

2024 BUDGET SURVEY

City of Victoria

Final Report

September 15, 2023

© 2023 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.



Contents

01 INTRODUCTION

02 KEY FINDINGS

03 DETAILED RESULTS

3.1 QUALITY OF LIFE

3.2 IMPORTANT LOCAL ISSUES

3.3 SATISFACTION WITH SERVICES

3.4 PRIORITIES FOR INVESTMENT

3.5 CORE SERVICES

3.6 FINANCIAL PLANNING

04 WEIGHTED SAMPLE CHARACTERISTICS



INTRODUCTION 01



Objectives and Methodology



This report presents the findings of the City of Victoria's 2024 Budget Survey. The main purpose of this survey is to obtain residents' input on City services, programs, and spending priorities to help guide the development of the City's 2024 Budget.



Ipsos conducted a total of 700 telephone interviews with a randomly selected representative sample of Victoria residents aged 18 years or older.

Interviewing was conducted using numbers from both cellphones and landlines. A screening question was included at the start of the survey to confirm residency in Victoria.

To ensure the data was gathered from a representative group of residents across the city, neighbourhood quotas were set roughly proportionate to the population in each of Victoria's 12 neighbourhoods.

All interviews were conducted between July 31 and August 17, 2023.

The final data has been weighted to ensure that the gender/age and neighbourhood distribution reflects that of the actual population in Victoria based on most recent Census data.

Overall results based on a sample size of 700 are accurate to within $\pm 3.7\%$, 19 times out of 20. The margin of error will be larger for sample subgroups.



Notes to Reader



Some totals in the report may not add to 100%. Some summary statistics (e.g., total satisfied) may not match their component parts. The numbers are correct, and the apparent errors are due to rounding.

Analysis of some of the statistically significant demographic results is included where applicable. While a number of significant differences may appear in the cross-tabulation output, not all differences warrant discussion.

The City's 12 neighbourhoods have been grouped into four broad areas for analytical purposes. Neighbourhood groupings are based on geographical proximity and ensure a statistically robust sample size in each area.

- Gonzales/Rockland/Fairfield (n=162)
- James Bay/Downtown/Victoria West (n=216)
- Jubilee/Fernwood/Oaklands (n=174)
- Hillside Quadra/North Park/Burnside Gorge (n=148)



KEY FINDINGS

02

Key Findings

1

Overall perceptions of quality of life are positive but many feel this has worsened over the past three years.

2

Social issues, particularly housing/affordable housing and poverty/homelessness, dominate the public issue agenda. Transportation and public safety/crime round out residents' top three local issues on an open-ended basis.

3

Nearly three-quarters of residents are satisfied with the overall level and quality of City services. Just over half say services have stayed the same over the past three years. However, among those noticing a change, more say services have worsened than improved.

4

Housing is consistently identified as the number one priority for investment. Community safety and well-being places second.

5

Corporate sponsorships and naming rights are residents' preferred way of balancing the City budget. An increase in property taxes is the least preferred option overall.

DETAILED RESULTS

03

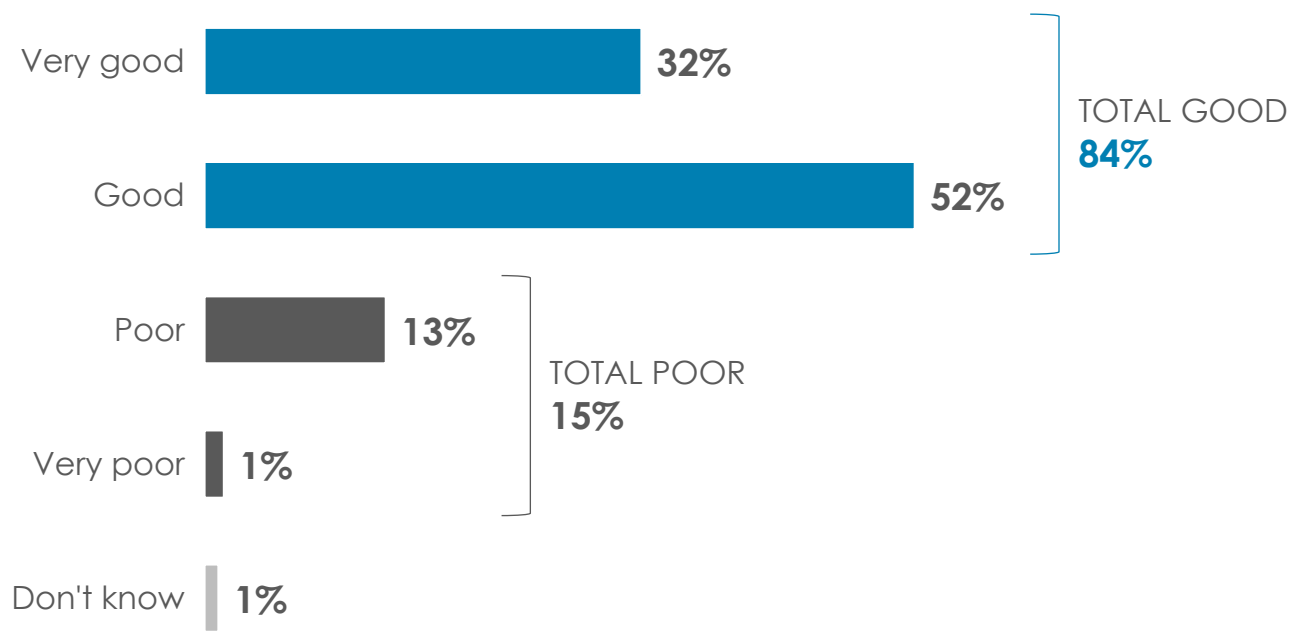
**QUALITY
OF LIFE**

3.1

Overall Quality of Life

- Overall perceptions of the current quality of life in Victoria are positive, with more than four-in-five (84%) residents considering this to be 'very good' (32%) or 'good' (52%).
- Less than one-in-five (15%) rate the quality of life poorly.

