

Committee of the Whole (2) Report

DATE: Tuesday, February 14, 2023 **WARD(S):** ALL

TITLE: RESULTS OF THE 2022 CITIZEN AND BUSINESS SURVEYS

FROM:

Nick Spensieri, City Manager

ACTION: FOR INFORMATION

Purpose

To share insights with Council into the results of the 2022 Citizen and Business Surveys.

Report Highlights

- The City of Vaughan conducted its 2022 Citizen and Business Surveys in November and December through a third-party.
- The results of this random telephone survey are statistically significant. An online survey was conducted concurrently and open to all citizens.
- Residents and businesses agree: overall quality of life in Vaughan is good, with 94% of residents and 95% of businesses saying it is good or very good.
- While many Canadian municipalities are experiencing significant declines in quality of life scores, Vaughan's not only remained stable during the pandemic but has remained static since 2014.
- 87% are satisfied with overall service delivery (with fire services achieving 99%) and 82% believe they get good value for their tax dollars.
- Service areas that must be protected and maintained include: the City's online, financial and business support services; recreation and fitness facilities; waste collection; arts and culture; and winter maintenance services.
- 91% of all businesses surveyed are satisfied with the delivery of City services.
- The results of both surveys will help inform future City planning, projects and strategies, including the 2022-2026 Term of Council Service Excellence Strategic Plan.

Recommendations

1. THAT the presentation and final report be received for information.

Background

Public engagement through statistically significant surveys offers an opportunity to hear from citizens and stakeholders about issues that are important to them, preferences for accessing City services and satisfaction with City services, all while building stronger relationships with the public. As we continue to deliver on the priorities of Council, the information gathered through the 2022 Citizen and Business Surveys will contribute to measuring the impact of City services, service delivery improvements and future planning initiatives.

Forum Research was retained to complete both surveys.

Background: 2022 Citizen Survey

Summary, Objectives, Methodology

Involving a representative sample of Vaughan residents, the City has commissioned the Citizen Survey since 2007 to identify key trends and improve service delivery. The last survey was conducted in 2018. Questions are formulated to determine the most critical 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 these important surveys is a key driver for decision-making, and informs policy decisions, budgetary spending and continuous improvement. Surveys are an essential 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 organizational priorities are aligned with citizen needs.

From November to December 2022, Forum Research 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 a few new and revised questions intended to explore preferences for accessing various core services and understand what information citizens want and need. The objectives of the 2022 Citizen Survey were as follows:

- Deliver a survey tool that assists the City in redefining the citizen as the customer and understanding customers' changing and evolving needs and preferences for receiving services.
- Maintain important year-over-year benchmarks.

- Rely on a municipal norms database to understand Vaughan’s performance in comparison to other cities when it comes to service delivery, especially in response to the pandemic, which compelled the City to quickly adapt the delivery of municipal services and, in some cases, rapidly transition to digital service models, all while maintaining continuity of service.

Forum Research conducted approximately 800 random telephone 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 2021 Census data. The survey was conducted using a RDD (random digit dialing) among Vaughan residents. A mix of landline and cellphone sample was used to reach cellphone-only households. Data collection was carried out from Nov. 17 to Dec. 15, 2022.

Overall, the survey was conducted among n=804 respondents 18 years of age and older living in the city of Vaughan. The survey results are accurate to within +/- 3.46 percentage points, 19 times out of 20. This referred to as the margin of error. It describes the maximum deviation of the sample results from the real values. If there is a large margin of error in a survey, there is also less confidence that the results match the “true” figures for the entire population. In surveys that are referred to as representative of the entire population, an acceptable margin of error is between 4% and 8%. A margin of error below 4% is considered even more representative and reflective of the “true” perceptions of the entire population.

Where available, national norm comparisons were added to the report findings. This is pulled from a database of municipal norms provided by Forum Research 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. More specifically, any benchmark analyses are based on the results of other surveys conducted between 2021-2022 that asked this same question. Comparisons were made against five other municipalities across Canada with populations ranging from ~250,000 to ~1,300,000. Populations are based on 2021 Census data.

Background: 2022 Business Survey

Summary, Objectives, Methodology

In 2018, the Economic Development Department undertook its first business survey with similar objectives to the Citizen 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 helped to inform the

Economic Development and Employment Sectors Study and the development of a four-year economic action plan to achieve the desired outcome of economic growth and expansion.

Business and job growth are fundamental to Vaughan's economic vitality.

With 19,000 firms¹ employing more than 236,000 people², Vaughan has a diverse economic and business base and is the largest employment centre and economy in York Region. Attracting and retaining high-quality, well-paying jobs across a broad range of sectors promotes economic resilience and ensures residents can work and thrive where they live.

The objectives of the 2022 Business Survey included the following:

- Gauge whether local businesses are growing, declining or stagnating.
- Determine factors influencing business operations and growth (macro- and micro-economic trends).
- Understand readiness for change.
- Understand planned investments.
- Understand the perception and use of municipal business services.
- Understand perceived opportunities that will make Vaughan more competitive as a business investment location.

The 2022 Business Survey expanded to exceed the previous survey – a record 347 statistically significant responses were collected, compared to 212 responses collected during the survey in 2018.

Using Computer Assisted Telephone Interviewing (CATI) and Computer Assisted Web Interviewing (CAWI) methodologies, Forum Research conducted 347 telephone and online surveys between November 18 and December 13, 2022. Survey respondents were drawn from the 2019 York Region Employment Survey database and included a variety of industries and sizes of businesses. The sampling framework was limited to contacts from the 2019 database; thus the survey results can be considered accurate within +/-5.26 percent, 19 times out of 20 for this population.

Previous Reports/Authority

[2018 CITIZEN AND BUSINESS STAKEHOLDER ENGAGEMENT SURVEY RESULTS](#), Committee of the Whole (Working Session), February 6, 2019

¹ Statistics Canada 2022, Canadian Business Counts December 2021

² The Conference Board of Canada. 2021. Regional Municipality of York Economic Forecast, 2013-2026

Analysis and Options

2022 Citizen Survey Findings

Overall quality of life score is high in the city of Vaughan with more than nine in 10 rating the quality of life as good or very good.

