vancouver provides [business owners/its residents.} Please rate the job you think the City of Vancouver is doing in providing each type of service.

About half of Businesses are satisfied with City services regardless of how they are asked

- To better understand the satisfaction levels among businesses, and enable comparison to 2013, an additional sample of 289 business owners in Vancouver were asked about their overall level of satisfaction with the City (this time using the same 5pt scale of satisfaction used in Budget 2013) as well as the reasons behind their ratings.
- The satisfaction results using the 5-point scale are equivalent to those for Budget 2013.

Level of Satisfaction with Quality of City Services



Residents and Businesses agree on the services the City delivers best – parks and green space top the list

% of Respondents who agree that the City of Vancouver rated the City as doing a "Excellent/Good" job (Score of 8 or higher out of 10)	Business	Residents
Essential Services		
Providing garbage collection, composting, and recycling services	31%	41%
Fire prevention & responding to fire and medical calls	35%	34%
Distributing and conserving water	24%	28%
Maintaining and repairing sewage and drainage systems	26%	27%
Reducing the crime rate and maintaining public safety	21%	24%
Social / Cultural Interests		
Providing access to library resources	32%	42%
Providing access to recreation facilities	27%	36%
Supporting arts and cultural organizations (e.g. museums, art galleries, culture grants)	13%	17%
Enabling affordable housing	10%	6%
Providing support services to the DTES	14%	10%
Supporting community service organizations (e.g. shelters, childcare, social grants)	12%	11%
Infrastructure		
Maintaining and enhancing street infrastructure (e.g. cleanliness, lighting, roundabout gardens)	24%	33%
Providing transportation infrastructure for walking, bikes, transit, and vehicles	24%	33%
Managing curbside parking spaces	11%	19%
Maintaining City infrastructure - administration buildings, vehicles, equipment and IT	18%	18%
Environment		
Providing & maintaining parks & green spaces	37%	44%
Environmental protection, support for green projects	19%	31%
Engagement		
Providing helpful information and engagement channels and customer service	13%	20%
Providing emergency preparedness information and support	10%	17%
Economy and Finance		
Promoting economic development	11%	14%
Managing tax dollars	7%	9%
Other		
Planning for and managing residential, commercial and industrial development	11%	12%
Permits, inspections and enforcement (e.g. building, renovation, business license etc.)	11%	10%

- Residents and Businesses both rate the City as doing the best job in: providing and maintaining parks and green space, providing access to library resources, garbage services and providing access to recreation facilities. All of these were among their Top 5 ratings of excellent/good service.
- The City was rated as doing an excellent/good job in delivering these services by between 27% to 44% of Residents and Businesses

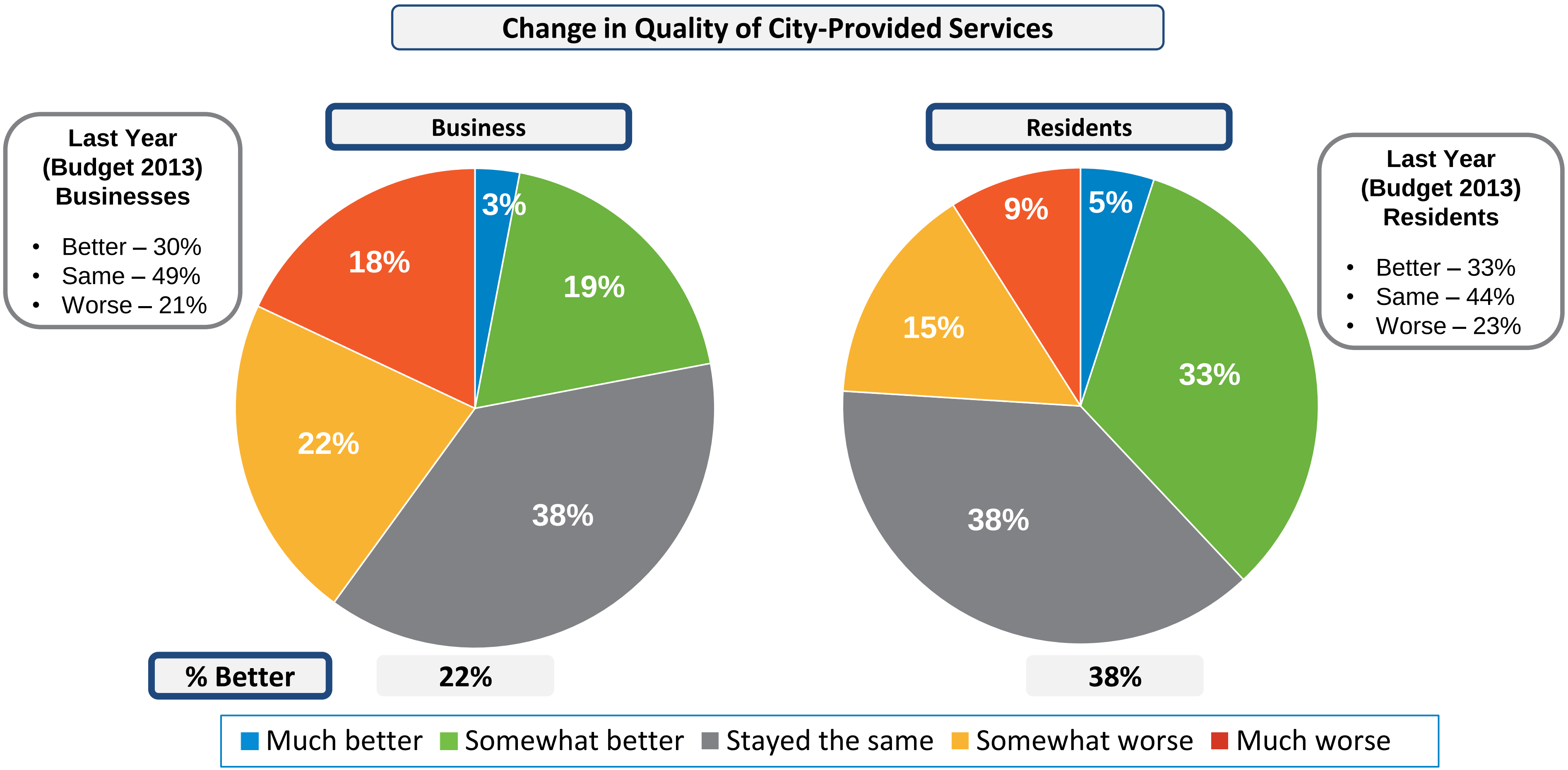
Significantly higher

Top 5 mention

Q3. Below is a list of the specific services the City of Vancouver provides [to businesses in the City/its residents]. Please rate the job you think the city is doing in providing each type of service [to its business/ (blank)]. Please use a scale from 0 to 10, where "0" means the City is doing a "very poor job" and "10"means you feel the City is doing an "excellent" job. A "5" means they're doing an "average" job.