OVERALL QUALITY OF LIFE IN VICTORIA TODAY



Total good is higher among:

- Those who are 35+ years of age (87% of 55+ years and 86% of 35-54 years versus 79% of 18-34 years)
- Those who have lived in Victoria for <20 years (88% versus 81% of 20+ years)
- University graduates (90% versus 74% of high school or less, 78% of some post secondary)
- Those with household incomes of \$60K+ (87% of \$100K+ and 86% of \$60K-<\$100K versus 79% of <\$60K)
- Those without household disabilities¹ (87% versus 74% with household disabilities)

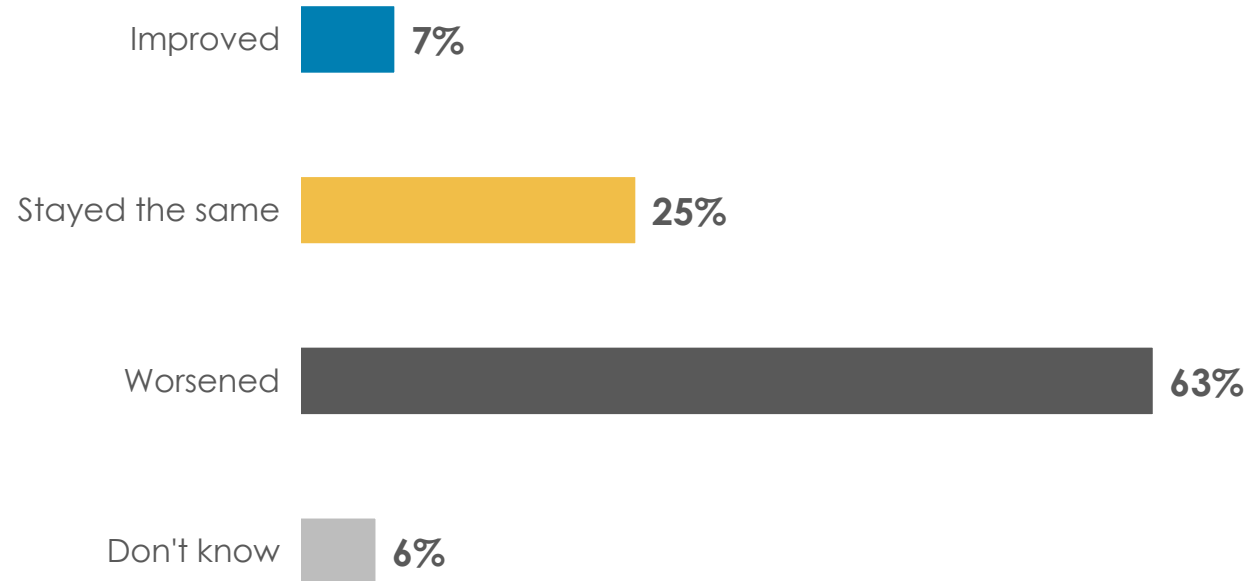
¹Defined as those saying they or a member of their household do not identify as having or living with a disability.

Base: All respondents (n=700)
Q2. How would you rate the overall quality of life in Victoria today?

Change in Quality of Life

- However, most (63%) residents believe that the quality of life in Victoria has 'worsened' over the past three years.
- One-quarter (25%) feel the quality of life has 'stayed the same' while 7% say 'improved'.

CHANGE IN QUALITY OF LIFE IN VICTORIA PAST THREE YEARS



Those who have lived in Victoria for 20+ years are more likely to say the quality of life has **worsened** (71% versus 54% of <20 years).

Base: All respondents (n=700)
Q3. And, do you feel that the quality of life in Victoria in the past three years has improved, stayed the same, or worsened?

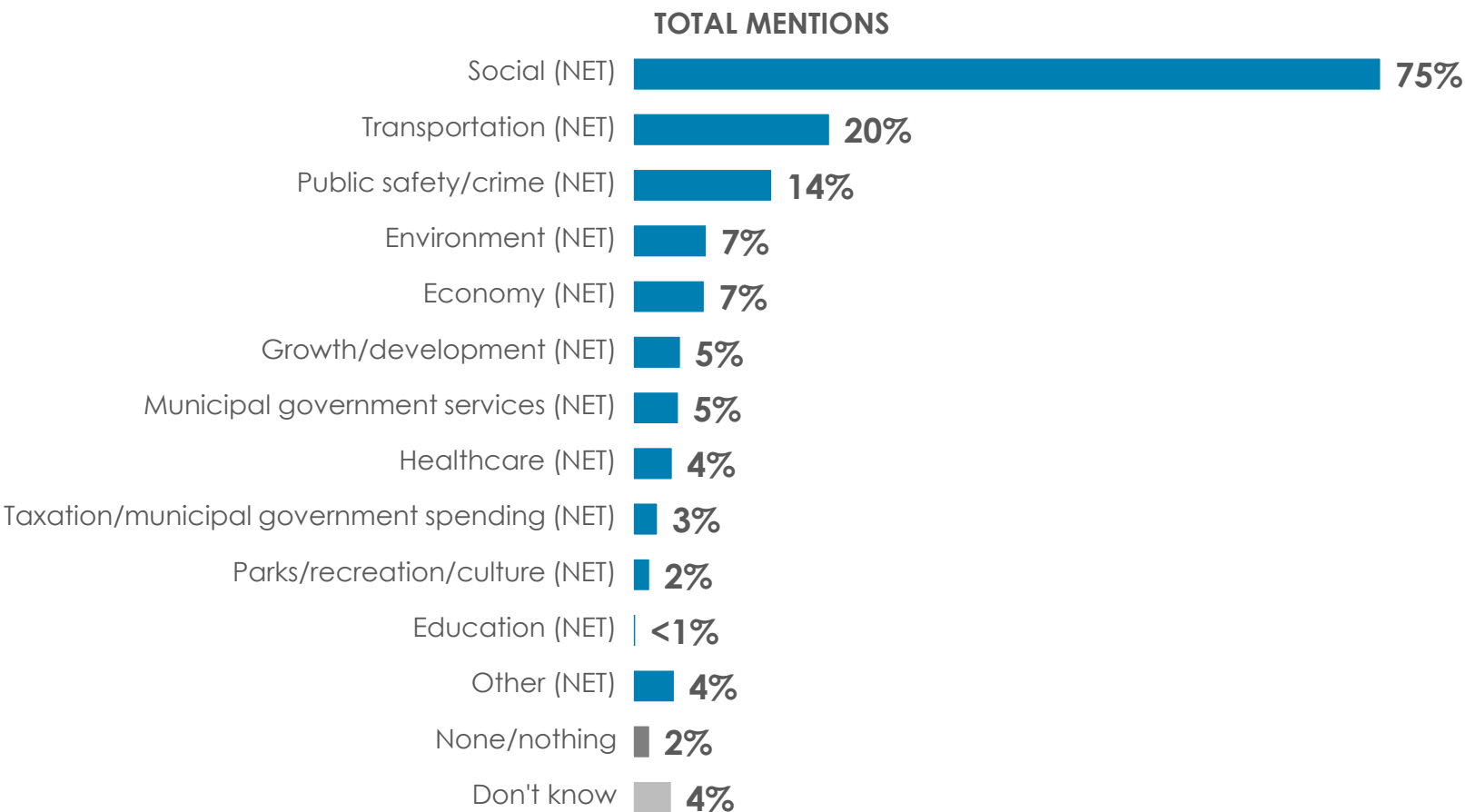
IMPORTANT LOCAL ISSUES

3.2

Important Local Issues

- Social issues dominate the public issue agenda, mentioned by 75% of residents on an open-ended basis. Social issues is primarily comprised of mentions related to “housing/affordable housing” (42%) and “poverty/homelessness” (38%).
- Transportation sits in distant second, garnering 20% of mentions.
- Public safety/crime rounds out the top three (14%).
- All other issues are mentioned by fewer than one-in-ten residents.

