2021 CIVIC SERVICE SATISFACTION SURVEY

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July 6, 2021

OBJECTIVES

- Determine resident and business satisfaction with municipal services and provide insight into service priorities

METHODOLOGY

- Random and representative telephone survey conducted with adult Vancouver residents and Vancouver businesses
- Fielded April 19 to May 11, 2021

Residents

- n600
- Cellphones and landlines
- English, Cantonese & Mandarin
- Final sample weighted by gender/age & neighbourhood
- MOE: ±4.0%, 19 times out of 20

Businesses

- n200
- Landlines
- English
- Final sample weighted by business size
- MOE: ±6.9%, 19 times out of 20

Weighted Sample Characteristics
(weighted by gender/age and neighbourhood)

RESIDENTS

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

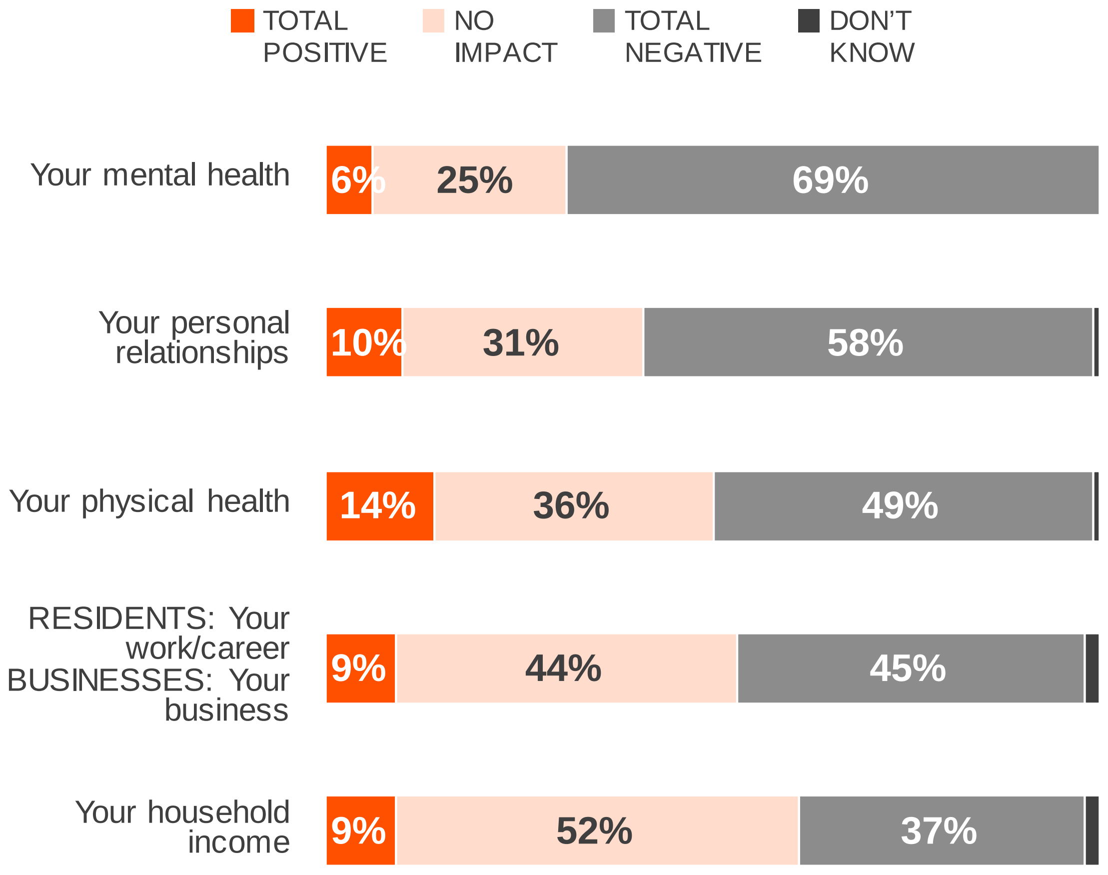
	2021 (n=600)	2019 (n=602)	2018 (n=600)
Own/Rent			
Own	53%	53%	54%
Rent	39%	42%	41%
Other	7%	5%	6%
Income			
<$60K	32%	37%	35%
$60K to <$100K	28%	26%	21%
$100K+	32%	27% ▼	33%
Refused	9%	10%	11%
Ethnicity			
European (net)	42%	42%	46%
Asian (net)	38% ▲	31%	31%
North American (net)	19%	23%	22%
Latin/South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

▲ / ▼ Significantly higher/lower than previous year.

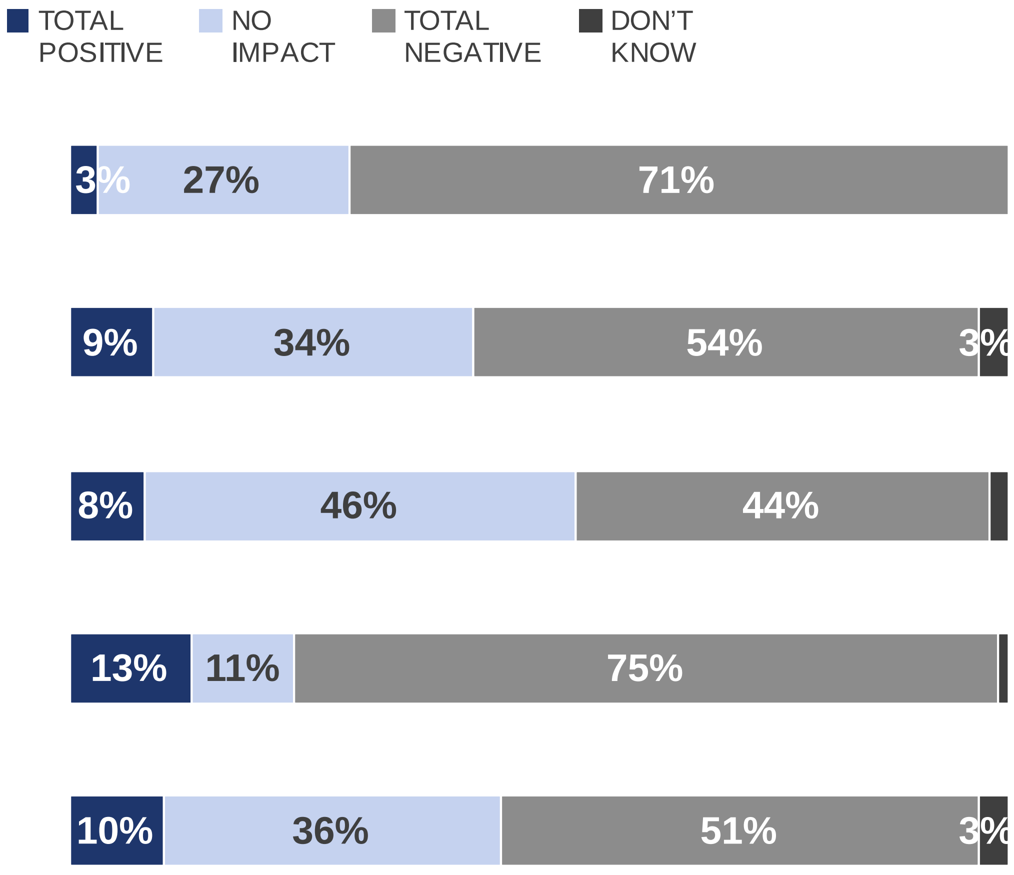
COVID-19

Impact of COVID-19

RESIDENTS Note: Items are listed in order of Total Negative



BUSINESSES



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

Impact of COVID-19 (Residents)