Residents and Businesses show some divergence in their perceptions of the stability of the quality of services, with Residents having more positive views.

- Almost 40% of both residents and businesses feel the quality of City services has not significantly changed over the past two to three years (38% each).
- Where they diverge is in their perceptions of the improvement or worsening of services. Just over a third of residents saw an improvement (38%) vs. a deterioration (24%). Among businesses 22% saw an improvement vs. 40% who saw deterioration.



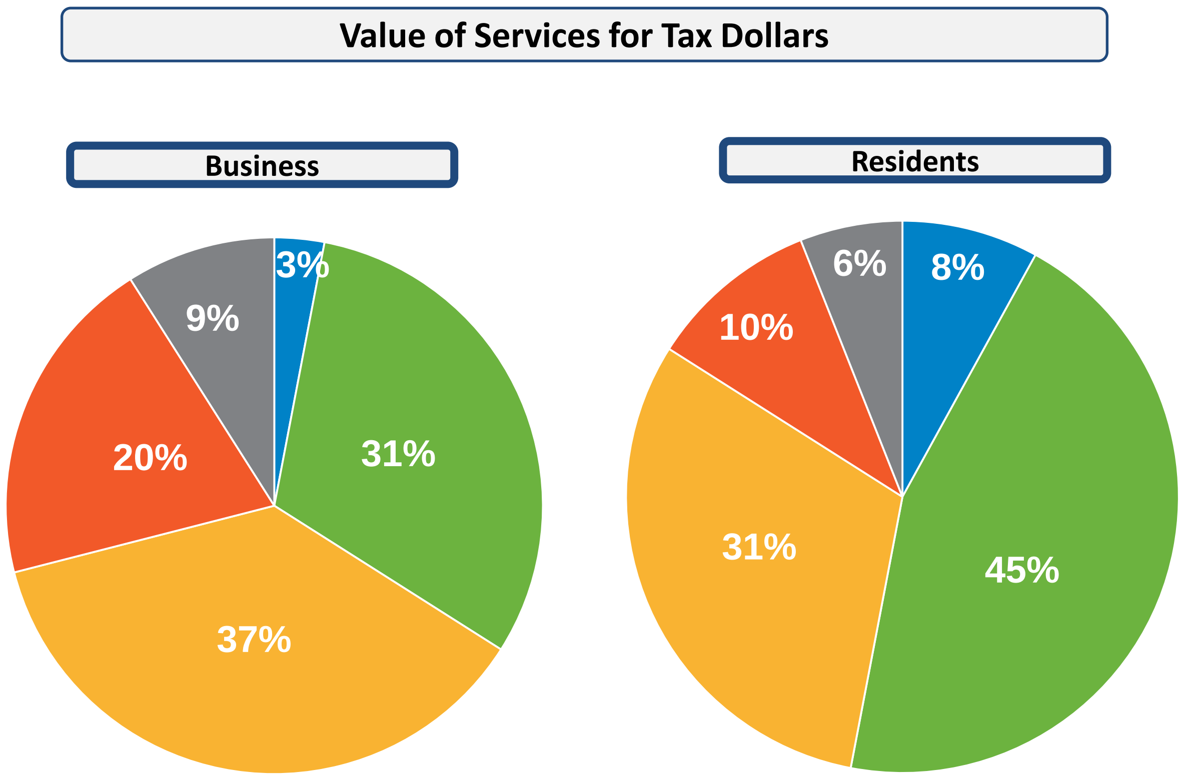
*Q5. And, would you say that the **overall** quality of services provided by the City of Vancouver [to its business/ (blank)] has gotten better or worse over the past 2 to 3 years?*

Residents and Businesses diverge in the perceptions of the value they receive for their tax dollars, with Businesses being less positive.

- Just over half of Residents feel they receive good value for their tax dollars (52%), whereas 34% of Businesses believe so.

Last Year (Budget 2013) Businesses

- Good value - 29%
- Neutral – 39%
- Poor value – 32%



Last Year (Budget 2013) Residents

- Good value - 33%
- Neutral –35%
- Poor value – 32%

% Good Value	34%	53%

■ Very good value ■ Fairly good value ■ Fairly poor value ■ Very poor value ■ Don't know

Q6. Thinking about all of the programs and services [your business receives/you receive] from the City of Vancouver, and the level of property taxes or rent [your business pays/you pay], would you say that [your business gets/you get] overall good value or poor value for [its/your] tax dollars?

Budgeting

Overall agreement on where to spend budget dollars: affordable housing, crime, transportation and fire prevention are priorities.

Allocation of Budget Dollars (Average %)	Business	Residents
Essential Services		
Reduce crime and maintain public safety	7.3	7.7
Fire prevention & response to fire and medical calls	5.7	6.1
Maintain and repair sewage and drainage systems	5.2	5.3
Provide garbage collection, composting, and recycling services	5.2	5.2
Distribute and conserve water	4.1	4.6
Social / Cultural Interests		
Enable affordable housing	7.0	8.0
Support community service organizations	4.8	5.4
Provide access to recreation facilities and deliver recreational programming	4.4	4.8
Support arts and cultural organizations	5.4	4.6
Provide access to library resources	3.8	4.1
Provide support services to the DTES	3.4	4.0
Infrastructure		
Provide transportation infrastructure for walking, bikes, transit, and vehicles	7.7	7.4
Maintain and enhance street infrastructure (e.g. cleanliness, lighting, roundabout gardens)	4.9	4.7
Maintain City infrastructure - administration buildings, vehicles, equipment and IT	4.0	4.1
Environment		
Provide & maintain parks & green spaces	5.7	6.2
Environmental protection, support for green projects	4.4	4.4
Engagement		
Provide helpful information channels and customer services	2.4	2.2
Economy		
Promote economic development	6.2	4.7
Other		
Plan for and manage residential, commercial and industrial development	4.9	3.7
Permits, inspections and enforcement (e.g. building, renovation, business etc.)	3.5	2.8

- For both groups, approximately 40% of the City's budget, on average, would go to the same top 4 services, and in roughly the same order.
- For Residents however, the provision and maintenance of parks and green spaces made it into their Top 5 in terms of dollars allocated.
- In contrast among Businesses, the promotion of economic development made it into their Top 5, and they were willing to allocate more dollars overall to that priority than Residents.

