

## **CITY OF VAUGHAN**

### **EXTRACT FROM COUNCIL MEETING MINUTES OF FEBRUARY 12, 2019**

Item 1, Report No. 9, of the Committee of the Whole (Working Session), which was adopted without amendment by the Council of the City of Vaughan on February 12, 2019.

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#### **1. 2018 CITIZEN AND BUSINESS STAKEHOLDER ENGAGEMENT SURVEY RESULTS**

**The Committee of the Whole (Working Session) recommends:**

- 1) That the recommendation contained in the following report of the Interim City Manager and Chief Corporate Initiatives and Intergovernmental Relations, dated February 6, 2019, be approved; and**
- 2) That the presentations and Communication C1, presentation material entitled, "*Citizen Satisfaction Survey – Key Findings*", be received.**

#### **Recommendations**

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

Item:



## Committee of the Whole (Working Session) Report

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

**WARD(S):** ALL

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

**FROM:**

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

**ACTION:** FOR INFORMATION

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#### **Purpose**

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

#### **Report Highlights**

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

## **Recommendations**

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

## **Background**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### **Previous Reports/Authority**

None.

### **Analysis and Options**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## **Next Steps**

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

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

### **Financial Impact**

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

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

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

### **Conclusion**

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

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

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

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

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

### **Attachments**

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

### **Prepared by**

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**Ipsos Public Affairs**



Final Report

# Citizen Satisfaction Survey

July 2018

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**GAME CHANGERS**



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# BACKGROUND AND OBJECTIVES

## BACKGROUND

The City of Vaughan provides a range of services to meet the needs of its growing population. Since 2007, the City has conducted citizen surveys to assess citizen satisfaction with existing programs and services provided by the city and to collect feedback from residents about a number of other topics including quality of life, communications, taxes and investment, and more. The City of Vaughan commissioned Ipsos to conduct the 2018 survey. The results will assist the city in identifying key trends and issues of importance in continuing to strive for service excellence.

## THE OBJECTIVES OF THE 2018 CITIZEN SATISFACTION SURVEY ARE TO:

- Determine the overall impressions toward the quality of life in the City of Vaughan;
- Determine the level of satisfaction of services provided by the City of Vaughan;
- Identify citizen perceptions and expectations concerning specific municipal planning priorities given current rapid growth;
- Benchmark the results of the 2016 Citizen Survey with those from previous surveys; and
- Provide a baseline to track progress delivering Service Excellence to residents in Vaughan.

# METHODOLOGY AND REPORTING CONVENTIONS

## METHODOLOGY

In 2018 the survey was conducted using both an RDD telephone and online data collection methodology. Most interviews were conducted via telephone (n=735), while supplementary interviews were conducted online utilizing the Ipsos iSay online panel (n=71).

Overall, the survey was conducted among n=806 respondents 18 years of age and older living in the city of Vaughan.



The margin of error for a sample of n=806 completed interviews is +/- 3.5 %, nineteen times out of twenty.

The results of the survey have been weighted based on age, gender and sub-region within the City of Vaughan to match the demographic profile of residents based on 2016 census data.

## REPORTING CONVENTIONS

In some questions those who were unable to provide a response (i.e., Answered “don’t know” or “no opinion” or “not enough experience”) were removed from the analysis. Therefore, the “n” reported for each of these questions will not always equal the total sample of 806.

Due to rounding, there are some cases where totals do not round to exactly 100%. In other cases, respondents were able to provide multiple responses to a survey question and for this reason the total percent exceeds 100%.

- Please note that throughout the report, significant differences with the average have been designated as follows:
  - Significantly higher 
  - Significantly lower 

# NORMATIVE COMPARISONS AND ANALYSIS BY WARD

## NORMATIVE COMPARISONS

Comparisons have been made between the results of the 2018 Vaughan Citizen Satisfaction Survey to Ipsos’ database of municipal normative data where possible.