TOP-OF-MIND LOCAL ISSUES (CODED OPEN-ENDS, MULTIPLE MENTIONS ALLOWED)



A “NET” is a combination of two or more mentions that cover a specific theme.
Base: All respondents (n=700)
Q1. In your view, as a resident of the City of Victoria, what is the most important issue facing your community, that is the one issue you feel should receive the greatest attention from your local leaders? Are there any other important local issues?

Important Local Issues – Individual Responses Included in Each Net

TOP-OF-MIND LOCAL ISSUES (CODED OPEN-ENDS, MULTIPLE MENTIONS ALLOWED)

	TOTAL MENTIONS
Social [Net]	75%
Housing/affordable housing	42%
Poverty/homelessness	38%
Substance use/drugs/addiction	8%
Mental health	3%
Seniors issues	1%
Food security	1%
Childcare	1%
Other social mentions	1%

Social mentions are higher among those living in Hillside Quadra/North Park/Burnside Gorge (82% versus 68% of Gonzales/Rockland/Fairfield, 73% of James Bay/Downtown/Victoria West, 79% of Jubilee/Fernwood/Oaklands).

	TOTAL MENTIONS
Transportation [Net]	20%
Cycling infrastructure	6%
Public transportation	3%
Traffic congestion	3%
Transportation (general)	3%
Condition of roads	2%
Road safety (incl. speeding)	1%
Parking	1%
Other transportation mentions	1%

Transportation mentions are higher among those who are 55+ years of age (25% versus 15% of 35-54 years, 18% of 18-34 years) and homeowners (23% versus 16% of renters).

	TOTAL MENTIONS
Public safety/crime [Net]	14%
Public safety	5%
Crime (general)	5%
Policing/law enforcement	2%
Downtown safety/crime	2%
Other public safety/crime mentions	<1%

Public safety/crime mentions are higher among those who have lived in Victoria for 20+ years (17% versus 11% of <20 years) and those with household incomes of \$60K+ (17% of \$60K-<\$100K and 16% of \$100K+ versus 9% of <\$60K).

A "NET" is a combination of two or more mentions that cover a specific theme. Only NETS of 10% or higher are shown.

Base: All respondents (n=700)

Q1. In your view, as a resident of the City of Victoria, what is the most important issue facing your community, that is the one issue you feel should receive the greatest attention from your local leaders? Are there any other important local issues?

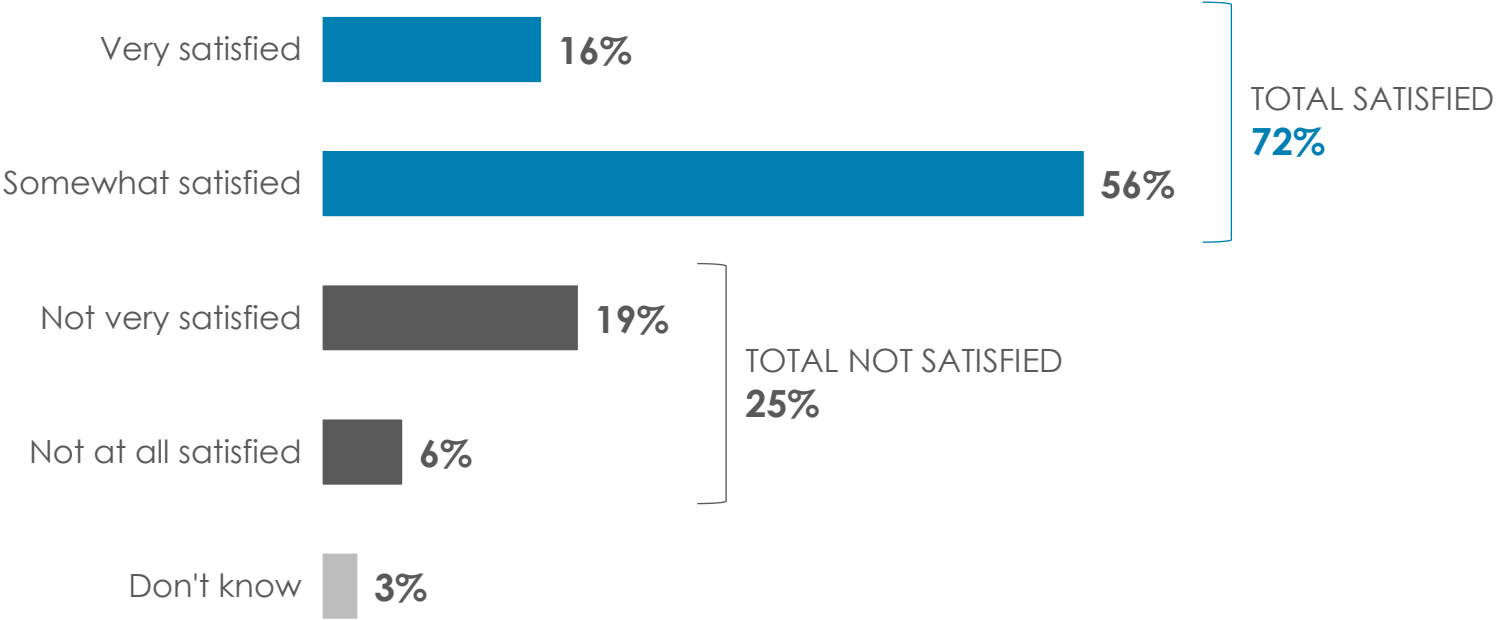
SATISFACTION WITH SERVICES

3.3

Overall Satisfaction with City Services

- Nearly three-quarters (72%) of residents are satisfied with the overall level and quality of services provided by the City, including 16% saying 'very satisfied' and 56% saying 'somewhat satisfied'.
- One-quarter (25%) are not satisfied.