Last Year (Budget 2013) Top 5

1. Affordable Housing
2. Crime
3. Transportation
4. Fire Prevention
5. Garbage Services

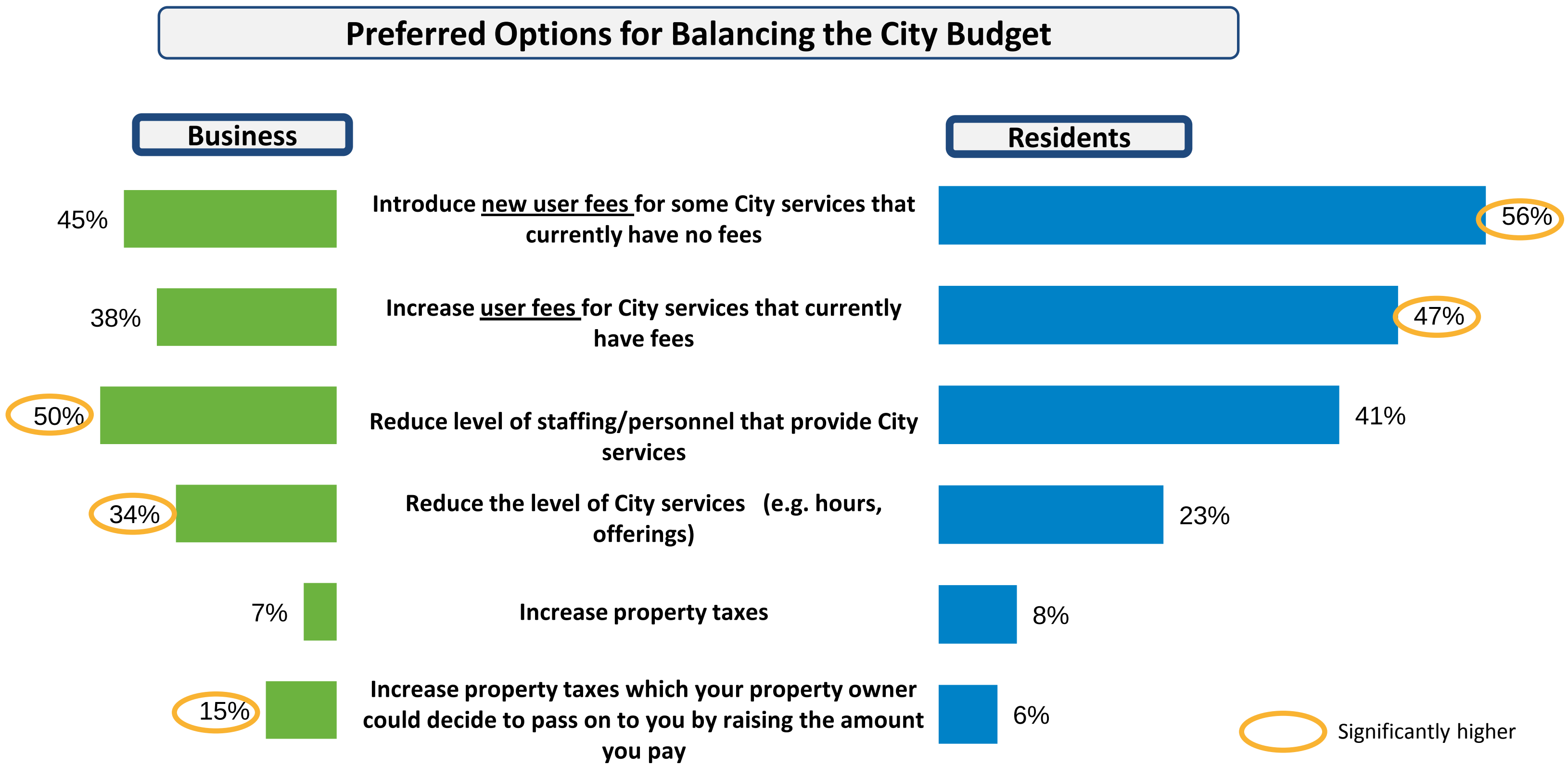
Top 5 mention

Significantly higher

Q7. Help us understand your priorities [as a business owner or operator / (blank)]. We are asking you to think in terms of a spending allowance – spend more on some things and less on others, as a way to show us your priories for the City of Vancouver. Please use the sliding arrows below to indicate what percent of the City's budget you would like to see the City spend on each of the following services it provides. The total should add to 100%.

Residents prefer user fees for balancing the budget, Businesses emphasize reducing the level of City service

- The most preferred options for balancing the budget receive just over 50% support among Residents and Businesses, suggesting that there may be other options that are more appealing for them.
- Residents do prefer user fee options, with 56% preferring the introduction of new user fees and 47% supporting the increase of current user fees. Businesses show the most support for reducing the level of City staffing (50%), followed by reducing the level of City services (34%).
- Both groups show the least support for increasing property taxes or rent as a means to balance the City Budget.

