

Vaughan Business Survey

Prepared by: Forum Research

December 2022

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Fieldwork dates November 18th – December 13th, 2022

Sample Business owners or decision makers for a business in Vaughan

Survey collection method

- Computer Assisted Telephone Interviewing (CATI)
- Computer Assisted Web Interviewing (CAWI)

Note: Respondents were reached using contact information provided by City of Vaughan. These respondents were contacted via telephone and/or email invitation, depending on the contact information provided. An online open link was also available for businesses to participate in, which achieved 21 completes that are not presented within this report.

Sample size

- Total: 347
- CATI: n=32
 - CAWI: n=315

Length of interview

- CATI: 13.2 mins
- CAWI: 13.2 mins

Top 2 (TOP2) and bottom 2 (BTM2) reference the collected TOP2 positive and BTM2 negative responses, where applicable. For example, a TOP2 grouping referred to as “satisfied” may be the combined result of “very satisfied” and “somewhat satisfied,” whereas a grouping of “not satisfied” (BTM2) may be the combined result of “somewhat dissatisfied” and “very dissatisfied.”

Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%. Similar logic applies to TOP2 and BTM2 groupings.

Executive Summary



Businesses are satisfied with the quality of life and the delivery of services provided by the City.

- The vast majority of respondents (TOP2: 95%) rate the overall quality of life in the City of Vaughan as good or very good. *(slide 12)*
- Majority of respondents (TOP2: 91%) are satisfied with the delivery of services provided by the City of Vaughan. *(slide 13)*

Majority of businesses are growing or staying about the same. Good location is the top advantage for being in Vaughan; cost, in general, is the top challenge for businesses.

- Majority (TOP2: 81%) indicated that their business is growing or staying about the same. *(slide 18)*
- Being in a good location (70%) is the most mentioned advantage for being in Vaughan, followed by living in Vaughan (47%) and their customers being there (38%). *(slide 11)*
- When it comes to the biggest challenges, cost (72%) is the top mentioned challenges that respondents' business face, followed by traffic (39%), hiring new employees (36%), and affording the high cost of labour (33%). *(slide 19)*
 - A third of respondents (36%) mentioned that cost is the most impactful issue for their business, followed by hiring new employees (11%). *(slide 20)*

Majority say they are aware of the general services the City provides to local businesses, however awareness on many specific services is low.

- 6 in 10 (TOP2: 60%) respondents said that they are aware of the services that City of Vaughan provides to local businesses. *(slide 14)*
- Respondents are most likely to have heard of *fire and emergency services (76%), bylaw enforcement (72%), building permits (71%), winter maintenance (68%), library (64%), recreation, sports and wellness services (63%), and waste management (63%)*. *(slide 15-17)*
- On the contrary, they are least likely to have heard of the *available information about funding programs, local and regional support organization, and business development opportunities (20%), location assistance (20%), entrepreneurship programs (19%), business research and intelligence offerings (19%), support for expansion or relocation (17%), and business advisory (17%)*. *(slide 15-17)*

Businesses have suggested the City focus its economic development efforts to improve road infrastructure, encourage businesses in a variety of ways, and improve public transit over the next five years.

- About half of the respondents reckoned that the City of Vaughan could consider focusing its economic development efforts to lower taxes (56%), improve road infrastructure (51%), and encourage businesses (47%). *(slide 24)*

While 1 in 6 respondents preferred receiving communications via Vauhanbusiness.ca website, only 1 in 12 have visited the website. Those who visited the website found what they needed and also thought the content was useful.

- Newsletters is the most preferred channel of communication, be it e-newsletters (39%) or via mail (20%). On the other hand, 1 in 6 (16%) respondents preferred receiving communications via Vauhanbusiness.ca website. *(slide 26)*
- However, only 1 in 12 respondents (8%) have visited Vaughan Economic Development's website (vaughanbusiness.ca) in the past 12 months. *(slide 27)*
 - Nearly all (96%) found (part of or completely) what they need. And most of them (TOP2: 92%) found the website useful. *(slide 27)*

A third of respondents have contacted the City and majority of their issues are resolved.

- A third of respondents (34%) have contacted the City of Vaughan for a reason related to their business. *(slide 25)*
- Of those who contacted the City, 8 in 10 (82%) indicated the reason for their contact was resolved. *(slide 25)*

Many businesses will be investing in new/innovative technology for their businesses; fewer will be implementing purpose-driven initiatives.

- Three-fourths of respondents (75%) say their business have an online presence or have taken digital transformation initiatives - *having an online presence (74%) and online marketing tactics (56%)* are the most common initiatives that the businesses have taken. *(slide 21)*
- 6 in 10 respondents (63%) expected to make some or a significant investment in new or innovative technology for their business in the next five years. *(slide 22)*
- 4 in 10 respondents (43%) are not considering implementing purpose-driven initiative. *(slide 23)*

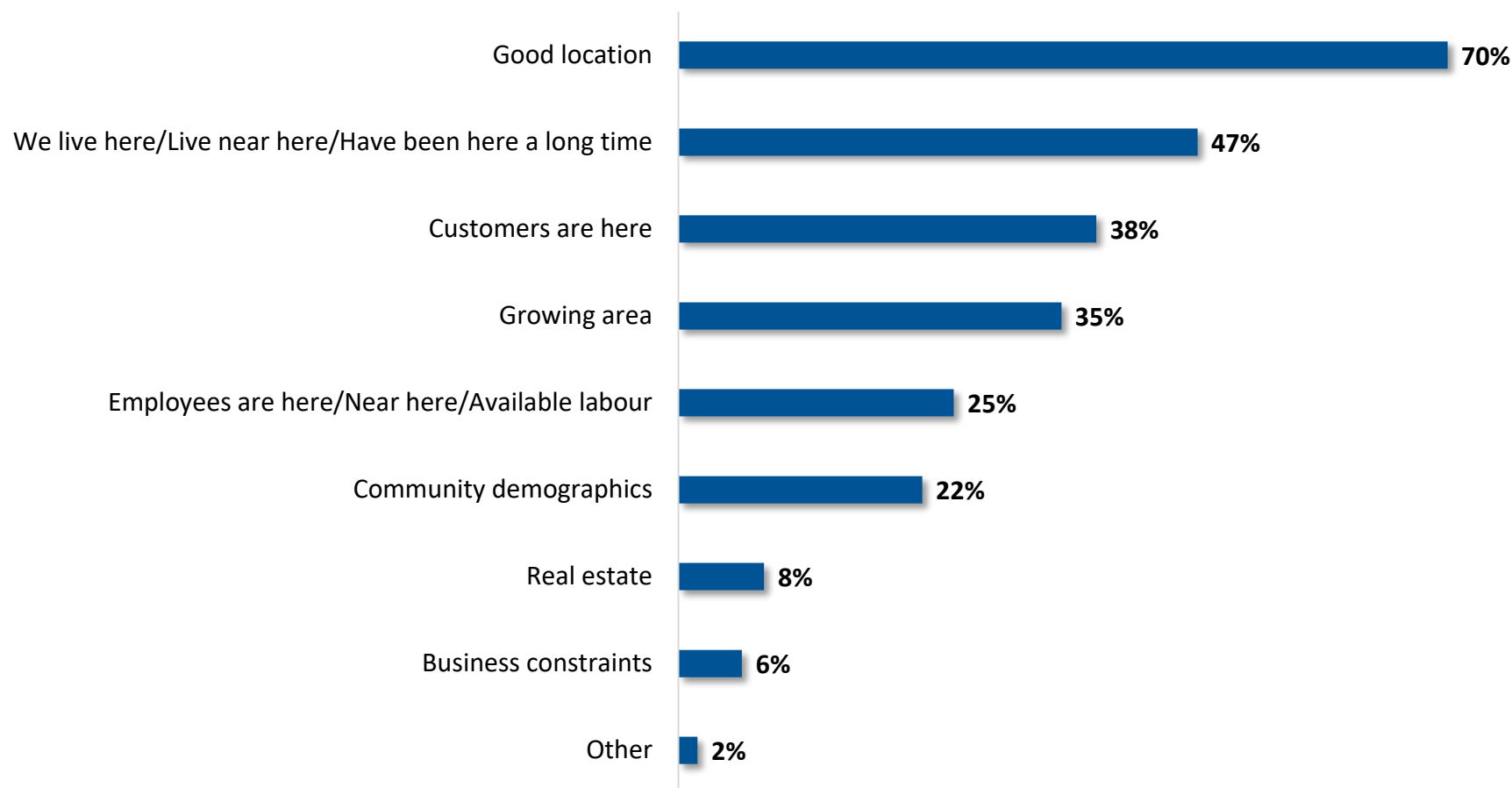
Majority agree that the City is a physically accessible community, and they are satisfied with the accessibility of a variety of accessibility services. More than half of the business said that their business meet accessibility standards.

- Majority of respondents (TOP2: 88%) agree that the City of Vaughan is a physically accessible community. *(slide 28)*
- In general, respondents are satisfied with the accessibility of the services. *(slide 29)*
 - More than 9 in 10 are satisfied with the *ability to receive services in a preferred language (TOP2: 92%), availability of accessible parking (TOP2: 91%), and its physical locations (TOP2: 91%)*. *(slide 29)*
- More than half of the respondents (TOP2: 55%) agree that their business has made changes to meet accessibility standards. *(slide 30)*

Key Findings

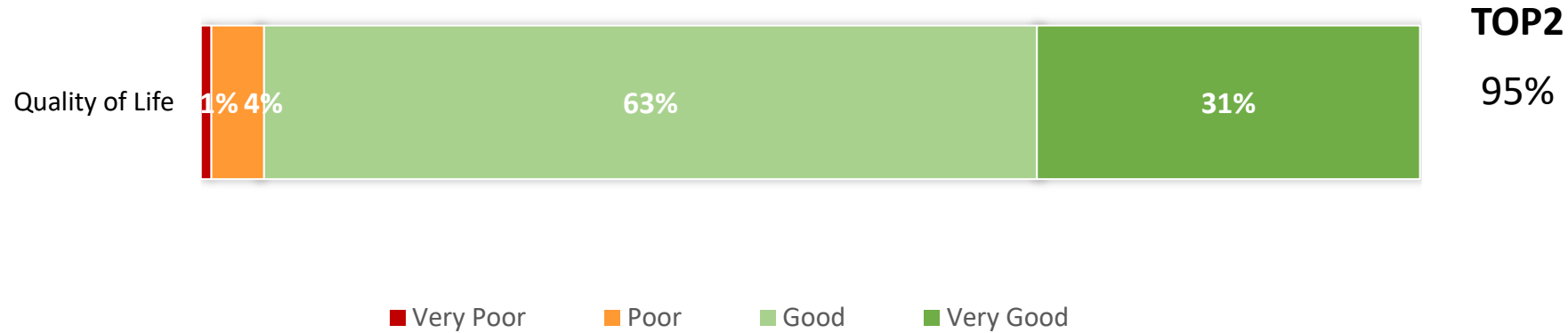


Advantages of Your Business of Being in Vaughan



Being in a good location (70%) is the most mentioned advantage for their business being in Vaughan, followed by them living in Vaughan (47%) and their customers being in Vaughan (38%).

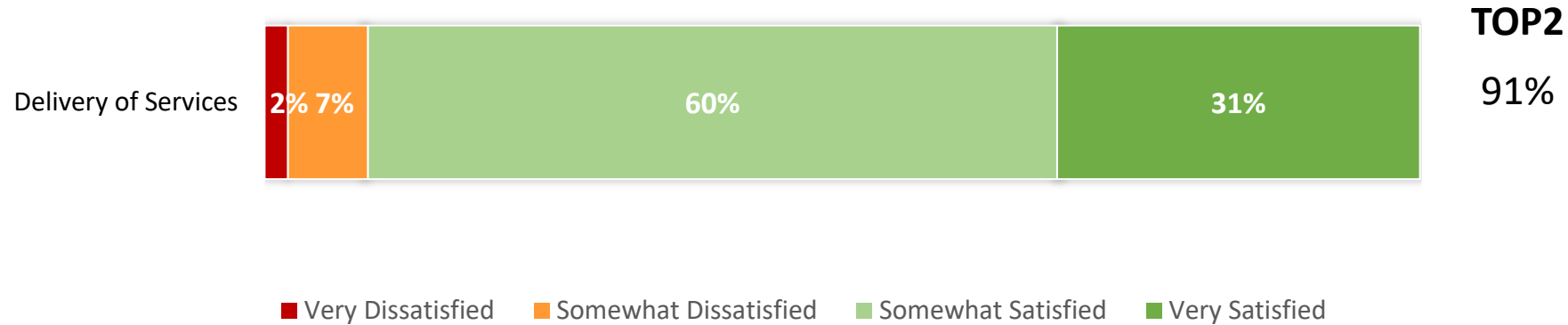
Overall Quality of Life in Vaughan



The vast majority of respondents are positive towards the overall quality of life in the City of Vaughan, with over 9 in 10 (TOP2: 95%) rating the quality of life as good or very good.

Satisfaction with Delivery of Services

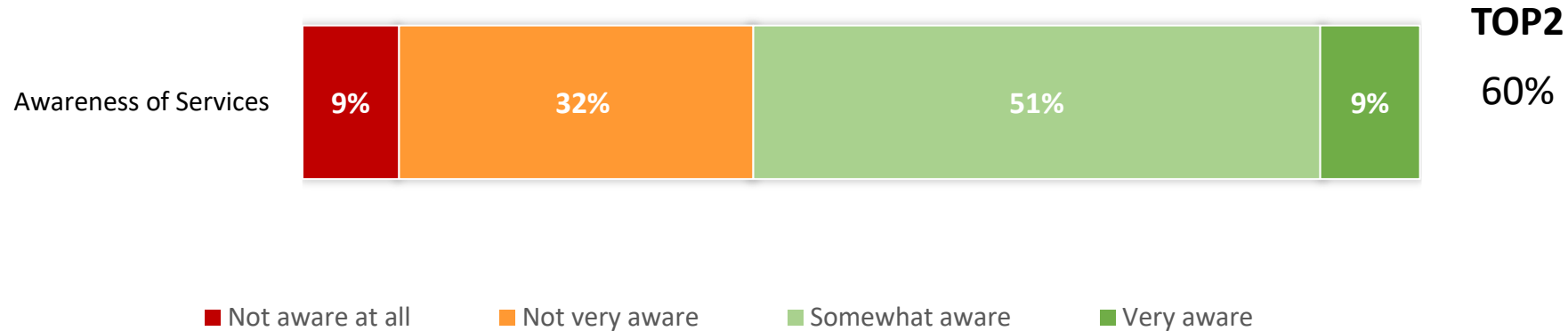
Majority of respondents (TOP2: 91%) are satisfied with the delivery of services provided by the City of Vaughan.



Awareness of Services Provided to Local Business

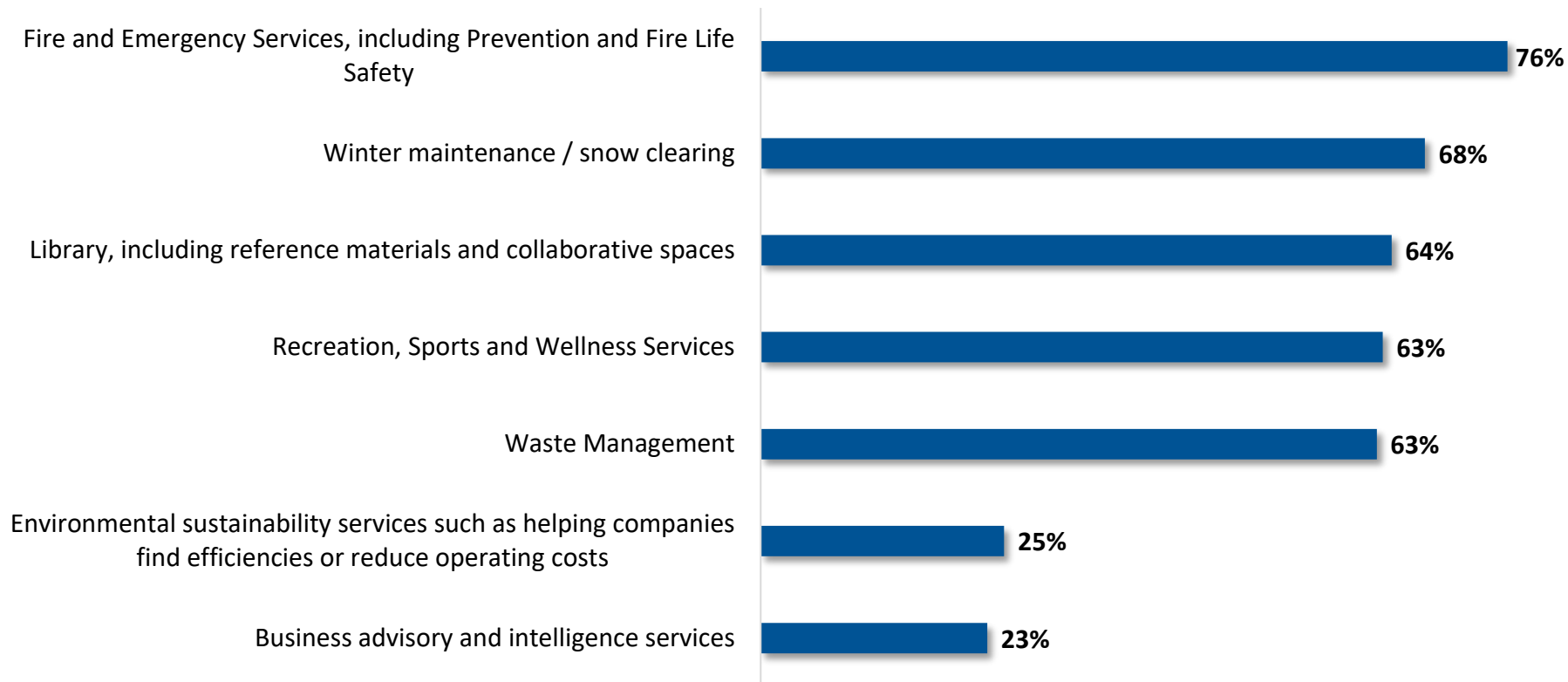


6 in 10 (TOP2: 60%) respondents are aware of the services that City of Vaughan provides to local businesses.



Question Q3: Generally, how aware are you of the services that the City of Vaughan provides specifically to local businesses?
Sample: n=347
Framework: All respondents

Services that Businesses have Heard About



The majority of respondents have heard about:

- Fire and Emergency Services (76%)
- Winter maintenance (68%)
- Library (64%)
- Recreation, Sports and Wellness Services (63%)
- Waste Management (63%)

However, only a quarter of respondents have heard about Environmental Sustainability services (25%) and business advisory and intelligence services (23%).

Question Q4: The City of Vaughan provides many different services to local businesses. Which of the following have you heard about? When I read each service, if you've heard of it, please say yes. If you haven't, please say no.

Sample: n=347

Framework: All respondents

Services that Businesses have Heard About



The majority of respondents have heard about bylaw enforcement (72%) and building permits (71%).

While half of them have heard about zoning support (52%) and planning and development services (48%), less than a third have heard of tourism business development support services (29%), small business services (25%), and procurement services (22%).

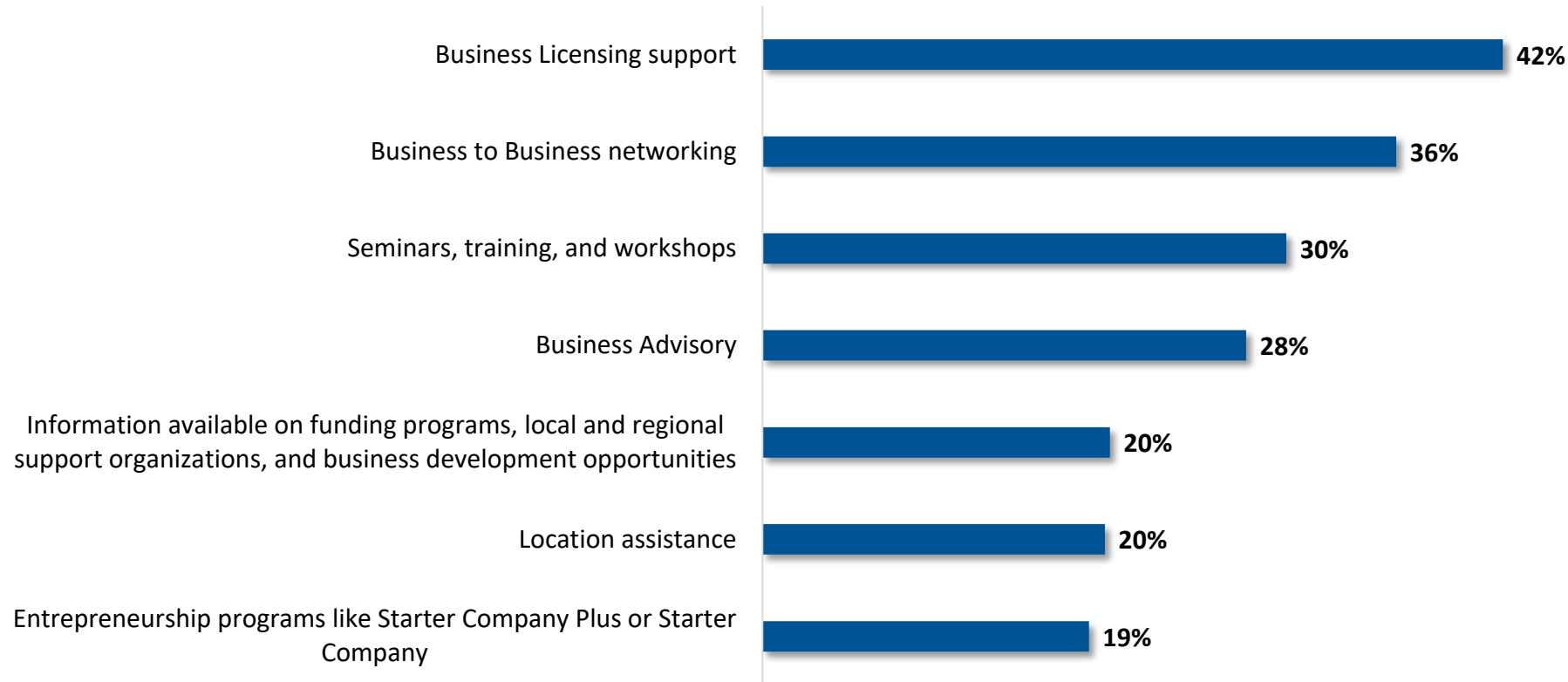
Business research and intelligence offerings (19%), support for expansion or relocation (17%) and business advisory (17%) have the least awareness.

Question Q7: I am about to read you another brief list of services that the city of Vaughan provides to businesses. If you have heard of a service please say yes, if you have not, please say no.

Sample: n=347

Framework: All respondents

Services that Businesses have Heard About



About 4 in 10 respondents have heard about:

- Business Licenses (42%)
- B2B networking (36%)

However, only 3 in 10 or fewer have heard about:

- Seminars, training, and workshops (30%)
- Business advisory (28%)
- Information about funding programs, local and regional support organization, and business development opportunities (20%)
- Location Assistance (20%)
- Entrepreneurship Programs (19%)

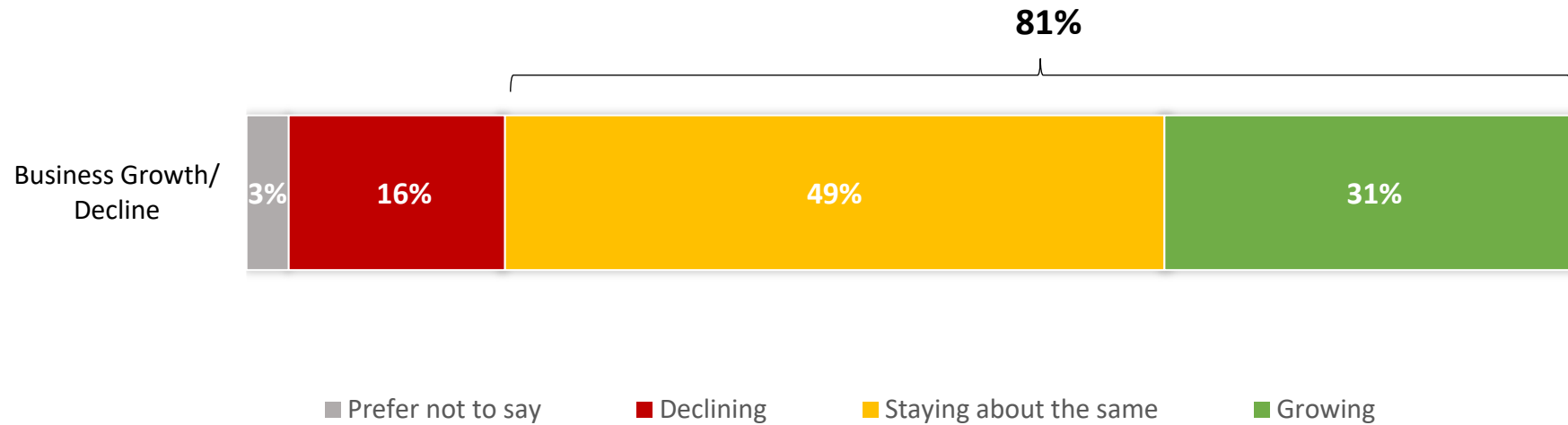
Question Q13: I'm going to read you one more list of services; please say yes if you're aware of them, and no if you are not.