SATISFACTION WITH OVERALL LEVEL AND QUALITY OF CITY SERVICES



Total satisfied is higher among:

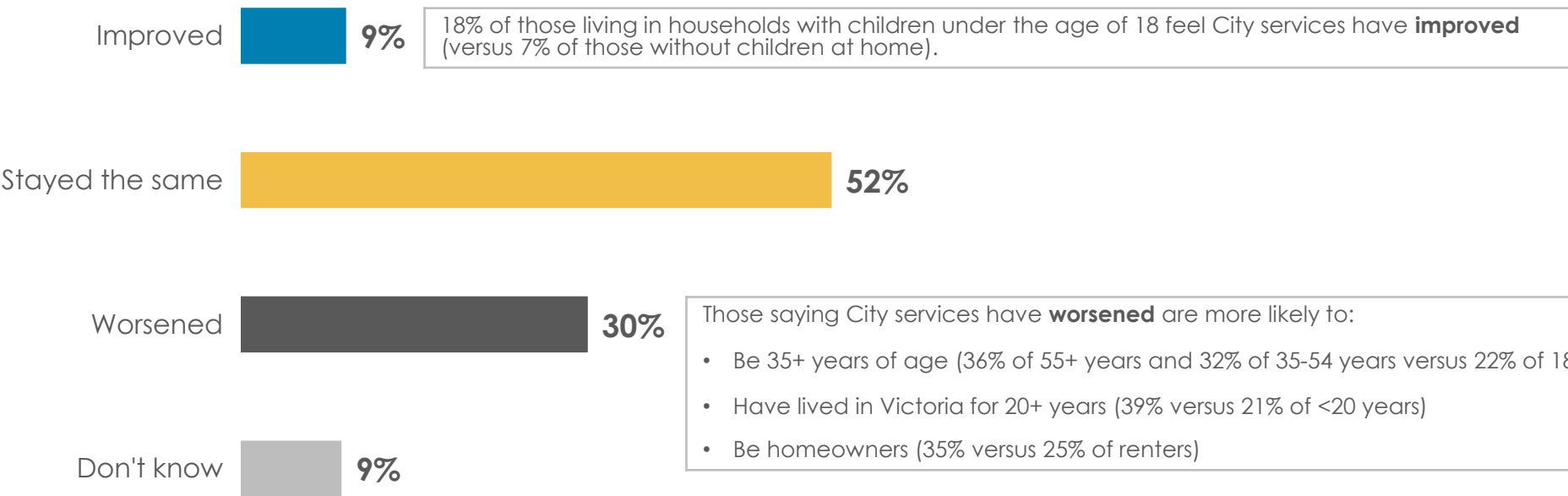
- Those living in Jubilee/Fernwood/Oaklands (83% versus 66% of James Bay/Downtown/Victoria West, 70% of Hillside Quadra/North Park/Burnside Gorge, 72% of Gonzales/Rockland/Fairfield)
- Those who have lived in Victoria for <20 years (81% versus 65% of 20+ years)

Base: All respondents (n=700)
Q4. How satisfied are you with the overall level and quality of services provided by the City of Victoria?

Change in Satisfaction with City Services

- Just over half (52%) feel the overall level and quality of City services has 'stayed the same' over the past three years.
- Among those noticing a change, more feel services have 'worsened' (30%) than 'improved' (9%).

CHANGE IN SATISFACTION WITH LEVEL AND QUALITY OF CITY SERVICES PAST THREE YEARS



Base: All respondents (n=700)
Q5. And, do you feel that the overall level and quality of services provided by the City over the past three years has improved, stayed the same, or worsened?

PRIORITIES FOR INVESTMENT

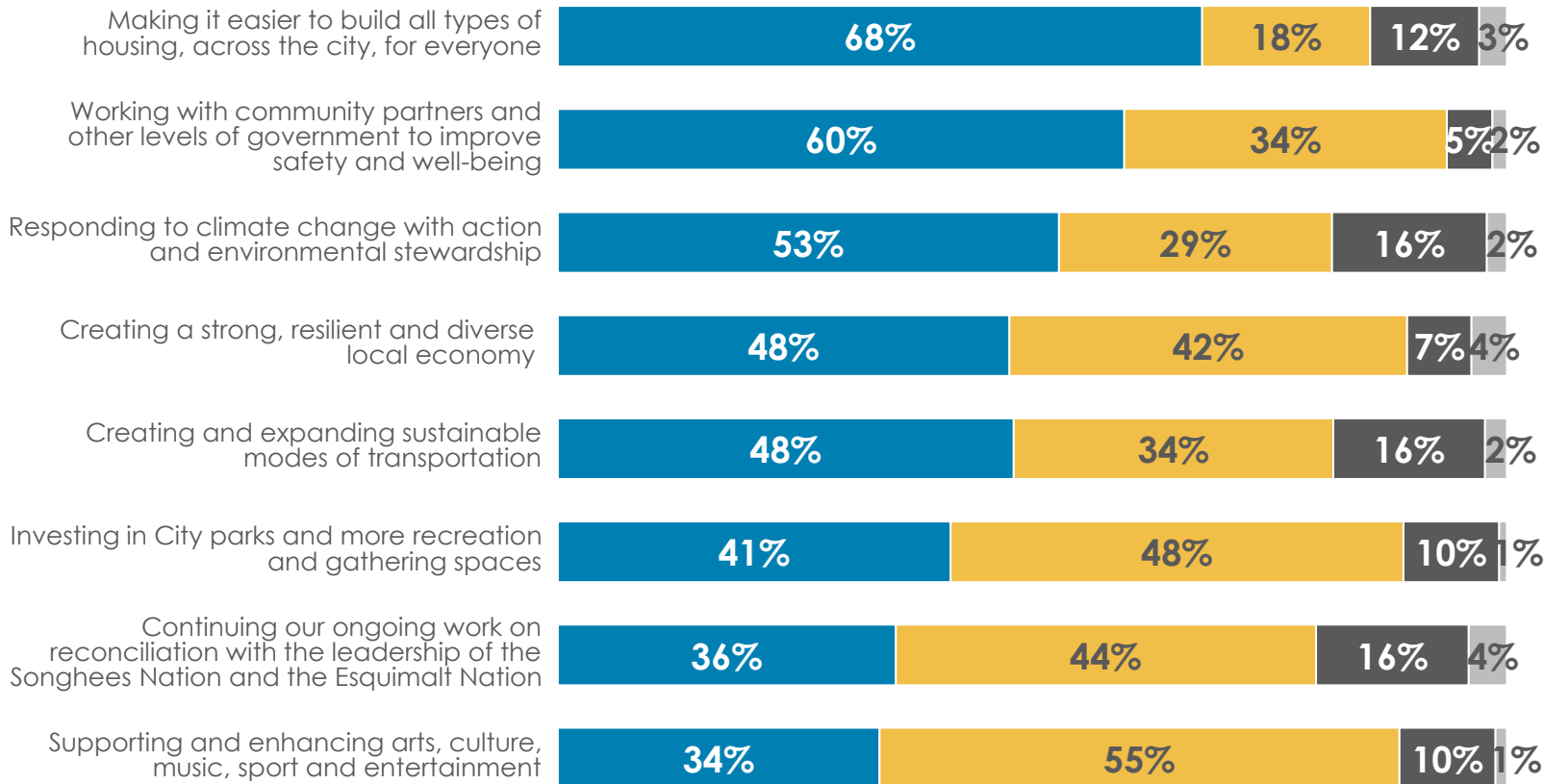
3.4

Investment in City Services and Programs

- Residents think the City should invest 'more' or 'the same' in all the evaluated services and programs. There are no services and programs where a majority thinks the City should reduce investment.
- However, some services and programs are clearly more of a priority than others.
- The overall greatest emphasis is put on *making it easier to build all types of housing, across the city, for everyone* (68% invest more).
- This is followed by *working with community partners and other levels of government to improve safety and well-being* (60% invest more).
- Just over half (53%) think the City should invest more in *responding to climate change with action and environmental stewardship*.
- Creating a strong, resilient and diverse local economy* (48%) and *creating and expanding sustainable modes of transportation* (48%) also place in the top five areas where residents would like the City to invest more.