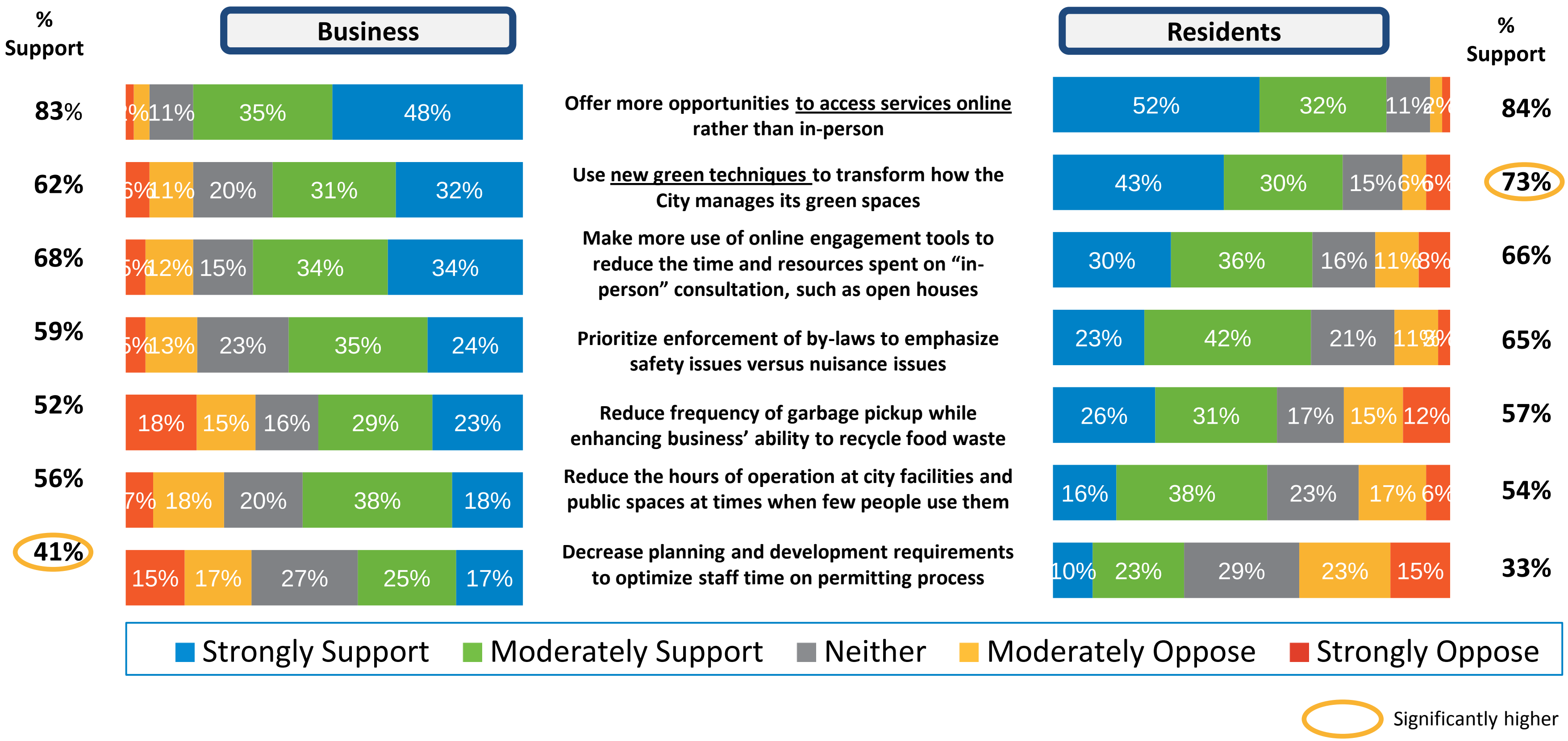


Q10. Now, to balance the 2013 budget as required by law, the City of Vancouver has a number of options to consider. Which of the following options would you prefer the City to use to balance its budget?

Residents/Businesses support a variety of initiatives to improve efficiency: online services, green techniques and online engagement tools are the most popular

- Overall support for potential initiatives to improve efficiency are high, with between 6 in 10 and 8 in 10 supporting the Top 4 initiatives. The most popular option is offering more services online than in person, selected by about 84% of Residents and Businesses. The least popular initiative overall is decreasing planning and development requirements, although Businesses support this more than Residents (41% vs. 33%).

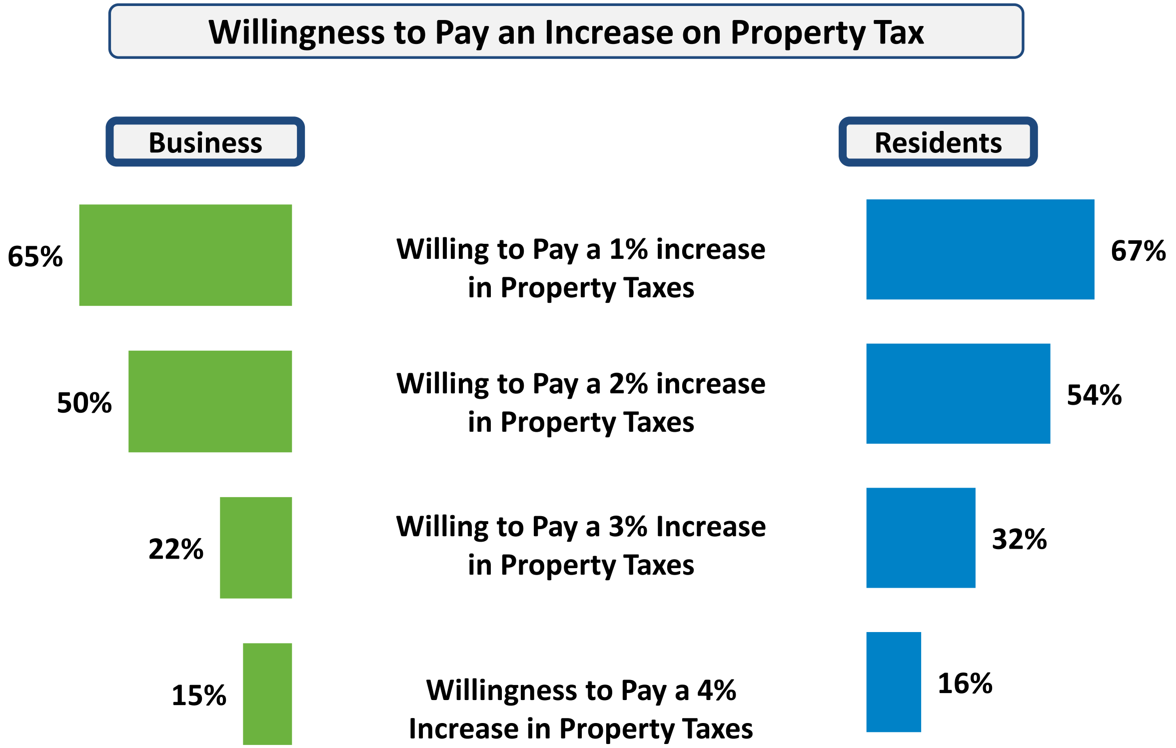
Preferred Initiatives for Greater Efficiencies in Service Delivery



Q11. There are a number of initiatives which are common across other Cities trying to find efficiencies in providing services to their [businesses / residents]. Would you support or oppose the City of Vancouver doing each of the initiatives below?