Sample: n=347

Framework: All respondents

Business Growth/ Decline

Majority of respondents (TOP2: 81%) indicated that their business is growing or staying about the same.



Biggest Challenges that the Business Face



About three-quarters of respondents (72%) mentioned that cost is one of the biggest challenges that their business faces.

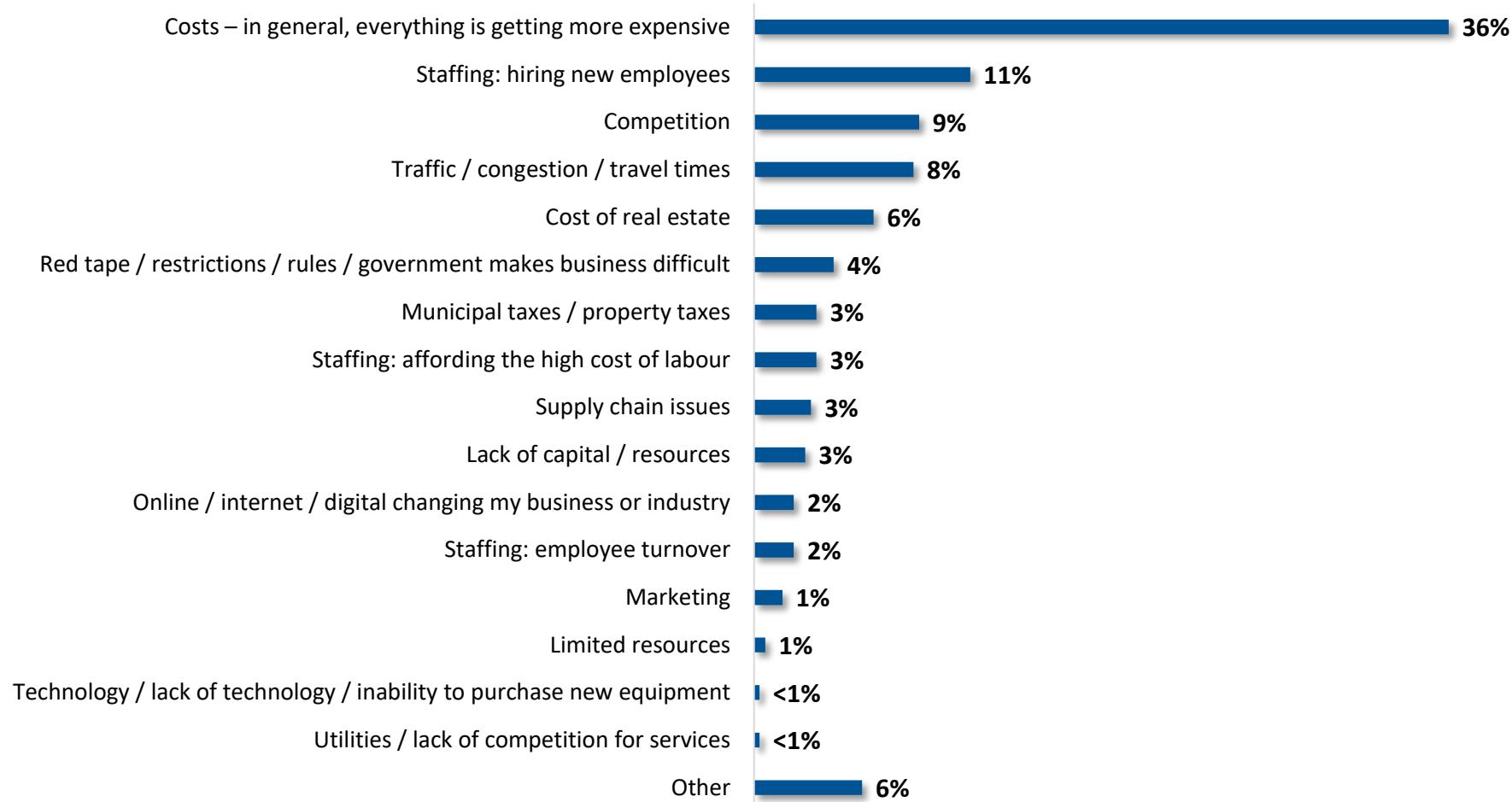
Traffic (39%), hiring new employees (36%), and affording the high cost of labour (33%) are the other top mentioned challenges.

Question Q6A: What would you say are the biggest challenges your business faces?

Sample: n=347

Framework: All respondents

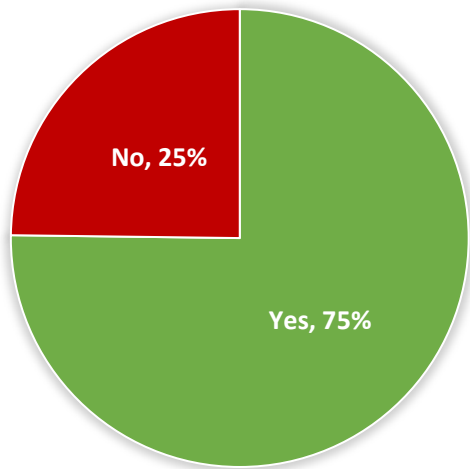
Most Impactful Challenge that the Business Face



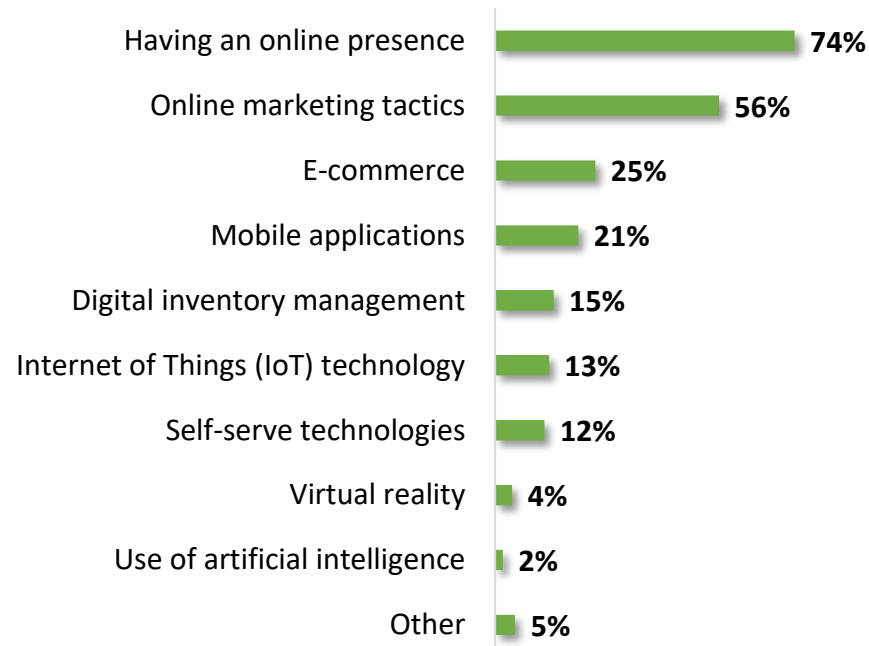
A third of respondents (36%) mentioned that cost impacts their business the most, followed by hiring new employees (11%).

Online Presence/ Digital Transformation Initiatives

Online Presence / Digital Transformation Initiatives



Types of Digital Transformation Initiatives



Three-quarters of respondents (75%) say their business has an online presence or that they have undertaken digital transformation initiatives.

Of those who have an online presence, having an online presence (74%) and online marketing tactics (56%) are the most common initiatives that the business has undertaken. About a quarter also mentioned e-commerce (25%) and mobile applications (21%).

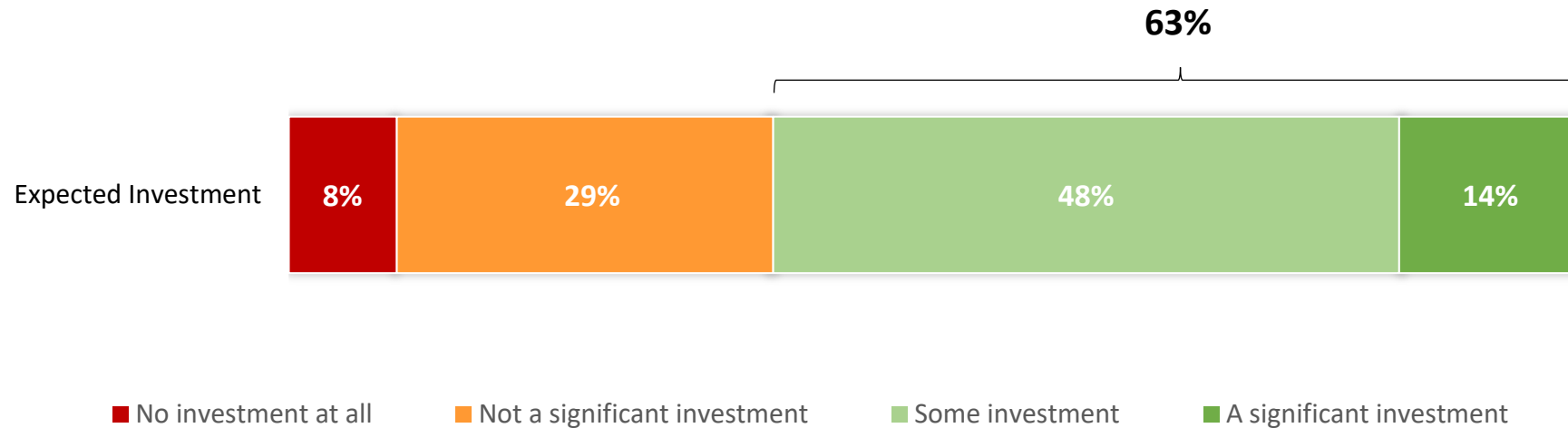
Question: [Left Q8A] Does your business have an online presence or has your business undertaken any other digital transformation initiatives? / [Right Q8B]

And what types of digital transformation initiatives has your business undertaken?

Sample: [Left] n=347 / [Right] n=261

Framework: [Left] All respondents / [Right] those whose business have an online presence or have undertaken other digital transformation initiatives

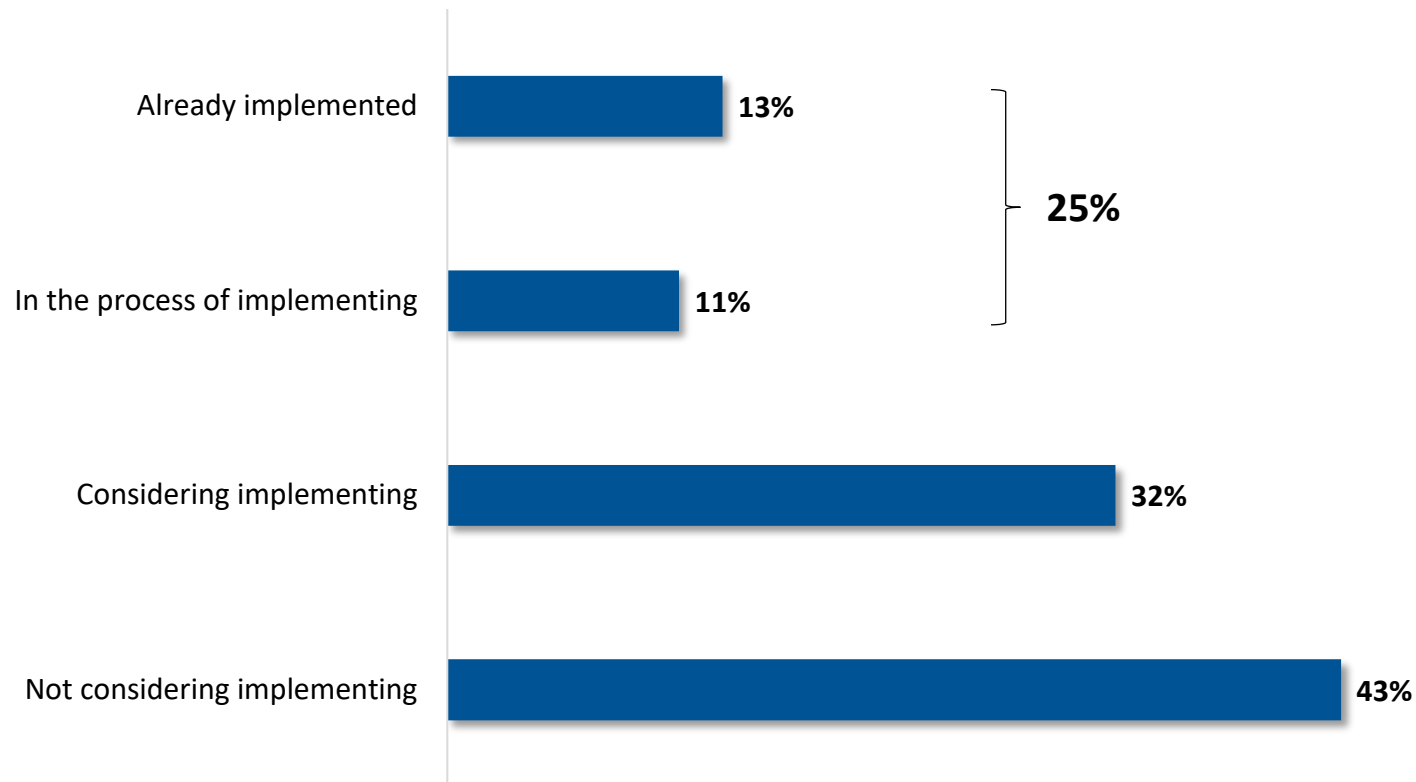
Expected Investment in New / Innovative technology



6 in 10 respondents (TOP2: 63%) expected to make some or a significant investment in new or innovative technology for their business in the next five years.

Only 8% said they will make no investment in next five years.

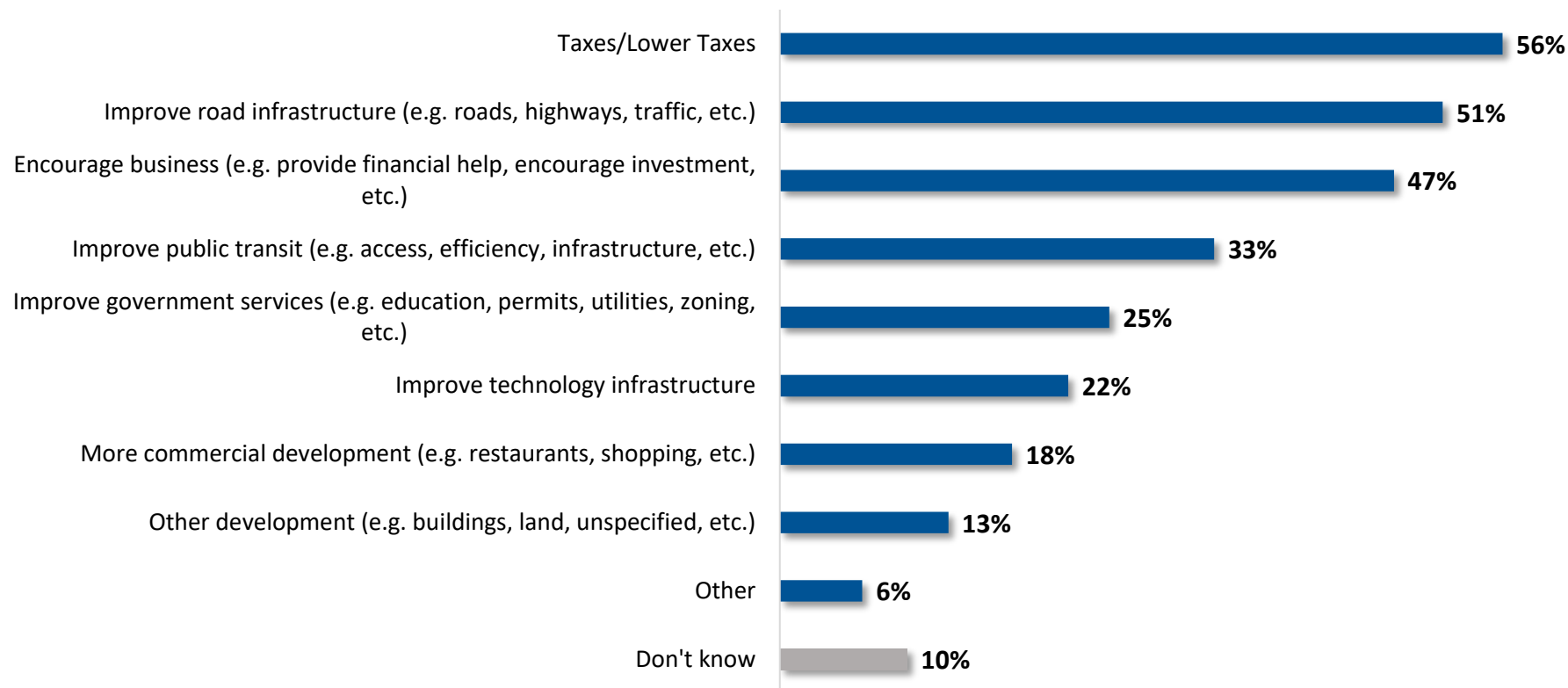
Implementation of Purpose-driven Initiative



4 in 10 respondents (43%) are not considering implementing purpose-driven initiatives.

On the other hand, a quarter of respondents (TOP2: 25%) have implemented or in the process of implementing purpose-driven initiatives.

Areas to Focus Economic Development Efforts



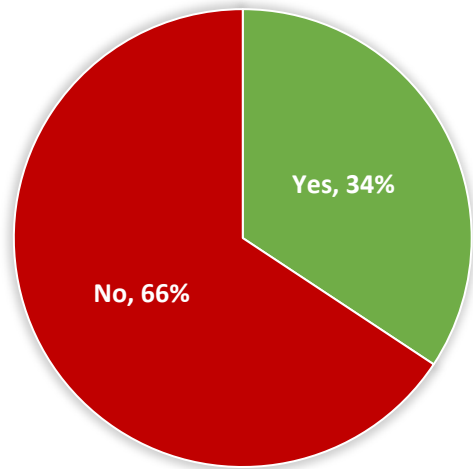
About half of the respondents reckoned that the City of Vaughan could consider focusing its economic development efforts to lower taxes (56%), improve road infrastructure (51%), and encourage businesses in a variety of ways (47%).

Question Q11: Over the next five years, specifically where should the City of Vaughan be focusing its economic development efforts?

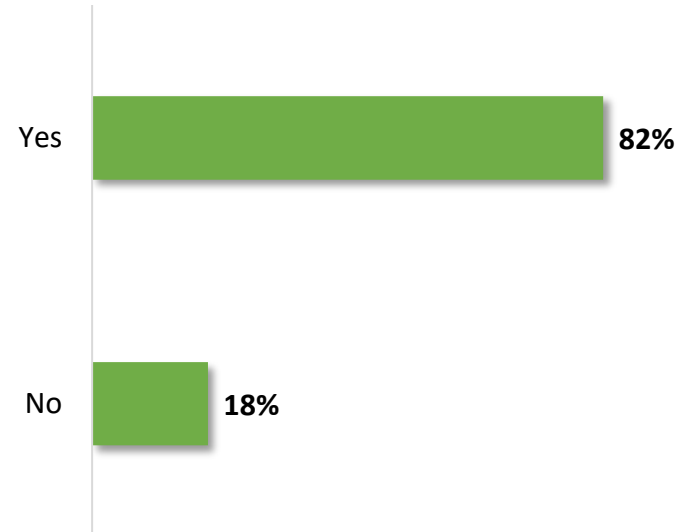
Sample: n=347

Framework: All respondents

Contacted City: Business Related



Reason for contact resolved



A third of respondents (34%) have contacted the City of Vaughan for a reason related to their business.

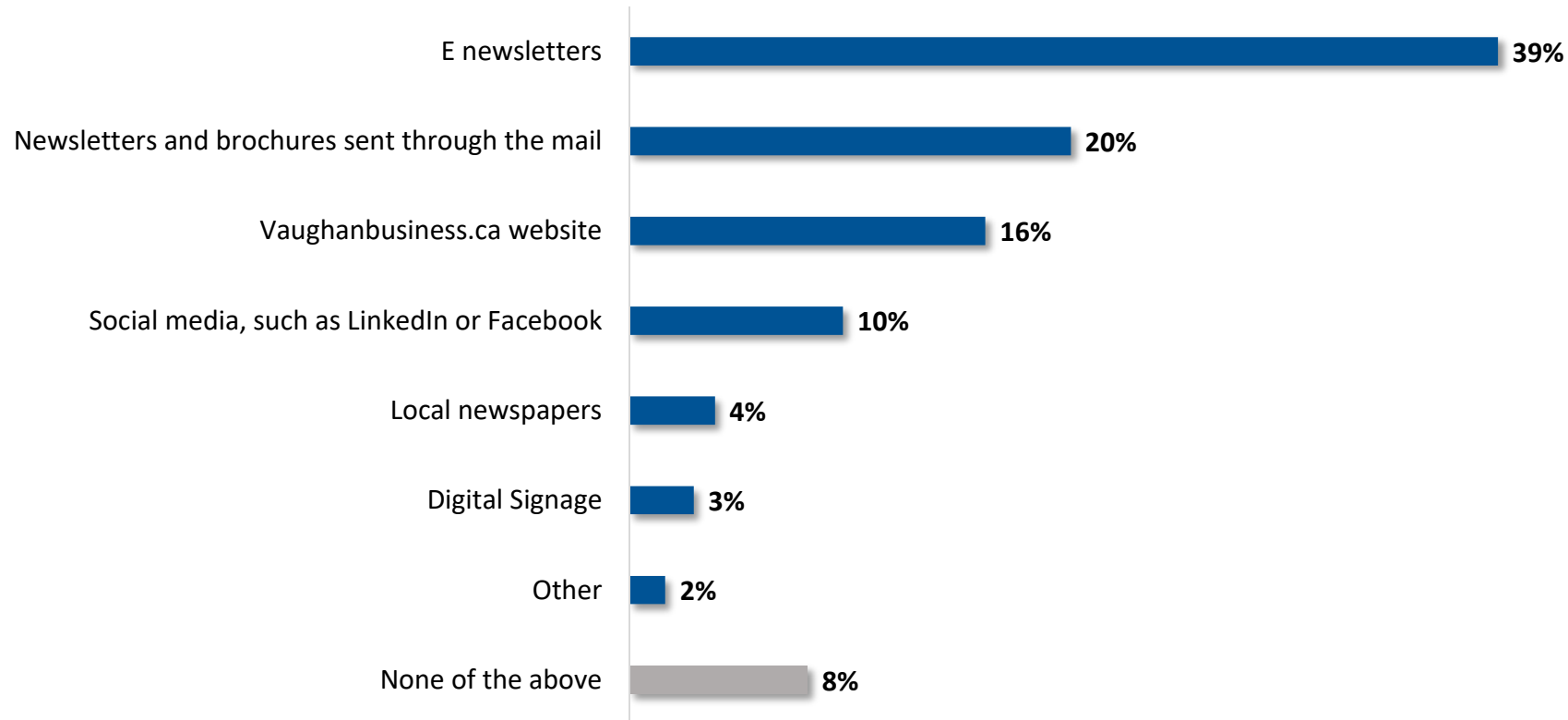
Of those who contacted the City, 8 in 10 (82%) said the reason for their contact was resolved.

Question: [Left Q12A] Have you ever contacted the City of Vaughan for a reason related to your business?/ [Right Q12B] Would you say that the reason for your contact of the city was resolved?

Sample: [Left] n=347 / [Right] n=119

Framework: [Left] All respondents / [Right] those who have contacted the City of Vaughan for a reason related to their business

Preferred Channels of Communication



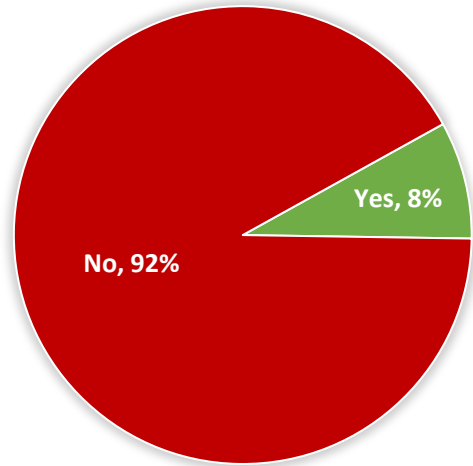
Newsletters is the most preferred channel of communication, be it e-newsletters (39%) or via mail (20%).