TOTAL NEGATIVE													
	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Your mental health	69%	64%	73%	73%	75%	58%	77%	62%	77%	61%	67%	65%	75%
Your personal relationships	58%	53%	61%	56%	59%	59%	63%	65%	60%	53%	53%	57%	59%
Your physical health	49%	45%	51%	53%	52%	42%	53%	38%	57%	43%	51%	46%	49%
Your work/career	45%	43%	45%	55%	52%	27%	51%	45%	48%	42%	42%	40%	50%
Your household income	37%	37%	36%	48%	38%	23%	41%	34%	37%	32%	39%	33%	42%

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

QUALITY OF LIFE

Overall Quality of Life

	NORM+	Residents 2018 (n=600)	Residents 2019 (n=602)	RESIDENTS		BUSINESSES	Businesses 2019 (n=201)	Businesses 2018 (n=200)
Very good	40%	32%	34%	▼22%	Very good	15%▼	38%	30%
Good	55%	59%	55%	59%	Good	65%	54%	57%
TOTAL GOOD	95%	91%	89%	▼81%		80%▼	92%	88%
Poor	4%	7%	9%	▲14%	Poor	17%▲	7%	11%
Very poor	1%	1%	1%	▲4%	Very poor	2%	1%	1%
TOTAL POOR	5%	8%	10%	▲18%		20%▲	8%	12%
Don't know	0%	1%	<1%	1%	Don't know	1%	0%	0%

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

▲ / ▼ Significantly higher/lower than previous year.

Change in Quality of Life

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

+ The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.
Base: All residents (n=600); All businesses (n=200)
Q3. And, do you feel that the quality of life in the City of Vancouver in the past three years has improved, stayed the same, or worsened?

▲ / ▼ Significantly higher/lower than previous year.

Change in Quality of Life (Residents)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Improved	8%	10%	5%	6%	9%	8%	5%	14%	8%	6%	7%	8%	7%
Stayed the Same	44%	47%	42%	54%	40%	38%	37%	42%	39%	48%	50%	43%	44%
Worsened	45%	40%	50%	34%	49%	54%	53%	42%	47%	43%	43%	48%	44%

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

Reasons Quality of Life has Worsened (Residents)

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

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

	2020	2019 (n=235)	2018 (n=251)
COVID-19/pandemic	26%▲	n/a	n/a
Cost of living	23%▼	42%	43%
Housing/accommodations	21%▼	35%	31%
Poverty/homelessness	18%	16%▲	8%
Decline in public safety/increased crime rate	16%▲	7%	6%
Drug addiction/overdose	9%	8%	5%
Traffic congestion	6%▼	13%	19%
Overcrowding/overpopulation/overdevelopment	6%▼	25%	20%
Governance and transparency	6%	6%	5%
Infrastructure/roads	4%	7%	6%
Taxation	4%▼	10%	7%
Don't know	2%	1%	1%

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

▲ / ▼ Significantly higher/lower than previous year.

Reasons Quality of Life has Worsened (Businesses)

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

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

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

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

▲ / ▼ Significantly higher/lower than previous year.

IMPORTANT LOCAL ISSUES

Important Local Issues (Residents)

(coded open-ends, multiple responses allowed)

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

	2021	2019 (n=602)	2018 (n=600)
COVID-19 (NET)	32% ▲	n/a	n/a
Other COVID-19 mentions (e.g., health and safety, general mentions)	21% ▲	n/a	n/a
Post-pandemic recovery	5% ▲	n/a	n/a
COVID-19 restrictions/health orders	4% ▲	n/a	n/a
Social issues (e.g., homelessness, poverty, childcare)	20% ▲	11%	13%
Housing/accommodations (including housing affordability)	19% ▼	48%	49%
Affordability/cost of living (excluding housing affordability)	13%	15%	16%
Infrastructure/transportation	12% ▼	40%	44%
Addiction and overdoses	11%	9%	7%
Economy/economic issues	8% ▲	3%	2%

	2021	2019 (n=602)	2018 (n=600)
Crime/criminal activity	7%	9% ▲	3%
Health/healthcare	6% ▲	3%	4%
Development (e.g., densification, impact on green space)	5% ▼	8%	9%
Environment/environmental issues/sustainability	5% ▼	8%	10%
Governance and transparency (e.g., bylaws and enforcement)	4%	3%	4%
Small/local business (unrelated to post-pandemic economic recovery of businesses)	4% ▲	n/a	n/a
City finances (e.g., debt, spending)	3%	3%	3%
Racism and inequity	3% ▲	n/a	n/a
Nothing/don't know	10%	10%	7%

Base: All residents (n=600)
Q1. From your perspective as a resident of the City of Vancouver, what are the most important local issues facing the City at the present time? Anything else?

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

▲ / ▼ Significantly higher/lower than previous year.

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

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

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

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

Base: All businesses (n=200)
Q1. From your perspective as a business owner, manager, or operator in the City of Vancouver, what are the most important local issues facing the City at the present time? Anything else?

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

▲ / ▼ Significantly higher/lower than previous year.

CITY SERVICES

Overall Satisfaction with City Services

	NORM+	RESIDENTS 2018 (n=600)	RESIDENTS 2019 (n=602)	RESIDENTS		BUSINESSES	BUSINESSES 2019 (n=201)	BUSINESSES 2018 (n=200)
Very satisfied	31%	20%	24%	▼17%	TOTAL SATISFIED ▼78%	14%	17%	15%
TOTAL SATISFIED	90%	83%	86%	▼78%		72%	80%	80%
Somewhat satisfied	59%	63%	61%	62%		58%	62%	65%
Not very satisfied	8%	12%	10%	▲15%	TOTAL NOT SATISFIED ▲20%	20%	18%	12%
TOTAL NOT SATISFIED	10%	16%	14%	▲20%		28%	19%	19%
Not at all satisfied	2%	4%	4%	6%		8% ▲	1% ▼	7%
Don't know	0%	1%	<1%	1%		0%	2%	1%

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

▲ / ▼ Significantly higher/lower than previous year.

Change in City Services

RESIDENTS 2018 (n=600)	RESIDENTS 2019 (n=602)	RESIDENTS		BUSINESSES	BUSINESSES 2019 (n=201)	BUSINESSES 2018 (n=200)
14%	13%	▼8%	Improved	6%	7%	9%
62%	69%▲	64%	Stayed the same	63%	73%▲	62%
22%	17%▼	▲25%	Worsened	30%▲	20%	29%
2%	2%	3%	Don't know	1%	0%	0%

Base: All residents (n=600); All businesses (n=200)
Q7. And, do you feel that the overall level and quality of services provided by the City of Vancouver in the past three years has improved, stayed the same, or worsened?

▲ / ▼ Significantly higher/lower than previous year.

Change in City Services (Residents)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Improved	8%	8%	8%	12%	5%	6%	7%	8%	6%	9%	8%	6%	10%
Stayed the Same	64%	67%	62%	69%	62%	61%	54%	69%	63%	64%	68%	65%	62%
Worsened	25%	21%	27%	13%	30%	31%	34%	21%	21%	25%	23%	27%	23%

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

Reasons City Services have Worsened (Residents)
(among those saying City services have worsened) (coded open-ends)

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

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

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

▲ / ▼ Significantly higher/lower than previous year.

Reasons City Services have Worsened (Businesses)

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

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

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

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

Sample sizes do not allow for significance testing.

