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## Committee of the Whole (Working Session) Report

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**DATE:** Wednesday, February 06, 2019

**WARD(S):** ALL

### **TITLE: 2018 CITIZEN AND BUSINESS STAKEHOLDER ENGAGEMENT SURVEY RESULTS**

**FROM:**

Tim Simmonds, Interim City Manager and Chief Corporate Initiatives and Intergovernmental Relations

**ACTION:** FOR INFORMATION

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#### **Purpose**

To share insights with Council into the results of two of the City's recent citizen and stakeholder engagement efforts, specifically the findings of the 2018 Citizen Satisfaction Survey and the 2018 Business Satisfaction and Needs Survey and focus groups.

#### **Report Highlights**

- The results of the 2018 Citizen Satisfaction Survey and Business Survey share strong similarities in high satisfaction levels with quality of life and delivery of services.
- Ninety-seven per cent of citizens think overall quality of life is good, 92 per cent are proud to be from Vaughan, 91 per cent say Vaughan is a welcoming city, 91 per cent are satisfied with overall service delivery (with fire services achieving a 100 per cent satisfaction score) and 82 per cent believe they get good value for their tax dollars.
- Ninety-one per cent of all businesses surveyed, and 94 per cent of large businesses are satisfied with the delivery of City services.
- The vast majority of businesses (95 per cent) reported Vaughan's quality of life as being very good or good.
- Businesses are continuing to grow and invest in new/innovative technology.
- The City should focus its efforts in improving road infrastructure, encouraging business and improving public transit.

## **Recommendations**

1. That the presentation and final reports be received for information.

## **Background**

Public engagement through statistically significant surveys and focus groups offers an opportunity to hear from citizens and stakeholders about their top-of-mind issues of concern and satisfaction with City services and builds stronger relationships with the public. As we continue to deliver on the priorities of Council, the information gathered through the 2018 Citizen Satisfaction Survey and 2018 Business Satisfaction and Needs Survey and focus groups will contribute to measuring the impact of City services, service delivery improvements and future planning initiatives.

### **Background: 2018 Citizen Satisfaction Survey**

#### **Summary, Objectives, Methodology**

Involving a representative sample of Vaughan residents, the City has commissioned the Citizen Satisfaction Survey since 2007 to identify key trends and improve service delivery. The last survey was conducted in 2016. Questions were formulated to determine the most important issues facing the community, the quality of life in Vaughan, satisfaction with and importance of service delivery, value for tax dollars, and communication and information requirements. Public input from this important questionnaire is a key driver for decision-making, and informs policy decisions, budgetary spending and continuous improvement. Surveys are an important source of statistically valid, reliable and relevant feedback from citizens. Gathering opinions on a number of key questions helps to inform strategic decisions by ensuring that organizational priorities are aligned with citizen needs.

From June to July 2018, the firm Ipsos conducted approximately 800 statistically significant surveys on behalf of the City. The survey included key questions from the previous surveys for benchmarking purposes, as well as new questions intended to explore sense of belonging, availability of arts, lifestyle and cultural amenities and the ability to influence municipal decisions. The objectives of the 2018 Citizen Satisfaction Survey were to:

- Determine the overall impressions and identify top-of-mind issues toward the quality of life in Vaughan
- Determine the level of satisfaction with services provided by the City
- Identify citizen perceptions and expectations concerning specific municipal planning priorities given current rapid growth
- Benchmark the results of the 2018 survey with those from previous years
- Provide a baseline to track our progress in delivering Service Excellence

Ipsos conducted 800 random surveys that are weighted based on age, gender and ward within the city of Vaughan to match the general population of the city based on 2016 Census data. The survey was conducted using both an RDD (random digit dial) telephone and online data collection methodology. Most interviews were conducted via telephone (n=735), while supplementary interviews were conducted online utilizing the Ipsos iSay online panel (n=71). Data collection was carried out from June 18 to July 15, 2018. Overall, the survey was conducted among n=806 respondents 18 years of age and older living in the city of Vaughan. The survey results are accurate to within +/- 3.5 percentage points, 19 times out of 20. Where available, national norm comparisons were added to the report findings. This is based on a database of municipal norms provided by Ipsos to assist with providing valuable context and benchmarks against which Vaughan can evaluate its performance. The database is comprised of survey findings for select questions from other municipal governments from across the country.