1 in 6 (16%) respondents preferred receiving communications via Vauhanbusiness.ca website.

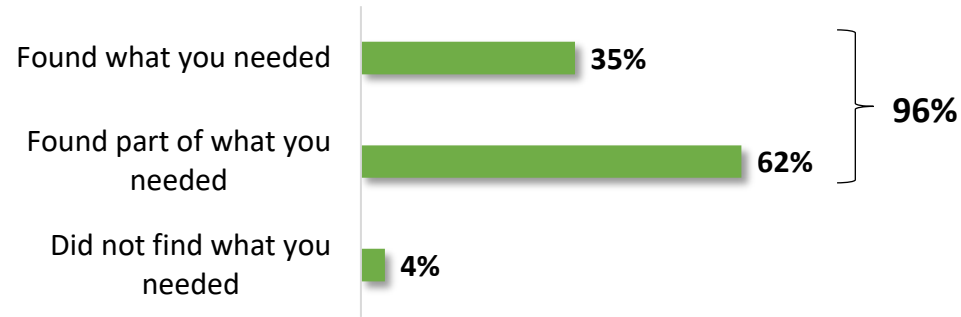
Visited Vaughan Economic Development's Website



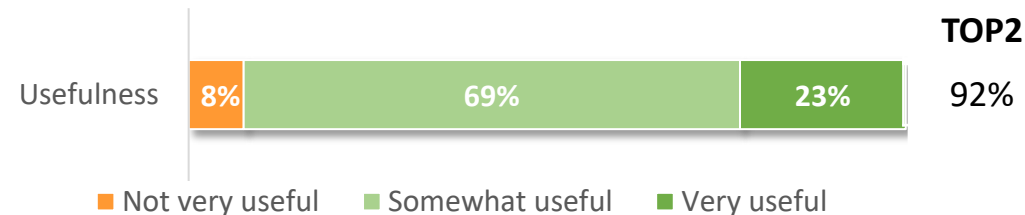
Visited Vaughan Economic Development's Website



Found What You Were Looking For*



Usefulness of the Website*



1 in 12 respondents (8%) have visited Vaughan Economic Development's website (vaughanbusiness.ca) in the past 12 months.

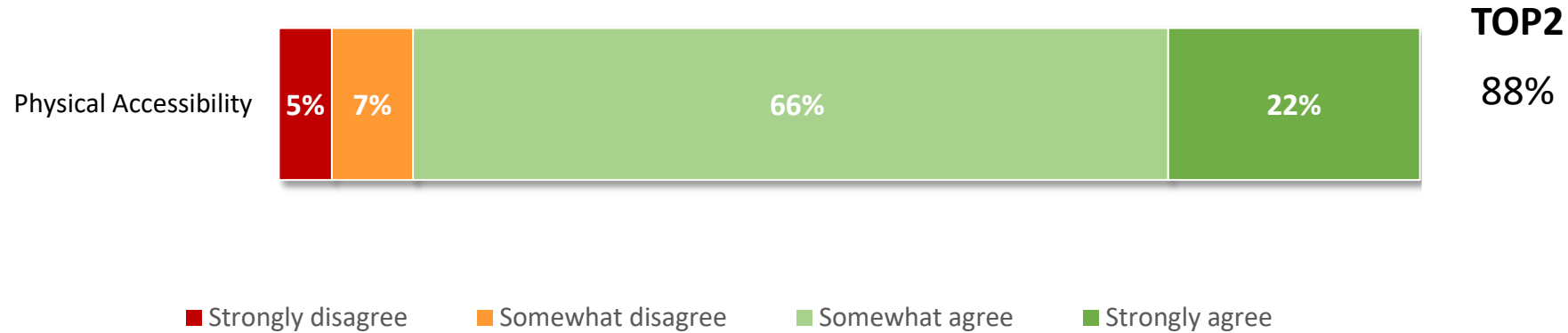
Of those who did, nearly all (96%) found (part of or completely) what they need, and most of them (TOP2: 92%) found the website useful.

Question: [Left Q15A] Have you been to Vaughan Economic Development's website (vaughanbusiness.ca) in the past 12 months? / [Top Right Q15B] In searching for the desired information on vaughanbusiness.ca, did you find what you were looking for? / [Bottom Right Q15C] How useful was the content available on vaughanbusiness.ca?
Sample: [Left] n=315 / [Right] n=26 *small sample size; interpret results with caution
Framework: [Left] Those who completed the survey online / [Right] those who have visited Vaughan Economic Development's Website

Physical Accessibility of the City of Vaughan



Majority of respondents (TOP2: 88%) agree that the City of Vaughan is a physically accessible community.

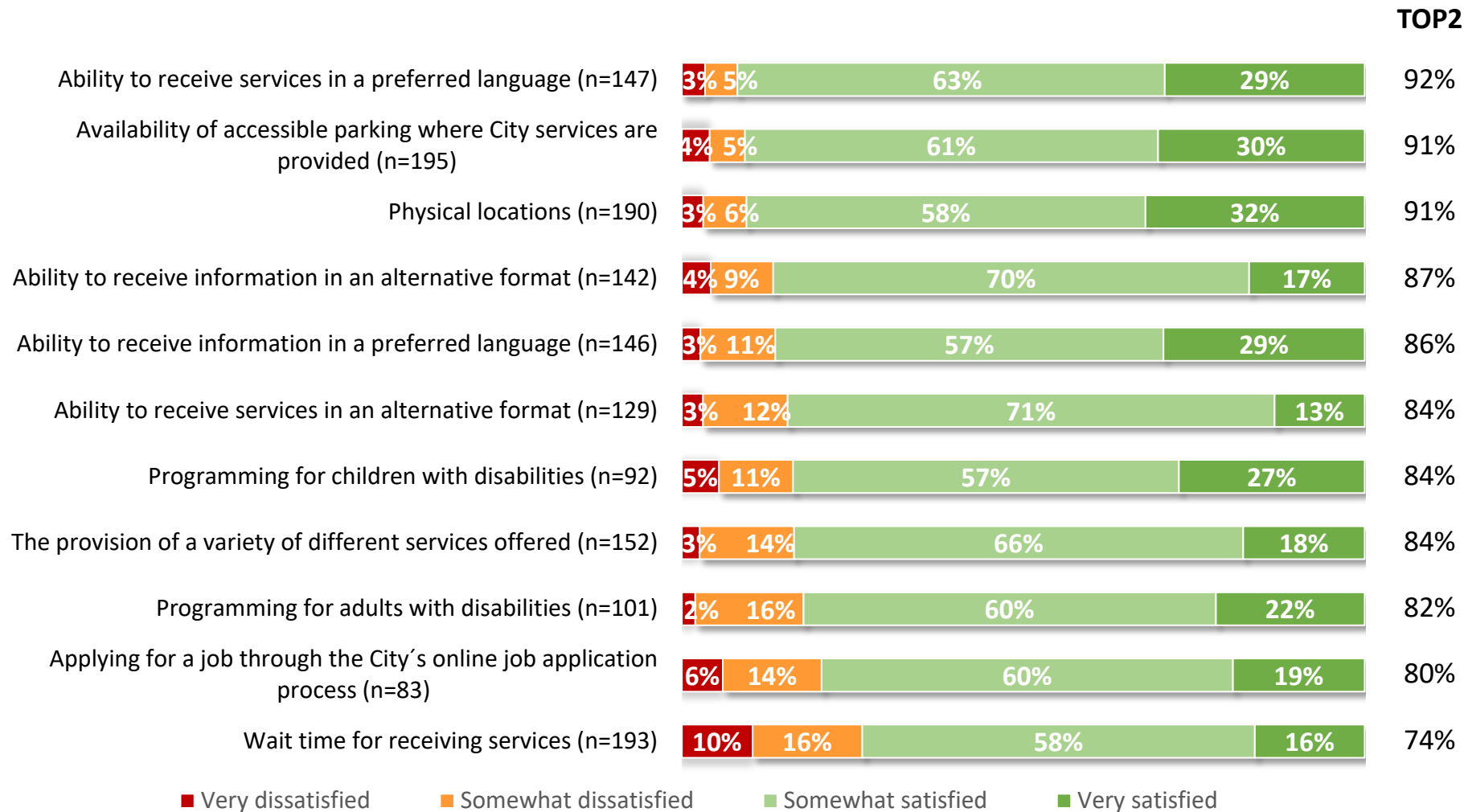


Question Q21: How much do you agree or disagree with the following statement: Generally speaking, the City of Vaughan is a physically accessible community. Would you say you...?

Sample: n=281

Framework: Those who finished the survey online, excluding "don't know"

Satisfaction of the Accessibility of the Services



In general, respondents are satisfied with the accessibility of the services.

More than 9 in 10 are satisfied with:

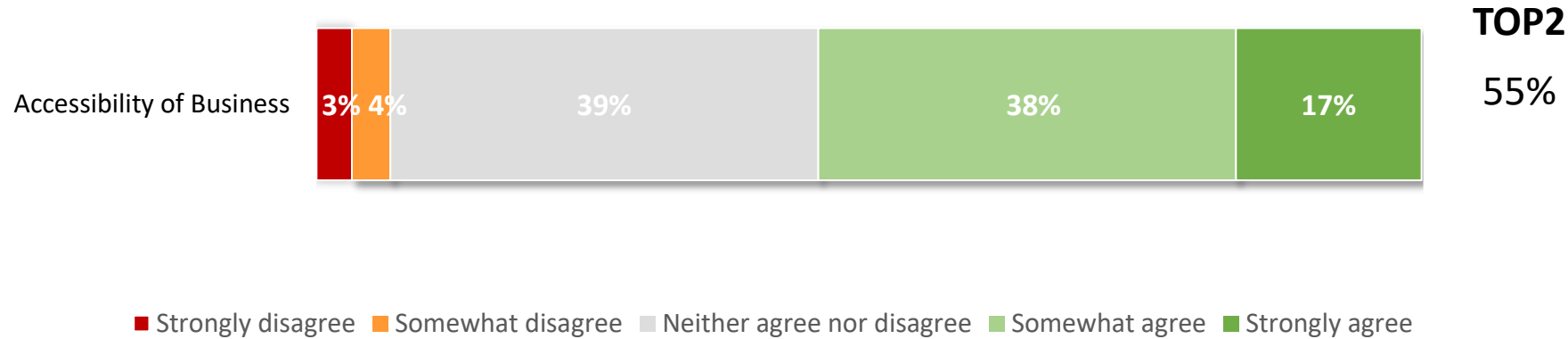
- The ability to receive services in a preferred language (TOP2: 92%)
- Availability of accessible parking (TOP2: 91%)
- Its physical locations (TOP2: 91%)

Question Q22: How satisfied or dissatisfied are you with the accessibility of the following areas of services provided by the City of Vaughan?

Sample: Shown in chart above; varies for each area

Framework: Those who finished the survey online, excluding "don't know"

Accessibility of the Business



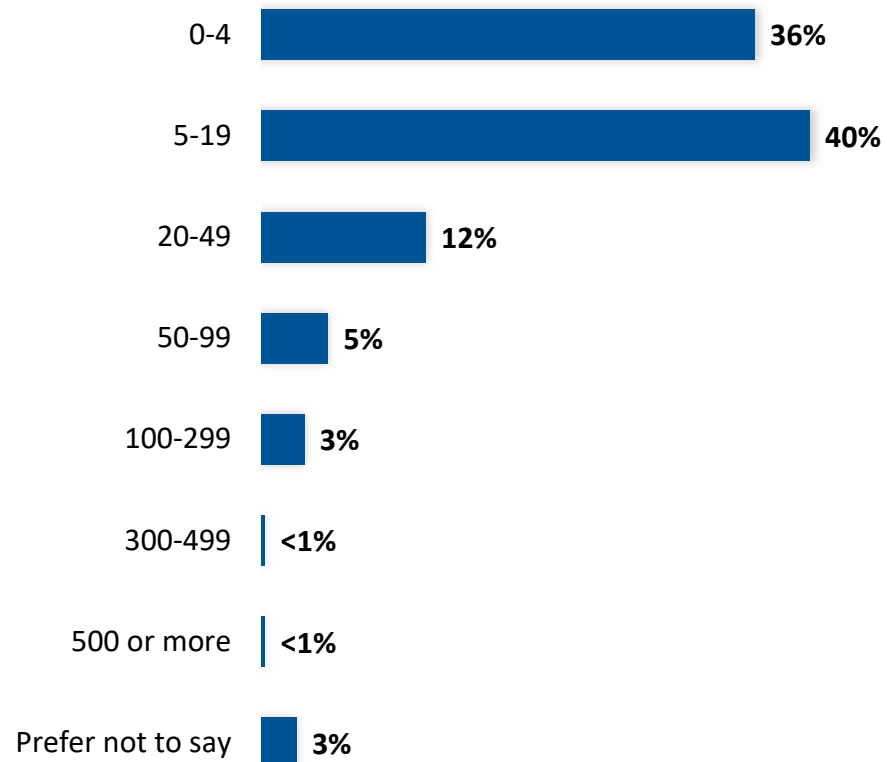
More than half of respondents (TOP2: 55%) agree that their business has made changes to meet accessibility standards.

Only a few (BTM2: 7%) disagree.

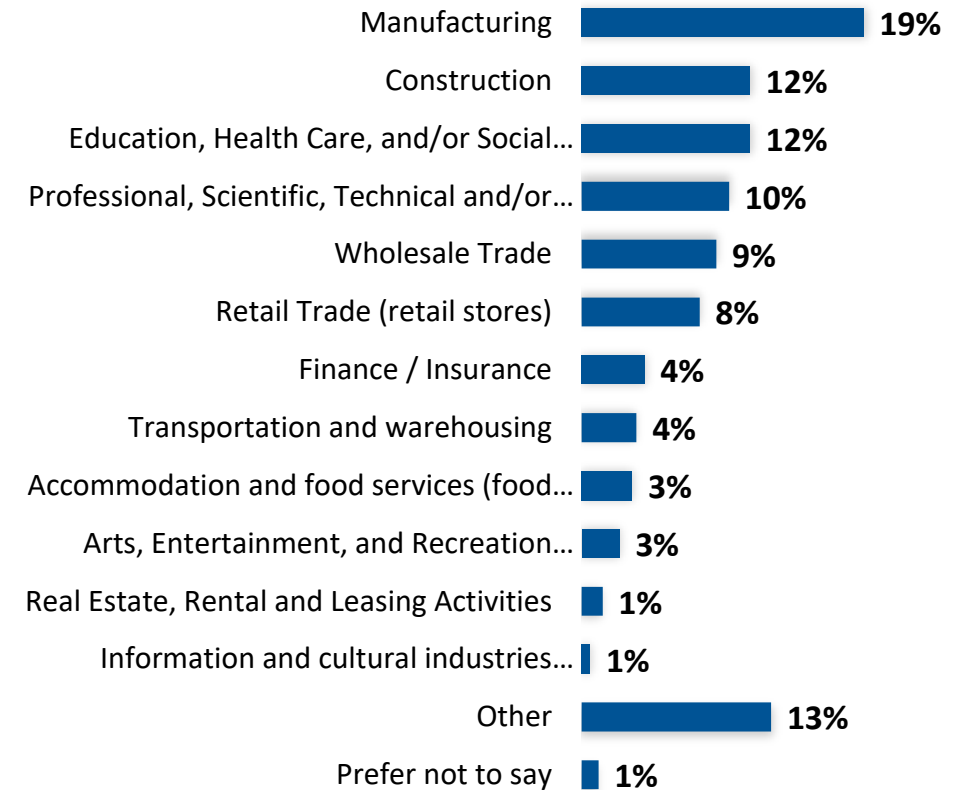
Demographics



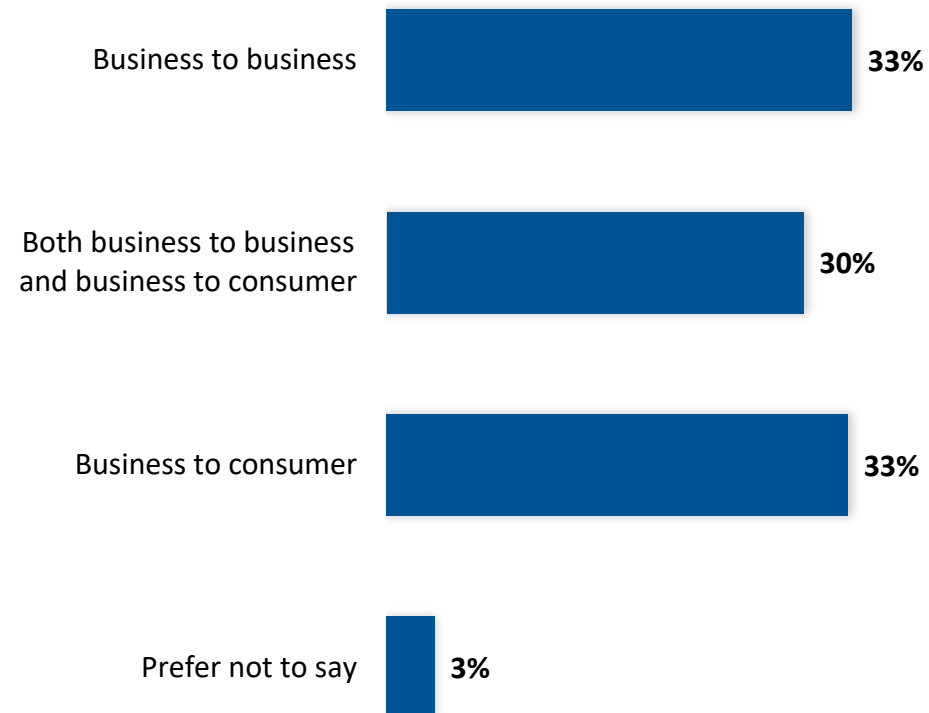
NUMBER OF EMPLOYEES



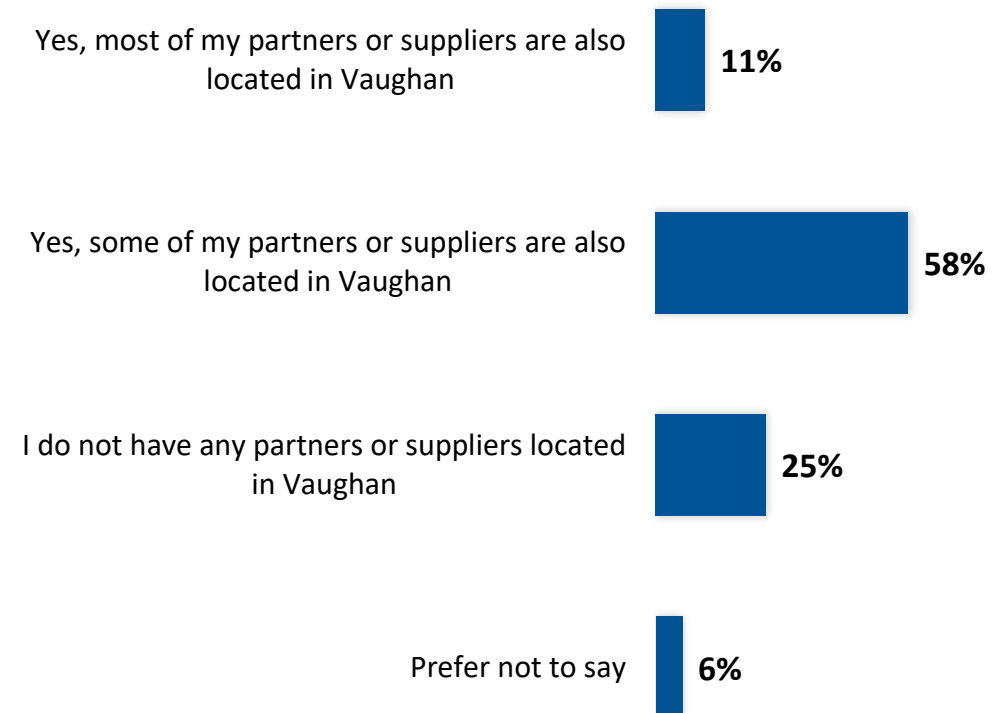
SECTORS



BUSINESS MODE



PARTNERS IN VAUGHAN



Question: [Left D3] Would you say that your business model is primarily business to business, business to consumer, or close to equal parts of both? [Right D4] Are you sourcing partners or suppliers from within Vaughan?

Sample: [Left] 347; [Right] 347

Framework: All

Vaughan Resident Survey

Prepared by: Forum Research

January 2023

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| | |
|---------------------------------|---|
| Fieldwork dates | November 17 th – December 16 th , 2022 |
| Sample | Respondents in the City of Vaughan who are 18 years of age or older |
| Survey collection method | <p>Computer Assisted Telephone Interviewing (CATI)</p> <ul style="list-style-type: none">• CATI sample was drawn using random digit dialing (RDD) among City of Vaughan respondents. A mix of landline and cell phone sample was used to reach cell phone-only households.• Results throughout this report have been statistically weighted by age and gender, to ensure that the sample reflects the target population according to 2021 Census data. |
| Margin of Error | ±3.46% |
| Sample size | Total: 804 |
| Length of interview | 19.7 min |

TOP2 / BTM2

Top 2 (TOP2) and bottom 2 (BTM2) reference the collected TOP2 positive and BTM2 negative responses, where applicable. For example, a TOP2 grouping referred to as “satisfied” may be the combined result of “very satisfied” and “somewhat satisfied,” whereas a grouping of “not satisfied” (BTM2) may be the combined result of “somewhat dissatisfied” and “very dissatisfied.”

Rounding

Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%. Similar logic applies to TOP2 and BTM2 groupings.

Multi-mentions

In some cases, more than one answer option is applicable to a respondent. Multiple mention questions allow respondents to select more than one answer category for a question. For questions that ask for multiple mentions (e.g., “Which of the following communication methods have you used?”), it is important to note that the percentages typically add to over 100%. This is because the total number of answer categories selected for a question can be greater than the number of respondents who answered the question. For example, respondents were able to select “email” and “physical mail/inserts” as their answer.

Significance Testing

Throughout the report, statistically significant differences (at the 95% confidence level) between demographic segments have been stated under the related finding in the right text boxes. Statistical differences exist only between the segments mentioned in the notes.

Executive Summary



Respondents are satisfied with the quality of life and the delivery of services provided by the City.

- The vast majority of respondents are positive towards the overall quality of life in the City of Vaughan, with over 9 in 10 (TOP2: 94%) rating the quality of life as good or very good. *(slide 45)*
- Majority of respondents (TOP2: 87%) are satisfied with the delivery of services provided by the City of Vaughan. *(slide 48)*

Majority of Vaughan respondents are satisfied with 24 out of 25 services provided by the City.

- Respondents are most satisfied with Fire services (TOP2: 99%). *(slide 50)*
- More than 9 in 10 respondents are satisfied with Local Public Libraries (TOP2: 96%), Recreation and fitness service programs (TOP2: 92%) and Off-road multi-use / natural trails (TOP2: 92%) *(slide 50)*
- Traffic management is the only service that has less than half indicating satisfaction, including traffic calming and improving the flow of traffic (TOP2: 40%). *(slide 51)*

About half of respondents' surveys have contacted the City of Vaughan within the past 12 months, and vast majority who did were satisfied with all aspects of service.

- 9 in 10 (TOP2: 88%) were satisfied with the overall quality of the service delivery from the City. *(slide 55)*
- Over 8 in 10 were also satisfied with the accessibility of services (TOP2: 84%) and overall quality of service received from City staff (TOP2: 82%). *(slide 55)*

However, majority did not contact the City for or look up the variety of items listed by the City within the past 12 months. Of those who did, majority did so online with some exceptions.

- About 1 in 3 have contacted the City for or looked up how to: Pay a City of Vaughan bill (34%), Waste collection schedule (31%), and Registering for or inquiring about recreation programs (27%; *slide 57*), and most of them have done so online and will continue to in the future. However, reporting issues to the City (58%) and Public works-related service requests (57%) are mostly done by phone (*slide 67*), and majority prefer to contact the City via phone for advice, information, or to inquire about a service (60%). (*slide 69*)

Majority think they received an overall good value for their tax dollars and do not wish to see taxes increased.