Overall, the City is meeting the needs of its citizens, providing a good quality of life, satisfaction with the use of taxpayer dollars and positive customer service experiences. 94% of respondents feel the quality of life in Vaughan is good, with 31% of citizens perceiving it to be very good. When compared with other similar municipalities across Canada, for which the mean quality of life rating is 85%, the City has the highest rating by almost 10 points. Although it may appear that this figure has dropped in comparison to the previous two surveys, a three-point dip is still within the margin of error (+/- 3.46). This means that while many municipalities across Canada are experiencing significant declines, Vaughan's quality of life score not only remained stable during the pandemic but has remained static since 2014.

Satisfaction (very good/good) with Quality of Life in Vaughan

2012	2014	2016	2018	2022
98%	95%	97%	97%	94%

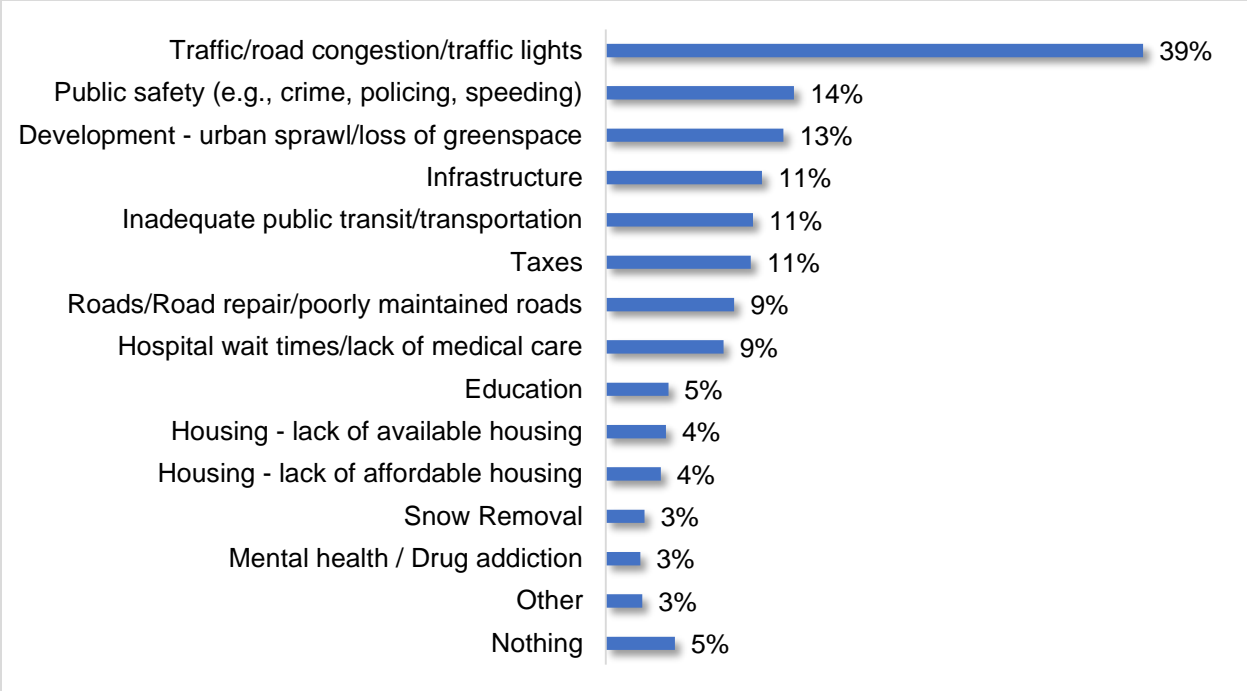
Q2: How would you rate the overall quality of life in the City of Vaughan today?

Sample: n=799

Framework: All respondents (exc. Don't know / Refused)

Traffic and traffic-related issues are the most important issues facing the community, with two in five respondents saying so.

Respondents were asked to identify the most important issue facing their community that they felt should receive the greatest attention from the Mayor and Members of Council. The most important issues are traffic and anything traffic-related (39%). Interestingly, women tend to be more concerned about traffic and traffic-related issues than men (48% versus 30%). Other top-of-mind issues include public safety at 14% (which saw a significant increase from 5% in 2018) and development (including urban sprawl and loss of greenspace) at 13% (which increased from 8% in 2018).



Q1: In your view, as a resident of the City of Vaughan, what is the most important issue facing your community, that is, the one issue you feel should receive the greatest attention from your Mayor and Members of Council? [Multi-mentions accepted, up to 3]

Sample: n=769

Framework: All respondents (exc. Don't know/Refused)

Residents from all Wards identified city traffic and traffic congestion as the most important issue to them, with about two-thirds (60%) from Ward 1 saying so. About one third of residents from Ward 2 (34%) and 5 (29%) also said so. About one quarter of residents from Ward 3 (21%) and Ward 4 (21%) identified development as the most important issue to them.

Top of Mind Issues — By Wards

Issue	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
Traffic/ road congestion/ traffic lights	60%	34%	40%	28%	29%
Roads/ road repair/poorly maintained roads	17%	9%	9%	9%	3%
Development – urban sprawl/ loss of greenspace	10%	7%	21%	21%	14%

Q1: In your view, as a resident of the City of Vaughan, what is the most important issue facing your community, that is, the one issue you feel should receive the greatest attention from your Mayor and Members of Council? [Multi-mentions accepted, up to 3]

Sample: n=769: Ward 1 n=183; Ward 2 n=152; Ward 3 n=141; Ward 4 n=95; Ward 5 n=125

Framework: All respondents (exc. Don't know/Refused/Unspecified Ward)

87% of Vaughan citizens are very satisfied with the delivery of City services.

Satisfaction with City services remains high with 87% indicating they are satisfied with the overall delivery of all services provided by the City of Vaughan, which is down slightly from 2018. Vaughan compares favourably to other Canadian municipalities on service delivery, exceeding the mean of 78% by one-tenth (9%).