More than half of Resident/Business owners are willing to pay small increases in property taxes, but less open to higher levels

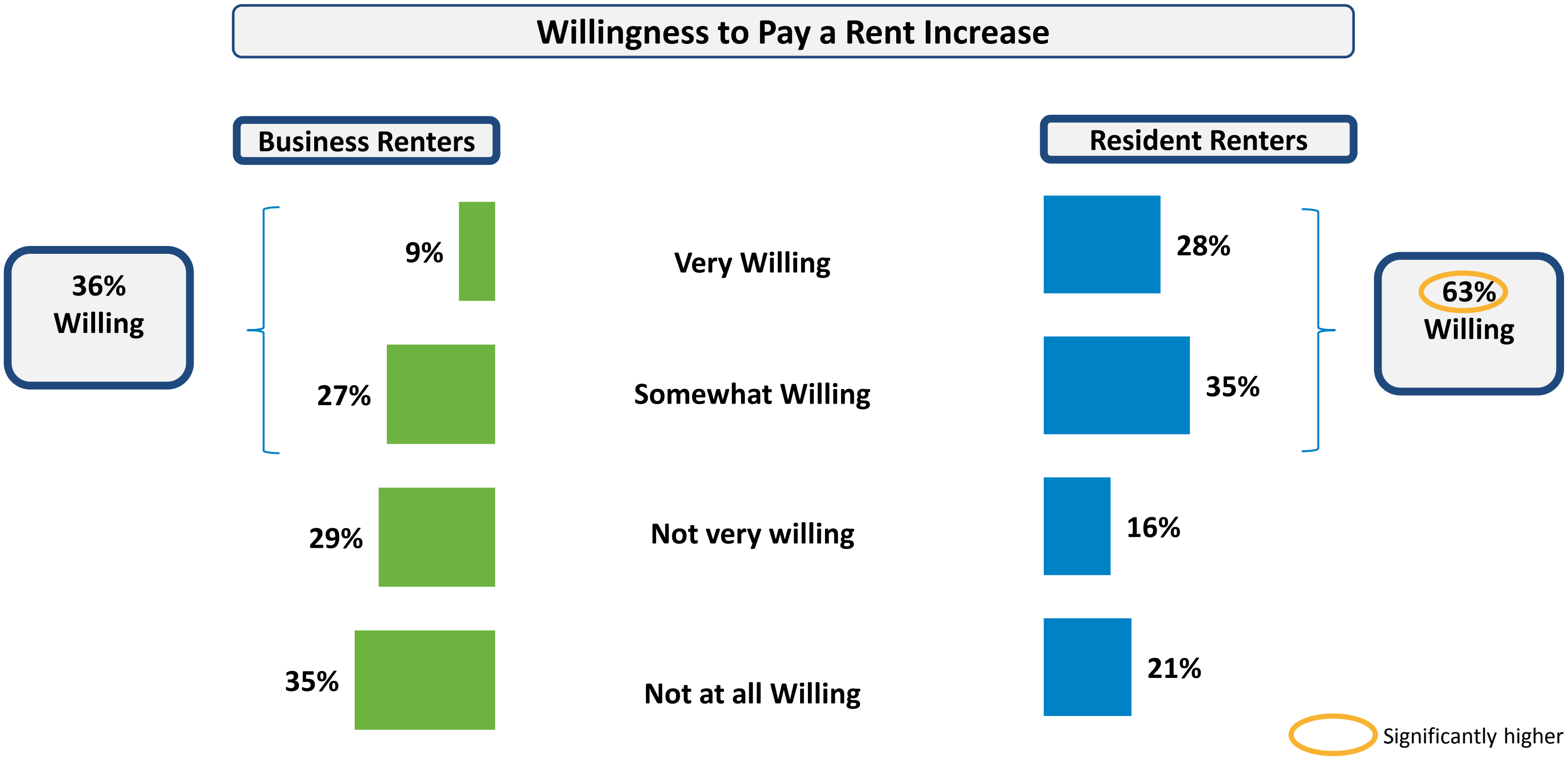
- Not surprisingly, Resident and Business Owners are most willing to pay the smallest increase in property taxes possible, with about 66% willing to pay a 1% increase and 54% of Residents and 50% of Businesses willing to pay an increase of 2%. This drops to 15% and 16% for the largest increase of 4%.



Q12. Thinking about increases in property taxes for a moment. If the City of Vancouver needed to increase taxes in order to cover increased costs for existing programs and services, without any cuts in services, would you be willing or not willing or not willing to pay an increase in your [business / (blank)] property taxes to keep services at current levels? Would you be willing to pay an increase of…

Resident and Business renters differ significantly in their willingness to pay increased rent to retain the current level of services in the City.

- The majority of Resident renters are willing to pay a $5 rent increase to retain programs and services at 63%, but only 36% of Businesses are willing to pay an increase of the same size.