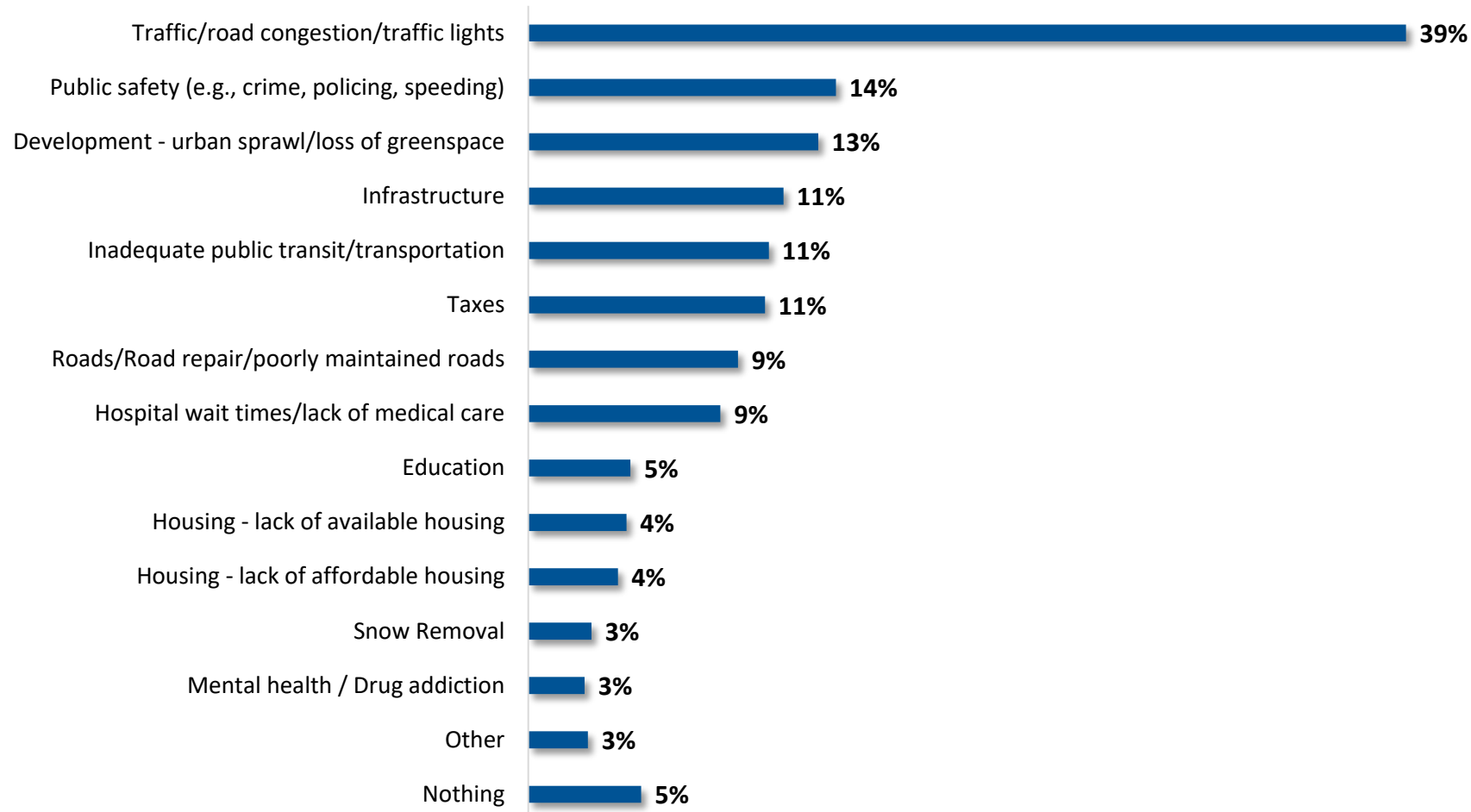
- Majority of respondents (TOP2: 82%) think they received an overall good value for their tax dollars. (*slide 74*)
- Around half (54%) do not want the City to increase taxes, even if it means cuts to services (*slide 76*). However, if they had no choice, and maintaining service levels or adding services and facilities meant an increased cost to provide these services, the plurality of respondents (46%) would prefer to pay for this through a combination of both increase user fees and increase property taxes. (*slide 77*)

Detailed Findings



Quality of Life

Top of Mind Issues



Traffic and traffic-related issues are the most important issue facing the community, with 2 in 5 (39%) respondents saying so.

- Women are more concern about traffic and traffic-related issues than men (48% vs 30%).

Other top of mind issues are public safety (14%) and development – urban sprawl / loss of greenspace (13%).

*note: not shown if <3%

Question 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)

Top of Mind Issues – By Wards

| | 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% |

Respondents from Ward 1 are more likely to think traffic-related issues are the most important issues facing the community compared to all other Wards.

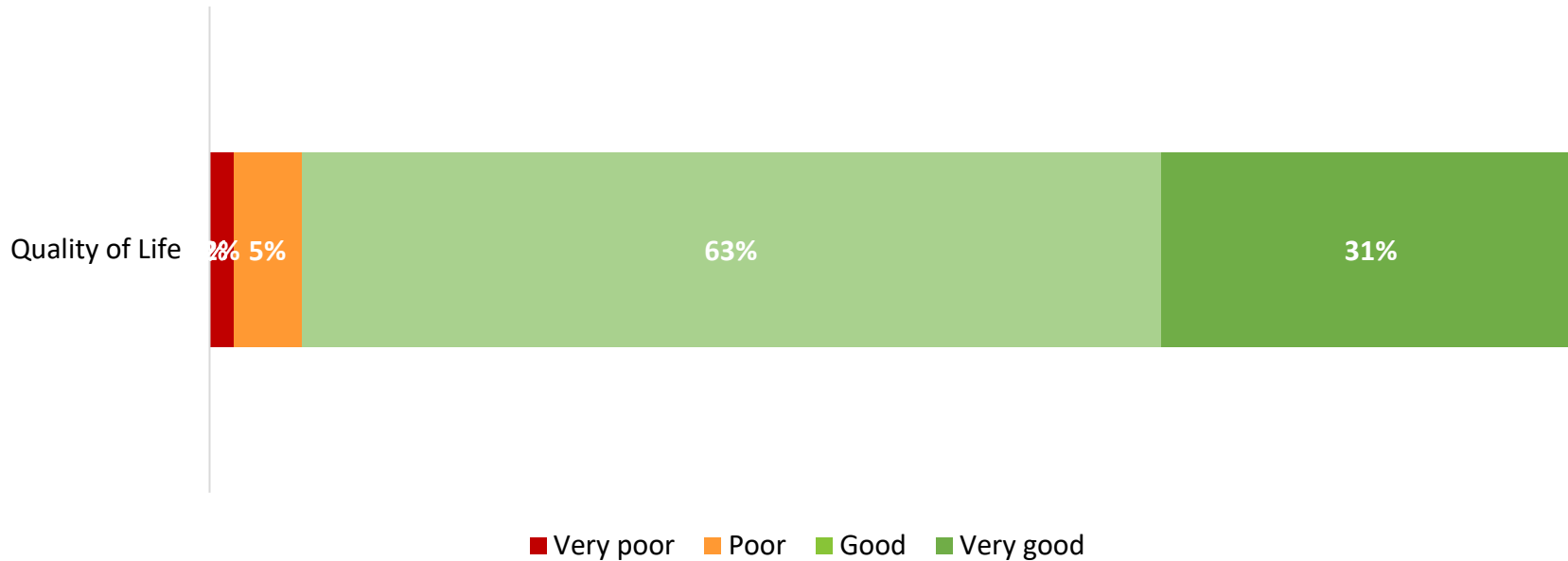
Ward 1 respondents are also more likely to say road-related issues are the most important issue compared to Ward 5 respondents, where Ward 3 respondents are more likely to say development is the most important issue compared to Ward 2 respondents.

Question 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)

Overall Quality of Life in Vaughan



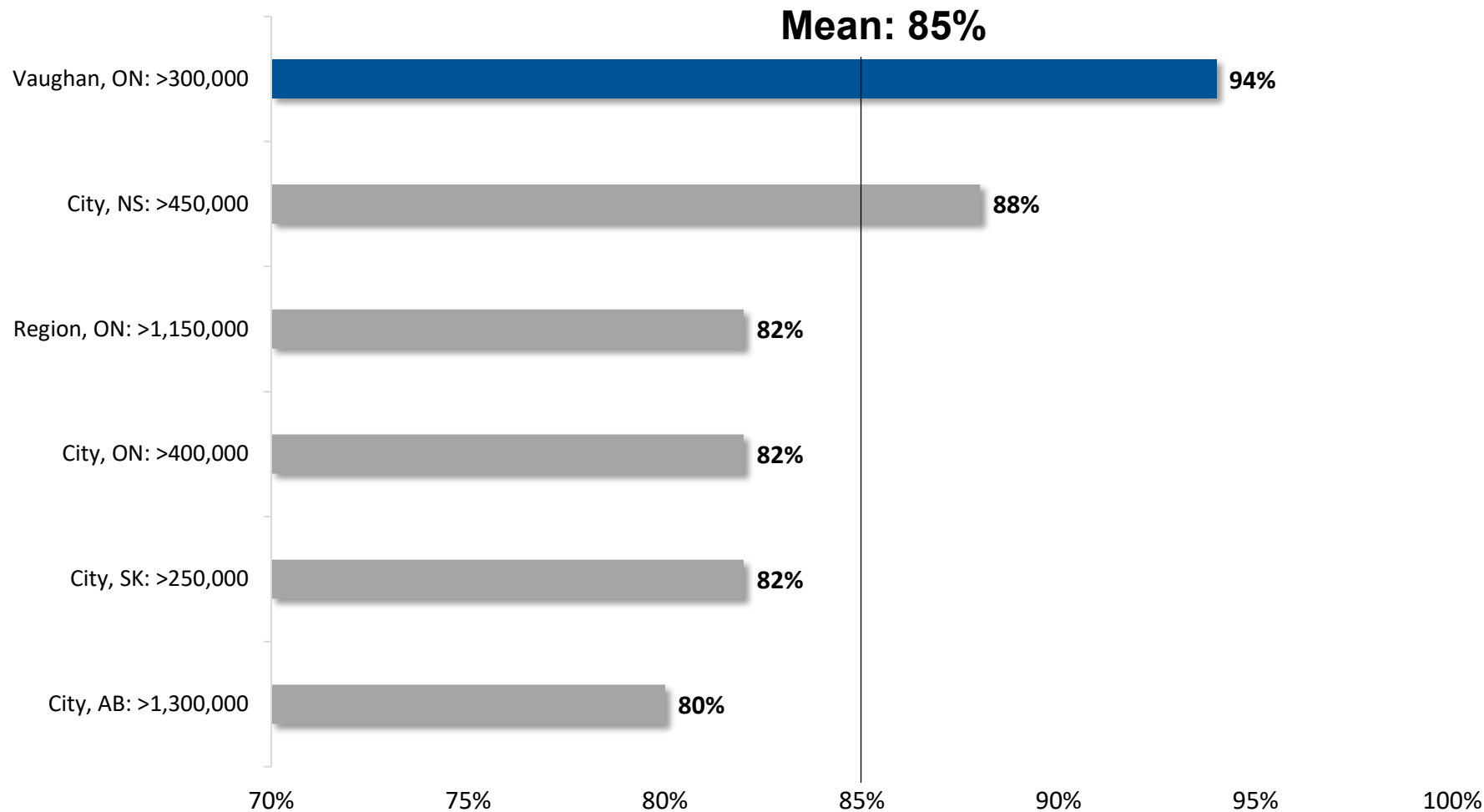
TOP2

94%

The vast majority of respondents are positive towards the overall quality of life in the City of Vaughan, with over 9 in 10 (TOP2: 94%) rating the quality of life as good or very good.

Respondents in Ward 4 (TOP2: 99%) are more likely to rate the quality of life as good or very good compared to Wards 1, 2 and 3 (TOP2: 92%, 93% and 94%, respectively), though quality of life is rated very high across all.

Quality of Life – Benchmark

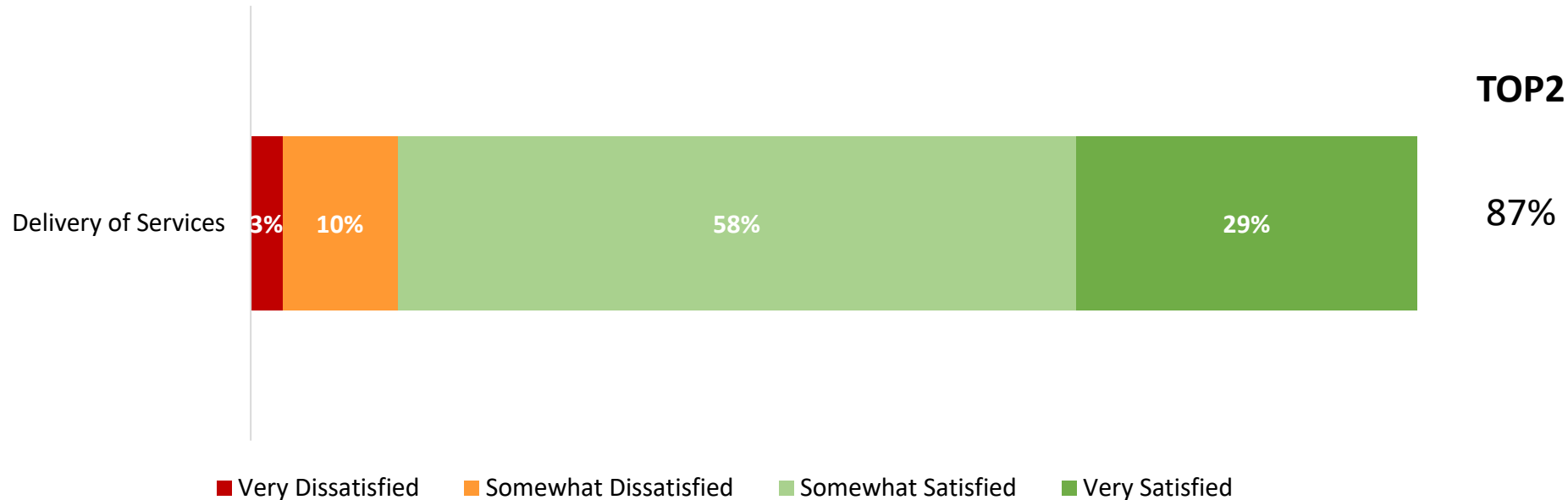


When compared with other similar municipalities across Canada, the City of Vaughan has the highest rating of quality of life.

This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2021-2022. Comparisons for this question include 5 municipalities across Canada, with populations ranging from ~250,000 to ~1,300,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

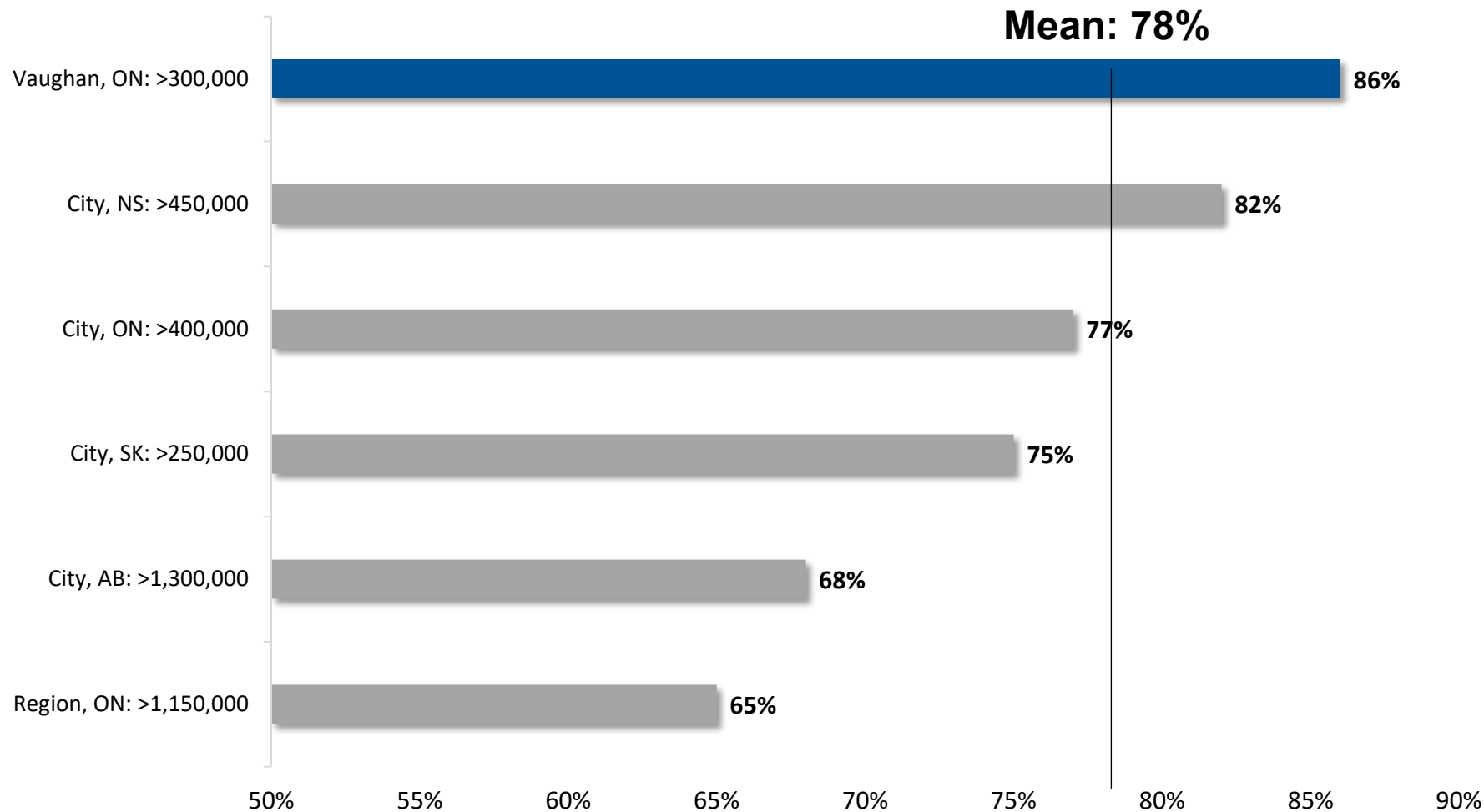
Quality of Services

Satisfaction with Delivery of Services



Majority of respondents (TOP2: 87%) are satisfied with the delivery of services provided by the City of Vaughan.

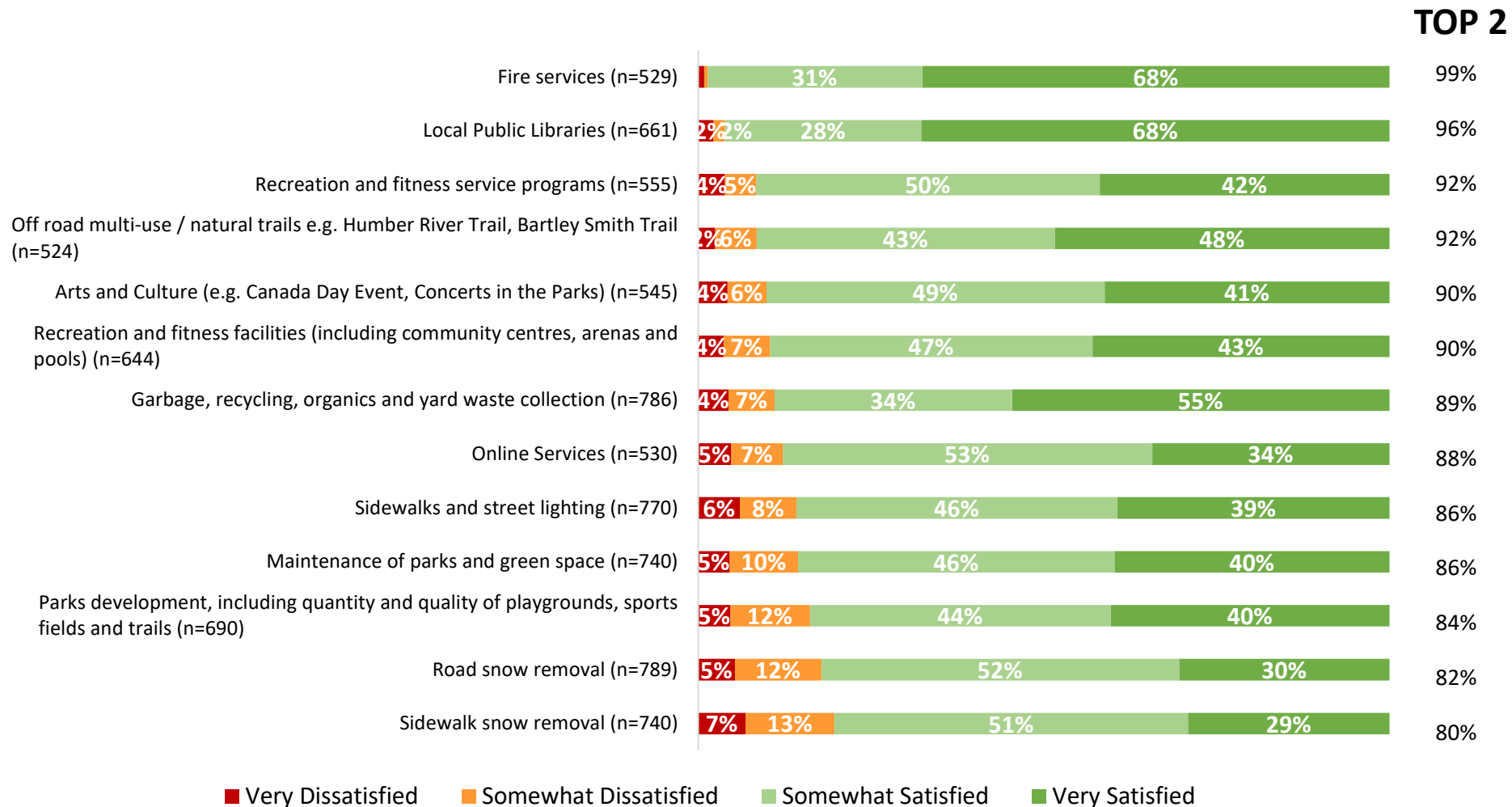
Satisfaction with Delivery of Services – Benchmarks



When compared with other similar municipalities across Canada, the City of Vaughan have the highest rating of Satisfaction with delivery of services.

This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2021-2022. Comparisons for this question include 5 municipalities across Canada, with populations ranging from ~250,000 to ~1,300,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

Satisfaction of Services Provided



Majority of respondents are satisfied with 24 out of 25 services provided by the City.

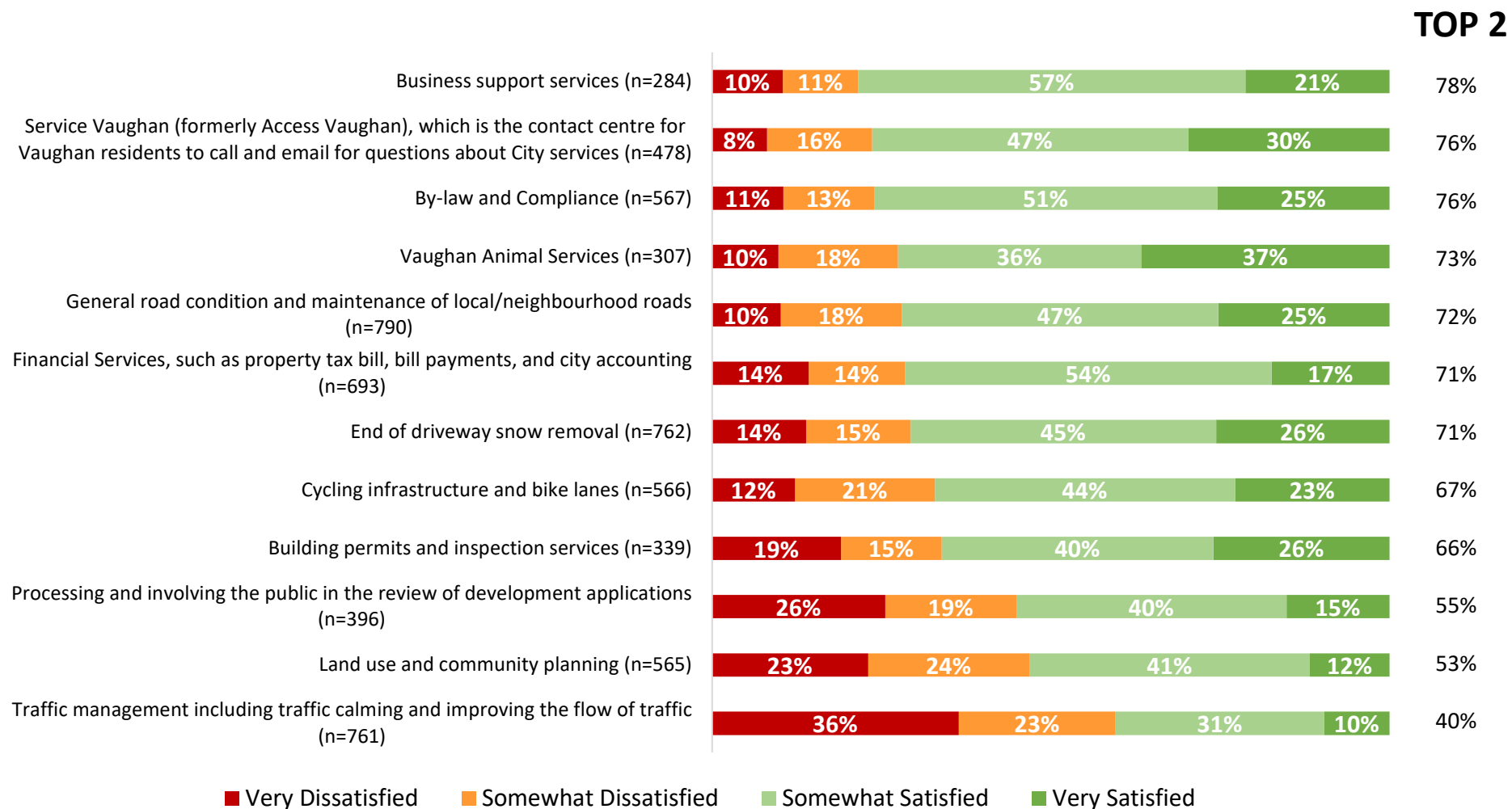
Respondents are most satisfied with fire services (TOP2: 99%), and more than 9 in 10 are satisfied with local public libraries (TOP2: 96%), recreation and fitness service programs (TOP2: 92%), and off-road multi-use / natural trails (TOP2: 92%)

Question Q4: And using the same scale, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the performance of the City of Vaughan on each of the following services?