LEVEL OF INVESTMENT IN CITY SERVICES AND PROGRAMS

■ MORE ■ SAME ■ LESS ■ DON'T KNOW



Base: All respondents (n=700)

Q6. The City of Victoria has started planning for its 2024 Draft Budget. To help inform this process, the City is interested in learning residents' priorities for investment next year. Considering all the services and programs competing for funding dollars, please tell me whether you think the City should invest more, less, or about the same as this year in each of the following.

Investment in City Services and Programs

(by Gender, Age, Neighbourhood, and Own/Rent)

INVEST MORE												
	TOTAL (n=700)	GENDER		AGE			NEIGHBOURHOOD				OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	GONZALES/ ROCKLAND/ FAIRFIELD	JAMES BAY/ DOWNTOWN / VICTORIA WEST	JUBILEE/ FERNWOOD/ OAKLANDS	HILLSIDE QUADRA/ NORTH PARK/ BURNSIDE GORGE	OWN	RENT
		(n=330)	(n=347)	(n=125)	(n=187)	(n=382)	(n=162)	(n=216)	(n=174)	(n=148)	(n=391)	(n=301)
Making it easier to build all types of housing, across the city, for everyone	68%	67%	69%	85%	73%	52%	48%	69%	78%	76%	56%	79%
Working with community partners and other levels of government to improve safety and well-being	60%	58%	63%	59%	60%	61%	59%	59%	58%	64%	62%	58%
Responding to climate change with action and environmental stewardship	53%	44%	61%	63%	45%	51%	55%	49%	54%	56%	49%	57%
Creating a strong, resilient and diverse local economy	48%	49%	48%	52%	50%	43%	42%	49%	53%	45%	44%	52%
Creating and expanding sustainable modes of transportation	48%	47%	48%	57%	46%	42%	42%	48%	48%	54%	42%	53%
Investing in City parks and more recreation and gathering spaces	41%	42%	40%	40%	41%	43%	45%	46%	39%	34%	45%	38%
Continuing our ongoing work on reconciliation with the leadership of the Songhees Nation and the Esquimalt Nation	36%	32%	37%	51%	38%	23%	27%	33%	40%	44%	28%	43%
Supporting and enhancing arts, culture, music, sport and entertainment	34%	34%	33%	44%	30%	29%	31%	33%	37%	34%	28%	40%

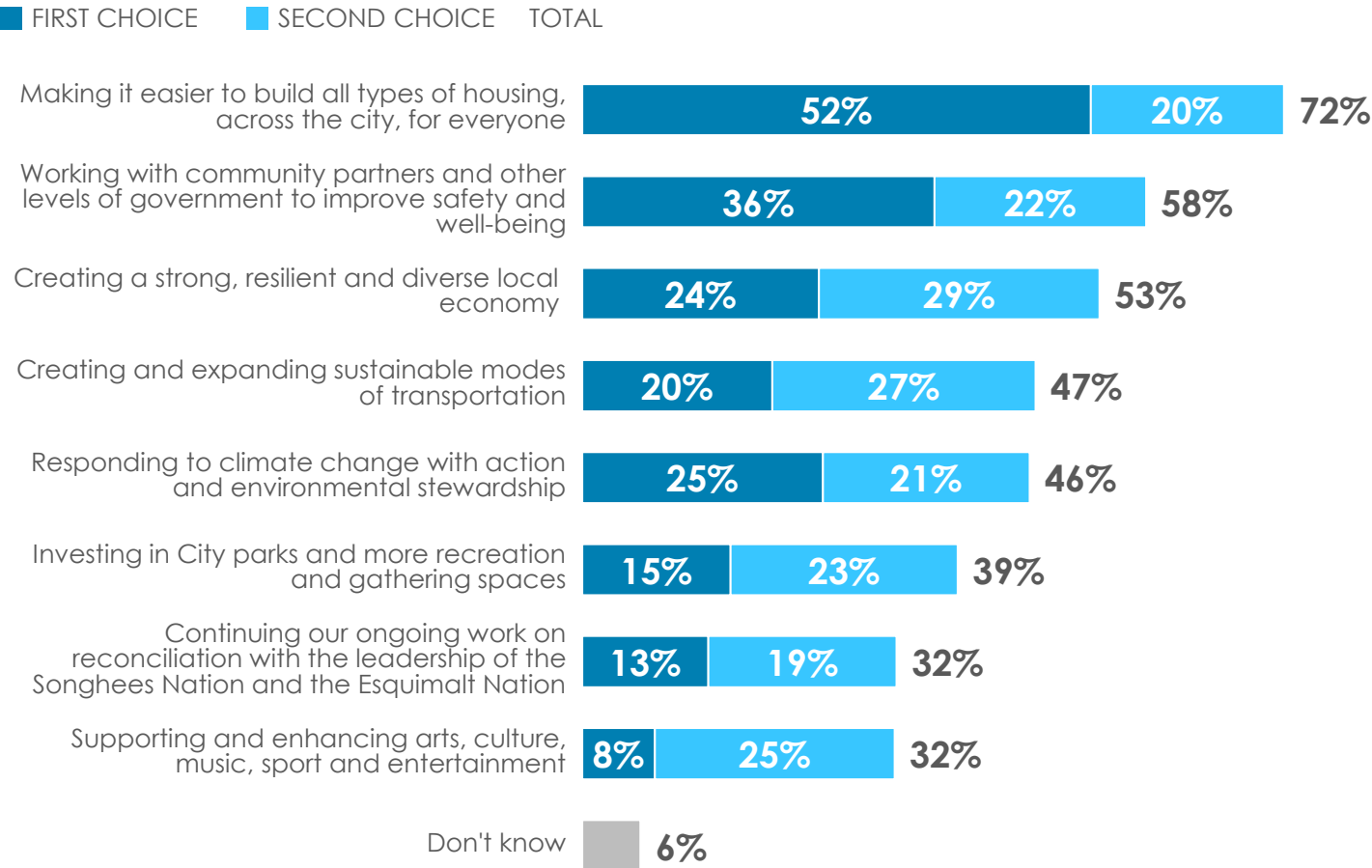
Base: All respondents (n=700)

Q6. The City of Victoria has started planning for its 2024 Draft Budget. To help inform this process, the City is interested in learning residents' priorities for investment next year. Considering all the services and programs competing for funding dollars, please tell me whether you think the City should invest more, less, or about the same as this year in each of the following.