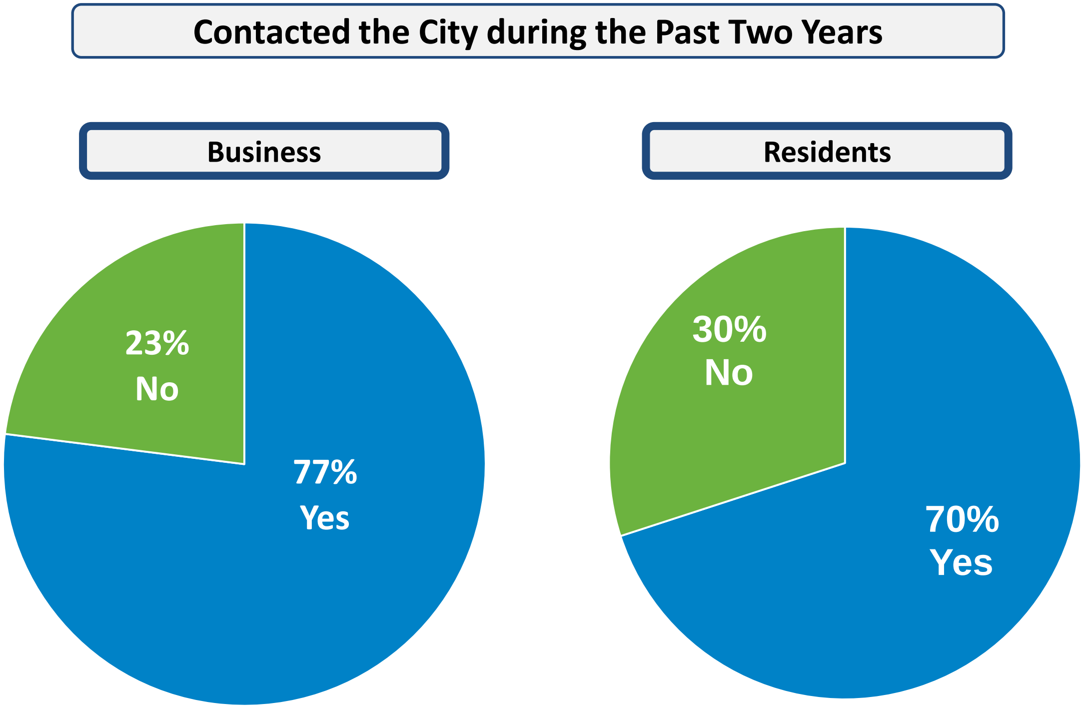
Q13. Think about increases in property taxes for a moment. If the City of Vancouver needed to increase taxes in order to cover increased costs for existing programs and services, it could need to raise the level of taxes your property owner pays. Your property owner could in turn decide to pass on to 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 $5 per month. Thinking about this, would you be willing to pay $5 more per month in order to maintain the current level of services provided by the City of Vancouver?

Contact with the City

The majority of Residents and Businesses surveyed have contacted the City in the past 2 years.

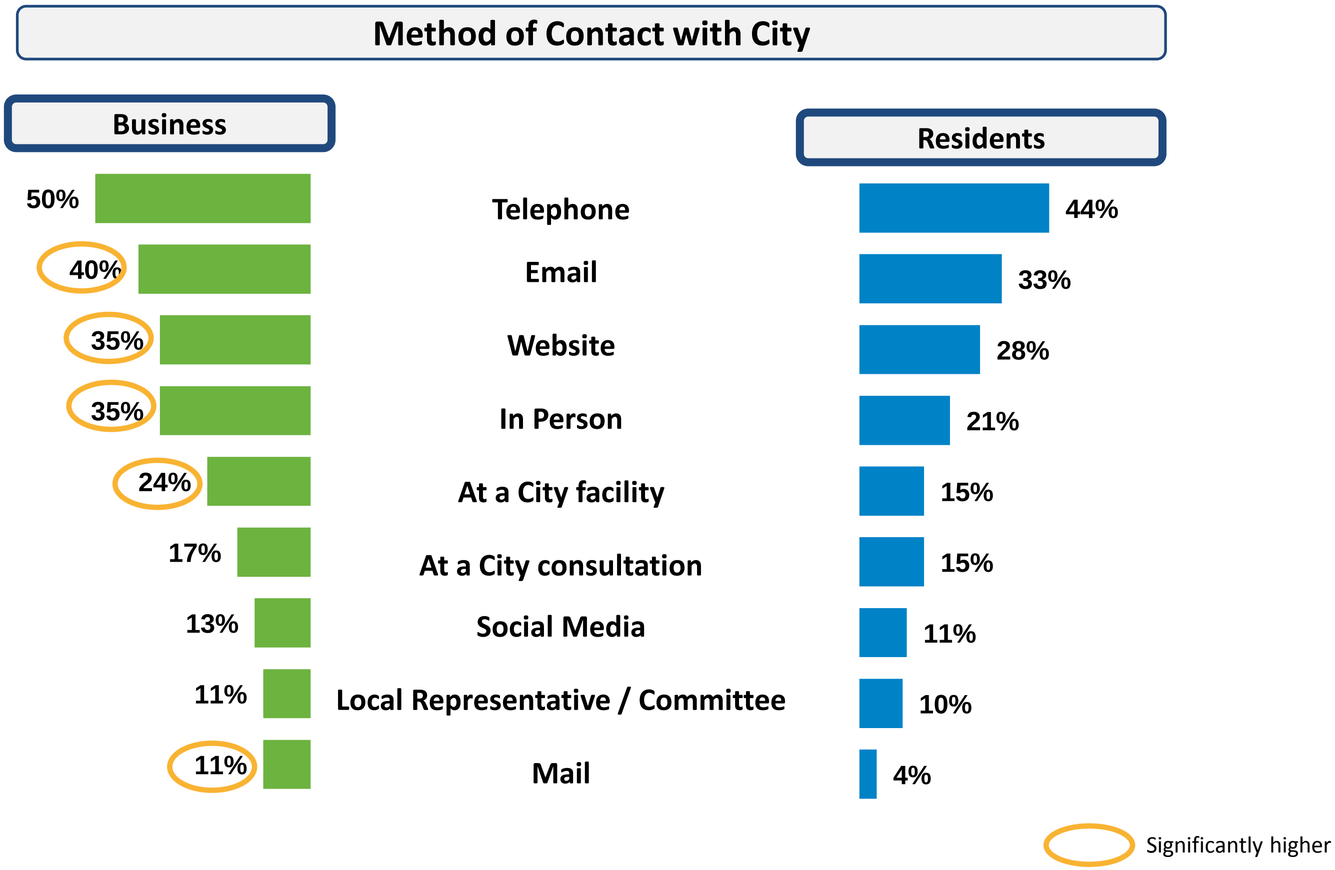
- Approximately three-quarters of Residents and Businesses surveyed have contacted the City in the past 2 years, at 70% and 77% respectively.