Overall Satisfaction (very satisfied/somewhat satisfied) with the Delivery of Services

2012	2014	2016	2018	2022
95%	90%	94%	91%	87%

Q3: Overall, how satisfied are you with the delivery of all the services provided by the City of Vaughan?

Sample: n=788

Framework: All respondents (exc. Don't know / Refused)

Respondents identified satisfaction levels for 25 of the services provided by the City of Vaughan. The options were: very satisfied, somewhat satisfied, not very satisfied or not at all satisfied.

The majority of respondents are generally satisfied with 24 out of 25 services provided by the City. Citizens are most satisfied with fire services (99%) and local public libraries (96%). They are also extremely satisfied with:

- Recreation and fitness service programs (92%)
- Off-road multi-use/natural trails (92%)
- Arts and culture (90%)
- Recreation and fitness facilities (90%)
- Garbage, recycling, organics and yard waste collection (89%)

The lowest satisfaction level is found for traffic management, including traffic calming and improving traffic flow, with fewer than half of residents (40%) satisfied and only 10% being very satisfied. However, it is important to note that satisfaction in these areas is actually on the rise, as traffic management saw a significant increase of nine points in comparison to 2018 and the number of citizens who are very satisfied has doubled (10% in 2022 versus only 5% in 2018).

When compared to historical results, the following data shows changes in satisfaction scores for all 25 of the services polled. The table below presents the score based on respondents' satisfaction (very satisfied and satisfied). Again, it's important to note that anywhere a drop is seen in the score, as long as the decline is within the margin of error (+/- 3.46), that score remains stable in comparison to 2018. A drop of one or two points outside of the margin of error is not considered a significant decline.

Service	2011 (%)	2012 (%)	2014 (%)	2016 (%)	2018 (%)	2022 (%)	Change in Satisfaction Score (2018-22)
Fire services	90	99	99	99	100	99	-1 ↓
Local public libraries	86	92	94	97	96	96	0
Recreation and fitness programs	86	88	92	91	91	92	+1 ↑
Off-road multi-use/natural trails				92	91	92	+1 ↑
Arts and culture	75	78	90	92	90	90	0
Recreation and fitness facilities			92	91	93	90	-3 ↓
Garbage, recycling, organics and yard waste collection	88	91	88	91	91	89	-2 ↓
Online services			91	93	88	88	0
Sidewalks and street lighting	82	87	86	86	88	86	-2 ↓
Maintenance of parks and greenspaces	88	86	90	90	90	86	-4 ↓
Parks development				89	88	84	-4 ↓
Road snow removal	86	91	84	86	77	82	+5 ↑
Sidewalk snow removal	79	87	77	84	77	80	+3 ↑
Business support services	79	86	86	91	88	78	-10 ↓
Service Vaughan			89	88	84	76	-8 ↓
By-law and compliance	76	82	81	80	77	76	-1 ↓
Animal services					86	73	-13 ↓
General road condition and maintenance (local roads)			81	83	76	72	-4 ↓
Financial services			87	70	77	71	-6 ↓

Service	2011 (%)	2012 (%)	2014 (%)	2016 (%)	2018 (%)	2022 (%)	Change in Satisfaction Score (2018-22)
End-of-driveway snow removal	74	83	76	72	70	71	+1 ↑
Cycling infrastructure and bike lanes				62	61	67	+6 ↑
Building permits and inspection services			78	77	74	66	-8 ↓
Processing and involving public in review of development applications				65	64	55	-9 ↓
Land-use and community planning	72	74	70	67	68	53	-15 ↓
Traffic flow and congestion			39	25	31	40	+9 ↑

In some cases, satisfaction with Vaughan services varies by Ward. Overall, respondents in Wards 4 and 5 are more likely to be satisfied with services compared to other Wards.

Satisfaction with Individual Services — By Wards

Service	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
Service Vaughan	68%	72%	82%	91%	86%
Arts and culture	91%	87%	89%	92%	94%
Building permits and inspection services	68%	62%	61%	75%	67%
Business support services	80%	72%	81%	96%	73%
By-law and Compliance	73%	67%	76%	87%	74%
Cycling infrastructure and bike lanes	69%	67%	69%	58%	71%
End of driveway snow removal	68%	68%	62%	83%	73%
Financial services	70%	65%	67%	82%	81%

Fire services	99%	99%	98%	100%	97%
Waste collection	83%	93%	93%	95%	88%
General road condition and maintenance	66%	74%	77%	64%	83%
Land use and community planning	61%	48%	57%	54%	48%
Local public libraries	98%	95%	99%	97%	96%
Maintenance of parks and green space	81%	89%	88%	88%	89%
Off road multi-use/natural trails	93%	90%	97%	91%	93%
Online services	89%	82%	80%	98%	88%
Parks development	84%	88%	87%	83%	88%
Processing and involving public in development applications	65%	36%	56%	64%	56%
Recreation and fitness facilities	88%	93%	93%	84%	85%
Recreation and fitness programs	93%	93%	90%	90%	87%
Road snow removal	78%	86%	82%	81%	79%
Sidewalk snow removal	77%	83%	80%	81%	78%
Sidewalks and street lighting	85%	89%	85%	89%	87%
Traffic management	31%	40%	43%	46%	46%
Animal services	69%	68%	86%	91%	63%

The percentages in the chart above reflect the number of respondents who were very/somewhat satisfied with each service.

Gap analysis identifies building permits and inspection services, parks development, and maintenance of parks and greenspace as primary areas for improvement

Forum Research conducted a gap analysis to demonstrate the difference between how satisfied residents are with each City service and the impact of the services to residents' overall service satisfaction. The analysis was conducted by dividing the 25 surveyed service areas into three categories: office/administrative services, road and transportation services and recreational/public services. As a result of the analysis, City services were distributed among four key areas:

- **Primary Areas for Improvement:** Services that have the highest impact on overall satisfaction, but with lower individual satisfaction scores. The regression analysis identifies that these services are the strongest drivers of satisfaction. If the City can increase satisfaction in these areas, this will have the largest impact on overall satisfaction with City services.
- **Secondary Areas for Improvement:** Services that have relatively high impact on overall satisfaction but have lower individual satisfaction scores. This should be the secondary area of focus to improve satisfaction scores.
- **Primary Areas for Maintenance:** Services that have relatively high impact on overall satisfaction and high individual satisfaction scores. The focus here is on maintaining the current level of service and satisfaction.
- **Secondary Areas for Maintenance:** Services with lower impact on overall satisfaction but high individual satisfaction scores. The focus here should also be to maintain current satisfaction levels.