Sample: Shown in chart above; varies for each area

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

Satisfaction of Services Provided (cont.)



Around 1 in 2 respondents are satisfied with the City's processing and involving of the public in the review of development applications (TOP2: 55%) and land use and community planning (TOP2: 53%).

Less than half of respondents are satisfied with traffic management (TOP2: 40%).

Question Q4: And using the same scale, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the performance of the City of Vaughan on each of the following services?

Sample: Shown in chart above; varies for each area

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

Satisfaction of Services Provided – TOP2 By Wards



| | Ward 1 | Ward 2 | Ward 3 | Ward 4 | Ward 5 |
|--|--------|--------|--------|--------|--------|
| Service Vaughan (formerly Access Vaughan), which is the contact centre for Vaughan respondents to call and email for questions about City services | 68% | 72% | 82% | 91% | 86% |
| Arts and Culture (e.g. Canada Day Event, Concerts in the Parks) | 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, such as property tax bill, bill payments, and city accounting | 70% | 65% | 67% | 82% | 81% |
| Fire services | 99% | 99% | 98% | 100% | 97% |
| Garbage, recycling, organics and yard waste collection | 83% | 93% | 93% | 95% | 88% |
| General road condition and maintenance of local/neighbourhood roads | 66% | 74% | 77% | 64% | 83% |
| Land use and community planning | 61% | 48% | 57% | 54% | 48% |
| Local Public Libraries | 98% | 95% | 99% | 97% | 96% |

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

Question Q4: And using the same scale, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the performance of the City of Vaughan on each of the following services?

Sample: Varies for each area

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

Satisfaction of Services Provided – TOP2 By Wards



| | Ward 1 | Ward 2 | Ward 3 | Ward 4 | Ward 5 |
|--|--------|--------|--------|--------|--------|
| Maintenance of parks and green space | 81% | 89% | 88% | 88% | 89% |
| Off road multi-use / natural trails e.g. Humber River Trail, Bartley Smith Trail | 93% | 90% | 97% | 91% | 93% |
| Online Services | 89% | 82% | 80% | 98% | 88% |
| Parks development, including quantity and quality of playgrounds, sports fields and trails | 84% | 88% | 87% | 83% | 88% |
| Processing and involving the public in the review of development applications | 65% | 36% | 56% | 64% | 56% |
| Recreation and fitness facilities (including community centres, arenas and pools) | 88% | 93% | 93% | 84% | 85% |
| Recreation and fitness service 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 including traffic calming and improving the flow of traffic | 31% | 40% | 43% | 46% | 46% |
| Vaughan Animal Services | 69% | 68% | 86% | 91% | 63% |

Ward 1 respondents are more likely to be satisfied with processing and involving the public in the review of development applications than those in Ward 2.

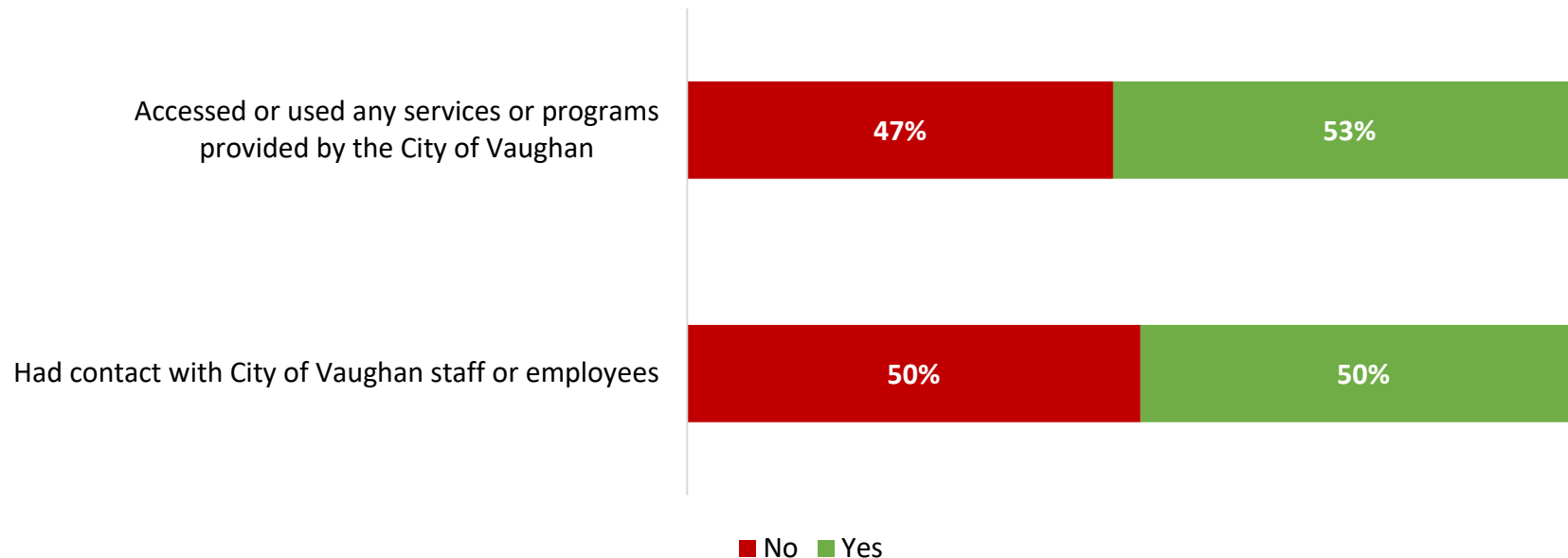
Ward 4 respondents are more likely to be satisfied with online services and compared to those in Wards 2 and 3, and also more likely to be satisfied with animal services compared to Ward 5.

Question Q4: And using the same scale, would you say you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with the performance of the City of Vaughan on each of the following services?

Sample: Varies for each area

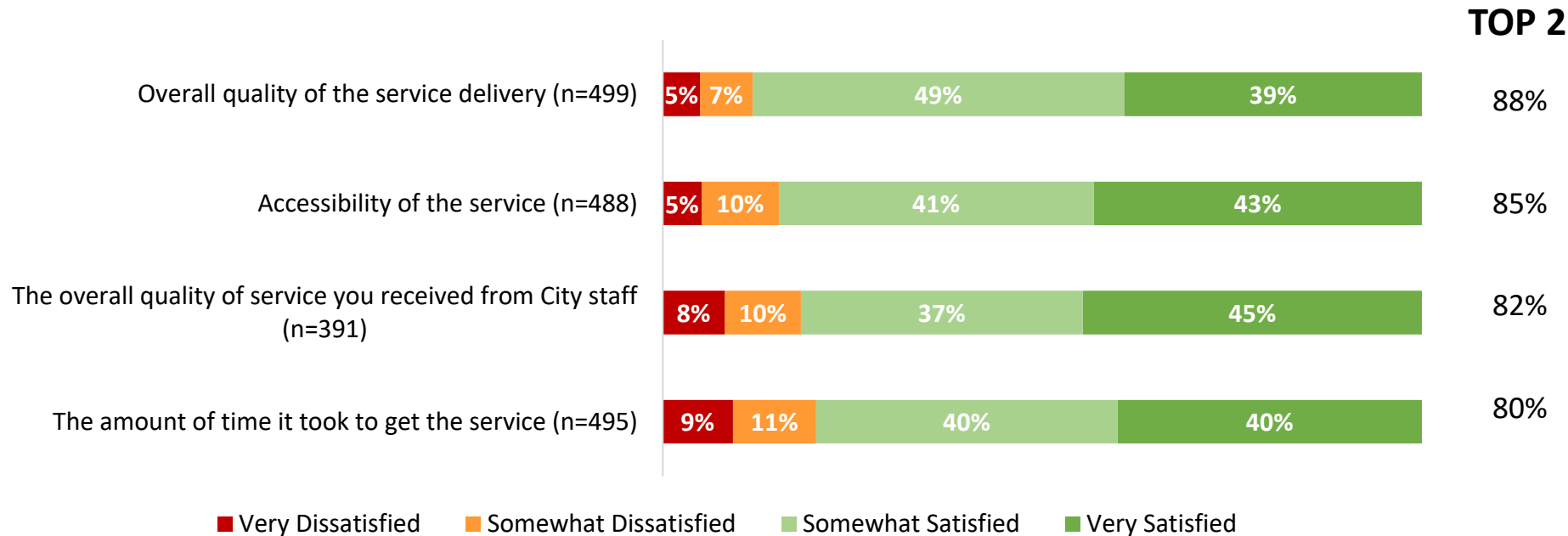
Framework: All respondents (exc. Don't know / Refused / Unspecified Ward)

Contact and Using Services Provided by the City



1 in 2 respondents (53%) have accessed or used services or program provided by the City. Around the same number (50%) also had contact with the City's staff or employees.

Satisfaction with Aspects of Services



Respondents are most satisfied with the over quality of service delivery from the City, with 9 in 10 (TOP2: 88%) saying they are satisfied, and specifically 2 in 5 (39%) saying they are very satisfied.

More than 8 in 10 (TOP2: 85%) say they are satisfied with the accessibility of the service, with another 2 in 5 (43%) saying they are very satisfied.

8 in 10 (TOP2: 82%) also express their satisfaction with the overall quality of service received from City staff, with over 2 in 5 (45%) saying they are very satisfied.

Question Q6: Based on your most recent experience with the City, how satisfied were you with....

Sample: Shown in chart above; varies for each area

Framework: Respondents who contacted City of Vaughan or accessed/used services or programs provided by City of Vaughan (exc. Don't know / Refused)

Satisfaction with Aspects of Services – By Wards



| | 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% |

There are no significant differences between wards on satisfaction levels with different aspects of their last experience with the City, with one exception.

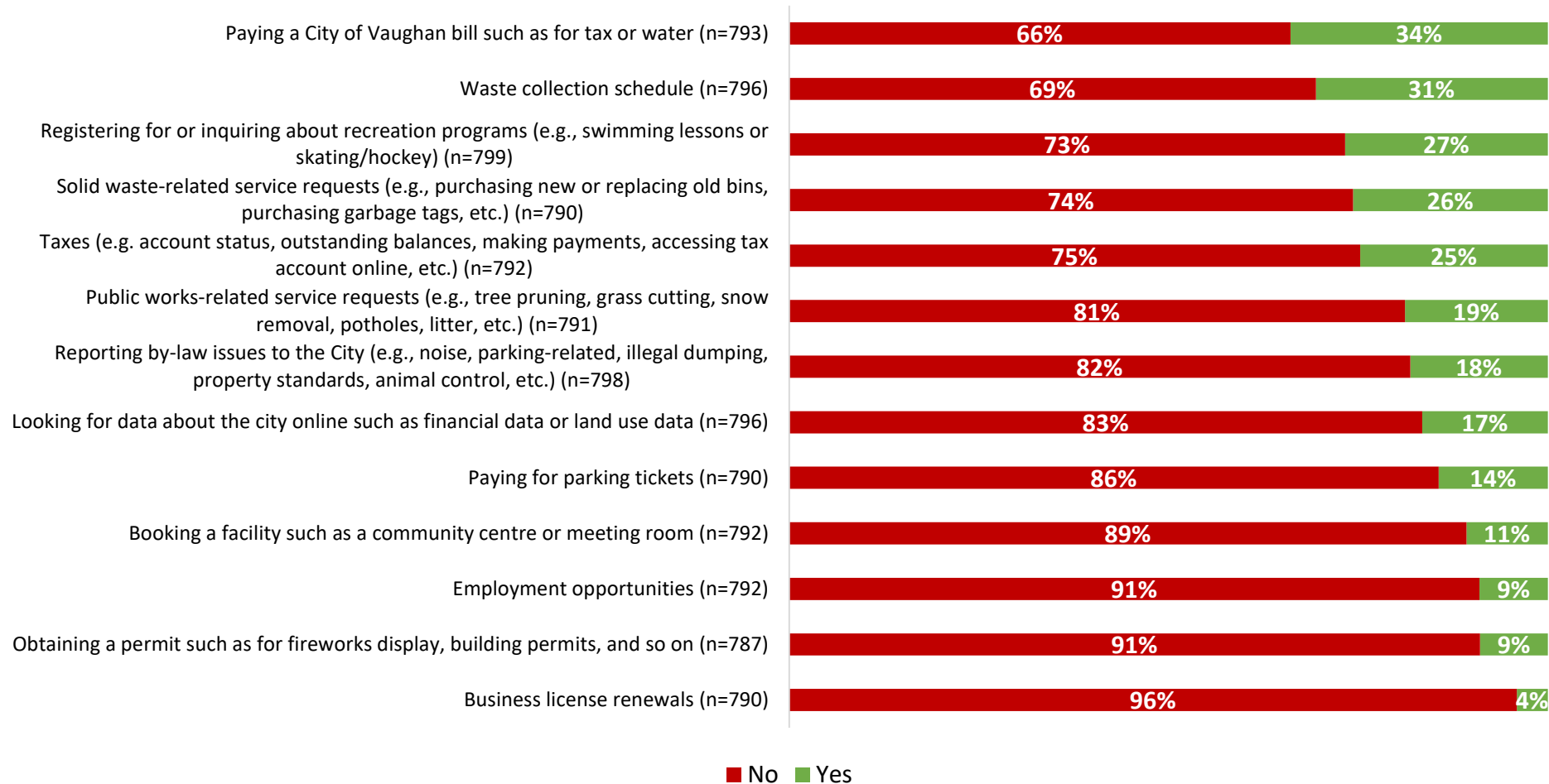
Ward 4 respondents are more likely to be satisfied with the overall quality of service delivery compared to those in Ward 2.

Question Q6: Based on your most recent experience with the City, how satisfied were you with....

Sample: Varies for each area

Framework: Respondents who contacted City of Vaughan or accessed/used services or programs provided by City of Vaughan (exc. Don't know / Refused / Unspecified Ward)

Services that Citizens have Contacted the City for



Within the past 12 months, majority of respondents have not contacted the City for, or looked up any listed items.

About 1 in 3 respondents have contacted the City for, or looked up how to:

- Pay a City of Vaughan bill (34%)
- Waste collection schedule (31%)
- Registering for or inquiring about recreation programs (27%)

However, only 1 in 10 or fewer have contacted the City for, or looked up how to:

- Book a facility (11%)
- Employment opportunities (9%)
- Obtaining a permit (9%)
- Business license renewals (4%)

Question Q7: In the past 12 months, have you contacted the City for, or looked up how to do, any of the following?

Sample: Shown in chart above; varies for each area

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

Gap Analysis

The Gap analysis shows the difference between how satisfied respondents are with each City service and the impact of the services to respondents' overall service satisfaction.

- **Satisfaction scores** are plotted vertically (along the Y-axis). They represent overall stated satisfaction (TOP2%) with each of the individual City services.
- **Impact on overall satisfaction scores** are plotted horizontally across the bottom of the chart (along the X-axis). They are based on a statistical method called regression analysis that determines how a specific service (“independent variable”) contributes to respondents' overall satisfaction with the services (“dependent variable”). Impact on overall satisfaction can also be referred to as perceived importance.

As a result of the analysis, City services have distributed among four areas:

1. 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.

2. Secondary Areas for Improvement:

- Services that have relatively high impact on overall satisfaction and have lower individual satisfaction scores. This should be the secondary area of focus to improve the satisfaction scores.

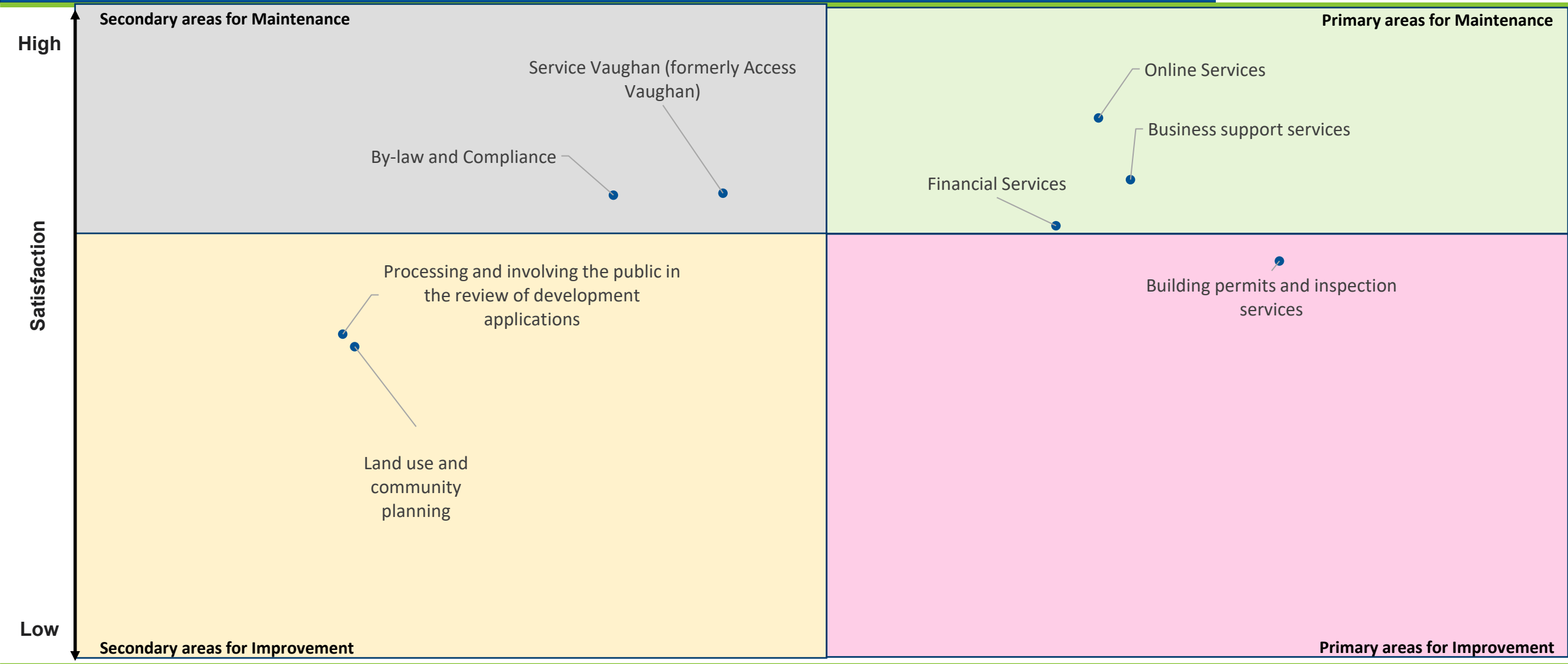
3. Primary Areas for Maintenance:

- 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.

4. 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.

Gap Analysis – Office / Administrative Services



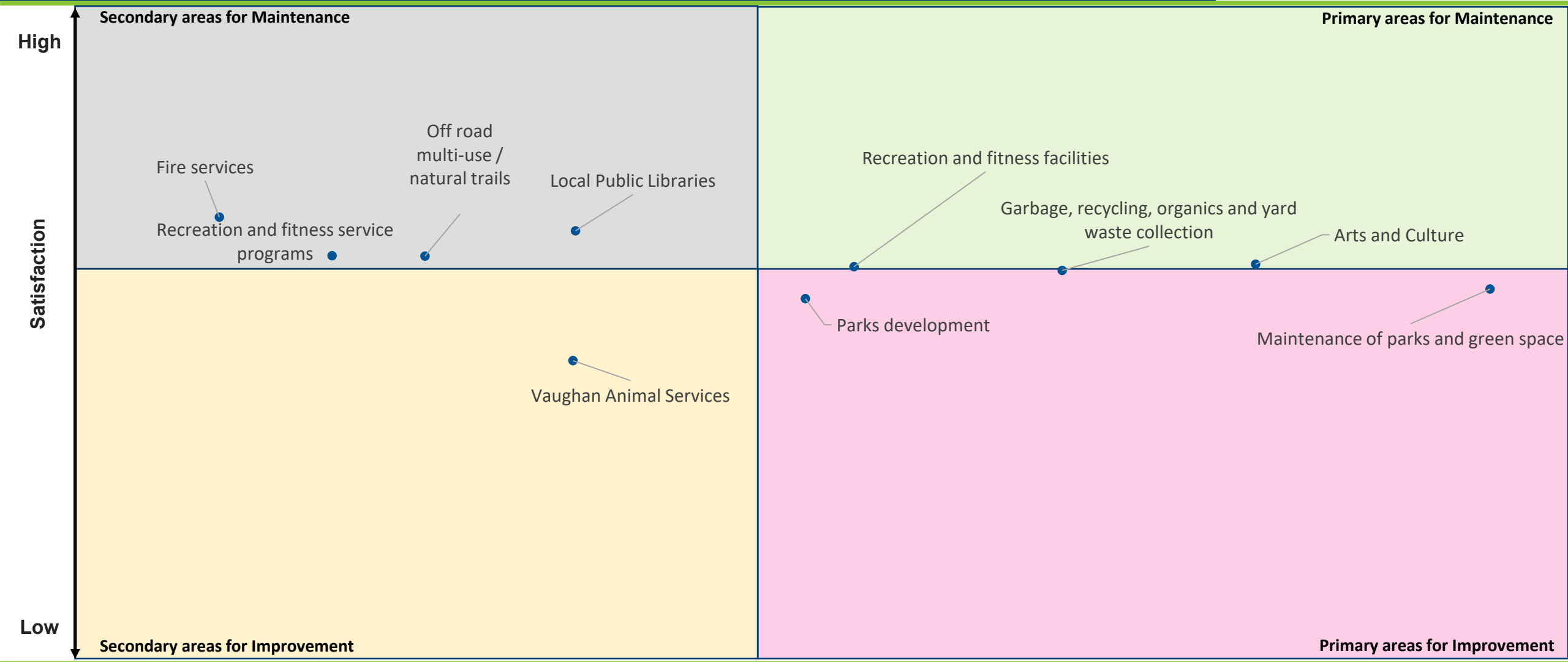
The services that the city should consider as **primary areas for improvement** include:

- Building permits and inspection services

The services that the city should consider as **secondary areas for improvement** include:

- Processing and involving the public in the review of development applications
- Land use and community planning