## **Background: 2018 Business Satisfaction and Needs Survey**

### **Summary, Objectives, Methodology**

In 2018, the Economic and Cultural Development Department undertook its first business survey with similar objectives to the Citizen Satisfaction Survey to gather insight and establish benchmarks on the private sector's operating outlooks, industry needs, readiness for change and service requirements from the City. The findings of this work will inform the Economic Development and Employment Sectors Study and the development of four-year economic action plans to achieve the desired outcome of economic growth and expansion.

Forum Research was retained to complete the business survey using a two-pronged data collection approach: focus groups and a telephone survey.

Forum conducted three one-hour long focus group discussions, recruiting up to eight businesses per group. The first focus group represented a cross-section of sectors with two representatives each from manufacturing, professional services, supply chain and other sectors. The second focus group was from the Arts and Culture sectors, and the remaining focus group was small business and entrepreneurs with fewer than 20 employees. All participants were screened to ensure that they were senior management or owners of enterprises conducting business in Vaughan and to ensure that only two per group had a personal contact within the Economic and Cultural Development Department or Vaughan Business Enterprise Centre. The focus groups discussions took place during the evening hours on Nov. 8, 2018 at Vaughan City Hall with a total of 23 participants.

Focus group discussions allow for a natural flow of conversation, eliciting and exploring new ideas and suggestions, and gathering volunteered comments and insights. Forum Research used the information collected through the focus groups as a foundation for designing a telephone survey consisting of quantifiable, structured questions put to a much larger sample.

According to the 2017 York Region Employment Survey, Vaughan's business base totaled almost 12,000 business establishments. For the City's first business telephone survey, a sample size of 150-200 participants was established as the target. Using the Computer Assisted Telephone Interviewing (CATI) survey methodology, Forum Research conducted 212 telephone surveys between Nov. 30 and Dec. 14, 2018. Survey respondents were drawn from the 2017 York Region Employment Survey database. The survey results are accurate to within +/-6.73 per cent, 19 times out of 20.

### **Previous Reports/Authority**

None.

### **Analysis and Options**

#### **2018 Citizen Satisfaction Survey (attachment 1)**

***Overall quality of life score is high in the city of Vaughan at 97 per cent, with citizens also citing a sense of community and belonging.***

Overall, the City is meeting the needs of its citizens, providing for a good quality of life, satisfaction for taxpayer dollars and positive customer service experiences. Ninety-seven per cent of respondents feel the quality of life in Vaughan is good, with 44 per cent of citizens perceiving it to be very good. This is consistent with levels recorded since 2011 and is also in line with the national norm (96 per cent). On questions related to belonging and community, citizens indicate high levels of agreement. Nine in 10 citizens say they are proud to be from Vaughan and that Vaughan is a welcoming community (92 per cent and 91 per cent respectively). A high number (86 per cent) say they have a strong sense of belonging to Vaughan.

***Transportation is the most important issue facing the community.***

Respondents were asked to identify the most important issue facing their community that they felt should receive the greatest attention from Mayor and Members of Council. The most important issue identified across all demographic groups was transportation (59 per cent), however, after a significant increase in 2016, mention of transportation has stabilized. One in 10 mention taxation and municipal government spending (nine per cent), healthcare (nine per cent) or growth or development (eight per cent). Since 2016, fewer mention taxation (down four points) or growth (down three points).

***Ninety-one per cent of Vaughan citizens are very satisfied with the delivery of City services.***

Satisfaction with City services remains high with 91 per cent indicating they were satisfied with the delivery of all services provided by the City of Vaughan. However, after an increase in 2016, this figure is down by three points. The proportion of citizens who are “very satisfied” also has declined by four points since 2016. Overall satisfaction with services is on par with the national norm (90 per cent).