Primary Areas for Improvement	Secondary Areas for Improvement	Primary Areas for Maintenance	Secondary Areas for Maintenance
<ul style="list-style-type: none"> • Building permits and inspection services • Parks development • Maintenance of parks and greenspace • Traffic management 	<ul style="list-style-type: none"> • Processing and involving the public in the review of development applications • Land use and community planning • End of driveway snow removal • Cycling infrastructure and bike lanes • Animal services 	<ul style="list-style-type: none"> • Online services • Business support services • Financial services • Recreation and fitness facilities • Waste collection • Arts and culture • Road snow removal • Sidewalks and streetlighting • General road condition and maintenance 	<ul style="list-style-type: none"> • Fire services • Local public libraries • Recreation and fitness programs • Off road multi-use/natural trails • Service Vaughan • By-law and Compliance • Sidewalk snow removal

About half of citizens have accessed City services and express high satisfaction rates with their interactions with the City.

About one in every two respondents (53%) have accessed or used services or programs provided by the City. About the same number (50%) also had contact with a City employee.

Generally, respondents are most satisfied with the overall quality of service delivery received from the City, with nine in 10 (88%) saying they are satisfied, with two in every five respondents (39%) saying they are “very satisfied.”

More than eight in 10 (85%) say they are satisfied with the overall accessibility of the service, with another two in five (43%) saying they are “very satisfied.” This is an overall drop of seven points in comparison to 2018.

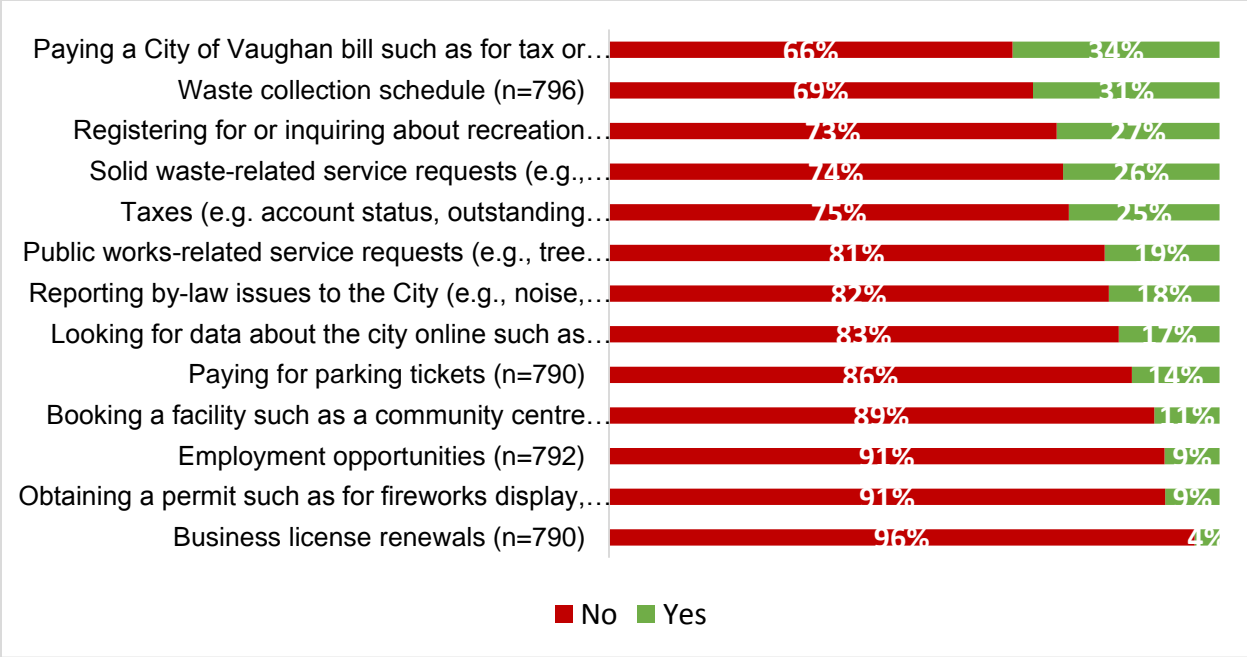
Eight in 10 (82%) also express their satisfaction with the overall quality of service received through their interactions with a City employee, with more than two in five respondents (45%) saying they are “very satisfied.” This is an overall drop of 13 points in comparison to 2018.

When looking at specific Wards, there are no significant differences with respect to satisfaction levels with different aspects of a respondent’s last experience with the City.

Satisfaction (very/somewhat) with Aspects of Services — By Wards

Service Aspect	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
The overall quality of service you received from City staff	77%	78%	77%	93%	82%
The amount of time it took to get the service	83%	71%	82%	88%	77%
Accessibility of the service	83%	79%	88%	89%	80%
Overall quality of the service delivery	92%	81%	86%	96%	84%

Within the past 12 months of the survey being administered, the majority of respondents had not contacted the City for, or looked up, any of the following services:



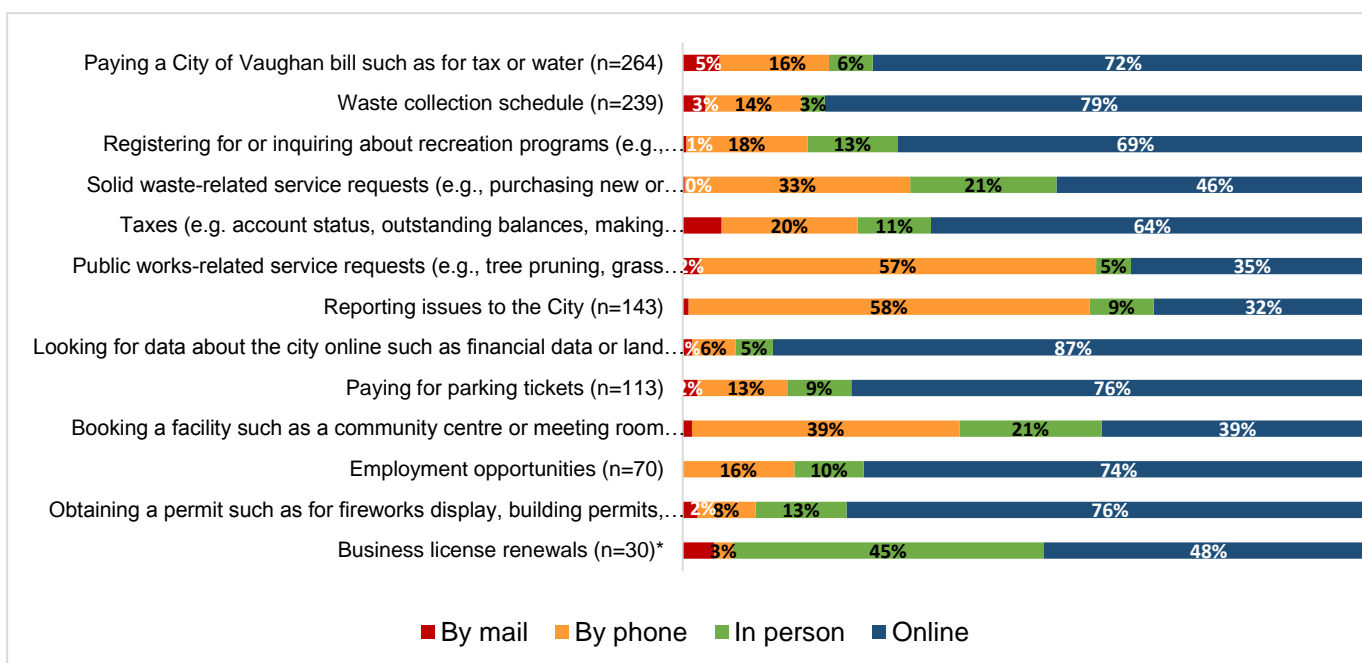
Only about one in every three respondents had contacted the City for or looked up information about paying a City of Vaughan bill (34%), the waste collection schedule (31%) and registering for or inquiring about recreation programs (27%).

However, only one in 10 or fewer had contacted the City for or looked up information about booking a City facility (11%), employment opportunities (9%), obtaining a permit (9%) or business license renewals (9%).

In general, citizens say they prefer to contact the City via telephone (60%), however when it comes to specific services, online methods for obtaining information far outweigh (87%) all other forms.

Generally speaking, when it comes to contacting the City of Vaughan for advice or information or to inquire about a service, three in every five respondents (60%) say they would prefer to do so via telephone. Only about one quarter (27%) say they would prefer email and website as a method of contacting the City for advice or information or to inquire about a service.

When asked to think about their most recent experience contacting the City of Vaughan about, or looking up how to use, any of the following services listed below, respondents were asked to identify whether they did so in person, online, by phone or by mail. It turns out that, generally, nine in 10 respondents (87%) have looked for data about the City online. More specifically, eight in 10 respondents have contacted the City or looked up waste collection scheduling (79%), how to obtain a permit (76%), and how to pay for parking tickets (76%) by going online. However, reporting issues to the City (58%) and making public works-related service requests (57%) are mostly preferred to be completed by phone.



Online methods are also the most popular methods respondents would want to use if they were to contact the City or look up the same item in the future. Almost nine in 10 respondents (85%) would prefer to look up data about the City online. About eight in 10 (82%) would prefer to pay a bill, pay for parking tickets (81%), and look up waste collection scheduling (78%) in the future online.

Respondents from Wards 1, 3 and 5 are more likely to prefer to contact the City via email compared to respondents from Ward 2.

Preferred Methods of Contacting the City — By Wards

Method	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
Email	33%	15%	28%	25%	29%
Telephone	68%	68%	57%	58%	56%

Q14: And what is your preferred method to contact the City of Vaughan for advice, information, or to inquire about a service? [Multi-mention]

Sample: n=794

Framework: All respondents (exc. Don't know/Unspecified Ward)

When asked how they prefer to receive information from the City of Vaughan, half of respondents (50%) prefer to receive information via newsletters and brochures sent through the mail, followed by eNewsletters sent via email from the City (30%) and eNewsletter sent via email from Councillors (17%).

Method	2016	2018	2022
Newsletters/brochures sent through mail	55%	58%	50%
eNewsletters from the City	53%	58%	30%
eNewsletters from Councillors	45%	47%	17%
City website	54%	53%	16%
Social media (Facebook, Twitter, etc.)	32%	39%	7%
Signage (roadside, digital, etc.)	0%	51%	0%
Local newspapers	48%	46%	0%
Townhalls or public meetings	32%	37%	0%

Data collection on this question in 2022 differed slightly from the way data was collected in 2018 and 2016. In 2018 and 2016, respondents were asked how they prefer to receive information from the City of Vaughan and then subsequently read a list of eight communications channels. Respondents were then able to select more than one preferred channel. In 2022 however, respondents were asked how they prefer to receive information from the City but were not read a list of communications channels. In other words, they did not receive any prompts, but they were still able to cite as many preferred communications channels as they wished. When unprompted, citizens are far more likely to prefer newsletters or brochures sent through the mail than any other communications method. Interestingly, also when unprompted, a notable number of citizens prefer to receive eNewsletters either from the City (close to one in three) or their Councillor (close to one in five).