Gap Analysis – Recreational / Public Services



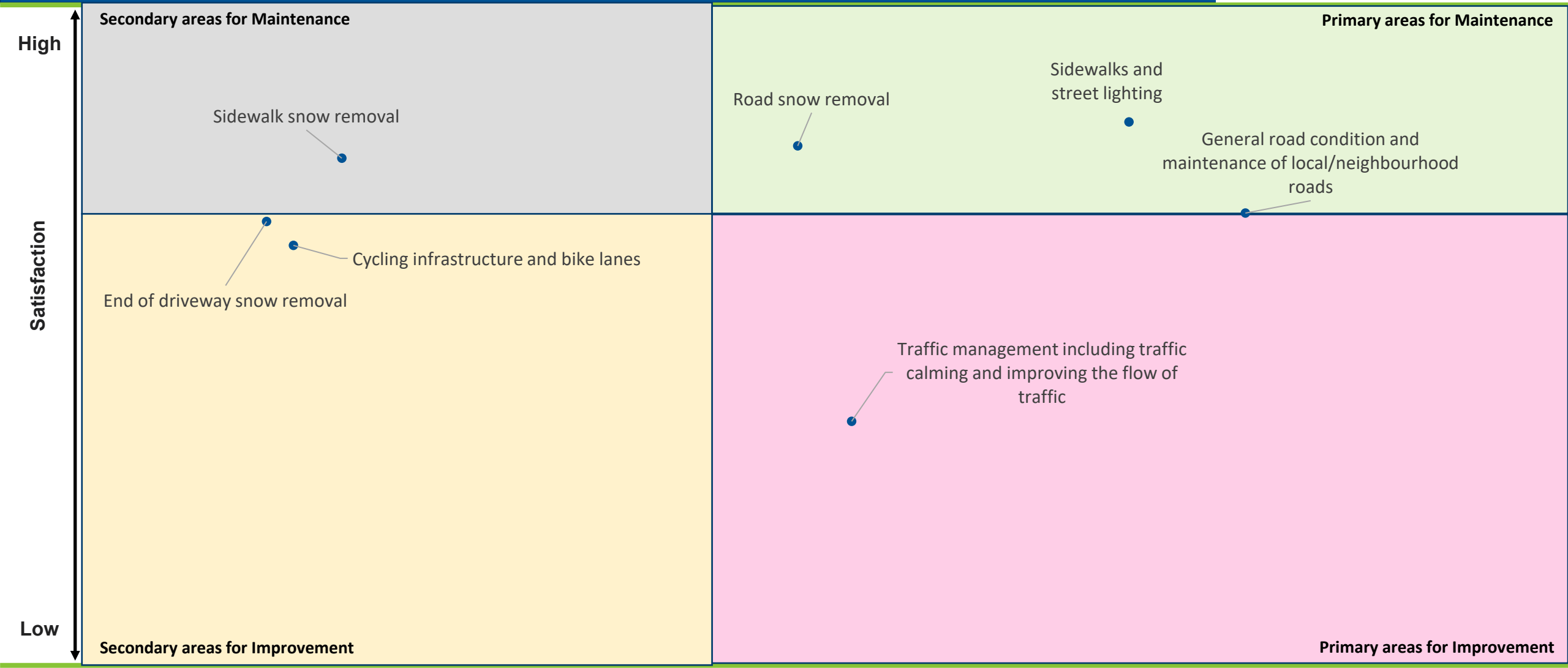
The services that the city should consider as **primary areas for improvement** include:

- Parks development
- Maintenance of parks and green space

The services that the city should consider as **secondary areas for improvement** include:

- Vaughan Animal Services

Gap Analysis – Road and Transportation Services



The services that the city should consider as **primary areas for improvement** include:

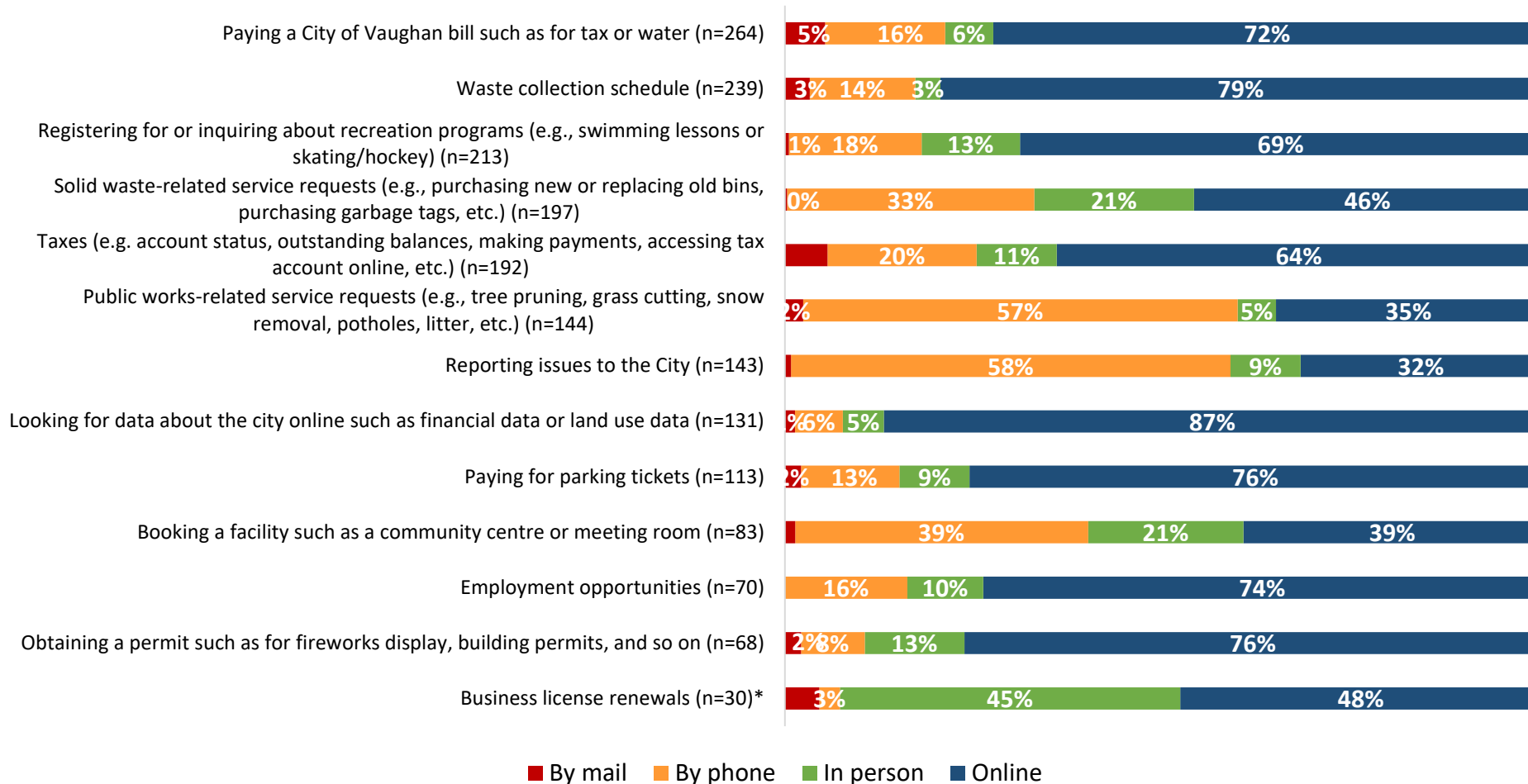
- Traffic management including traffic calming and improving the flow of traffic

The services that the city should consider as **secondary areas for improvement** include:

- End of driveway snow removal
- Cycling infrastructure and bike lanes

Communication With The City

Methods of Contacting the City – Most Recently



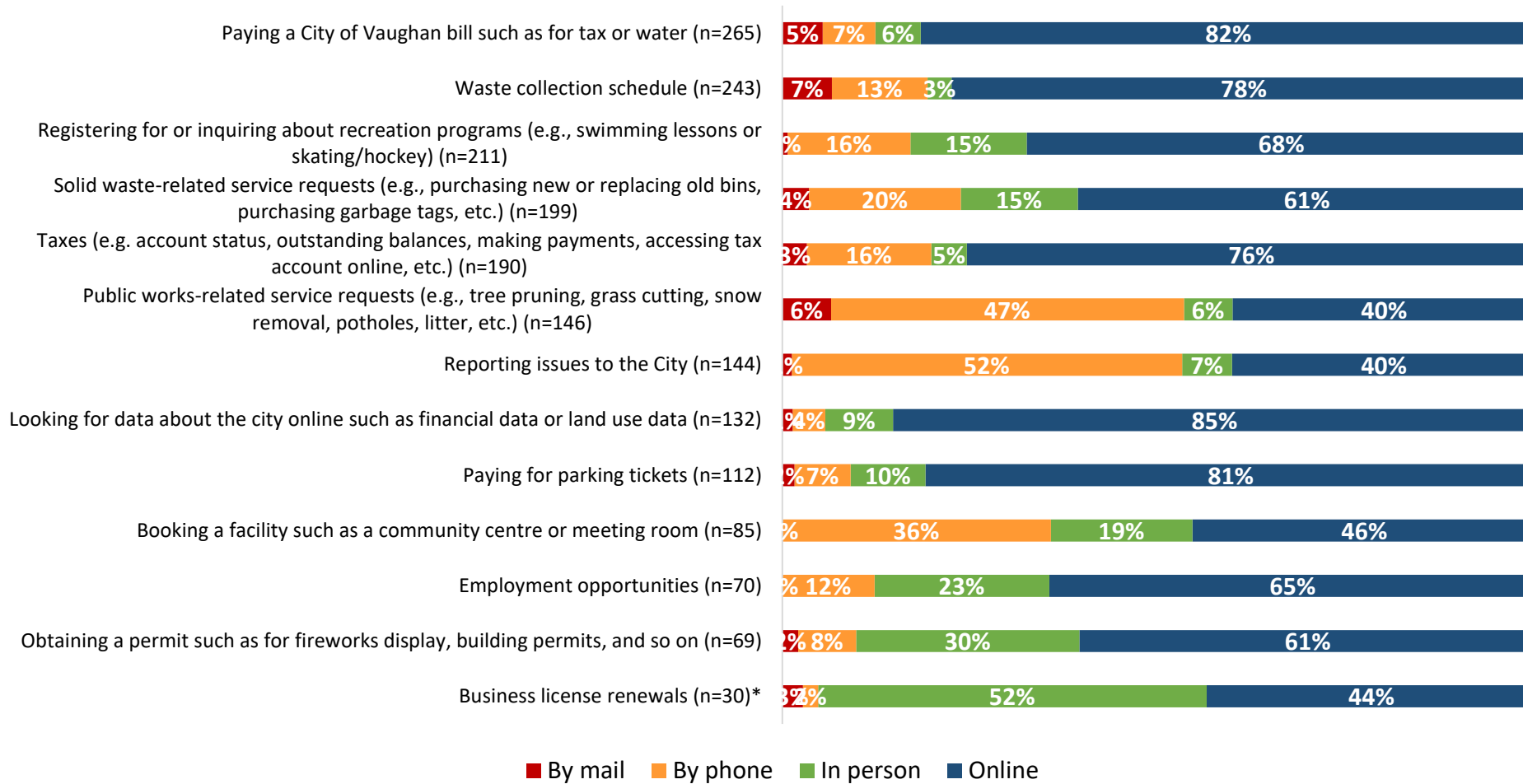
Online is the most popular method used to contact or look up for information.

- 9 in 10 respondents have looked for data about the city online (87%).
- 8 in 10 respondents have contacted or looked into waste collection scheduling (79%), obtaining a permit (76%), and paying for parking tickets (76%) using the online method.

However, reporting issues to the City (58%) and Public works-related service requests (57%) are mostly done by phone.

Question Q8: Thinking of your most recent experience, which method did you use when you contacted the city about, or looked up how to do, the following? Was it in-person, online, by phone, or by mail?
Sample: Shown in chart above; varies for each area, *: small sample size; interpret results with caution
Framework: Respondents who contacted the city or looked up how to do the following (exc. Don't know / Refused)

Methods of Contacting the City – In the Future

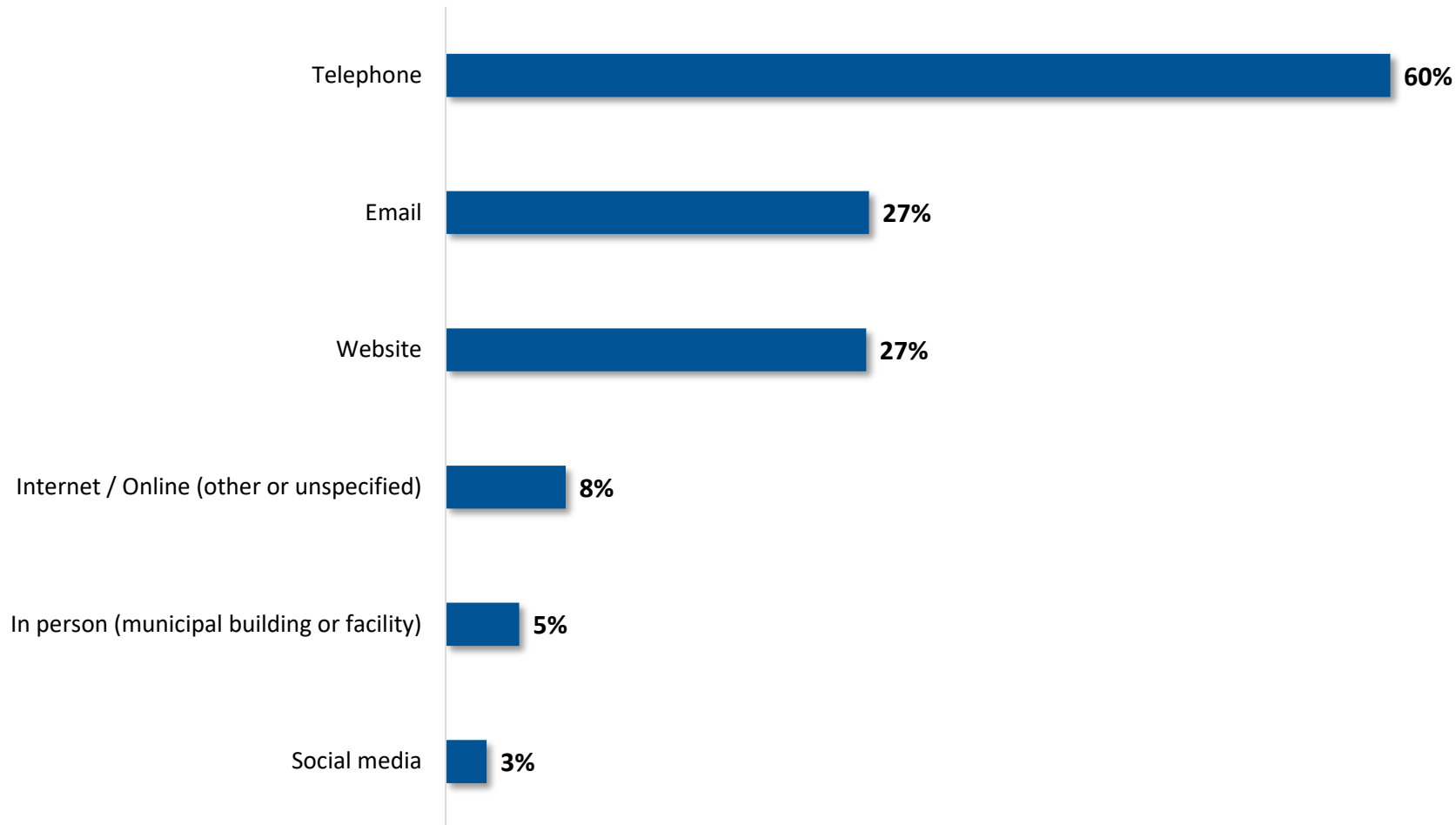


Online is also the most popular method respondents would want to use if they were to contact the City or look up the same item.

- Almost 9 in 10 respondents would prefer to look up data about the city online (85%).
- About 8 in 10 prefer to pay a bill (82%), pay for parking tickets (81%), and look up waste collection scheduling (78%) online.

Question Q9: Thinking of the next time you will do the following, which method would you prefer to use for....? Would you prefer in-person, online, by phone or by mail?
Sample: Same as previous slide, *: small sample size; interpret results with caution
Framework: Respondents who contacted the city or looked up how to do the following (exc. Don't know / Refused)

Preferred Methods of Contacting the City



When it comes to contacting the City for advice, information, or to inquire about a service, 3 in 5 (60%) prefer to do so via telephone.

1 in 4 (27%) prefer email and website as a method of contacting the City for advice, information, or to inquire about a service.

*note: not shown if <3%

Question 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)

Preferred Methods of Contacting the City – By Wards



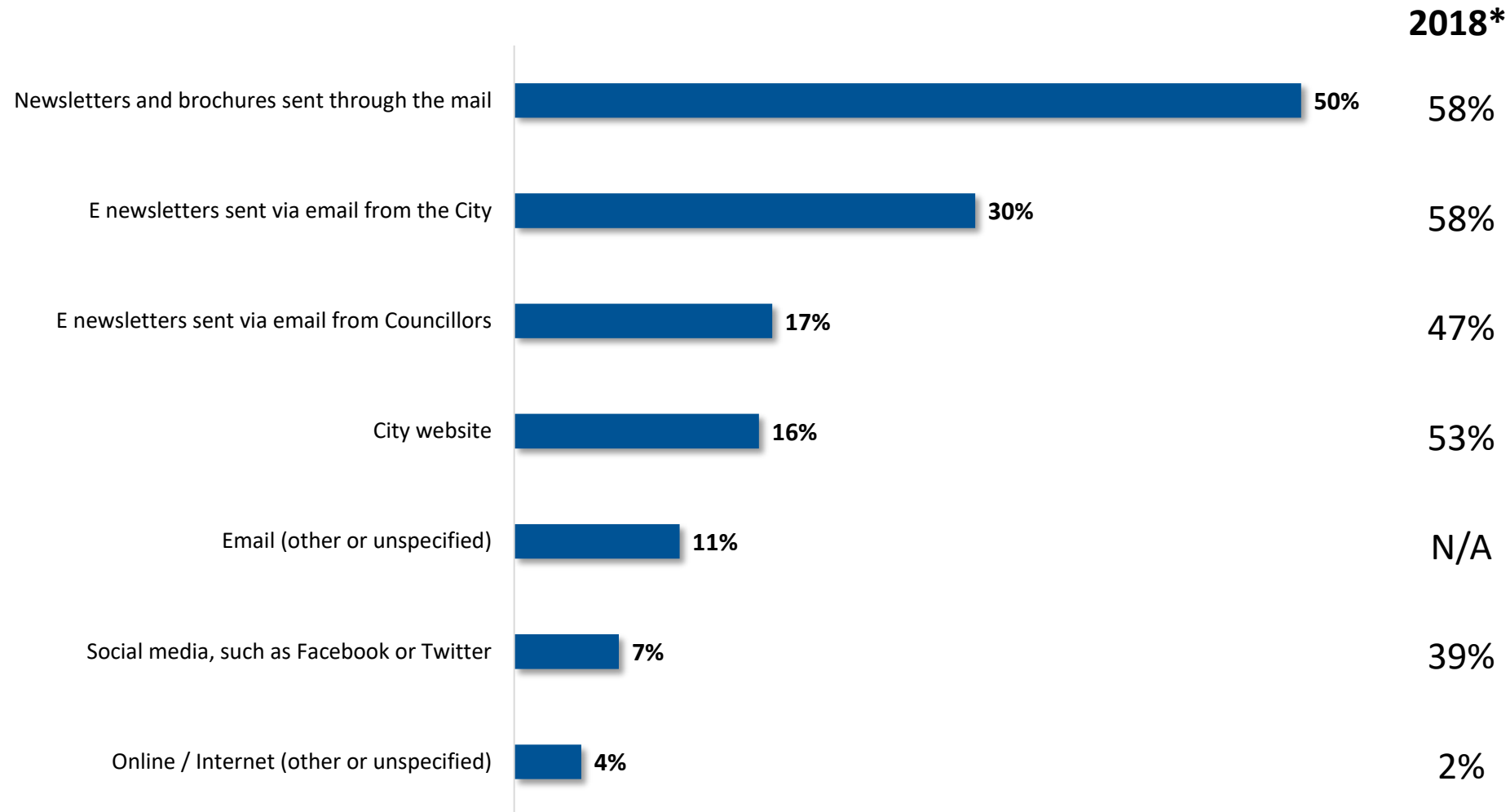
| | Ward 1 | Ward 2 | Ward 3 | Ward 4 | Ward 5 |
|-----------|--------|--------|--------|--------|--------|
| Email | 33% | 15% | 28% | 25% | 29% |
| Telephone | 68% | 68% | 57% | 58% | 56% |

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

*note: not shown if <3%

Question 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)

Methods for Receiving Information



Half of respondents (50%) prefer to receive information from the City via newsletters and brochures sent through the mail, followed by E newsletters sent via email from the City (30%).

**Note: This question was presented differently in 2018 and 2022. Data comparisons between the two should be done so with caution.*

*note: not shown if <3%

Question Q13: How do you prefer to receive information from the City of Vaughan? [Multi-mention] **(Do not read)** / Question from 2018 survey: What are your preferred methods for the City of Vaughan to communicate with you? **(Read list)**

Sample: n=796

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

Methods for Receiving Information – By Wards



| | 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% |

Ward 4 respondents prefer to receive information from the City via the City’s website, significantly more so than 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.

*note: not shown if <3%

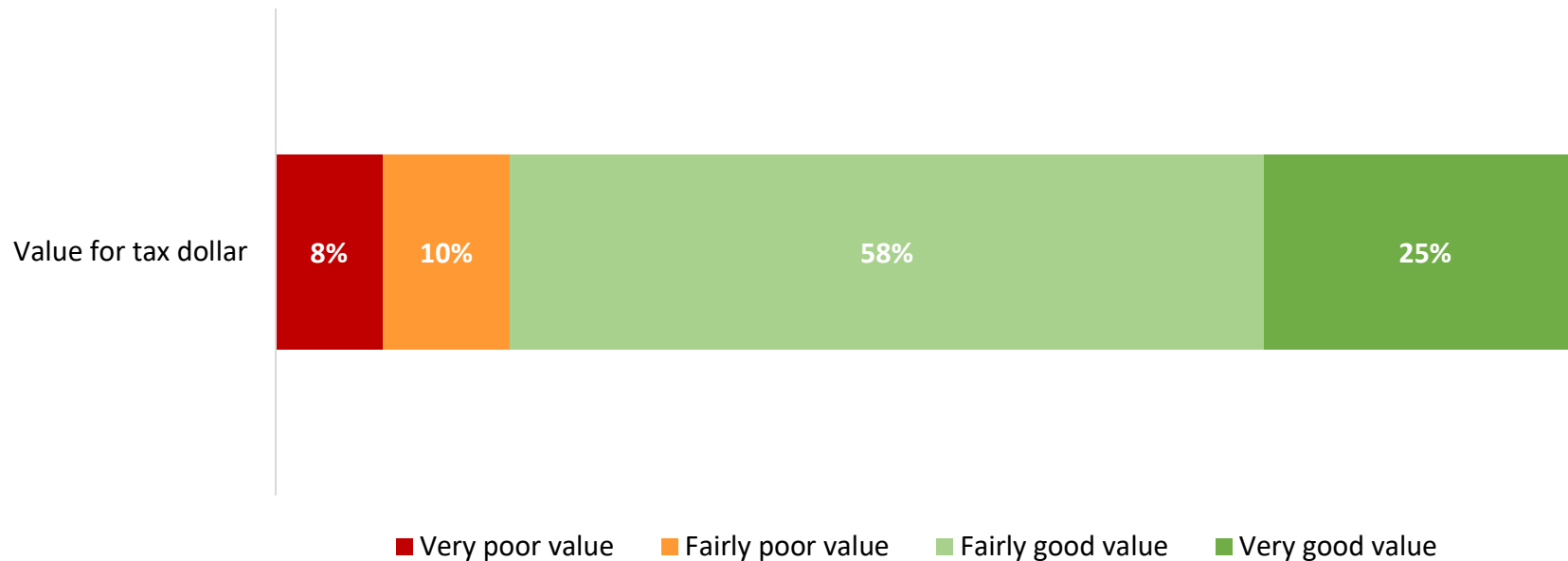
Question Q13: How do you prefer to receive information from the City of Vaughan? [Multi-mention] **(Do not read)** / Question from 2018 survey: What are your preferred methods for the City of Vaughan to communicate with you? **(Read list)**

Sample: n=796

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

Taxation

Value for Tax Dollars



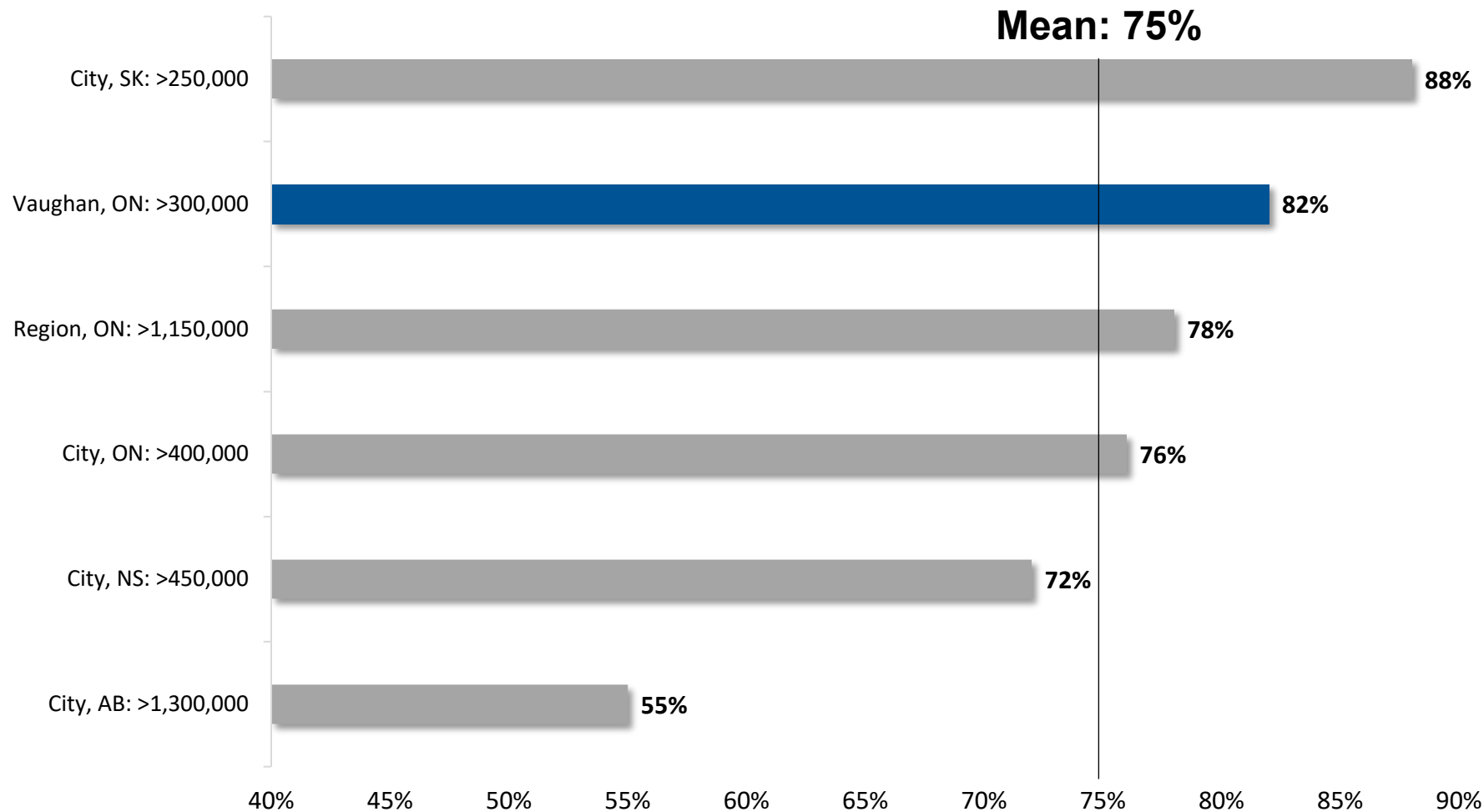
TOP2

82%

Majority of respondents (TOP2: 82%) think they received an overall good value for their tax dollars.