Satisfaction with Specific Services (Residents)

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

■ VERY SATISFIED ■ SOMEWHAT SATISFIED

	VERY SATISFIED		T2B 2019	T2B 2018
Library services (n=449)	51%▼ (59%)	92%	92%	93%
Fire rescue & medical response (n=472)	46%▼ (53%)	89%	90%	92%
Garbage & green bin collection (n=475)	50%	88%	84%	87%
Online payment services (n=442)	47%	87%▲	81%	86%
Parks/green spaces (n=446)	37%▼ (46%)	87%	91%	91%
Services to enhance parks (n=466)	24%▼ (36%)	87%	90%▲	85%
Water conservation (n=466)	29%	85%	83%	81%
Recreation (n=463)	24%▼ (37%)	83%▼	91%▲	86%
Making streets vibrant (n=459)	26%▼ (35%)	82%▼	88%▲	81%
Urban design (n=487)	24%	81%	81%	81%
Facilitating film/special events (n=447)	25%▼ (33%)	80%	84%	82%
Arts & culture (n=467)	19%▼ (25%)	80%	83%	83%
Availability of online services (n=453)	32%	78%	78%	80%

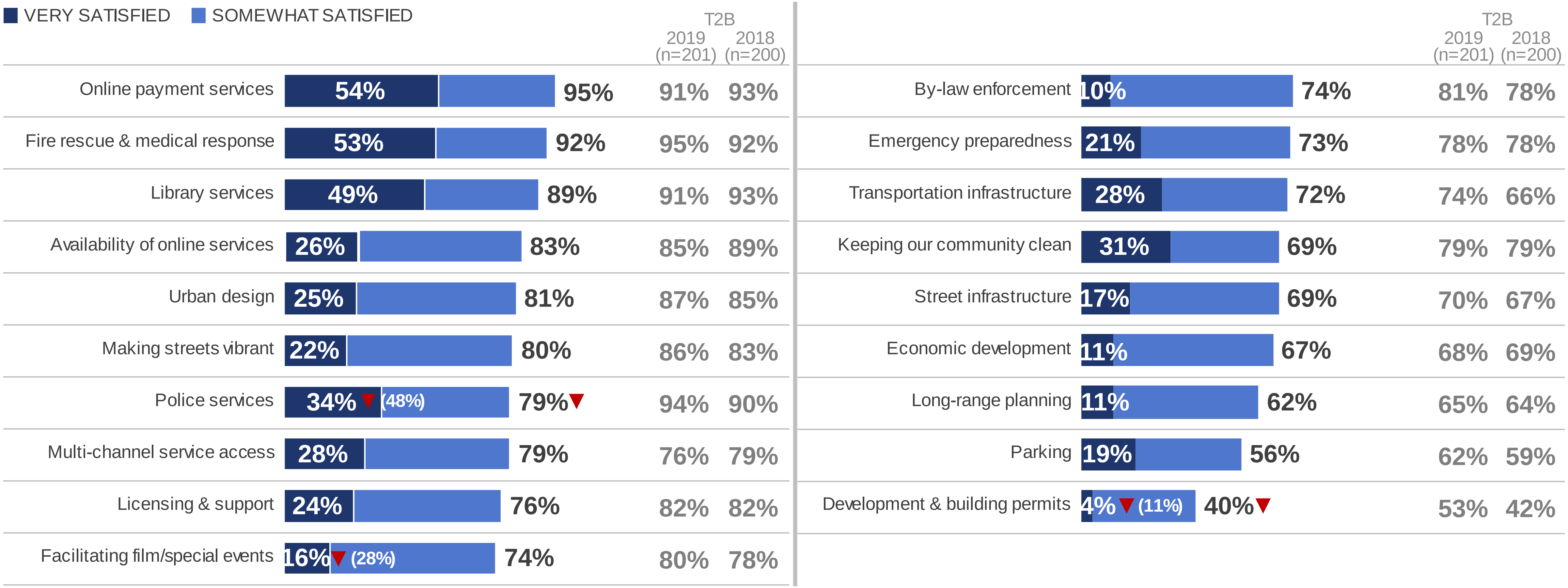
	VERY SATISFIED		T2B 2019	T2B 2018
Transportation infrastructure (n=448)	31%	78%	76%▲	67%
Police services (n=462)	28%▼ (44%)	78%▼	89%	88%
Keeping our community clean (n=470)	33%	76%	80%	76%
Multi-channel service access (n=462)	26%	74%	70%	73%
By-law enforcement (n=475)	17%▼ (25%)	73%	78%	76%
Emergency preparedness (n=471)	23%	71%▼	79%	74%
Street infrastructure (n=477)	20%	71%	72%	71%
Economic development (n=449)	10%	67%	66%	67%
Parking (n=459)	16%	65%	59%	58%
Development & building permits (n=457)	10%▼ (14%)	52%	55%	50%
Social policies & projects (n=465)	7%	44%▼	52%	51%
Homelessness services (n=475)	6%	34%▼	51%	50%
Enabling affordable housing (n=438)	7%	30%	30%	28%

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

▲ / ▼ Significantly higher/lower than previous year.

Satisfaction with Specific Services (Businesses)

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



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

▲ / ▼ Significantly higher/lower than previous year.

Investment in Specific Services (Residents)

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

INVEST MORE | INVEST THE SAME | INVEST LESS | DON'T KNOW

Service	Invest more	Invest the same	Invest less	Invest more 2019	Invest more 2018
Homelessness services (n=475)	75%	16%	6%	69%	66%
Enabling affordable housing (n=438)	73%	18%	7%	73%	73%
Social policies & projects (n=465)	71%	20%	5%	69%	71%
Fire rescue & medical response (n=472)	44%	52%	1%	40%	38%
Street infrastructure (n=477)	45%	50%	4%	48%	47%
Keeping our community clean (n=470)	41%	56%	3%	42%	45%
Emergency preparedness (n=471)	39%	54%	3%	41%	45%
Parks/green spaces (n=446)	39%	57%	3%	34%	35%
Recreation (n=463)	39%	54%	4%	39%	36%
Economic development (n=449)	40%	47%	6%	45%	42%
Transportation infrastructure (n=448)	45%	40%	14%	47%	53%
Water conservation (n=466)	32%	60%	4%	39%	36%
Urban design (n=487)	36%	55%	9%	36%	33%

Service	Invest more	Invest the same	Invest less	Invest more 2019	Invest more 2018
Library services (n=449)	31%	63%	4%	30%	30%
Arts & culture (n=467)	36%	50%	10%	35%	39%
Garbage & green bin collection (n=475)	24% ▼	73%	2%	32%	30%
Police services (n=462)	34%	49%	15%	38%	36%
Development & building permits (n=457)	32%	46%	15%	35%	38%
Availability of online services (n=453)	18%	69%	5%	19%	22%
Multi-channel service access (n=462)	15%	70%	3%	18%	17%
Making streets vibrant (n=459)	32%	46%	21%	28%	25%
By-law enforcement (n=475)	19% ▼	66%	8%	26%	28%
Online payment services (n=442)	13%	79%	4%	13%	12%
Services to enhance parks (n=466)	21%	64%	13%	22%	24%
Facilitating film/special events (n=447)	15%	66%	12%	19%	21%
Parking (n=459)	21% ▼	52%	24%	28%	31%

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

Only significant differences for invest more are shown.

▲ / ▼ Significantly higher/lower than previous year.