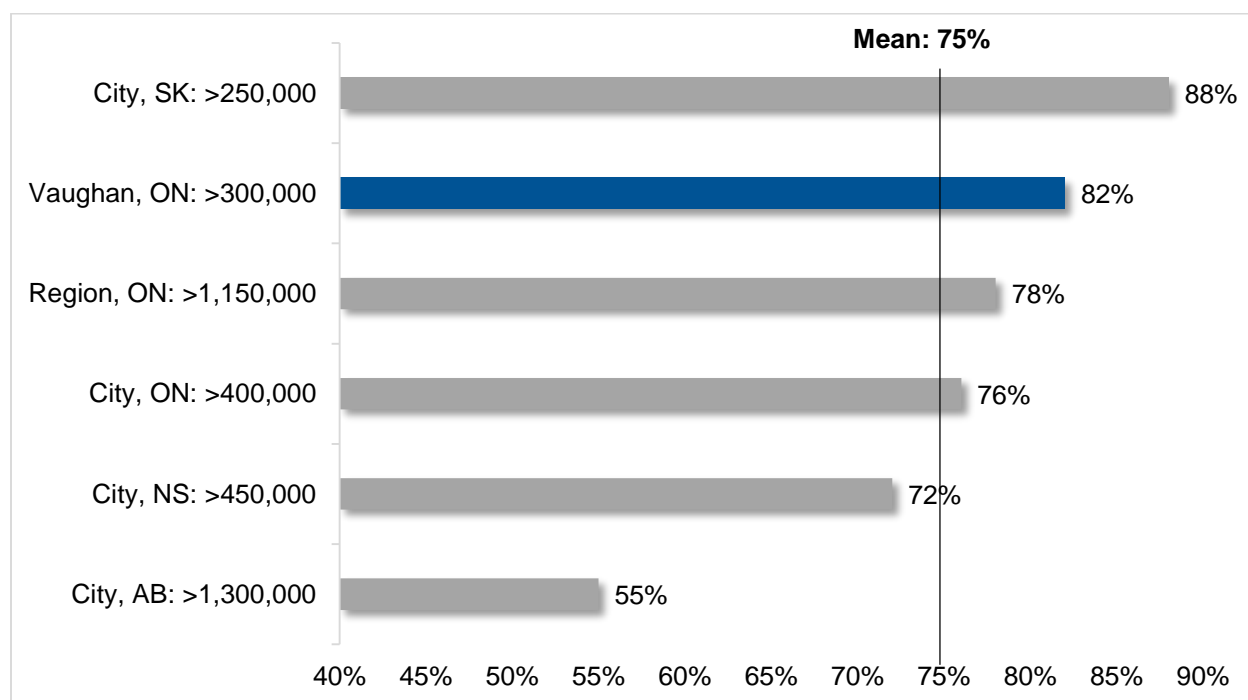
Ward 4 respondents prefer to receive information from the City via the City's website, significantly more so than respondents from Wards 1, 2 and 3. Ward 2 respondents are more likely to prefer newsletters and brochures sent through the mail compared to those in Wards 1, 3, and 4.

Methods for Receiving Information — By Wards

Method	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
City website	8%	12%	12%	31%	18%
Newsletters and brochures sent through the mail	50%	66%	50%	35%	52%
E newsletters sent via email from the City	32%	22%	34%	36%	34%

More than 80% 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%) citizens believe they are getting good value for their tax dollar. This figure remains unchanged compared to 2018 and 2016. Residents from Ward 4 (91%) and Ward 5 (91%) are more likely to say they get good or very good value for their tax dollars. When compared with other similar municipalities across Canada, the City has the second-highest rating for value for tax dollars and scores above the mean national norm.



When it comes to taxation and maintaining services, around half (54%) of respondents do not want the City to increase taxes, even if it means cuts to services. This is a 10-point increase in comparison to 2018. About one in every three respondents (30%) think

the City should maintain existing services level, even if it means taxes or user fees must increase. This is a five-point decrease in comparison to 2018. And one in six (16%) think the City should add new services and facilities, even if it means taxes or user fees must increase.

Sentiment – in agreement	2014	2016	2018	2022
Do not increase taxes, even if it means cuts to services	46%	45%	44%	54%
Maintain existing services level, even if it means taxes or user fees must increase	34%	47%	45%	30%
Add new services and facilities, even if it means taxes or user fees must increase	-	-	-	16%

If maintaining service levels or adding services and facilities meant an increased cost to provide these services, the plurality of respondents (46% in 2022 versus 45% in 2018) would prefer to pay for this through a combination of both increases to user fees and increases to property taxes. Whereas 38% would prefer to pay for this only through user fees (versus 45% in 2018) and 7% would prefer to pay for this only through increases to property taxes (versus 8% in 2018).

Seven in 10 respondents have visited City’s website in the past 12 months and the majority were able to find what they were looking for.

Almost three-quarters (71%) of respondents had visited City of Vaughan’s website in the past 12 months. The most common reason for respondents’ last visit to the City’s website was to find information (55%), followed by the need to request a service or permit (19%). Residents from Ward 1 (74%), Ward 4 (79%) and Ward 5 (74%) are more likely to visit the City’s website. Generally, the majority of respondents who had been to the City’s website found (64%) or partially found (28%) what they needed during their last visit.

Three in five citizens agree they can influence municipal decisions, with residents from Ward 1 and 4 more likely to agree.

Almost two-thirds (61%) of respondents agree that they can influence municipal decisions affecting Vaughan by participating in public engagement events. Males are more likely to agree compared to females (68% versus 55% respectively). Respondents from Ward 1 (67%) and Ward 4 (80%) are more likely to agree that they can influence municipal decisions affecting Vaughan by participating in public engagement events.

During the pandemic, and especially in 2021, public trust in government was at an all-time low, with 46% of the Canadian population maintaining the perception that governments were purposefully misleading.³ In 2022, public trust in government had begun to stabilize and saw a turn toward pre-pandemic levels (government at 53%).⁴ The fact that Vaughan citizens' perceptions of their ability to influence municipal decisions remains relatively unchanged from 2018 to 2022 speaks to the City's ability to maintain public relationships and continue to offer meaningful opportunities to influence decision-making even in the midst of uncertain times.

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

The City of Vaughan made the Citizen Survey available to citizens in an online format through an open-link survey. This allows for an additional 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 Nov. 15 to Dec. 19, 2022. It was programmed and hosted by Forum Research. The survey was conducted among respondents (n=225) 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 2022 Citizen Survey online are quite positive: large majorities of respondents through the online survey think overall quality of life is good and the 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 (87%). 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 73%. Most respondents are satisfied with 22 out of 25 City services, with the highest level of satisfaction provided for fire services (97%) and local public libraries (90%).