Top Investment Choice(s)

- If the City only had the ability to increase investment in one of these areas, just over half (52%) say it should be *making it easier to build all types of housing, across the city, for everyone*. Another 20% select this as their second choice, for a total of 72% identifying this as one of their top two investment priorities. This is notably higher than what is reported for any other item.
- *Working with community partners and other levels of government to improve safety and well-being* places second, garnering 58% total mentions.
- This is followed by *creating a strong, resilient and diverse local economy* (53% total), *creating and expanding sustainable modes of transportation* (47% total) and *responding to climate change with action and environmental stewardship* (46% total).

FIRST/SECOND CHOICE TO INCREASE INVESTMENT IN



Each respondent was shown two sets of four items. For each set, respondents were asked to select their first choice and second choice, resulting in two first choices and two second choices per respondent.
 Base: All respondents (n=700)
 Q7/Q8. If the City only had the ability to increase investment in one of the following areas, which would be your first choice? Which would be your second choice?

Top Investment Choice(s)

(by Gender, Age, Neighbourhood, and Own/Rent)

TOTAL												
	TOTAL (n=700)	GENDER		AGE			NEIGHBOURHOOD				OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	GONZALES/ ROCKLAND/ FAIRFIELD	JAMES BAY/ DOWNTOWN / VICTORIA WEST	JUBILEE/ FERNWOOD/ OAKLANDS	HILLSIDE QUADRA/ NORTH PARK/ BURNSIDE GORGE	OWN	RENT
		(n=330)	(n=347)	(n=125)	(n=187)	(n=382)	(n=162)	(n=216)	(n=174)	(n=148)	(n=391)	(n=301)
Making it easier to build all types of housing, across the city, for everyone	72%	74%	72%	86%	75%	61%	59%	67%	81%	84%	64%	81%
Working with community partners and other levels of government to improve safety and well-being	58%	57%	61%	49%	58%	66%	67%	58%	54%	54%	63%	53%
Creating a strong, resilient and diverse local economy	53%	56%	52%	50%	55%	54%	55%	56%	49%	53%	60%	47%
Creating and expanding sustainable modes of transportation	47%	47%	47%	55%	44%	42%	41%	48%	48%	50%	48%	45%
Responding to climate change with action and environmental stewardship	46%	38%	53%	44%	42%	50%	48%	47%	48%	42%	45%	47%
Investing in City parks and more recreation and gathering spaces	39%	43%	35%	32%	39%	44%	44%	38%	37%	36%	45%	33%
Continuing our ongoing work on reconciliation with the leadership of the Songhees Nation and the Esquimalt Nation	32%	30%	33%	42%	34%	24%	30%	31%	34%	35%	24%	41%
Supporting and enhancing arts, culture, music, sport and entertainment	32%	32%	32%	33%	33%	30%	32%	31%	35%	31%	30%	34%

Each respondent was shown two sets of four items. For each set, respondents were asked to select their first choice and second choice, resulting in two first choices and two second choices per respondent.

Base: All respondents (n=700)

Q7/Q8. If the City only had the ability to increase investment in one of the following areas, which would be your first choice? Which would be your second choice?

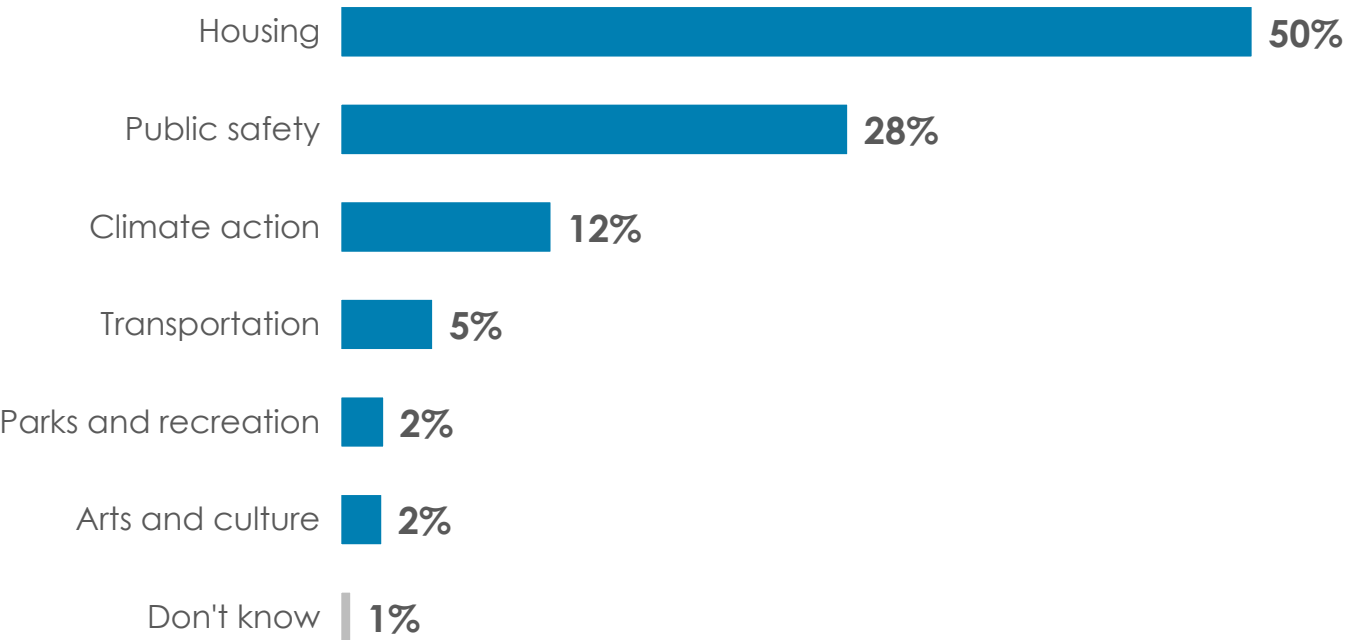
CORE SERVICES

3.5

Core City Service Needing Most Attention and Investment

- *Housing* stands out from all other core City services perceived as most in need of attention and investment next year (50%).
- *Public safety* places second (28%), followed by *climate action* (12%).
- Very few identify *transportation* (5%), *parks and recreation* (2%), and *arts and culture* (2%) as the areas most in need of attention and investment.

CORE CITY SERVICE MOST IN NEED OF ATTENTION AND INVESTMENT NEXT YEAR



Base: All respondents (n=700)
Q9. Of the following six core City services, which one do you think needs the most attention and investment next year?