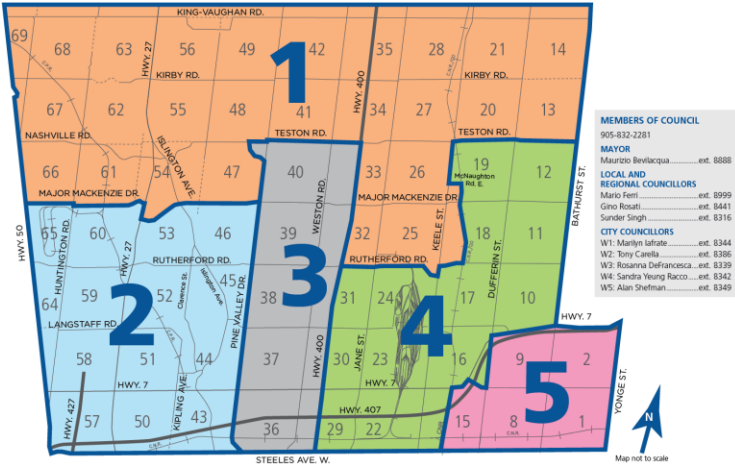
This normative database is comprised of survey findings for select questions from other municipal government from across the country.

## WARD COMPARISONS

An analysis of surveys results by ward within the City of Vaughan is included throughout the report where statistically significant differences by ward exist.

### Ward and Councillor Area Map

TERM: Dec. 1, 2014 to Nov. 30, 2018



# EXECUTIVE SUMMARY

## EXECUTIVE SUMMARY (1)

The results of the 2018 Citizen Satisfaction Survey for the City of Vaughan continue to be very positive: large majorities of residents think overall quality of life is good, think the City is welcoming, and are proud to be from the City, and majorities express satisfaction with nearly all specific services. Nonetheless, there has been some slippage in satisfaction with overall service delivery and in some specific service areas and on perceptions of accessibility to service.

- Overall quality of life scores remain high (97%), including 44% of residents who perceive it to be “very good.”
- Transportation-related issues continue to dominate the public agenda in Vaughan, but after increasing in 2016, mention of these issues have stabilized.
- Overall satisfaction with the delivery of services provided by the City among residents has declined slightly (-3 points) to 91%.
- Majorities of six in ten or more residents are satisfied with 24 out of 25 services, with the highest level of satisfaction provided for:
  - Fire services (100%)
  - Local public libraries (96%)
  - Recreation and fitness facilities (93%)
  - Garbage, recycling, organics and yard waste collection (91%)
  - Off road multi-use/nature trails (91%)
  - Recreations and fitness service programs (91%)
  - Arts and culture (90%)
  - Maintenance of parks and green space (90%)
- Residents’ level of satisfaction has improved in the areas of financial services (up 7 points) and traffic management (up 6 points) since 2016, but the latter still remains one of the lowest scoring areas. There have been declines in satisfaction in four areas: road snow removal (down 9 points), sidewalk snow removal (down 7 points), general road condition and maintenance (down 7 points), and online services (down 5 points).

## EXECUTIVE SUMMARY (2)

**The survey also finds that those who had contact with City staff or have accessed/ used its services/ programs express high levels of satisfaction with their experience, although there has been a small decline in perceptions with accessibility of the service. There are also high levels of likelihood to access services provided by the City online.**

- Among those who had contact with City staff, almost nine in ten (86%) are satisfied with overall quality of service (unchanged from 2016).
- Among those who accessed services/ programs large majorities are satisfied with the overall quality of service delivery, accessibility of the service, and the amount of time it took to get the service. Since 2016, there has been a small decline in satisfaction with accessibility (-4 points).
- Among those who use these services and have Internet access, majorities of six in ten or more indicate that they are likely to use these services online, particularly online bill payment (60% say very likely) and online voting (61%) and much less so for business licence registration or renewal (35%).

**Other positive findings are continued belief by residents that they are receiving value for tax dollars and an openness to maintaining service levels and to spending on infrastructure, even if this means increasing property taxes or user fees.**

- Consistent with 2016, a large majority of residents believe they are receiving good value for their tax dollars (81%).
- There continues to be openness to taxes/ user fees to maintain existing service levels (44%), and this view remains on par with the belief that the City should not increase taxes or user fees, even if it means cuts to services (44%).
- There continues to be large majority support to spending money on infrastructure renewal and construction (79%). A smaller number of residents (54%) , but still a small majority, support increasing property taxes to pay for this infrastructure renewal.