Respondents identified satisfaction levels for 25 of the services provided by the City of Vaughan. For each service provided they indicated if they were very satisfied, somewhat satisfied, not very satisfied or not at all satisfied. Six in 10 citizens are satisfied with 24 out of the 25 services provided by the City. Citizens are most satisfied with fire services (100 per cent) and local public libraries (96 per cent). They are also satisfied with:

- Recreation and fitness facilities (93 per cent)
- Recreation and fitness programs (91 per cent)
- Garbage, recycling, organics and yard waste collection (91 per cent)
- Off-road multi-use/natural trails (91 per cent)
- Arts and culture (90 per cent)
- Maintenance of parks and greenspace (90 per cent)

The lowest satisfaction level is found for traffic management, with only three in 10 expressing satisfaction and only five per cent being “very satisfied.”

Vaughan scores higher than the national norm on building permits and inspection services (74 per cent versus 68 per cent, respectively) and general road condition and maintenance of local/neighbourhood roads (76 per cent versus 68 per cent). The City is on par with national norms when it comes to by-law and compliance (77 per cent versus 76 per cent), cycling infrastructure and bike lanes (61 per cent versus 62 per cent) and land-use and community planning (68 per cent versus 71 per cent). Vaughan is far below the national norm on traffic management (31 per cent versus 61 per cent). When compared to historical results, the following data shows changes in satisfaction scores for the listed services:

<b>Service</b>	<b>2011 (%)</b>	<b>2012 (%)</b>	<b>2014 (%)</b>	<b>2016 (%)</b>	<b>2018 (%)</b>	<b>Change in Satisfaction Score (2016-18)</b>	<b>National Norm</b>	<b>Above or Below Norm</b>
Sidewalk snow removal	79	87	77	84	77	-7	-	-

<b>Service</b>	<b>2011 (%)</b>	<b>2012 (%)</b>	<b>2014 (%)</b>	<b>2016 (%)</b>	<b>2018 (%)</b>	<b>Change in Satisfaction Score (2016-18)</b>	<b>National Norm</b>	<b>Above or Below Norm</b>
Business support services	79	86	86	91	88	-3	-	-
Garbage, recycling, organics and yard waste collection	88	91	88	91	91	-	88	↑
Local public libraries	86	92	94	97	96	-1	88	↑
Road snow removal	86	91	84	86	77	-9	-	-
Arts and culture	75	78	90	92	90	-2	-	-
Fire Services	90	99	99	99	100	+1	96	↑
Sidewalks and street lighting	82	87	86	86	88	+2	-	-
Maintenance of parks and greenspaces	88	86	90	90	90	-	93	↓
Recreation and fitness programs	86	88	92	91	91	-	82	↑
By-law and compliance	76	82	81	80	77	-3	76	↑
Access Vaughan			89	88	84	-4	-	-
Land-use and community planning	72	74	70	67	68	+1	70	↓
End-of-driveway snow removal	74	83	76	72	70	-2	-	-
Traffic flow and congestion			39	25	31	+6	61	↓

The 2018 survey included the addition of the following service. The table below presents the score based on respondents' satisfaction (very satisfied and satisfied):

Service added to 2018 Survey	2018 (%)	National Norm	Above or Below Norm
Vaughan Animal Services	86	-	-

***Citizens express high satisfaction rates with their interactions with the City.***

Similar to 2016, four in 10 respondents (43 per cent) indicate they have had contact with a City of Vaughan staff member or employee in the past 12 months. The same proportion (43 per cent) say they accessed or used services or programs provided by the City. Four in 10 (40 per cent) did not have contact with City staff or services. The proportion of citizens who say they have had contact with City staff is lower than the national norm (43 per cent versus 52 per cent, respectively).

Among those who accessed or used services or programs provided by the City, more than nine in 10 express satisfaction with their most recent experience with the City. Citizens continue to be most satisfied with the accessibility of the service (54 per cent), followed by overall quality of the service delivery (49 per cent) and amount of time it took to get the service (46 per cent). However, since 2016, fewer residents are satisfied with accessibility of the service (down four points). Among those who contacted City staff or employees, almost nine in 10 express satisfaction with their most recent experience, including 56 per cent who are “very satisfied.”