Core City Service Needing Most Attention and Investment

(by Gender, Age, Neighbourhood, and Own/Rent)

CORE CITY SERVICE MOST IN NEED OF ATTENTION AND INVESTMENT NEXT YEAR												
	TOTAL (n=700)	GENDER		AGE			NEIGHBOURHOOD				OWN/RENT	
		MALE	FEMALE	18-34	35-54	55+	GONZALES/ ROCKLAND/ FAIRFIELD	JAMES BAY/ DOWNTOWN / VICTORIA WEST	JUBILEE/ FERNWOOD/ OAKLANDS	HILLSIDE QUADRA/ NORTH PARK/ BURNSIDE GORGE	OWN	RENT
		(n=330)	(n=347)	(n=125)	(n=187)	(n=382)	(n=162)	(n=216)	(n=174)	(n=148)	(n=391)	(n=301)
Housing	50%	45%	54%	68%	56%	33%	39%	46%	62%	55%	38%	63%
Public safety	28%	29%	27%	14%	25%	41%	36%	31%	19%	25%	39%	18%
Climate action	12%	11%	12%	11%	10%	14%	16%	9%	11%	11%	11%	12%
Transportation	5%	9%	2%	5%	3%	6%	4%	7%	5%	4%	7%	3%
Parks and recreation	2%	4%	2%	1%	2%	4%	2%	3%	2%	3%	4%	2%
Arts and culture	2%	2%	2%	2%	3%	2%	3%	3%	2%	2%	3%	2%

Base: All respondents (n=700)

Q9. Of the following six core City services, which one do you think needs the most attention and investment next year?

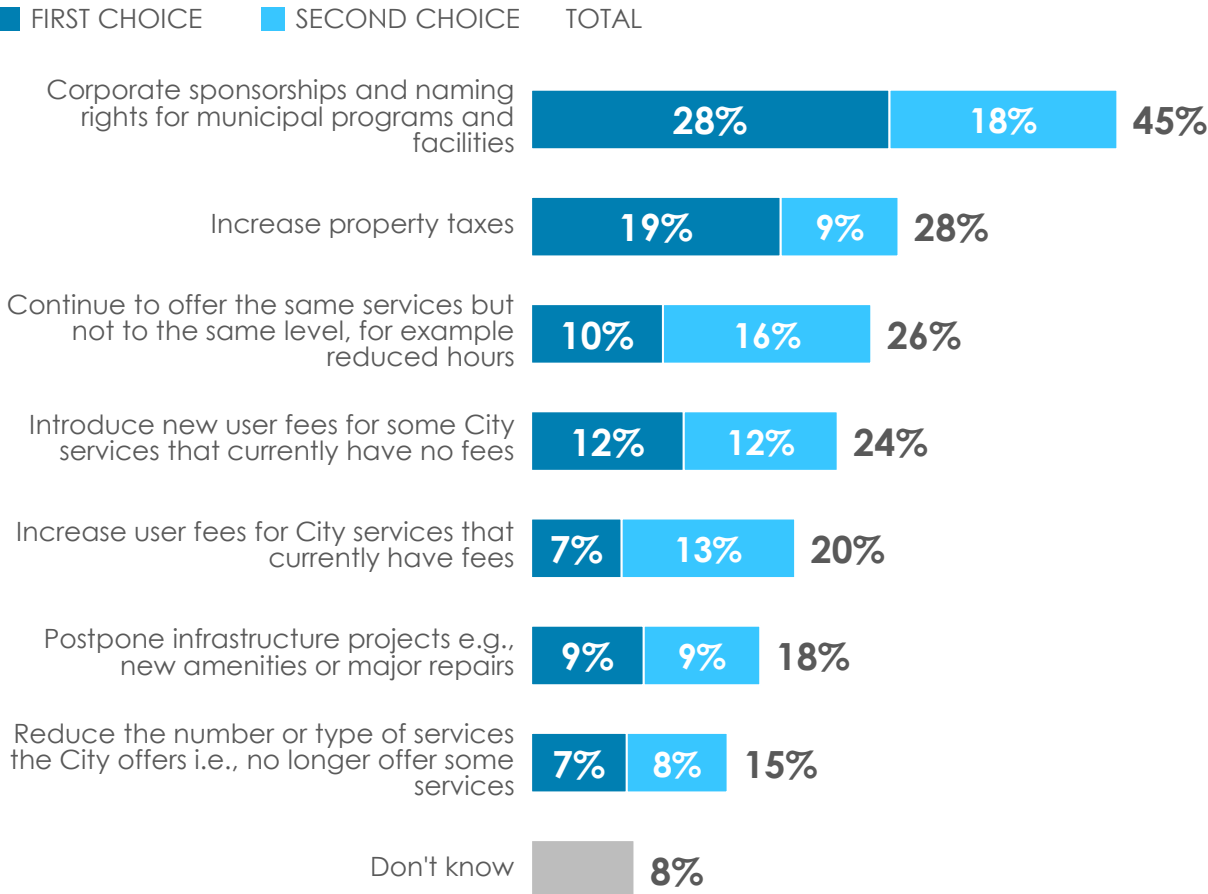
FINANCIAL PLANNING

3.6

Preferred Options to Balance City Budget

- More than two-in-five (45%) residents would prefer the City use *corporate sponsorships and naming rights for municipal programs and facilities* to balance the budget.
- Of the remaining financial tools, there is generally little agreement on which approach is best, with no single option standing out above the others.

PREFERRED FINANCIAL TOOLS FOR CITY TO BALANCE ITS BUDGET



Those <55 years of age are more likely to prefer **corporate sponsorships** (53% of 35-54 years and 51% of 18-34 years versus 36% of 55+ years).

Base: All respondents (n=700)