Investment in Specific Services (Businesses)

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

INVEST MORE | INVEST THE SAME | INVEST LESS | DON'T KNOW

Service	Invest more	Invest the same	Invest less	Invest more 2019 (n=201)	Invest more 2018 (n=200)
Keeping our community clean	52% ▲	46%	1%	38% ▼	50%
Fire rescue & medical response	49%	50%	1%	40%	35%
Street infrastructure	51%	43%	6%	49%	53%
Economic development	47%	46%	7%	46%	48%
Emergency preparedness	42%	52%	3%	44%	47%
Long-range planning	46%	44%	9%	43%	45%
Police services	46%	43%	11%	39%	38%
Development & building permits	43%	41%	12%	41%	52%
Urban design	33%	56%	10%	37%	31%
Licensing & support	29%	61%	7%	20%	21%

Service	Invest more	Invest the same	Invest less	Invest more 2019 (n=201)	Invest more 2018 (n=200)
Transportation infrastructure	40%	40%	19%	43%	40%
Making streets vibrant	37%	45%	18%	35%	29%
Availability of online services	24% ▲	67%	6%	14%	20%
By-law enforcement	26%	61%	9%	27%	21%
Library services	19%	73%	5%	18%	26%
Multi-channel service access	19%	68%	7%	24%	21%
Online payment services	8%	88%	4%	12%	12%
Parking	27%	48%	24%	27%	27%
Facilitating film/special events	14%	68%	13%	16%	20%

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

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

FINANCIAL PLANNING

Value for Taxes

	NORM+	RESIDENTS 2018 (n=600)	RESIDENTS 2019 (n=602)	RESIDENTS	BUSINESSES	BUSINESSES 2019 (n=201)	BUSINESSES 2018 (n=200)
Very good value	20%	20%	21%	▼15%	11%	13%	12%
TOTAL GOOD	81%	79%	81%	76%	77%	76%	72%
Fairly good value	61%	59%	60%	61%	66%	64%	60%
Fairly poor value	13%	13%	13%	15%	16%	16%	16%
TOTAL POOR	17%	20%	18%	22%	23%	23%	26%
Very poor value	4%	6%	5%	7%	7%	7%	11%
Don't know	2%	1%	1%	2%	<1%	1%	2%

+ The norm is the average rating from Canadian municipalities surveyed by Ipsos in the past five years.
Base: All residents (n=600); All businesses (n=200)
Q13. Thinking about all the programs and services you receive from the City of Vancouver, would you say that overall you get good value or poor value for your tax dollars? (Is that very or fairly good/poor value?)

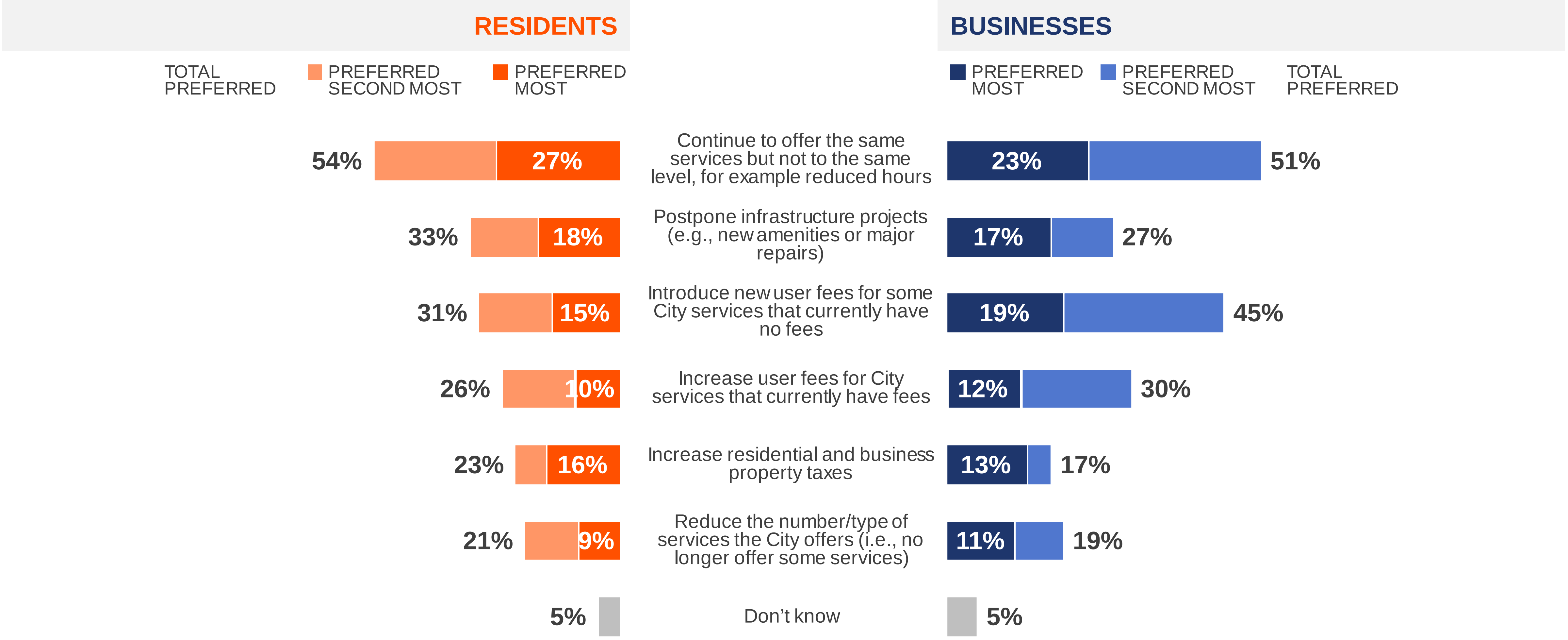
▲ / ▼ Significantly higher/lower than previous year.

Value for Taxes (Residents)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Total Good Value	**76%**	**78%**	**77%**	**79%**	**73%**	**77%**	**74%**	**74%**	**78%**	**78%**	**77%**	**73%**	**80%**
Total Poor Value	**22%**	**21%**	**20%**	**18%**	**25%**	**22%**	**23%**	**22%**	**20%**	**22%**	**21%**	**25%**	**17%**

Base: All residents (n=600)
Q13. Thinking about all the programs and services you receive from the City of Vancouver, would you say that overall you get good value or poor value for your tax dollars? (Is that very or fairly good/poor value?)