Respondents from Ward 4 (TOP2: 91%) and Ward 5 (TOP2: 91%) are more likely to say that they get a good or very good value for their tax dollars compared to those in Ward 2 (TOP2: 77%)

Value for Tax Dollars – Benchmarks



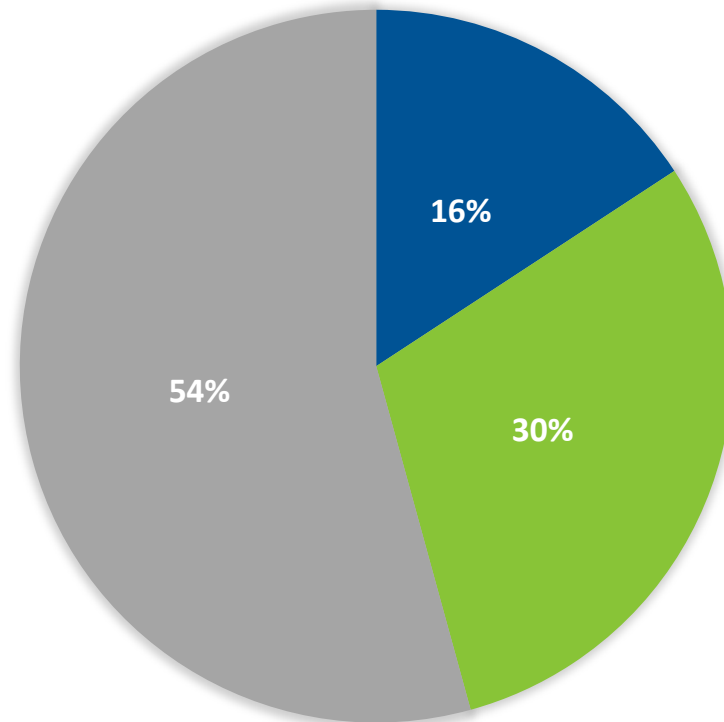
When compared with other similar municipalities across Canada, the City of Vaughan has the second highest rating of Value for tax dollars, and scores above the mean.

This benchmark analysis is based on the results of surveys that asked this same question and were conducted between 2021-2022. Comparisons for this question include 5 municipalities across Canada, with populations ranging from ~250,000 to ~1,300,000. Populations shown are rounded to the nearest 50,000 based on 2021 Census data.

Question Q10: Thinking about all the programs and services you receive from The City of Vaughan, would you say that overall you get a very good, fairly good, fairly poor, or very poor value for your tax dollars?

Sample: n=763

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

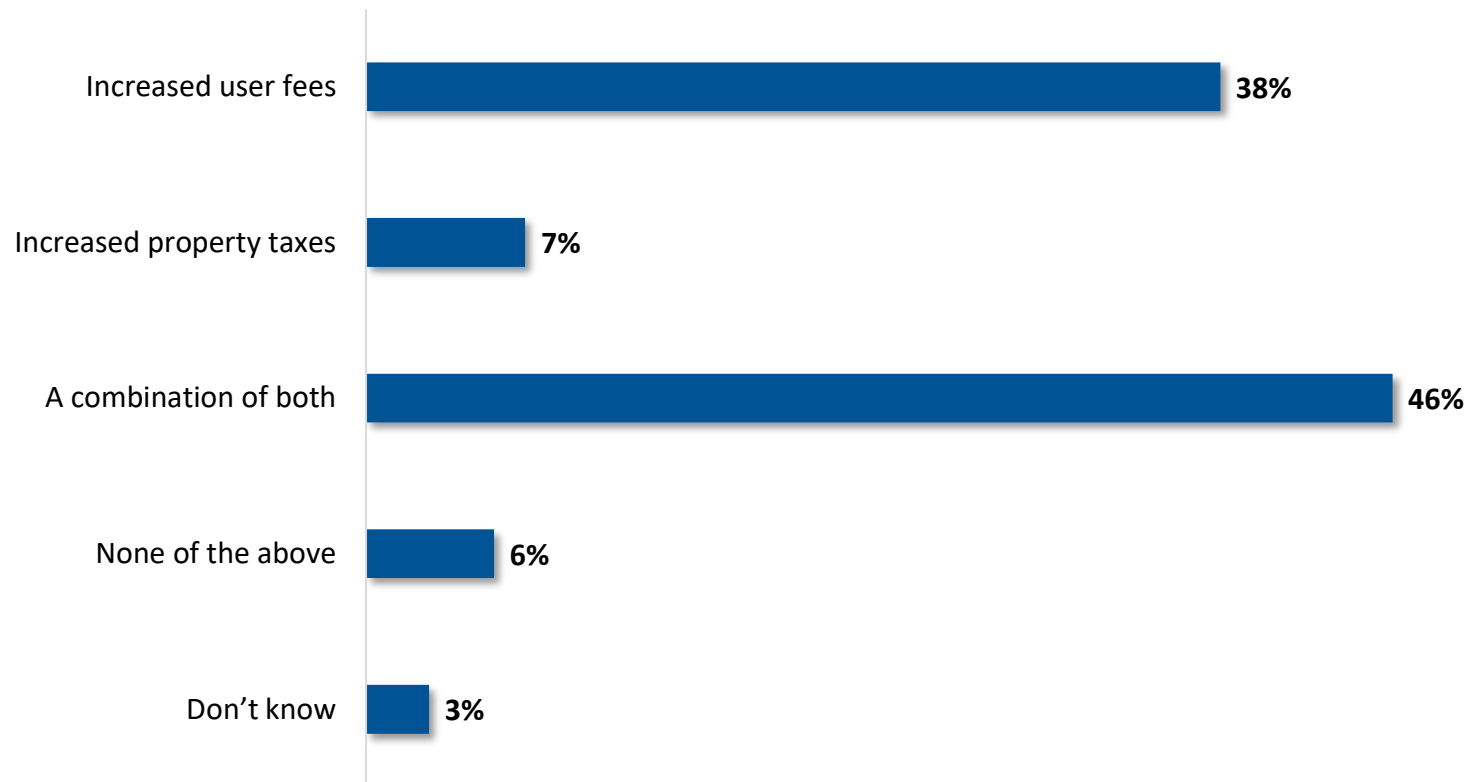


- The City of Vaughan should add new services and facilities, even if it means taxes or user fees must increase
- The City of Vaughan should maintain existing service levels, even if it means taxes or user fees must increase
- The City of Vaughan should not increase taxes or user fees, even if it means cuts to services

Around half (54%) of respondents do not want the City to increase taxes, even if it means cuts to services.

About 1 in 3 (30%) think the City should maintain existing services level, even if it means taxes or user fees must increase, and 1 in 6 (16%) think the City should add new services and facilities, even if it means taxes or user fees must increase.

Balance of Taxation and Services (cont.)

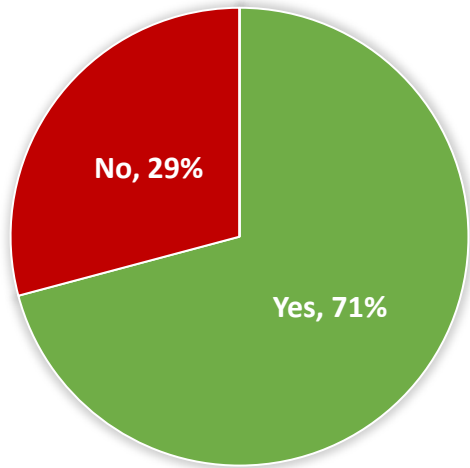


If maintaining service levels or adding services and facilities meant an increased cost to provide these services, the plurality of respondents (46%) would prefer to pay for this through a combination of both increase user fees and increase property taxes.

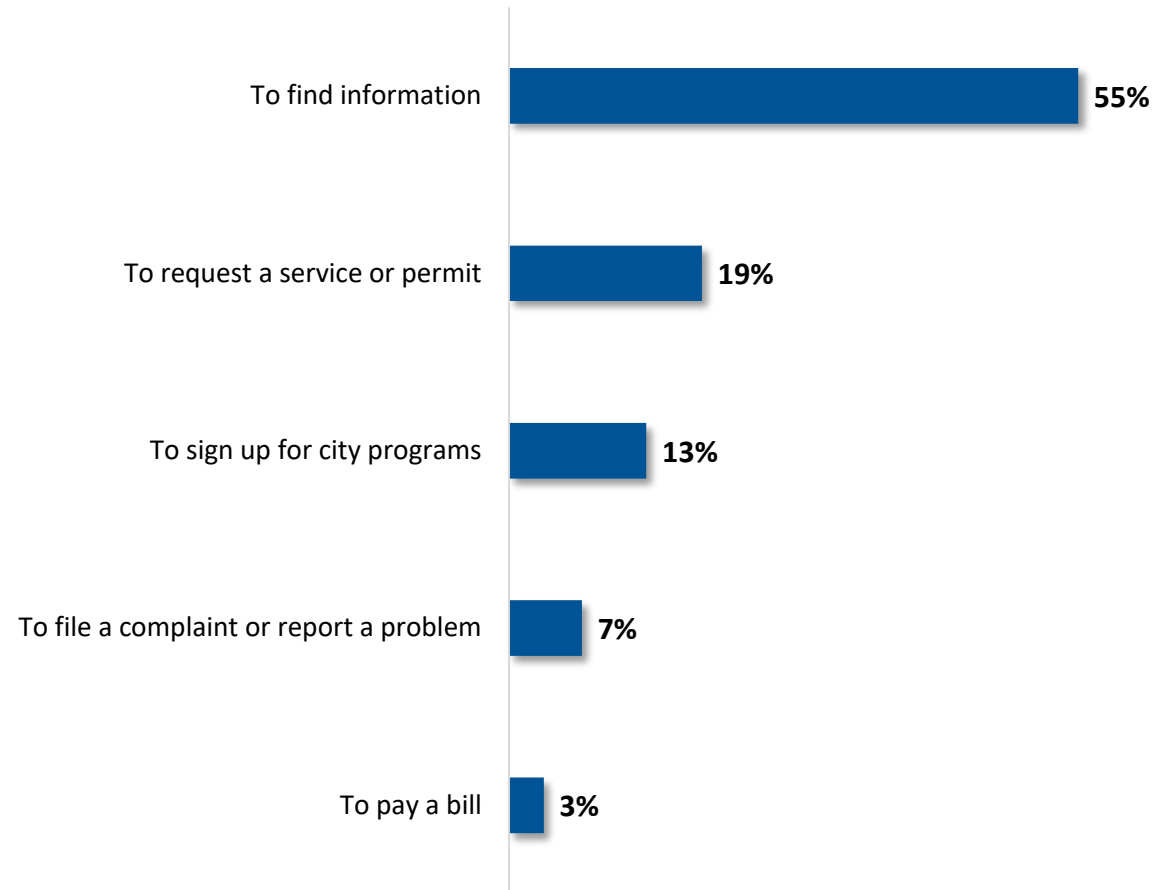
Public Information and Engagement

Reasons for Visiting City of Vaughan's Website

Visited The City of Vaughan's Website



Reason for Website Visit



7 in 10 respondents (71%) have 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 requesting a service or permit (19%).

Respondents from Ward 1 (74%), Ward 4 (79%) and Ward 5 (74%) are more likely to visit the City's website than those in Ward 2 (58%).

- Respondents from Ward 5 (75%) are more likely to visit the City's website to find information compared to those in Ward 1 and Ward 2 (49% and 51%, respectively).

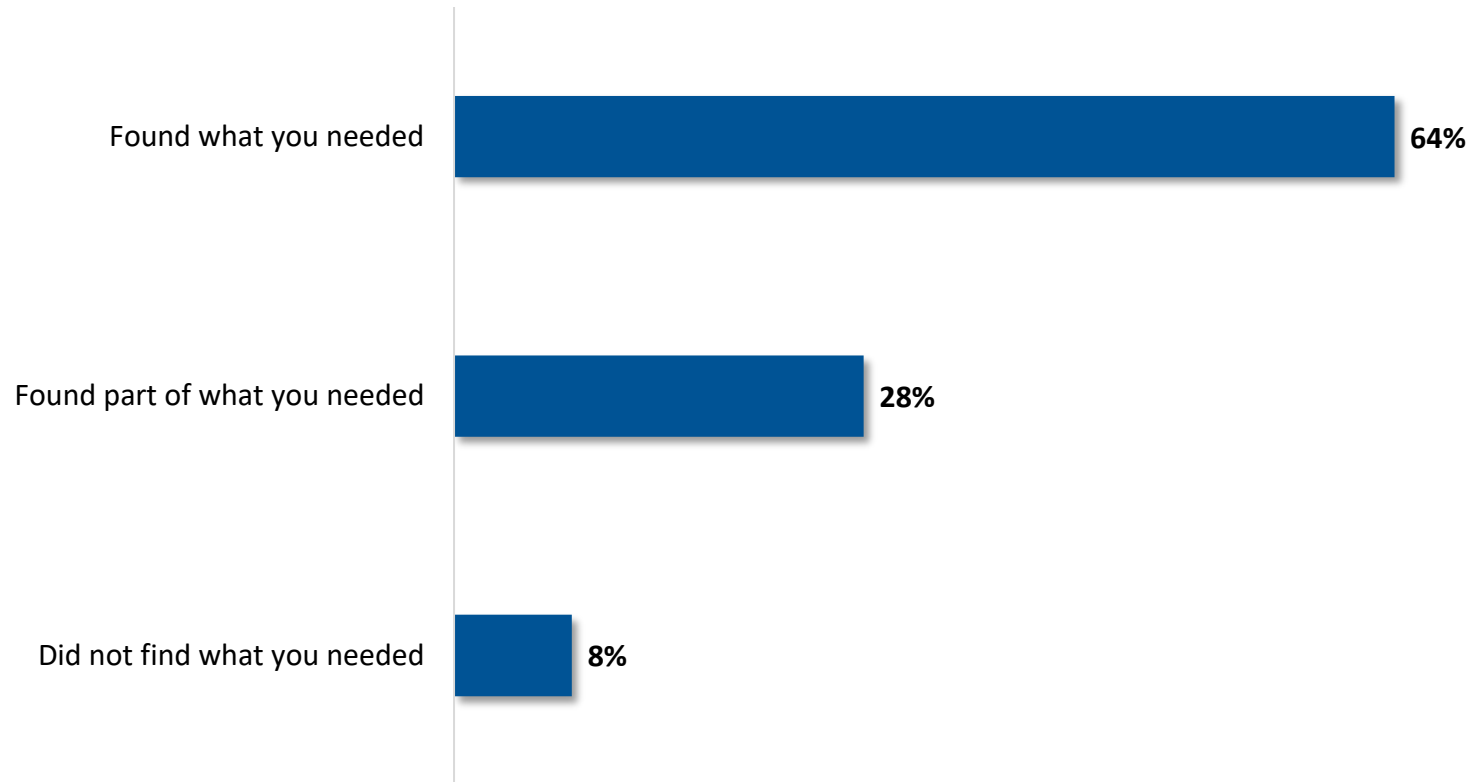
*note: not shown if <3%

Question Q15/Q16: Have you been to the City of Vaughan's website in the past 12 months? / Thinking of the last time you visited the City of Vaughan's website, what were you looking for? Was it...

Sample: [Q15/Left] n=791 / [Q16/Right] n=551

Framework: [Left] All respondents (exc. Don't know) / [Right] Respondents who have been to the City of Vaughan's website in the past 12 months (exc. Don't know / Refused)

Visiting City of Vaughan's Website



Generally, the majority of respondents who have been to the City of Vaughan's website have found (64%) or partially found (28%) what they need during their last visit.

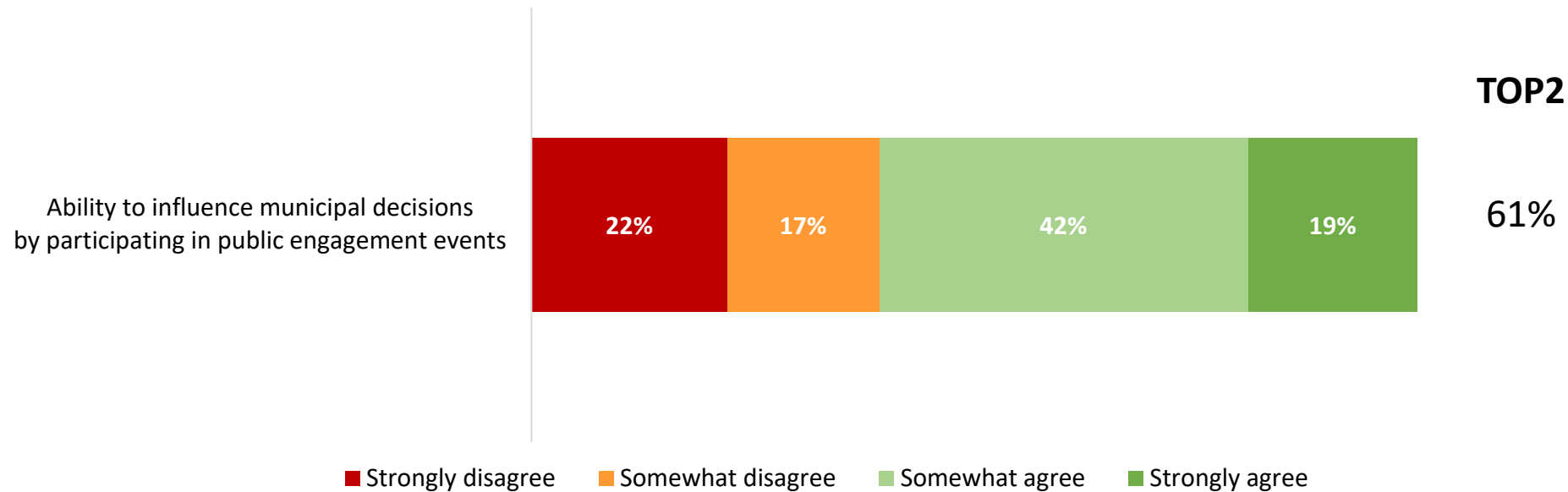
Respondents from Ward 3 (38%) are more likely to have found part of what they needed compared to Ward 1 (19%).

Question Q17: And still thinking of the last time you visited the City of Vaughan's website, would you say that you....

Sample: n=557

Framework: Respondents who have been to the City of Vaughan's website in the past 12 months (exc. Don't know)

Ability to Influence Municipal Decisions



3 in 5 respondents (TOP2: 61%) agree that they can influence municipal decisions affecting Vaughan by participating in public engagement events.

- Males are more likely to agree that they can influence municipal decisions affecting Vaughan by participating in public engagement events compared to Females (68% vs 55%, respectively).
- Respondents from Ward 1 (TOP2: 67%) and Ward 4 (TOP2: 80%) are more likely to agree that they can influence municipal decisions affecting Vaughan by participating in public engagement events compared to Wards 2 and 5 (TOP2: 51% and 48%, respectively).

Question Q18: Would you strongly agree, somewhat agree, somewhat disagree, or strongly disagree that you can influence municipal decisions affecting Vaughan by participating in public engagement events?