## EXECUTIVE SUMMARY (3)

**With respect to communications, a sizeable proportion of residents continue to want more information from the City mainly via newsletters (mail or email), and the City's website, as well as through digital or portable roadside signage.**

- Although most residents (55%) continue to be satisfied with the amount of information they receive from the City of Vaughan, a sizeable proportion of 42 percent think they receive too little information.
- Newsletters and brochures via mail, E-newsletters sent via email, the City website and digital or portable roadside signage are the most preferred modes of contact with the City of Vaughan. There have been increases in preference for E-newsletters (up 5 points), as well as for social media (up 7 points to 39%), and town hall meetings (up 5 points to 37%).
- A majority (59%) of residents use the City's website, and most found what they needed.

**When it comes to use and perceptions of the City's website, a majority of residents (59%) accessed the City of Vaughan's website in the past 12-months**

- Among these residents, the vast majority found the information they needed and found the content and information and the online services available useful.

**A majority of residents (62%) believe that they can influence municipal decisions affecting Vaughan by participating in public engagement events.**

- A significantly smaller proportion of residents feel strongly that they can influence municipal decisions compared to those who somewhat feel that they can have an influence (17%, compared to 45%).

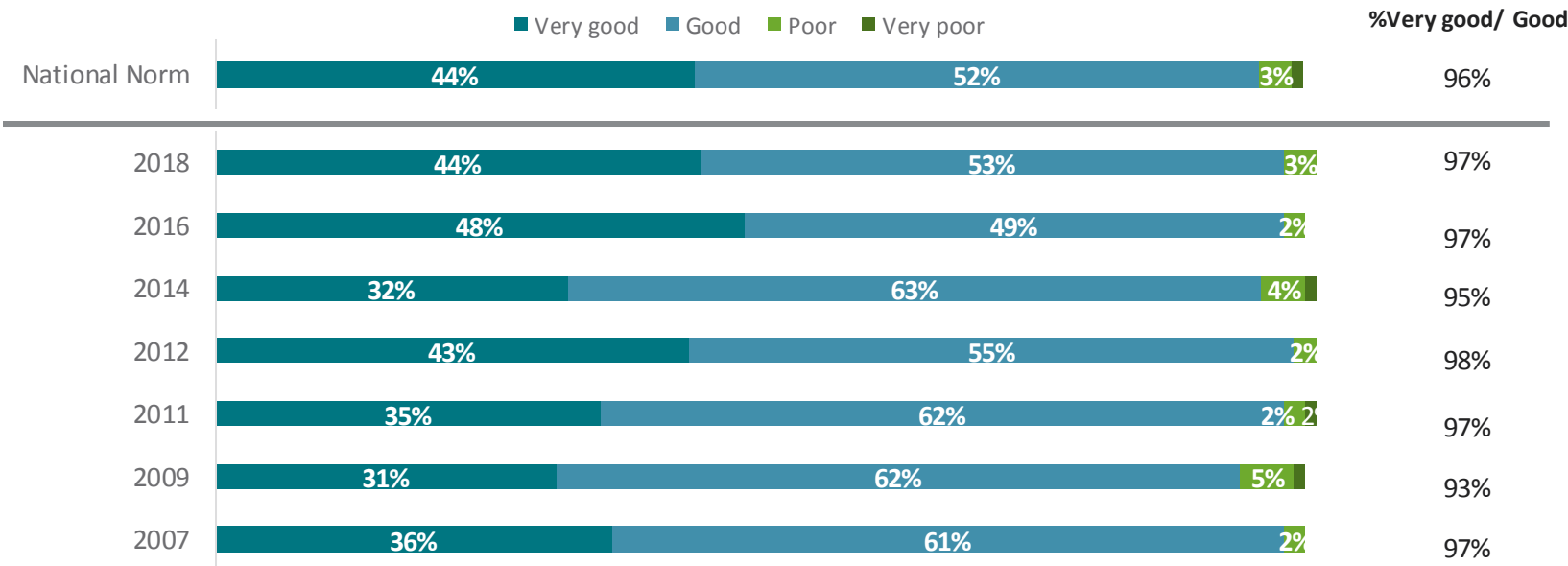
# ASSESSMENT OF LIFE IN VAUGHAN

# QUALITY OF LIFE

The overall quality of life is very high (97% say “very good” or “good”), and is consistent with levels recorded since 2011.