***About 60 per cent of citizens indicate they are likely to use online services.***

Citizens were informed that the City is considering expanding how it delivers services online and asked about the likelihood of using specific services online. Among those who have Internet access, six in 10 indicate that they are likely to use nearly all of these services online:

Online Service	2016 (%)	2018 (%)	Change in Likelihood (2016-18)
Paying a bill online	82	80	-2
Reporting issues that citizens have	-	79	-
Having live customer service chat	79	78	-1
Voting online for municipal elections	79	78	-1
Posting various kinds of data about the city online	-	69	-
Booking a facility	68	66	-2
Obtaining a range of permits	-	61	-
Registering or renewing a business licence	-	49	-

Citizens are most likely to say they would use online bill payment (60 per cent say very likely) and online voting (61 per cent say very likely) and least likely to register or renew a business licence (35 per cent), with 32 per cent indicating they are “not at all likely” to use this online service. Those between the ages of 18 and 54 are more likely than those aged 55 and older to be “very likely” to use most of these online services.

***More than 80 per cent of citizens believe they receive good value for their tax dollar but remain divided on service costs and the maintenance of services.***

Eight in 10 (82 per cent) citizens believe they are getting good value for their tax dollar. This figure remains unchanged compared to 2016. The perception of good value for tax dollars is on par with the national norm (81 per cent).

When it comes to taxation and maintaining services, similar to 2016, citizens are divided – 45 per cent say the City should maintain existing service levels, even if it means taxes or user fees must increase, while 44 per cent say the City should not increase taxes or user fees, even if it means cuts to services. However, there was a four-point increase in the proportion of citizens who choose neither of these options (10 per cent). Of those who believe the City should maintain current service levels, opinion remains divided as to how to pay for the cost increases:

- 45 per cent favour increased user fees
- 45 per cent prefer a combination of both increased user fees and increased taxes
- Eight per cent opt for increased property taxes

After significant increases in 2016, perceptions on spending on infrastructure renewal have stabilized. Eight in 10 (79 per cent) citizens strongly (29 per cent) or somewhat (50 per cent) support the City spending money on infrastructure renewal and construction.

***Citizen express their desire for hard-copy and digital communications and 60 per cent believe they can influence decision-making.***

The most preferred ways of contact from the City of Vaughan continue to be:

- newsletters and brochures sent through the mail (58 per cent)
- eNewsletters sent via email from the City (58 per cent)
- the City website (53 per cent)
- signage, such as digital signs or road-side signs (51 per cent)

Preference for eNewsletters is up five points from 2016. Growing proportions also cite social media, such as Facebook or Twitter (39 per cent, up seven points), and town hall or public meetings (37 per cent, up five points).

Similar to in 2016, six in 10 (59 per cent) citizens report visiting the City’s website in the past 12 months, which is on par with the national norm (60 per cent). Seven in 10 (69

per cent) found what they needed when they visited the website. Three in 10 found part of what they needed (24 per cent) and six per cent did not find what they needed on the website. These findings are consistent with results from the 2016 survey.

Six in 10 (62 per cent) citizens believe that they can influence municipal decisions affecting Vaughan by participating in public engagement events, while a sizeable proportion of about four in 10 (36 per cent) disagree with this view.

***Vaughan citizens believe there is just the right amount of arts, culture and lifestyle amenities.***

Most citizens (54 per cent) believe there is just the right amount of arts, lifestyle and cultural amenities available in the city of Vaughan. About one-quarter (27 per cent) say there is not enough, while one in 10 (12 per cent) believe there is more than enough, and just under one in 10 (seven per cent) don't know.

***Supplemental online survey provides an opportunity for all citizens to have a say.***

Starting in 2016, the City of Vaughan made the Citizen Satisfaction Survey available to citizens in an online format through an open-link survey. This was continued for the 2018 survey, allowing for a new avenue of public engagement through an interactive online tool, allowing the public to voluntarily voice their opinions about quality of life, satisfaction with services and issues facing the city. The survey was made available from June 18 to Aug. 31, 2018. It was programmed and hosted by Ipsos. The survey was conducted among respondents (n=270) 18 years of age and older living in the city of Vaughan.

As an online open-link survey, it is not designed to reflect a statistically accurate representation of Vaughan citizens among the respondents. All responses provided through the online survey will be used to assist with informing key trends and issues of importance for the City. The results have been kept separate from the telephone survey for statistical purposes.