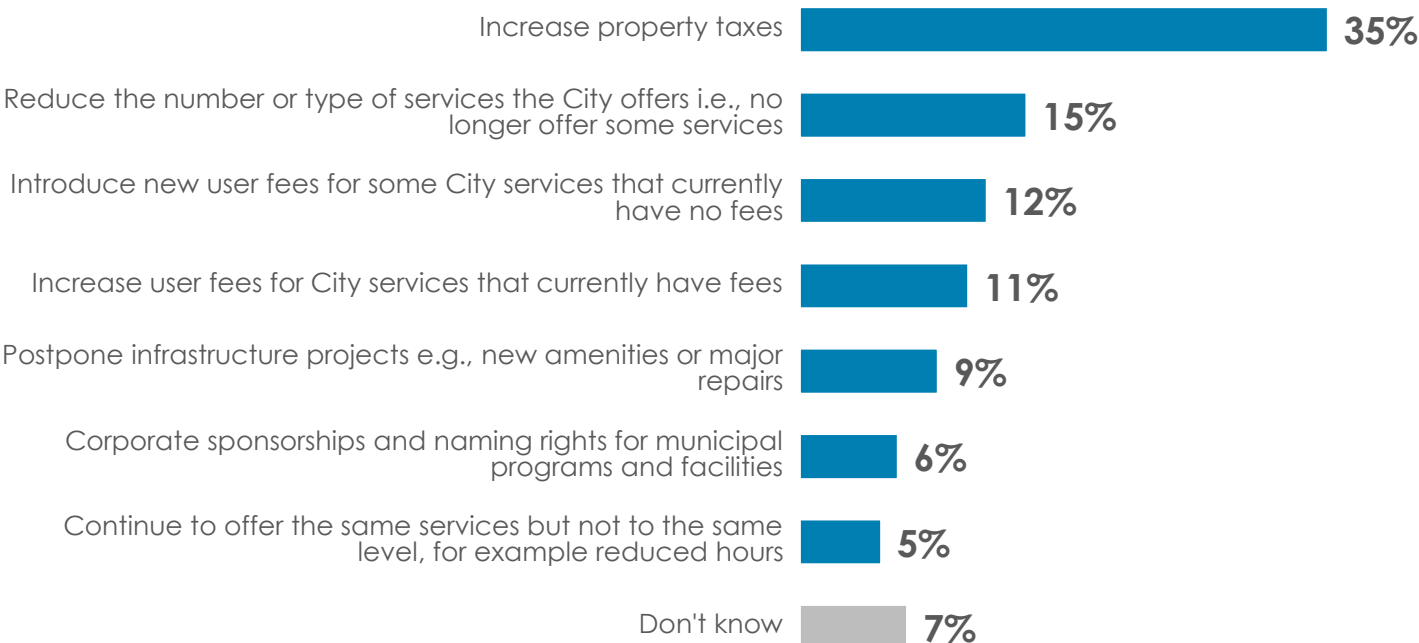
Q10. The City has a number of financial tools that can be used to balance the budget. Which one of the following would you most prefer the City use to balance its budget?

Q11. Which one would you next most prefer?

Least Preferred Option to Balance City Budget

- An increase in property taxes is the least preferred option overall (35%).
- This is more than double than what is reported for any other financial tool.

LEAST PREFERRED FINANCIAL TOOL FOR CITY TO BALANCE ITS BUDGET



Those least likely to prefer an **increase in property taxes** are:

- Those who have lived in Victoria for 20+ years (40% versus 29% of <20 years)
- Homeowners (42% versus 28% of renters)

Base: All respondents (n=700)
Q12. And which one would you least prefer?

A diverse group of people, including men and women of various ethnicities, are seated in rows, clapping and smiling. They appear to be at a presentation or event. The background is slightly blurred, focusing attention on the audience members in the foreground.

WEIGHTED SAMPLE CHARACTERISTICS

04

Weighted Sample Characteristics (1/2)



GENDER IDENTITY



46%



51%

2% Non-binary
1% Prefer to self-describe
1% Refused



AGE

18 to 34 31%

35 to 54 29%

55+ 40%

Refused 1%



NUMBER OF PEOPLE IN HHLD

1 31%
2 37%
3 11%
4 14%
5 or more 7%
Refused 1%



CHILDREN <18 IN HHLD

Yes 20%
No 80%
Refused 1%



OWN/RENT

Own 49%
Rent 50%
Refused 1%



EDUCATION

High school or less 14%
Some post-secondary/
college diploma 29%
Completed university
degree/ post-grad 55%
Refused 2%



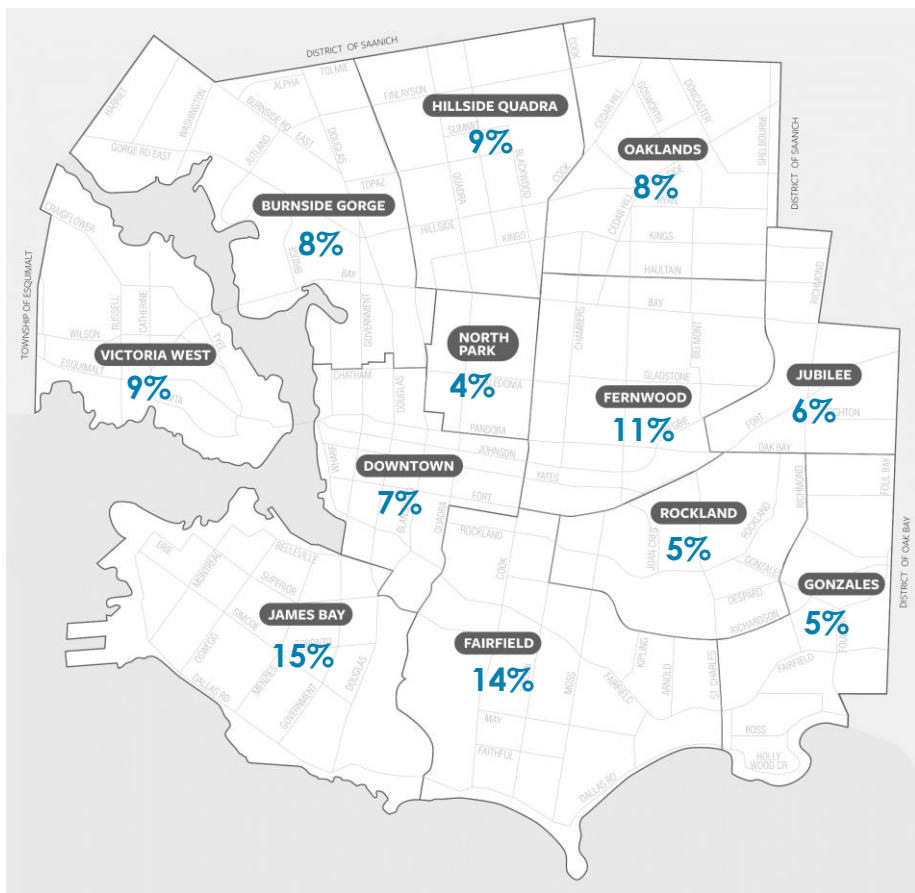
HHLD INCOME

<\$40K 14%
\$40K to <\$60K 14%
\$60K to <\$80K 15%
\$80K to <\$100K 16%
\$100K+ 29%
Refused 11%

Base: All respondents (n=700)

Weighted Sample Characteristics (2/2)

NEIGHBOURHOOD



Base: All respondents (n=700)

YEARS LIVED IN VICTORIA

20 years or less  54%

21 years to 40 years  31%

41+ years  15%

Refused <1%

Mean 22.6 years

INDIGENOUS IDENTITY

Yes – First Nations  2%

Yes – Métis  2%

Yes – Inuit  <1%

Yes – Prefer to self-describe  <1%

No  94%

Refused 1%


ETHNIC ORIGIN

European  58%

North American  16%

Asian  11%

Latin/South American  3%

African  2%

Other regions  17%

Refused  4%

OWN VICTORIA BUSINESS

Yes  10%

No  89%

Refused <1%

DISABILITY IN HHLD

Yes – myself  14%

Yes – someone in my household  9%

No  79%

Refused 1%

About Ipsos

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

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

"Game Changers" – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

Game Changers

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

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

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

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

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:

You act better when you are sure.