Overall quality of life is similar to the national norm (96% vs 97%, respectively).

There are few demographic differences, but men are more likely than women to think that quality of life is “very good” (48% vs. 40%, respectively). And, those residents who earn a higher annual household income are significantly more likely to provide a “very good” rating for quality of life (55% among residents earning \$160,000 or more, compared to 26% among those earning less than \$40,000).

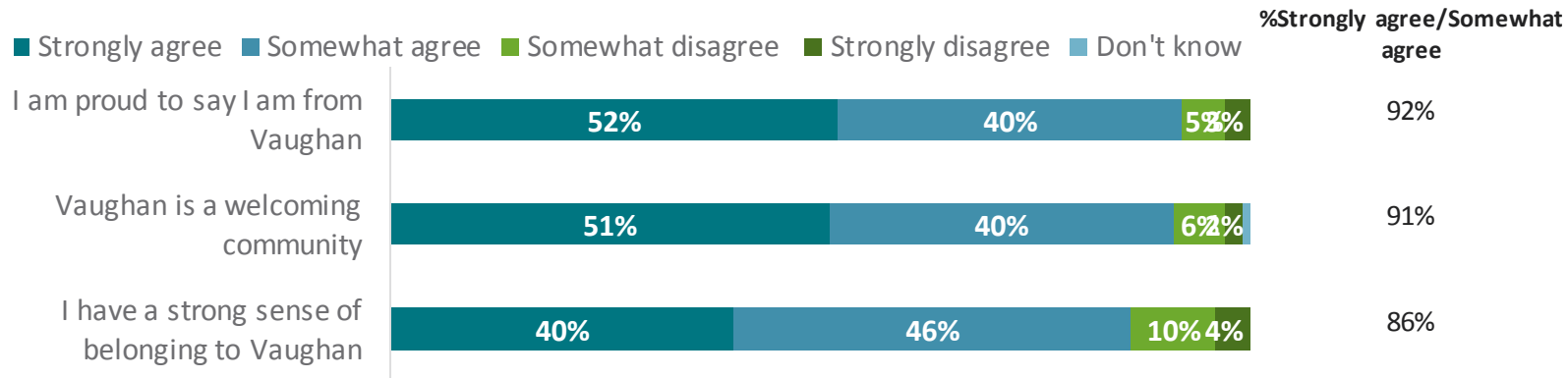


Q2. How would you rate the overall quality of life in the City of Vaughan today? Base: All respondents (excl. Dk/NA) 2018 (n=805); 2016 (n=796); 2014 (n=797); 2012 (n=498); 2011 (n=500); 2009 (n=300); 2007 (n=300)

# COMMUNITY AND BELONGING

On questions related to belonging and community, residents indicate high levels of agreement. Nine in ten residents say that they are proud to be from Vaughan and that Vaughan is a welcoming community (92% and 91%). A smaller (86%), but still high, say they have a strong sense of belonging to Vaughan.

There are few demographic differences, but agreement that they have a strong sense of belonging to Vaughan is higher among older residents (75% among 18-34 year old vs. 90% among 35-54 year old and 89% among aged 55 and older). This view is also higher among those who have children under 18 living in the household than those who do not (91% vs. 83%, respectively).





Q2a. Please rate the extent to which you agree or disagree with the following statements. How about...?  
Base: 2018 (n=806)

# MOST IMPORTANT ISSUES FACING COMMUNITY

Transportation issues remain the top-of-mind issue among Vaughan residents. Six in ten (59%) residents cite transportation as the most important issue facing their community. After a large increase in 2016, mention of transportation has stabilized. One in ten each mention taxation and municipal government spending (9%), healthcare (9%) or growth or development (8%). Since 2016, fewer mention taxation (down 4 points) or growth (down 3 points).