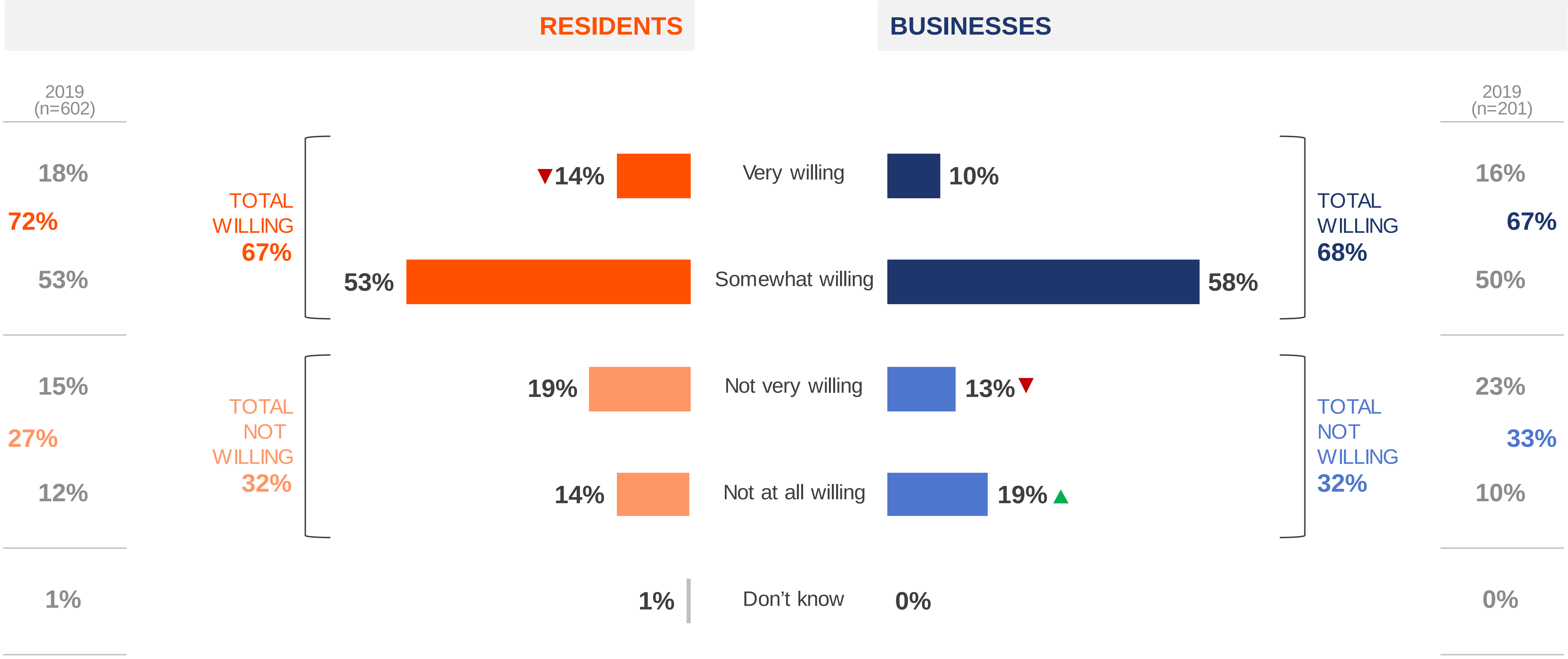
Preferred Options to Balance Budget



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

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

Willingness to Pay More User Fees for Services



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

▲ / ▼ Significantly higher/lower than previous year.

SUMMARY

Key Takeaways (page 1 of 2)

1	The COVID-19 pandemic has negatively impacted many aspects of everyday life for residents and businesses.
2	Key survey measures around overall quality of life and service satisfaction are positive but lower than previous years. • Quality of life: 81% residents (down 8 points from 2019), 80% businesses (down 12 points) • Overall service satisfaction: 78% residents (down 8 points), 72% businesses (down 8 points)
3	For residents, overall satisfaction has dropped for a number of services, including homelessness services, police services, recreation, emergency preparedness, social policies & projects, and making streets vibrant. There are also two services where business satisfaction has significantly decreased (police services and development & building permits).
4	Perceptions of a worsening quality of life are exacerbated this year, partly due to the COVID-19 pandemic but also due to issues around the cost of living, housing/accommodations, poverty/homelessness, and public safety/crime.

Key Takeaways (page 2 of 2)

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

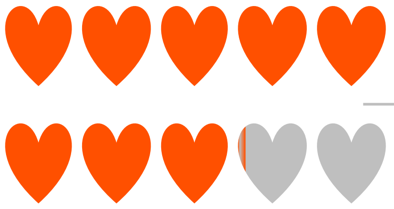
DISCUSSION

APPENDIX

Dashboard – Residents

QUALITY OF LIFE

OVERALL QUALITY OF LIFE

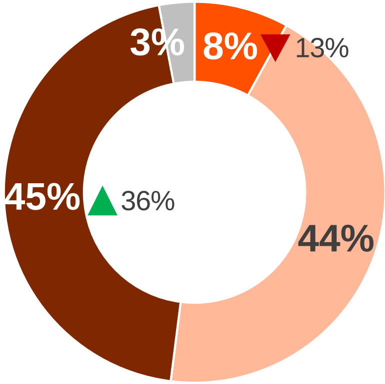


81% ▼ 89%

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

CHANGE IN QUALITY OF LIFE

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



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

IMPORTANT LOCAL ISSUES

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

32% ▲ 0%
COVID-19 (NET)

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

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

FINANCIAL PLANNING

VALUE FOR TAXES

76%

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

WILLINGNESS TO PAY MORE USER FEES

67%

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

TOP 3 PREFERRED OPTIONS TO BALANCE BUDGET Answer list changed in 2021 – no longer comparable to previous years.

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

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

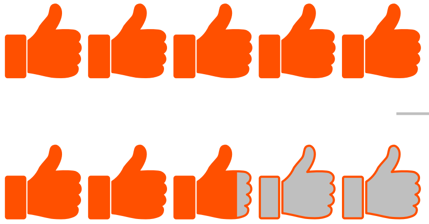
31%
Introduce new user fees for some City services that currently have no fees

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

Dashboard – Residents (cont.)

CITY SERVICES

OVERALL SATISFACTION WITH CITY SERVICES

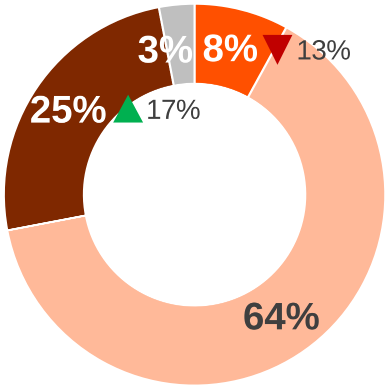


78% ▼ 86%

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

CHANGE IN LEVEL AND QUALITY OF SERVICES

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



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

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

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

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

TOP 3 SERVICES WHERE RESIDENTS FEEL THE CITY SHOULD INVEST MORE

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

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

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

Dashboard – Businesses

QUALITY OF LIFE

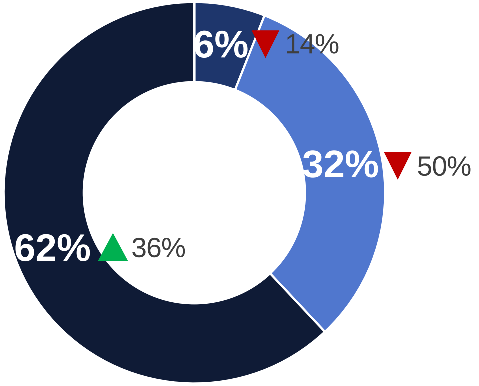
OVERALL QUALITY OF LIFE

80% ▼92%

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

CHANGE IN QUALITY OF LIFE

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



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

IMPORTANT LOCAL ISSUES

TOP 3 ISSUES

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

38% ▲0%
COVID-19 (NET)

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

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

FINANCIAL PLANNING

VALUE FOR TAXES

77%

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

WILLINGNESS TO PAY MORE USER FEES

68%

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

TOP 3 PREFERRED OPTIONS TO BALANCE BUDGET

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

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

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

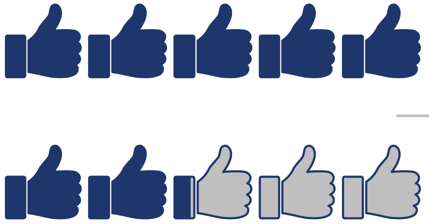
30%
Increase user fees for City services that currently have fees

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

Dashboard – Businesses (cont.)