Q8. In the past two years, have you contacted the City of Vancouver for any reason?

The most common method of contact is via telephone, but Businesses have contacted the City through a greater variety of means than Residents.

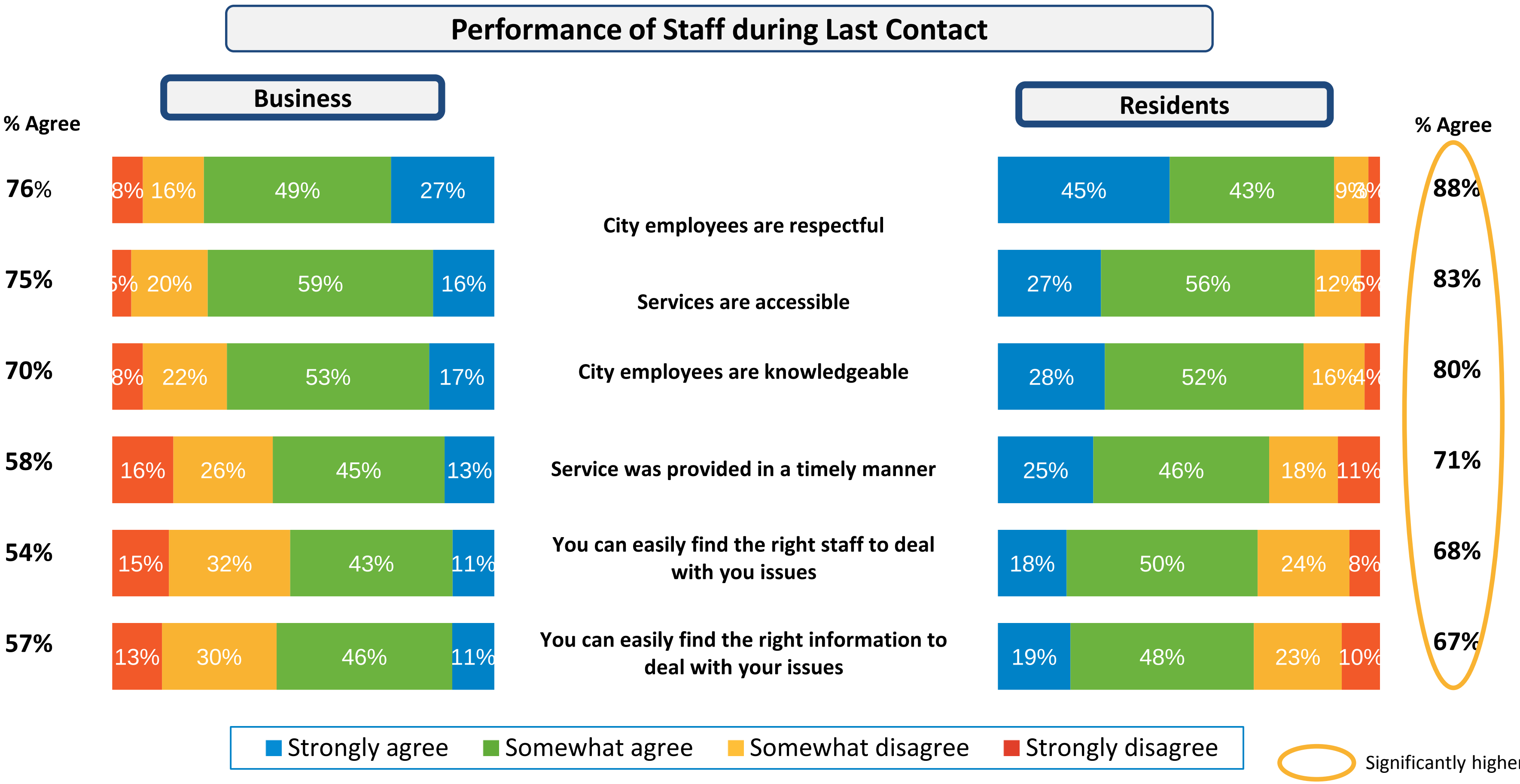
- Residents and Businesses have used a variety of means to contact the City in the past 2 years, with the telephone the most popular among both (44% and 50%) respectively. This is followed by email contact, the City website and in-person.
- Businesses are more likely than Residents to have used email, the City website, in-person contact, City facilities and mail to engage with the City.



Q8. In the past two years, have you contacted the City of Vancouver for any reason? If so, how? Was it by?

Residents and Businesses evaluate their contact with the City highly, but Residents are more positive across all dimensions.