³ Edelman. (2021). *Edelman Trust Barometer 2021*. Retrieved from https://www.edelman.ca/sites/g/files/aatuss376/files/trust-barometer/2021%20Canadian%20Edelman%20Trust%20Barometer_0.pdf

⁴ Edelman. (2022). *Edelman Trust Barometer 2022*. Retrieved from <https://www.edelman.ca/sites/g/files/aatuss376/files/trust-barometer/2022%20Canadian%20Edelman%20Trust%20Barometer.pdf>

2022 Business Survey Findings

Vaughan's location is a major draw for businesses. The City's proximity to major transportation assets which support connectivity to key regional supply chains, access to talent, and position at the heart of the Greater Toronto Hamilton Area (GTHA) economic region provide a strong value proposition for Vaughan.

The most mentioned advantage by respondents was good location (70%), followed by living in Vaughan (47%), and their customers being in Vaughan (38%).

Vaughan's location boasts proximity to major transportation assets such as:

- direct access to Highways 427, 400 and 407 and minutes away from Highways 401, 404 and 410;
- connections to rail service via the Canadian National (CN) MacMillan Yard, the Canadian Pacific (CP) Railway Vaughan Intermodal Terminal, and the passenger rail service via the Maple and Rutherford stations on GO Transit's Barrie line;
- being located within 10 kilometers of Canada's busiest airport, Toronto Pearson International Airport; and,
- multimodal transit mobility, as the only municipality outside of Toronto with direct subway access via three stations on Toronto Transit Commission's Line 1 subway and regional bus rapid transit options, with another three planned stations coming to Vaughan with the North-Yonge Subway Extension happening along the eastern border of the City.

One-quarter (25%) of respondents also indicated the availability of labour as a major advantage. Vaughan is the largest employment centre within York Region, offering access to talent for a variety of industries. The City's location at the heart of the GTHA provides Vaughan businesses the ability to draw from Toronto Region's 3.9 million strong labour force.

The City's place-making efforts in creating a vibrant urban community where residents can live, work and play – the majority of respondents acknowledged the high quality of life Vaughan offers its residents and businesses.

The vast majority of businesses also reported Vaughan's quality of life as being good or very good (95%). A thriving and dynamic community positions Vaughan as a destination of choice for residents, visitors, and businesses alike. Place-making efforts such as advancing public art; the enhancement of Vaughan as a destination for visitors, tourists, and business; and City amenities bring vibrancy to the city's public realm, inspire civic pride, and contribute to a high quality of life.

Awareness of City services among businesses increased, and satisfaction with the delivery of services remains high.

In general, awareness of City services increased, with 60% of businesses indicating they were aware or very aware of City services available to business, an increase of 8% from 2018. The highest recognition levels were for Fire and Emergency Services (76%), By-law Enforcement (72%) and Building Permits (71%). Fire and Emergency services, Environmental Sustainability Services, Planning and Development Services, Procurement Services and Business Licensing Support all saw a reduction in awareness from 2018, with business licensing support seeing the most marked decrease.

In 2022, the survey added additional questions to gauge awareness of all services offered by Economic Development, which identified there is a substantial opportunity to amplify these service offerings and increase awareness of support for business. Expansion or relocation support within Vaughan and business advisory services inclusive of the corporate calling program each had a reported awareness of 17%; these services provide great value to businesses as part of Economic Development's business retention and expansion activities. Increasing awareness of services is supported through a new Economic Development-Communications Business Unit in the Corporate and Strategic Communications department. Launched last year, the mandate of this group accelerated strategic communications, marketing, and promotional efforts to Economic Development department clients (both current and prospective) about the advantages of doing business in Vaughan and service offerings.

Satisfaction with the delivery of City services remains unchanged from 2018 at 91% reported in the 2022 survey. Nearly one in three businesses (31%) reported being very satisfied, which was a reduction from the 38% reported in 2018.

A new addition to the survey for 2022 asked businesses about their satisfaction levels with the accessibility of City services. In general, businesses are satisfied – more than 9 in 10 respondents are satisfied with the ability to receive services in a preferred language (92%), availability of accessible parking (91%), and the physical locations (90%). The lowest satisfaction levels reported regarding accessibility of City services were related to wait-times for receiving services (74% satisfaction) and applying for a job through the City's online job application process (79%).

Of businesses that reported contacting the City for a business related concern, 82% reported the reason for contact was resolved.

While eight in 10 businesses reported they were “growing or remaining the same,” the number of businesses that reported they were “growing” decreased by 15% from 2018. Emerging as the most impactful challenge in 2022, nearly three in four respondents identifying costs as one of the biggest challenges their business faces.

Business conditions and the economic climate within Canada have drastically changed the economic landscape since 2018. Businesses have been affected by continued supply chain challenges, increasing inflationary pressures and the associated increases to the costs of doing business, as well as a tightening labour market.⁵ While 81% of businesses reported they were growing or remaining the same, the number of those who indicated they were growing decreased by 15% (dropping to 31% in 2022 from 46% in 2018). The number of businesses declining more than doubled from 2018 to 2022, rising from 7% to 16%. This increase was seen most among small business respondents (fewer than 20 employees). The majority of medium and large-sized businesses (those with 20 or more employees) reported they were growing or remaining the same (98%), while only 1% of these businesses indicated they were declining.

The biggest challenges identified in the survey were rising costs (72%), traffic and congestion (39%), and staffing, citing both hiring new employees (36%) and the high cost of labour (33%).

When asked to identify the most meaningful of all challenges faced, more than one-third of businesses identified increasing costs (36%), followed by hiring new employees (11%), competition (9%), traffic and congestion (8%), and cost of real estate (6%). This echoes what Economic Development staff have been hearing from businesses as challenges during corporate calls. Concerns over increasing costs saw a marked increase from 2018, where only 10% of businesses identified it as their most impactful challenge.

Vaughan’s businesses are transformative, ambitious, and purpose-driven: three in four businesses have undertaken a digital transformation initiative; more than one-half have made changes to increase accessibility; nearly two in three expect to make an investment in new or innovative technology in the next five years; and one in four are in the process of or have already implemented a purpose-driven initiative.