CITY SERVICES

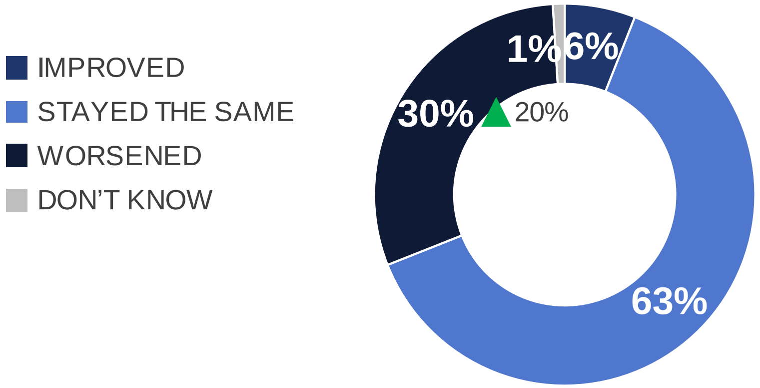
OVERALL SATISFACTION WITH CITY SERVICES



72%

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

CHANGE IN LEVEL AND QUALITY OF SERVICES



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

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

92% Fire rescue and medical response

89% Library services

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

62% City-wide and community long-range planning

56% Parking and enforcement

40% ▼ 53% Development & building permits

TOP 3 SERVICES WHERE BUSINESSES FEEL THE CITY SHOULD INVEST MORE

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

51% Street infrastructure and maintenance

49% Fire rescue and medical response

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

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

Overall Quality of Life (Residents)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Total Good	81%	85%	80%	82%	81%	81%	76%	92%	80%	85%	78%	82%	81%
Total Poor	18%	14%	19%	17%	18%	17%	23%	8%	19%	15%	20%	17%	19%

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

Reasons Quality of Life has Improved (Residents)
(among those saying the quality of life has improved) (coded open-ends)

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

	2020	2019 (n=67)*	2018 (n=60)*
Things are getting better/city is improving	14%	11%	19%
Improved transportation options	11%	23%	22%
More facilities/amenities	10%	9%	12%
Good quality of life	7%	7%	7%
Improved infrastructure/roads	6%	15%	17%
Improved access to services	5%	2%	7%
Improved public safety/reduction in crime	5%	4%	7%
More diverse population	4%	1%	6%
Health/healthcare	4%	6%	1%
More environmentally friendly city	3%	2%	9%
More opportunities for everyone	3%	0%	6%
Nothing	8%	0%	0%
Don't know	7%	8%	2%

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

Sample sizes do not allow for significance testing.

Top Ten Important Local Issues (Residents)
(coded open-ends, multiple responses allowed)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
COVID-19 (NET)	32%	31%	31%	41%	27%	26%	31%	26%	31%	34%	34%	27%	36%
Social issues	20%	17%	23%	18%	22%	21%	25%	22%	21%	15%	18%	22%	18%
Housing/accommodations	19%	19%	19%	15%	23%	18%	23%	27%	25%	17%	10%	17%	23%
Affordability/cost of living	13%	12%	13%	11%	13%	15%	11%	18%	15%	12%	11%	14%	13%
Infrastructure/transportation	12%	11%	14%	10%	11%	17%	11%	14%	13%	20%	8%	16%	9%
Addiction and overdoses	11%	10%	12%	6%	13%	12%	17%	6%	13%	7%	10%	11%	10%
Economy/economic issues	8%	7%	10%	9%	7%	9%	8%	11%	7%	11%	7%	9%	9%
Crime/criminal activity	7%	6%	8%	4%	10%	5%	11%	2%	5%	4%	9%	8%	6%
Health/healthcare	6%	5%	7%	4%	7%	7%	4%	7%	8%	3%	7%	5%	6%
Development	5%	6%	5%	1%	7%	8%	4%	6%	3%	8%	5%	9%	1%
Environment	5%	4%	6%	4%	5%	6%	4%	10%	2%	5%	6%	6%	4%

Base: All residents (n=600)
Q1. From your perspective as a resident of the City of Vancouver, what are the most important local issues facing the City at the present time? Anything else?

Overall Satisfaction with City Services (Residents)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Total Satisfied	78%	75%	83%	81%	76%	77%	68%	80%	83%	80%	80%	77%	79%
Total Not Satisfied	20%	23%	17%	18%	23%	21%	30%	19%	17%	20%	18%	22%	20%

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

Reasons City Services have Improved (Residents)

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

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

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

* Small base size (<100), interpret with caution. ** Very small base size (<50), interpret with extreme caution.
Base: Those saying City services have improved: Residents (n=42**); Businesses (n=14**)
Q8. Why do you think the overall level and quality of services provided by the City of Vancouver has improved?

Sample sizes do not allow for significance testing.

Satisfaction with Specific Services (Residents)
(slide 1 of 2)

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

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

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

Satisfaction with Specific Services (Residents)
(slide 2 of 2)

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

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Transportation infrastructure	78%	78%	79%	81%	79%	75%	79%	76%	78%	79%	79%	73%	82%
Police services	78%	83%	73%	72%	75%	87%	79%	77%	69%	80%	83%	82%	71%
Keeping our community clean	76%	76%	75%	79%	72%	76%	75%	87%	70%	75%	75%	72%	79%
Multi-channel service access	74%	73%	76%	78%	75%	70%	72%	68%	86%	69%	76%	79%	68%
By-law enforcement	73%	73%	74%	80%	68%	72%	71%	73%	72%	75%	73%	73%	74%
Emergency preparedness	71%	74%	69%	67%	72%	75%	76%	67%	78%	64%	72%	74%	69%
Street infrastructure	71%	69%	72%	78%	70%	63%	67%	77%	71%	69%	71%	69%	71%
Economic development	67%	64%	70%	75%	60%	68%	63%	69%	63%	65%	72%	65%	68%
Parking	65%	62%	68%	66%	68%	61%	70%	69%	62%	67%	60%	66%	62%
Development & building permits	52%	53%	52%	73%	41%	42%	54%	49%	48%	55%	54%	46%	59%
Social policies & projects	44%	49%	38%	50%	38%	43%	37%	47%	44%	43%	47%	47%	38%
Homelessness services	34%	36%	33%	36%	31%	37%	33%	36%	33%	30%	37%	33%	35%
Enabling affordable housing	30%	35%	25%	22%	30%	36%	26%	33%	29%	30%	29%	32%	23%

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

Satisfaction with Specific Services

Summary of satisfaction for services asked of both residents and businesses

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

VERY SATISFIED SOMEWHAT SATISFIED

Service		Very satisfied	Total	T2B 2019 (n=varies) (n=201)	T2B 2018 (n=varies) (n=200)
Library services	Residents	51% ▼ (59%)	92%	92%	93%
	Businesses	49%	89%	91%	93%
Fire rescue & medical response	Residents	46% ▼ (53%)	89%	90%	92%
	Businesses	53%	92%	95%	92%
Online payment services	Residents	47%	87% ▲	81%	86%
	Businesses	54%	95%	91%	93%
Making streets more vibrant	Residents	26% ▼ (35%)	82% ▼	88% ▲	81%
	Businesses	22%	80%	86%	83%
Urban design	Residents	24%	81%	81%	81%
	Businesses	25%	81%	87%	85%
Facilitating film/special events	Residents	25% ▼ (33%)	80%	84%	82%
	Businesses	16% ▼ (28%)	74%	80%	78%
Availability of online services	Residents	32%	78%	78%	80%
	Businesses	26%	83%	85%	89%
Transportation infrastructure	Residents	31%	78%	76% ▲	67%
	Businesses	28%	72%	74%	66%
Police services	Residents	28% ▼ (44%)	78% ▼	89%	88%
	Businesses	34% ▼ (48%)	79% ▼	94%	90%

Service		Very satisfied	Total	T2B 2019 (n=varies) (n=201)	T2B 2018 (n=varies) (n=200)
Keeping our community clean	Residents	33%	76%	80%	76%
	Businesses	31%	69%	79%	79%
Multi-channel service access	Residents	26%	74%	70%	73%
	Businesses	28%	79%	76%	79%
By-law enforcement	Residents	17% ▼ (25%)	73%	78%	76%
	Businesses	10%	74%	81%	78%
Emergency preparedness	Residents	23%	71% ▼	79%	74%
	Businesses	21%	73%	78%	78%
Street infrastructure	Residents	20%	71%	72%	71%
	Businesses	17%	69%	70%	67%
Economic development	Residents	10%	67%	66%	67%
	Businesses	11%	67%	68%	69%
Parking	Residents	16%	65%	59%	58%
	Businesses	19%	56%	62%	59%
Development & building permits	Residents	10% ▼ (14%)	52%	55%	50%
	Businesses	4% ▼ (11%	40% ▼	53%	42%

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

▲ / ▼ Significantly higher/lower than previous year.