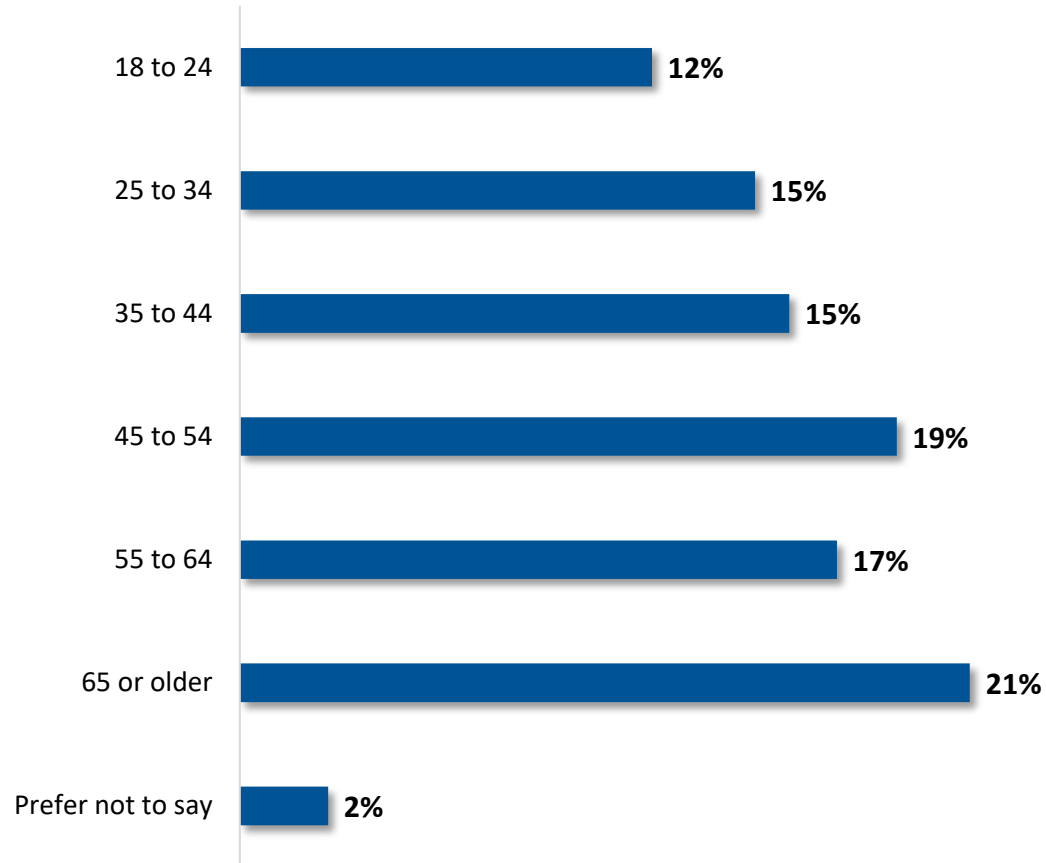
Sample: n=755

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

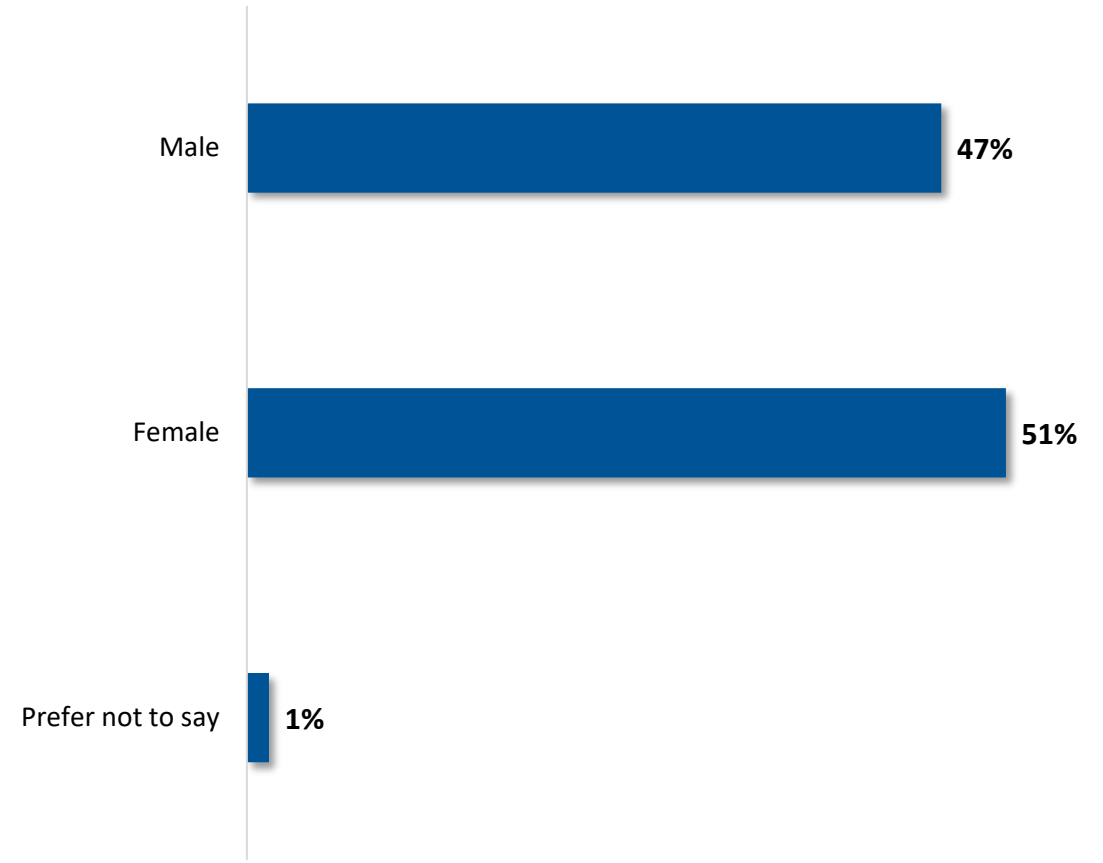
Demographics



Age

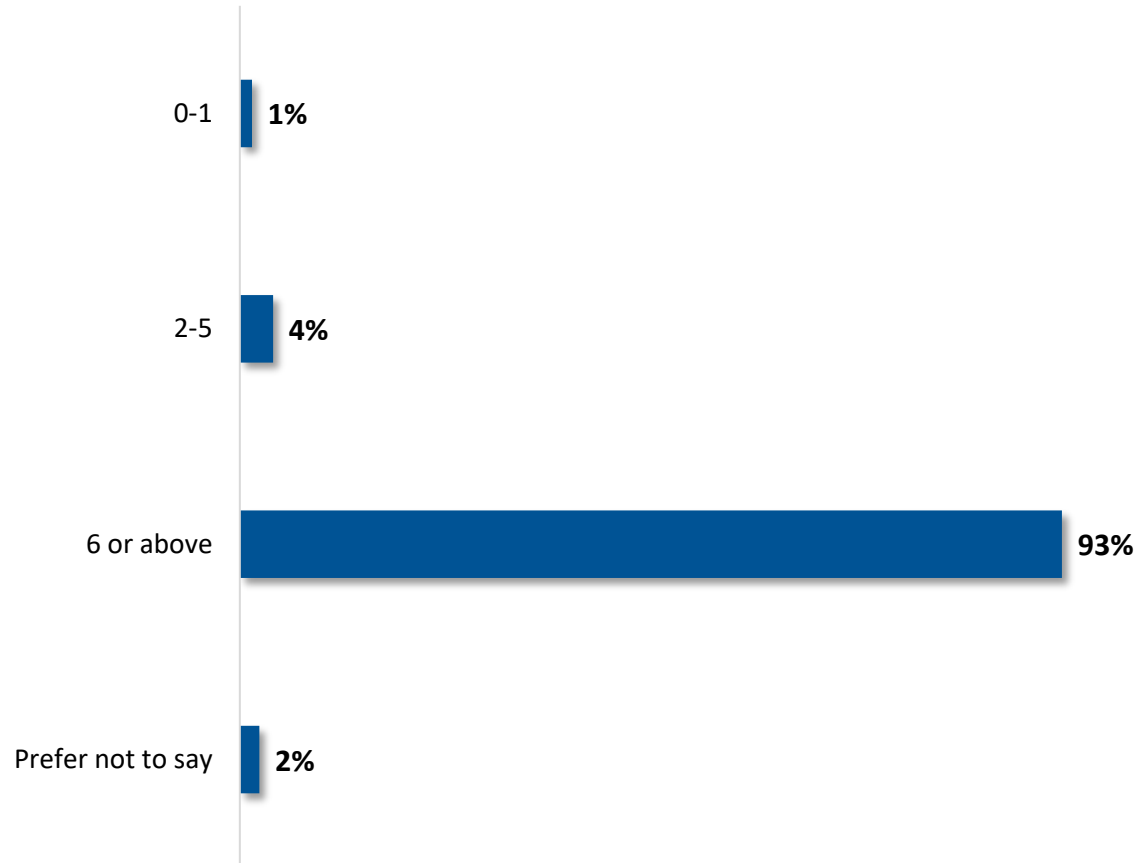


Gender

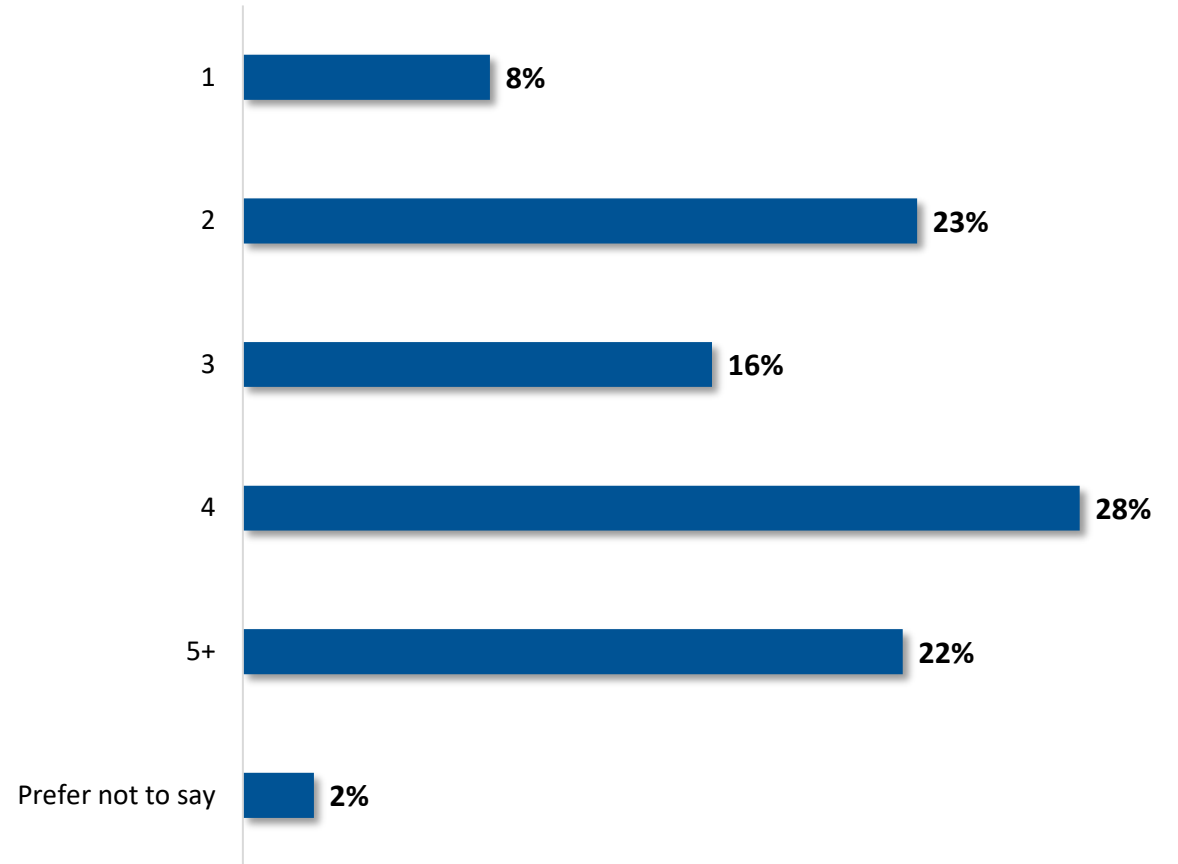


Question: [Left D1] Which of the following age categories do you belong to? [Right D2] Are you...?
Sample: n=804
Framework: All respondents

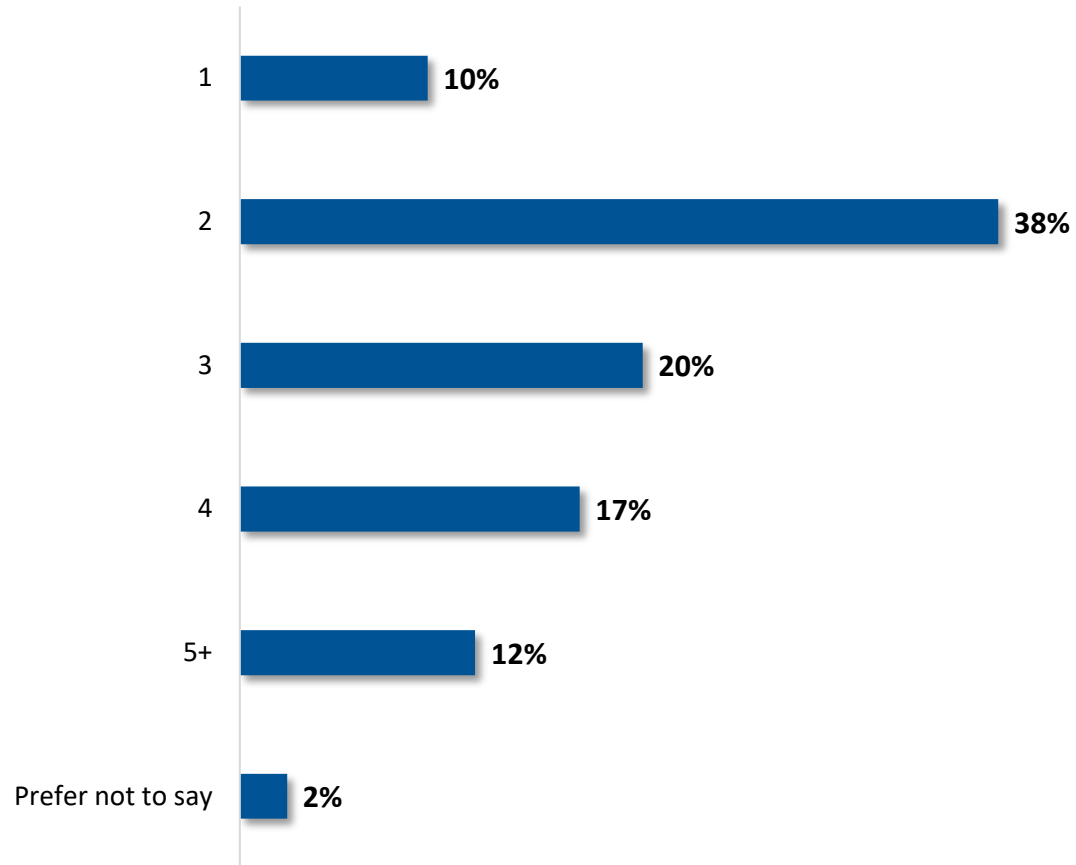
Tenure of Living in Vaughan



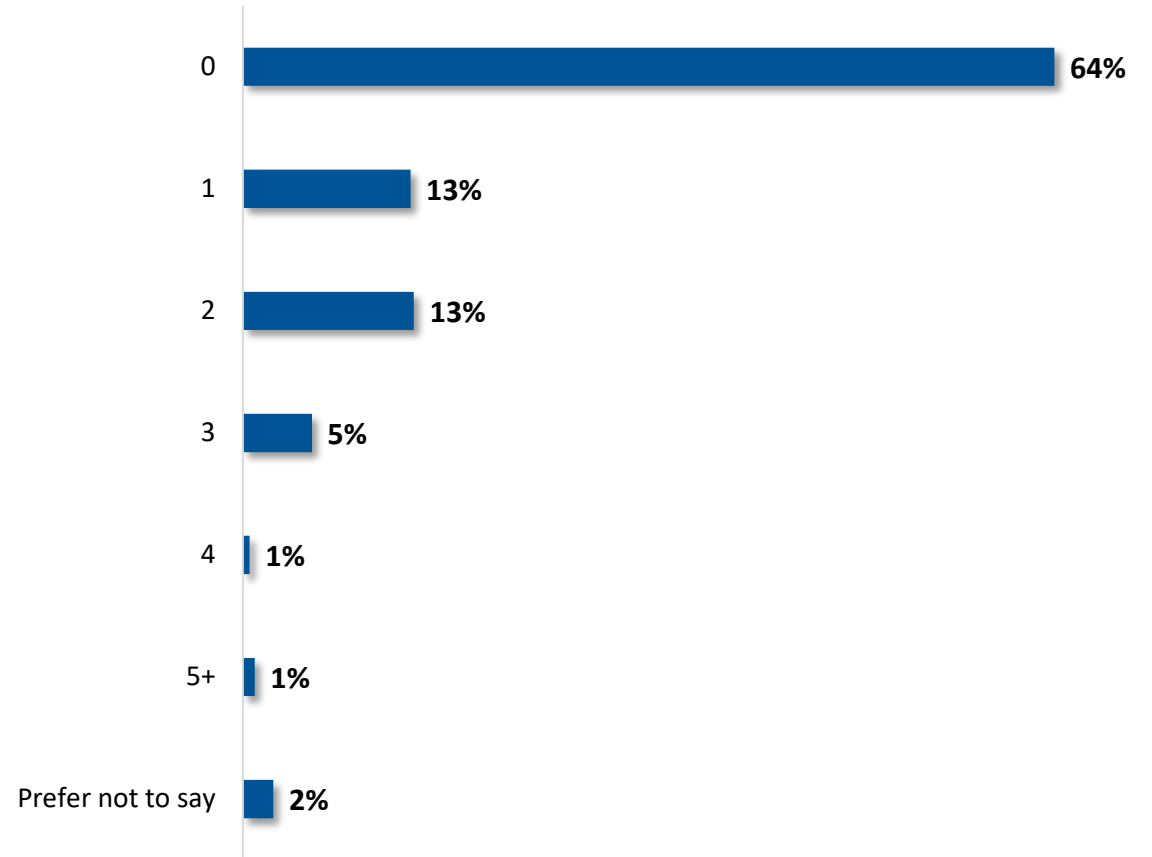
Household Size



Household size - Number of adults



Household size - Number of children

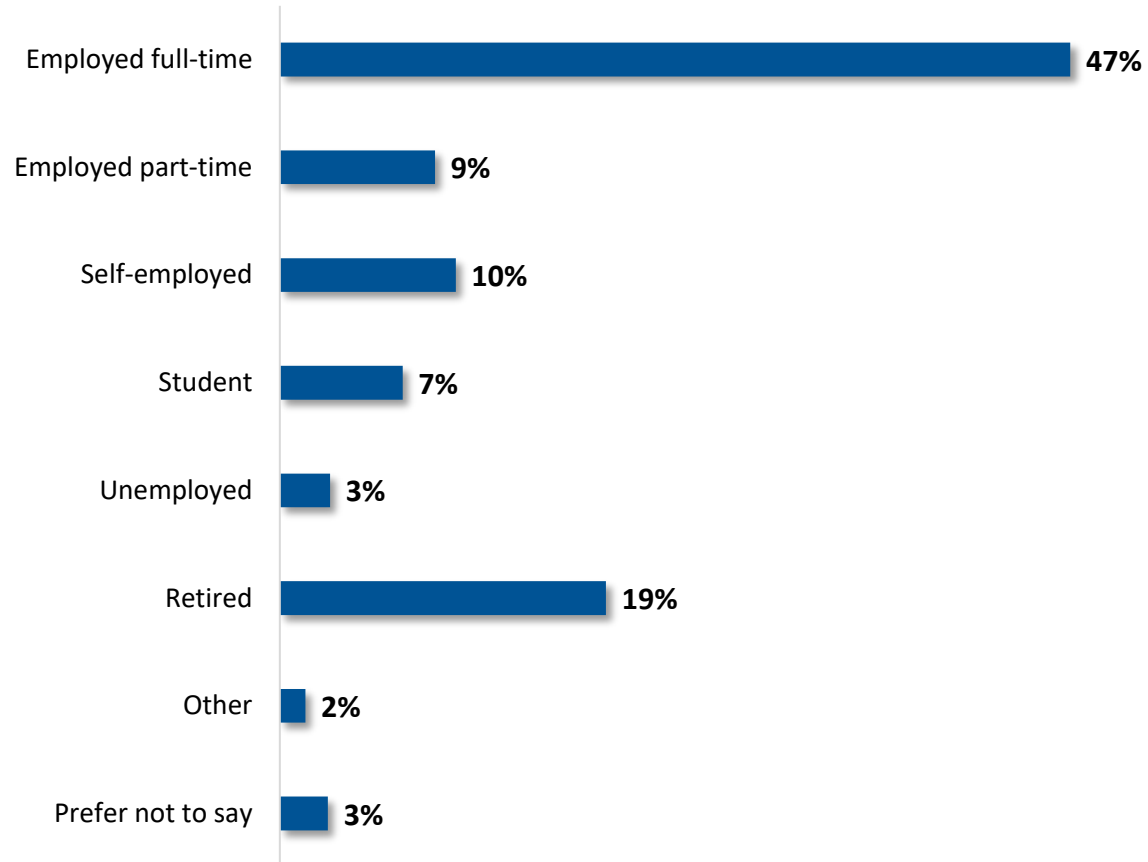


Question: [Left D4A] How many adults and children (under the age of 18) live in your home, including yourself? – Adults [Right D4] How many adults and children (under the age of 18) live in your home, including yourself? - Children

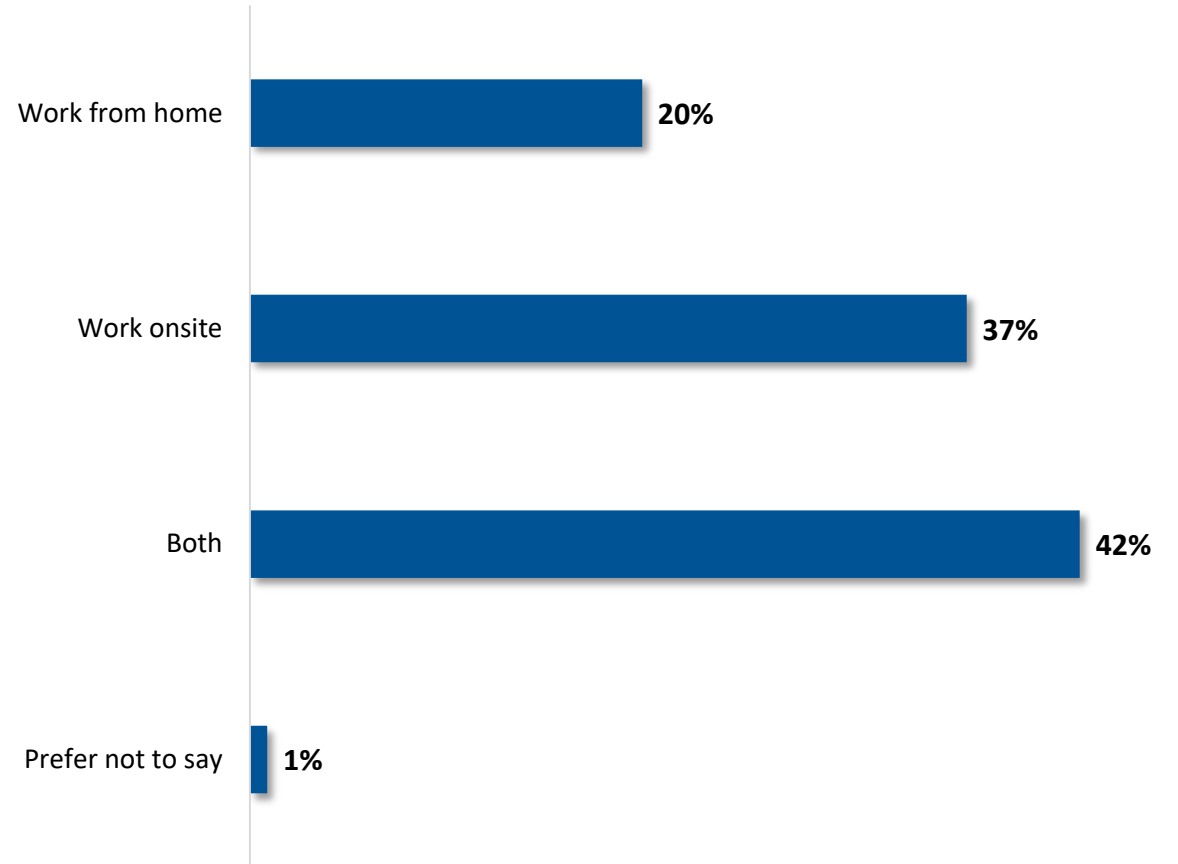
Sample: n=804

Framework: All respondents

Employment



Work from home status

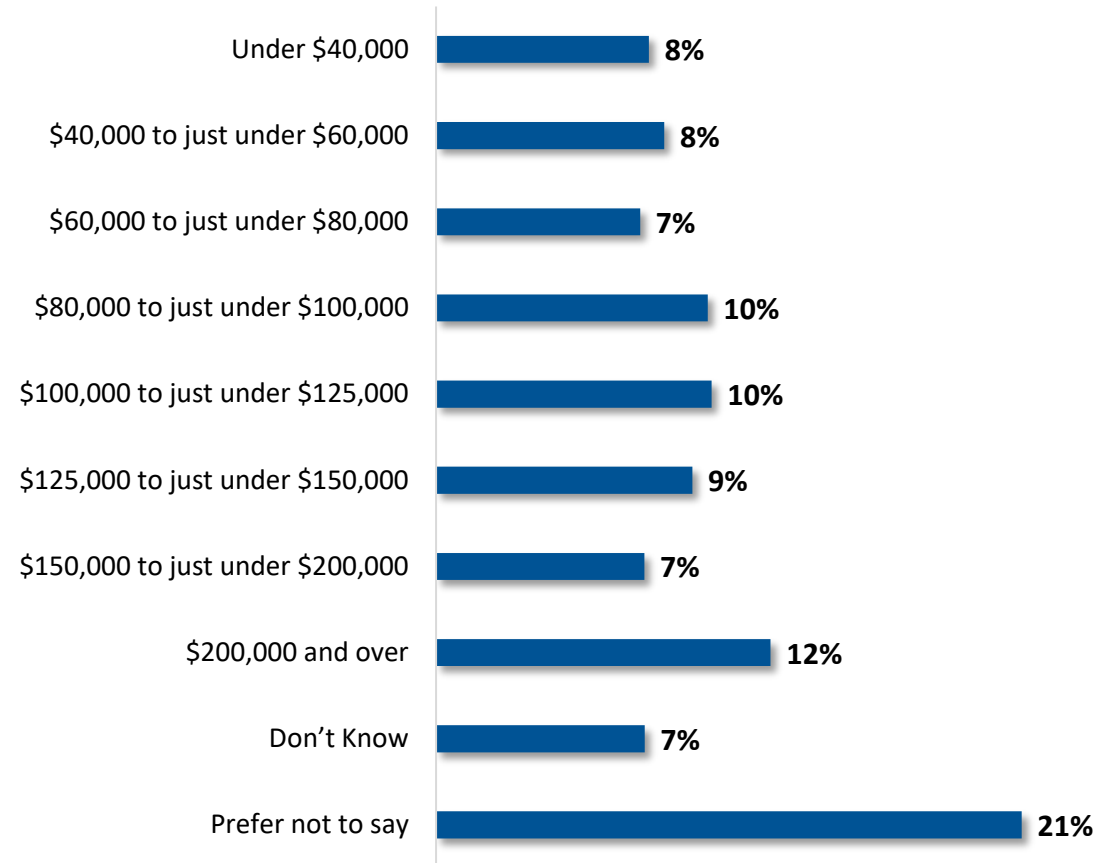


Question: [Left D5A] What is your current primary employment status? [Right D5B] Do you work from home, at your place of work, or a mix of both?

Sample: [Left] n=804 / [Right] n=532

Framework: All respondents / Respondents who are employed

Annual Income



Question D6: And lastly, which of the following categories was your total household income before taxes in 2021?

Sample: n=804

Framework: All respondents