The results of the 2018 Citizen Satisfaction Online Survey for the City of Vaughan are quite positive: large majorities of respondents to the online survey think overall quality of life is good, think the City is welcoming, and are proud to be from the City, and majorities express satisfaction with most specific services. Respondents to the online survey are divided on whether they can influence municipal decisions.

Overall quality of life scores in the online survey are high (85 per cent), including 26 per cent of respondents who perceive life in Vaughan to be "very good." Transportation-related issues are the most important issues for online survey respondents. Overall satisfaction with the delivery of services provided by the City among respondents to the

online survey is somewhat high at 75 per cent. About six in 10 respondents are satisfied with 19 out of 25 City services, with the highest level of satisfaction provided for fire services (95 per cent) and local public libraries (94 per cent). A large majority of respondents to the online survey believe they are receiving good value for their tax dollars (75 per cent).

## **2018 Focus Groups and Business Satisfaction and Needs Survey (attachment 2)**

Findings of the focus groups sessions and telephone surveys are summarized below. A full analysis of the Business Survey can be found on Attachment 2.

### **Summary of Focus Group Findings**

***Community pride and recognition of public transit improvements were high among focus group participants, however, traffic and congestion are impacting businesses.***

Generally, focus groups participants consider Vaughan to be a nice place to live with a high quality of life. Findings from the focus groups determined that most participants were unaware of the supports and services the City makes available to its businesses. It also found that the two commonly identified challenges to the business experience are the increasing transportation costs, delivery times and travel time to work site and client meetings, and the lack of networking options within the business community.

Participants representing businesses in the manufacturing and construction sectors also identified a lack of skilled candidates or a lack of skilled trades as a challenge, and for small businesses, participants often identified a lack of resources due to financial constraints, which limits their capacity to hire full-time staff and afford office space.

***Focus groups participants were very engaged, responding with suggestions and opportunities to support the business community.***

Several commonly identified opportunities to support the business community were suggested by focus groups participants:

- Providing opportunities for networking and knowledge sharing
- Creating a database of Vaughan businesses to generate awareness
- Facilitating partnerships between post-secondary institutions and businesses to bridge skilled graduates with workforce/sponsor opportunities and skilled trades training
- Alleviating traffic and congestion in the short term and addressing further population growth in long-term infrastructure planning
- Providing training for personnel
- Providing access to detailed market data on Vaughan residents and businesses

- Providing financial supports for new businesses
- Providing small business grants to hire personnel
- Subsidizing or facilitating lower priced shared office spaces for small businesses

## **Summary of Business Satisfaction and Needs Survey Findings**

### ***Good location most often cited by business respondents as a reason their business is in Vaughan.***

Thirty-nine per cent of business respondents cited that Vaughan is a good location for their business, while 21 per cent and 20 per cent took into consideration that Vaughan was their home and where customers were located, respectively.

The vast majority of businesses (95 per cent) reported Vaughan's quality of life as being very good or good.

### ***Satisfaction with the delivery of services was very high.***

When it comes to satisfaction with the delivery of services, the vast majority (91 per cent) of respondents are satisfied, with 38 per cent being very satisfied. When looking at perceptions among large businesses (100 or more employees), 94 per cent of respondents are satisfied with the delivery of services, with 35 per cent being very satisfied.

Fifty-two per cent of respondents indicated they were aware or very aware of services that the City provides to local businesses. Fire services earned the highest recognition levels among businesses (80 per cent), followed by Bylaw Enforcement (72 per cent) and Building Standards (68 per cent).

One-third of respondents have had an interaction with the City for business reasons and the majority of businesses were satisfied with the resolution of their issues (68 per cent).

### ***The vast majority of business respondents were growing or staying the same.***

Vaughan is well positioned for growth as 93 per cent of businesses reported that they were growing or staying the same. Only seven per cent reported that their businesses were declining.

### ***Among top challenges for businesses, both small and large, are competition and costs in general.***

Respondents identified the biggest challenges that their businesses face include competition (15 per cent), rising costs (10 per cent), people and goods movement (10 per cent), attracting and retaining customers (nine per cent) and staffing/general hiring

(eight per cent). When looking at perceptions among large businesses, the top challenges identified were costs, resources and staffing.