Investment in Specific Services (Residents)
(slide 1 of 2)

INVEST MORE (service wording has been abbreviated to fit within the space provided)													
	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Homelessness services	75%	70%	81%	80%	74%	70%	83%	69%	75%	77%	71%	70%	81%
Enabling affordable housing	73%	66%	79%	77%	75%	66%	82%	65%	79%	67%	72%	63%	84%
Social policies & projects	71%	68%	76%	75%	73%	64%	72%	67%	70%	72%	73%	67%	76%
Street infrastructure	45%	45%	46%	41%	45%	48%	44%	35%	40%	53%	48%	46%	46%
Transportation infrastructure	45%	48%	44%	51%	50%	36%	42%	51%	52%	40%	44%	45%	47%
Fire rescue & medical response	44%	39%	49%	50%	41%	41%	50%	42%	39%	34%	50%	41%	47%
Keeping our community clean	41%	37%	45%	38%	43%	40%	47%	32%	36%	43%	42%	40%	41%
Economic development	40%	43%	37%	45%	44%	32%	55%	36%	28%	39%	42%	39%	44%
Emergency preparedness	39%	38%	40%	44%	40%	35%	40%	39%	32%	38%	44%	37%	41%
Parks/green spaces	39%	39%	40%	39%	44%	34%	39%	34%	45%	30%	44%	39%	37%
Recreation	39%	39%	39%	31%	47%	38%	38%	37%	45%	35%	38%	40%	41%
Arts & culture	36%	33%	41%	32%	38%	39%	38%	36%	39%	39%	33%	33%	45%
Urban design	36%	35%	36%	45%	36%	26%	41%	43%	44%	19%	33%	35%	34%

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

Investment in Specific Services (Residents)
(slide 2 of 2)

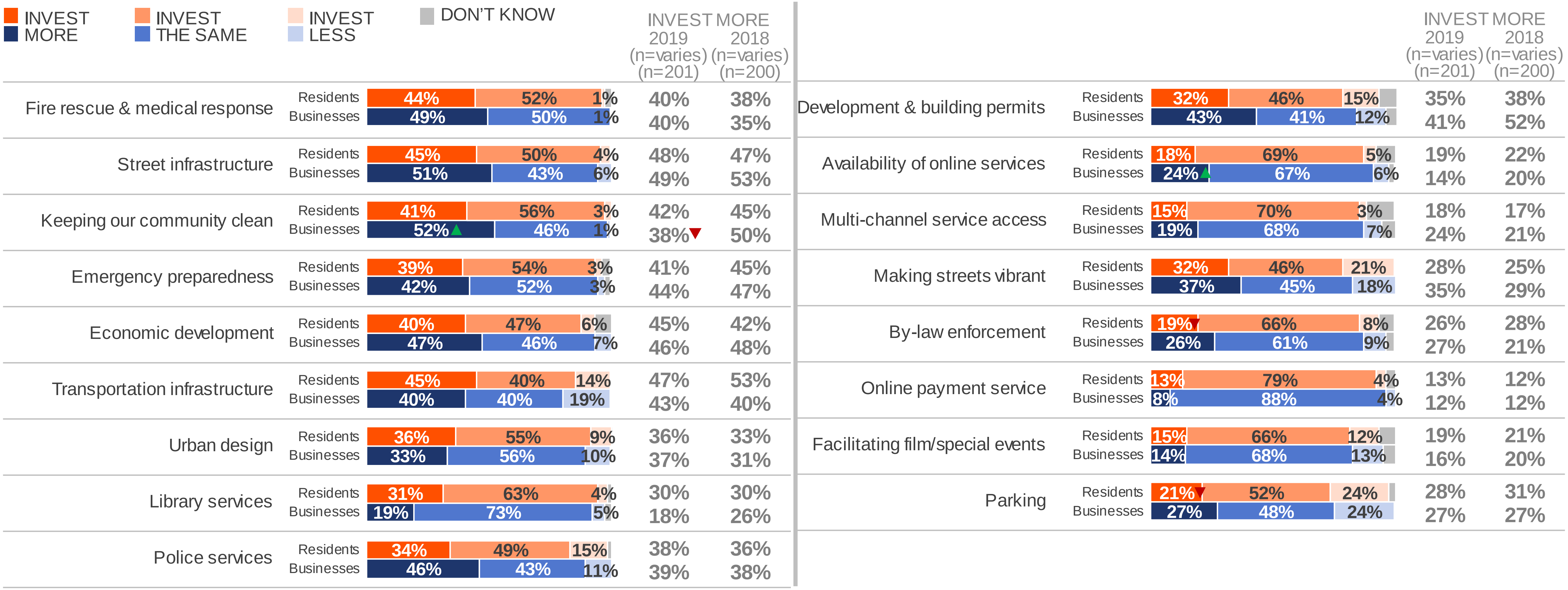
INVEST MORE (service wording has been abbreviated to fit within the space provided)													
	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Police services	34%	31%	39%	24%	35%	42%	43%	31%	30%	32%	35%	33%	35%
Development & building permits	32%	39%	25%	23%	40%	32%	32%	30%	26%	39%	32%	37%	27%
Making streets vibrant	32%	34%	30%	31%	36%	29%	25%	37%	33%	36%	30%	31%	33%
Water conservation	32%	30%	36%	42%	27%	28%	33%	27%	30%	26%	40%	28%	36%
Library services	31%	30%	34%	26%	38%	29%	32%	37%	35%	31%	25%	31%	36%
Garbage & green bin collection	24%	23%	25%	28%	26%	17%	32%	20%	20%	18%	27%	23%	25%
Parking	21%	22%	21%	27%	19%	16%	25%	12%	17%	22%	25%	19%	21%
Services to enhance parks	21%	24%	19%	22%	21%	22%	33%	31%	14%	23%	14%	22%	23%
By-law enforcement	19%	19%	20%	13%	25%	21%	17%	20%	23%	21%	17%	21%	19%
Availability of online services	18%	23%	13%	24%	14%	16%	17%	25%	17%	14%	18%	17%	20%
Facilitating film/special events	15%	17%	13%	14%	16%	15%	18%	20%	18%	11%	11%	17%	14%
Multi-channel service access	15%	18%	13%	12%	17%	17%	11%	18%	17%	16%	15%	16%	15%
Online payment services	13%	14%	12%	17%	8%	13%	1%	22%	14%	7%	17%	13%	13%

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

Investment in Specific Services

Summary of investment in services asked of both residents and businesses

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



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

Only significant differences for invest more are shown.