⁵ Canadian Federation of Independent Business (CFIB). November 2022. *Business Barometer®: Small business confidence reaches one of its lowest levels ever heading into the holiday season*

Vaughan businesses reflect the innovative and entrepreneurial spirit of the City. Within the next five years, nearly two in three respondents (63%) estimated that they will invest in new or innovative technology for their business. This represents a decrease of only 4% compared with 2018, despite cost being identified as a significant challenge.

Three of every four businesses (75%) indicated they have undertaken some form of digital transformation initiative, demonstrating their resiliency and adaptiveness to an ever-increasing digital world. A key learning from the changing business environment caused by the COVID-19 pandemic was to improve competitiveness, businesses needed to improve the way they did business online. Through entrepreneurship programs like Digital Boost and Starter Company Plus, Economic Development has been able to and continues to provide free training and mentorship across digital transformation topics to Vaughan's small business community.

The landscape of doing business continues to change, including changes to the location of work. Digital transformation initiatives enable businesses to remain competitive in the labour market by permitting arrangements such as remote or hybrid work when appropriate. Vaughan's residents benefit from these arrangements; in the Citizen Survey, of those who reported being employed, 62% work from home or have a hybrid work arrangement.

A quarter of businesses have implemented or are in the process of implementing a purpose-driven initiative, such as corporate social responsibility (CSR), social enterprise, diversity, equity, and inclusion (DEI) initiatives, and/or environmental, social and governance (ESG) reporting. In the same spirit, more than half of respondents (55%) agreed that their business had made changes to meet accessibility standards.

The prevalence of CSR, DEI, and ESG initiatives in our business community is supported by Economic Development programs that promote purpose-driven initiatives through the programs like Better Your Business. Better Your Business is a continuation of the department's leadership in social enterprise and corporate social responsibility, including the Social Innovation Challenge, the Activate!Vaughan innovation program and Social Enterprise 101 training. The first Better Your Business cohort focused on supporting businesses as they advance their social and environmental sustainability, while the second cohort encourages tourism diversity, to position Vaughan and its tourism operators as an inclusive, safe, and welcoming place for people to visit and stay.

Newsletters continue to be the preferred channel of communication with the business community, with digital versions emerging ahead of those received via mail.

Newsletters were identified as the most preferred channel of communication, be it e-newsletters (39%) or via mail (20%).

Only one in 12 respondents (8%) had visited Economic Development's website (vaughanbusiness.ca) in the past 12 months, nearly all who did (96%) found (part of or completely) what they needed and found the website useful (92%). In 2023, Economic Development continues to make improvements to the content and navigation of its website and will leverage opportunities to promote it as a valuable resource for both businesses, potential investors, stakeholders, and the business community at large.

To support the business community, the City should: remain one of the most competitive tax regimes in Ontario; improve road infrastructure to reduce gridlock; and support businesses through advisory and intelligence services.

When asked where Economic Development should focus its efforts over the next five years, responses reflected the challenges identified earlier in the survey. More than half of respondents indicated taxes and lowering of taxes (56%) and improving road infrastructure (51%) – both physical roads and highways as well as traffic reduction – as a top area to focus on. Encouraging business (47%), improving public transit (33%), and improving services (25%) were other top choices for focused efforts.

The pronounced focus on taxes and the cost burden reflects concerns around the increased cost of doing business. Vaughan's industrial and commercial tax rates remain very competitive and are among the lowest in the GTHA; only Richmond Hill has a lower industrial tax rate, and Markham, Richmond Hill and Milton have lower commercial tax rates.⁶

Financial Impact

Costs related to administering the 2022 Citizen Survey were paid for through Council-approved funding, and the 2022 Business Survey was funded as part of the annual business plan and budget process. There are no new financial implications related to this report.

Broader Regional Impacts/Considerations

A copy of this report will be uploaded to vaughan.ca and vaughanbusiness.ca and be distributed to critical local/regional partners and stakeholders, such as York Region

⁶ 2022 Tax Rates comparisons for total industrial and commercial taxable full rates (Vaughan, Richmond Hill, Markham, Newmarket, Toronto, Mississauga, Brampton, Caledon, Oakville, Milton, Hamilton, Oshawa and Whitby)

Economic Development, the Vaughan Chamber of Commerce, other Chambers of Commerce, ministries, and other local and regional stakeholders.

Conclusion

Results of the 2022 Citizen Survey continue to be very positive with 94% of citizens indicating that overall quality of life is good. A majority of citizens (87%) are satisfied with the overall delivery of City services. In fact, 82% believe they get good value for their tax dollars. A gap analysis revealed the service areas that need to be protected and maintained include: the City's online, financial and business support services; recreation and fitness facilities; waste collection; arts and culture; winter maintenance services; sidewalks; and streetlighting and general road maintenance. Areas of focus for improvement include: building permits and inspection services; parks development; maintenance of parks and greenspace; and traffic management. These results will help inform the 2022-2026 Term of Council Service Excellence Strategic Plan. In addition, these results will further assist the City's intergovernmental relations and advocacy efforts with other government levels to advance support for Council-approved priorities.

The Business Survey continues to serve as a baseline for assessing the state of Vaughan's business community, its outlook, challenges, resiliency, and service requirements. Findings from the survey will help inform future projects and initiatives such as the next four-year economic development action plan (currently in-progress), and other strategic and service planning initiatives. The survey highlights opportunities for improvement in the delivery of services and creating targeted awareness of Economic Development services and initiatives for the City. As Vaughan's economy continues to grow, findings can continue informing the City's efforts and investments to deliver a community and business destination of choice.

Both the Citizen and Business Surveys will be repeated every other year to continue tracking satisfaction and issues of importance among residents and the business community. The next surveys are targeted for 2024.

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Attachment

1. 2022 Vaughan Citizen and Business Survey, Forum Research, January 2023

Prepared by

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Approved by

A handwritten signature in black ink, appearing to read 'Nick Spensieri', with a long horizontal line extending to the right.

Nick Spensieri, City Manager