***Many businesses will be investing in new or innovative technology for their business.***

Within the next five years, the majority of respondents (67 per cent) estimated that they will invest in new or innovative technology for their business. On a related note, the majority of respondents (61 per cent) indicated that they are not strongly or negatively affected by digital or online products or competitors.

***Businesses have mixed feelings about the effectiveness of the City's promotion of the Vaughan Metropolitan Centre as a location where businesses should invest.***

The majority (52 per cent) of respondents indicated the City of Vaughan is effectively promoting the Vaughan Metropolitan Centre (VMC) as a location where businesses want to invest. Given recent investments in the transit hub at the VMC including the opening of the TTC subway station, coupled with the fact that the office development projects are less than three years old, staff see this rating of 52 per cent as a strong result that will grow in the years ahead.

Only about two in 10 (22 per cent) said the City is not effectively promoting the VMC. When looking at perceptions among large businesses only, 53 per cent indicate the City is not effectively promoting the VMC.

***The City's efforts should be focused on improving road infrastructure, encouraging business and improving public transit.***

Similar to the findings of the focus groups, survey respondents identified improving road infrastructure (40 per cent) and encouraging business (26 per cent) as the top two efforts going forward. Improvements to government services, lowering taxes and improving technology infrastructure were of lesser importance falling into the single digits in percentage of responses.

**Next Steps**

The inaugural Business Satisfaction and Needs Survey serves as a baseline for assessing the state of Vaughan's business community, its outlook, challenges, resiliency, and service requirements. The findings from the Business Satisfaction Survey will be used to inform the Economic Development and Employment Sectors study, including the four-year economic development action plans, now in-progress, and other strategic and service planning initiatives. The survey highlights for the City opportunities for improvement in delivery of services, creating awareness and communications.

On an annual or bi-annual frequency, it would be desirable to repeat this survey for the purposes of tracking trends in the business community and marketplace in general.

### **Financial Impact**

Costs related to administering the Citizen Satisfaction Survey were paid for through Council-approved funding. The 2018 Business Satisfaction Survey and focus groups were funded from expenditure reserves under the Economic and Cultural Development Department. Future updates to the Business Satisfaction and Needs Survey will require funding and will be dealt with as part of the annual business plan and budget process.

### **Broader Regional Impacts/Considerations**

A copy of this report will be forwarded to the Vaughan Chamber of Commerce and York Region Economic Strategy.

### **Conclusion**

Results of the 2018 Citizen Satisfaction Survey continue to be very positive with 97 per cent of citizens indicating that overall quality of life is good. A majority of citizens say they are proud to be from Vaughan, a welcoming city, and are satisfied with the overall delivery of City services. In fact, 82 per cent believe they get good value for their tax dollars. The results also demonstrate that recreation and fitness facilities and programming; garbage, recycling, organics and yard waste collection; maintenance of parks and green space; and business support services are the main areas of strength for the City of Vaughan. The City will continue to work to maintain and protect these areas as they correlate strongly with overall satisfaction with service delivery. Performance scores for these service lines have seen little movement compared to 2016.

The main findings of the 2018 business community focus groups suggest raising awareness of the resources and services offered by the City could support continued relationship-building with Vaughan businesses, improve the business community's perceptions of the City and allow the City to offer more opportunities and support to this very important stakeholder group.

The main findings of the 2018 Business Satisfaction and Needs Survey reveal an opportunity for a more robust strategy for targeted communications and promotions to generate awareness about the Vaughan Metropolitan Centre as a prime location for businesses to invest. The top challenges identified by small and large businesses should be considered and explored for future planning initiatives.

As Vaughan continues to grow in population and business establishments, the development of consistent benchmarks will help to focus the City's efforts and investments to deliver a community of choice.

For more information, please contact: Michael Genova, Director, Corporate and Strategic Communications or Dennis Cutajar, Director, Economic and Cultural Development.

### **Attachments**

1. 2018 Citizen Satisfaction Survey, Ipsos Final Report, October 2018
2. 2018 Vaughan Business Survey, Forum Research, January 11, 2019

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