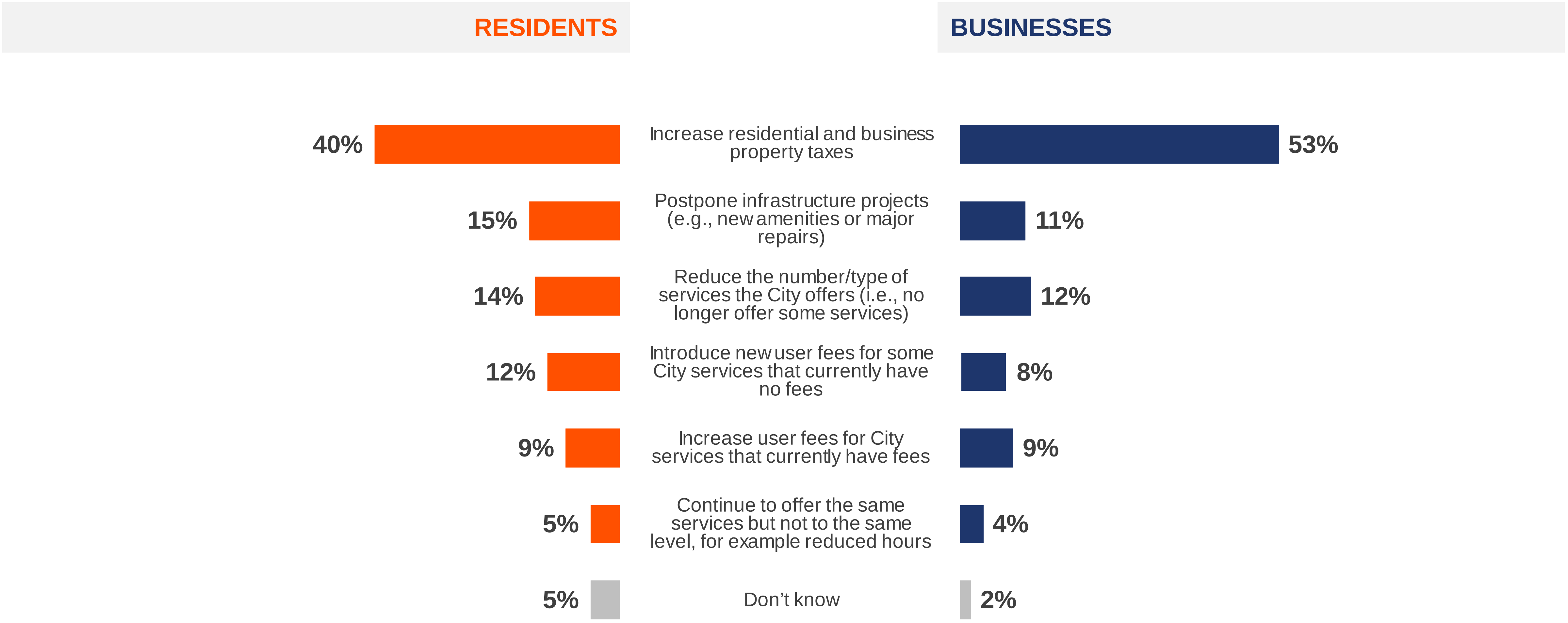
▲ / ▼ Significantly higher/lower than previous year.

Preferred Options to Balance Budget (Residents)

TOTAL PREFERRED														
		GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
	TOTAL	MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Continue to offer the same services but not to the same level, for example reduced hours	54%	53%	53%	61%	48%	52%	56%	52%	44%	54%	59%	55%	50%
Postpone infrastructure projects (e.g., new amenities or major repairs)	33%	29%	36%	41%	29%	28%	37%	26%	30%	32%	36%	33%	31%
Introduce new user fees for some City services that currently have no fees	31%	30%	31%	24%	31%	36%	31%	30%	26%	33%	32%	35%	24%
Increase user fees for City services that currently have fees	26%	32%	21%	20%	30%	27%	24%	34%	33%	20%	22%	27%	27%
Increase residential and business property taxes	23%	22%	24%	28%	22%	19%	20%	31%	24%	24%	19%	17%	31%
Reduce the number/type of services the City offers (i.e., no longer offer some services)	21%	26%	16%	19%	25%	18%	18%	19%	28%	22%	18%	20%	22%

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

Least Preferred Options to Balance Budget



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

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

Least Preferred Options to Balance Budget (Residents)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Increase residential and business property taxes	40%	40%	40%	34%	49%	38%	46%	40%	34%	36%	43%	51%	27%
Postpone infrastructure projects (e.g., new amenities or major repairs)	15%	17%	13%	16%	12%	16%	14%	17%	17%	14%	15%	12%	17%
Reduce the number/type of services the City offers (i.e., no longer offer some services)	14%	15%	14%	17%	14%	13%	15%	15%	10%	14%	17%	13%	17%
Introduce new user fees for some City services that currently have no fees	12%	12%	12%	18%	10%	8%	11%	11%	22%	11%	7%	8%	17%
Increase user fees for City services that currently have fees	9%	8%	9%	10%	6%	11%	10%	5%	7%	16%	8%	8%	10%
Continue to offer the same services but not to the same level, for example reduced hours	5%	4%	5%	5%	5%	4%	2%	10%	7%	4%	3%	3%	7%

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

Willingness to Pay More User Fees for Services(Residents)

	TOTAL	GENDER		AGE			NEIGHBOURHOOD					OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	DT	NW	NE	SW	SE	OWN	RENT
Total Willing	67%	68%	68%	67%	69%	64%	61%	70%	65%	68%	68%	64%	68%
Total Not Willing	32%	32%	31%	32%	31%	34%	39%	29%	33%	31%	31%	34%	32%

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

Weighted Sample Characteristics
(weighted by business size)

BUSINESSES

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

▲ / ▼ Significantly higher/lower than previous year.

Full Service Wording

CHART WORDING	FULL SERVICE WORDING
Parks/green spaces	Provision and maintenance of a diversity of parks and green spaces
Recreation	Provision and support of recreation facilities and programs
Services to enhance parks	Provision of services to enhance parks and recreational experiences, such as golf courses, marinas and concessions
Arts & culture	Support for arts and cultural services, programs, and organizations
Social policies & projects	Social policies and projects that address issues such as poverty, mental health and addictions, immigration, and childcare
Homelessness services	Homelessness services, such as shelters, warming centres, and housing support
Licensing & support	Business licensing and support
Development & building permits	Development and building permits
By-law enforcement	By-law enforcement for buildings, property use and animal services
Transportation infrastructure	Providing transportation infrastructure for walking, bikes, transit and vehicles
Parking	Parking and enforcement
Street infrastructure	Street infrastructure and maintenance
Making streets vibrant	Making streets vibrant through landscaping, art, furniture, patios and innovative temporary installations
Facilitating film/special events	Facilitating the production and permits for film and special events on city streets and spaces
Keeping our community clean	Keeping our community clean - i.e. litter pick up, roads and sidewalks sweeping, receptacles etc.
Water conservation	Water conservation and resource management
Garbage & green bin collection	Providing garbage and green bin collection
Online payment services	Online services for paying taxes, tickets, utility bills, etc.

Full Service Wording

CHART WORDING	FULL SERVICE WORDING
Availability of online services	Availability of online services via Vancouver.ca
Multi-channel service access	Providing multi-channel access to City services through the VanConnect mobile app and the 3-1-1 contact centre
Enabling affordable housing	Enabling affordable housing
Economic development	Promoting economic development
Urban design	Urban design that enhances public life and public spaces
Long-range planning	City-wide and community long-range planning
Fire rescue & medical response	Fire rescue and medical response
Emergency preparedness	Providing emergency preparedness information and support
Police services	Police services
Library services	Library services

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