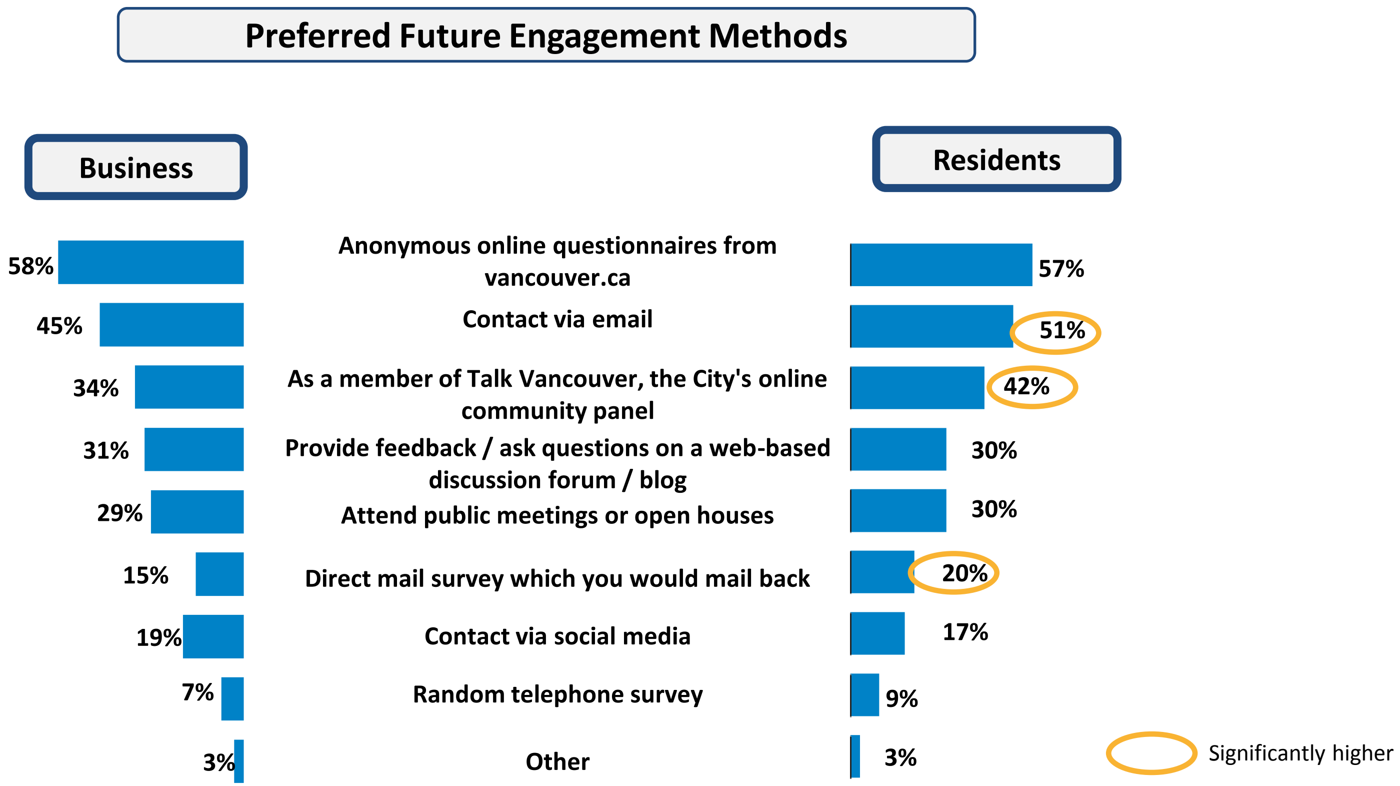
- Residents and Businesses evaluate City contact positively overall, with between 57% and 88% rating dimensions of their contact positively. The highest ratings are received for the respectfulness of City employees, the accessibility of services, and the knowledge of employees. The lowest ratings are for the ease of finding the right information.
- Residents are evaluate their City contact as significantly more positive on all dimensions than Businesses.



Q9. In general, thinking about the contact you've had with the City of Vancouver, do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements…?

Residents and Businesses are open to a variety of engagement methods; online questionnaires, email and the Talk Vancouver panel are the most popular.

- Online methods of engaging with the City are the most preferred, ranging from online questionnaires to web-based discussion forums/blogs, but more traditional methods such as in-person events and direct mail still figure prominently.
- Residents prefer email contact, engagement through Talk Vancouver, and direct mail survey more than Businesses.



Q14. [As a business owner or operator in the City of Vancouver/ (blank)], How would like to be consulted by the City [(blank)/ (of Vancouver)] in the future? Which three of the following ways would you be most likely to participate in? Please select up to 3 responses.

Profile of Respondents

Demographic Profiles - Resident

Residents	Total %
Age	
18-29 years	23%
30-39 years	19%
40-49 years	19%
50-59 years	16%
60-65 years	7%
66-69 years	4%
70-79 years	9%
80 years or over	3%
Gender	
Male	47%
Female	50%
Prefer not to answer	3%
Annual Household Income	
Under $20,000	7%
$20,000 to $ 39,999	12%
$40,000 to $ 59,999	14%
$60,000 to $ 79,999	13%
$80,000 to $99,999	10%
$100,000 to $149,999	17%
$150,000 and above	12%
Prefer not to say	15%

Residents	Total %
Children in Household	
Yes	34%
No	66%
House Type	
Single, detached house	32%
Duplex or townhouse	8%
Apartment or condominium	56%
Other	2%
Rent / Own	
Yes - I pay the property taxes	46%
Yes - I pay the rent	43%
No - I am not the person responsible for paying the property taxes / rent	11%
Region	
Downtown	25%
North East	19%
North West	25%
South East	9%
South West	22%

Demographic Profile – Business

Businesses	Total %
Position in Company	
Owner/President	80%
Senior Management (Senior VP, VP)	6%
Director	6%
Manager / Office Manager	5%
Other	3%
Business Sector	
Advertising / Marketing / Public Relations	6%
Agriculture / Forestry / Fishing / Hunting	1%
Arts / Entertainment / Sports / Recreation	9%
Banking / Finance / Insurance / Accounting Services	3%
Business / Professional Services / Management Consultancy	10%
Charity / Volunteer / Non-profit Organizations	3%
Cleaning / Waste Management	1%
Construction & Building Services	5%
Creative Services / Art & Design	7%
Health care / Medical / Social care / Child care	6%
Hospitality (hotels, restaurants, bars, catering and food services)	5%
Internet / New or Online Media	3%
IT and Telecommunications	5%
Legal Services	3%
Manufacturing	2%
Media / Journalism	2%
Personal Services	3%
Publishing / Printing / Packaging	1%
Real Estate (including rental and leasing)	7%
Servicing and Repairs	1%
Trades: Electricity/Gas/Heating/Plumbing/Carpentry	1%
Travel / Tourism	2%
Other (specify)	14%

Businesses	Total %
Value of Property Owned	
400,000 dollars	40%
700,000 dollars	18%
900,000 dollars	11%
1.2 million dollars	31%
Pay Rent & Property Taxes	
Pay rent and property taxes	34%
Pay rent only	66%
Number of Employees in the City of Vancouver	
1-4	58%
5-9	18%
10-24	13%
25-99	9%
100 or more	2%
Number of Employees Outside the City of Vancouver	
0	67%
1-4	17%
5-9	4%
10-24	5%
25-99	4%
100 or more	3%
Number of Years Business has Been Operating	
5 or less	37%
6 to 19 years	38%
20 years or more	24%
City of Vancouver Resident	
Yes	68%
No	32%
Region	
Downtown	35%
North East	17%
North West	25%
South West	15%
South East	8%

REAL VALUE

delivering value for money

CITY OF VANCOUVER