Transportation is the top issue across all demographic groups, but is higher among higher income earners, and older residents.

	2014	2016	2018
Transportation (NET)	50%	62%	59%
Taxation/ Municipal Government Spending (NET)	10%	13%	9% 
Healthcare (NET)	6%	11%	9%
Growth (NET)	7%	11%	8% 
Parks/ Recreation/ Culture (NET)	-	6%	5%
Education (NET)	2%	5%	4%
Municipal Government Services (NET)	4%	4%	4%
Crime (NET)	5%	4%	5%
Social (NET)	2%	3%	2%
Economy (NET)	1%	3%	1%
Environment (NET)	-	1%	2%

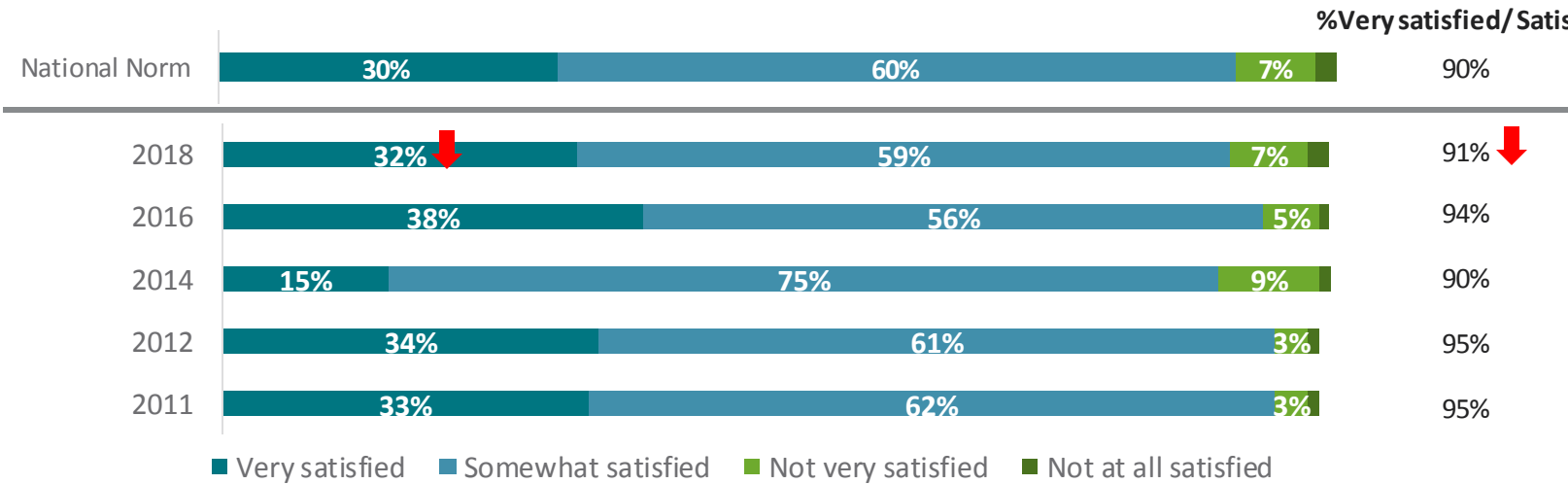
# SERVICE SATISFACTION

# OVERALL SATISFACTION WITH SERVICES

Satisfaction with City services remains high. Nine in ten (90%) residents are satisfied with the delivery of all the services provided by the City. After an increase in 2016, this figure is down by three points this year. Moreover, the proportion of residents who are “very satisfied” has declined by 4 points since 2016.

Overall satisfaction with services is on par with the national norm (91% vs. 91%, respectively) and the proportion of Vaughan residents who are “very satisfied” is also consistent with the national norm (30% vs. 32%).

Overall satisfaction with services does not differ significantly among demographic groups or among wards, with the exception of those residents who have resided in the City for 15 years or who perceive receiving poor value for tax dollars providing a lower satisfaction rating.



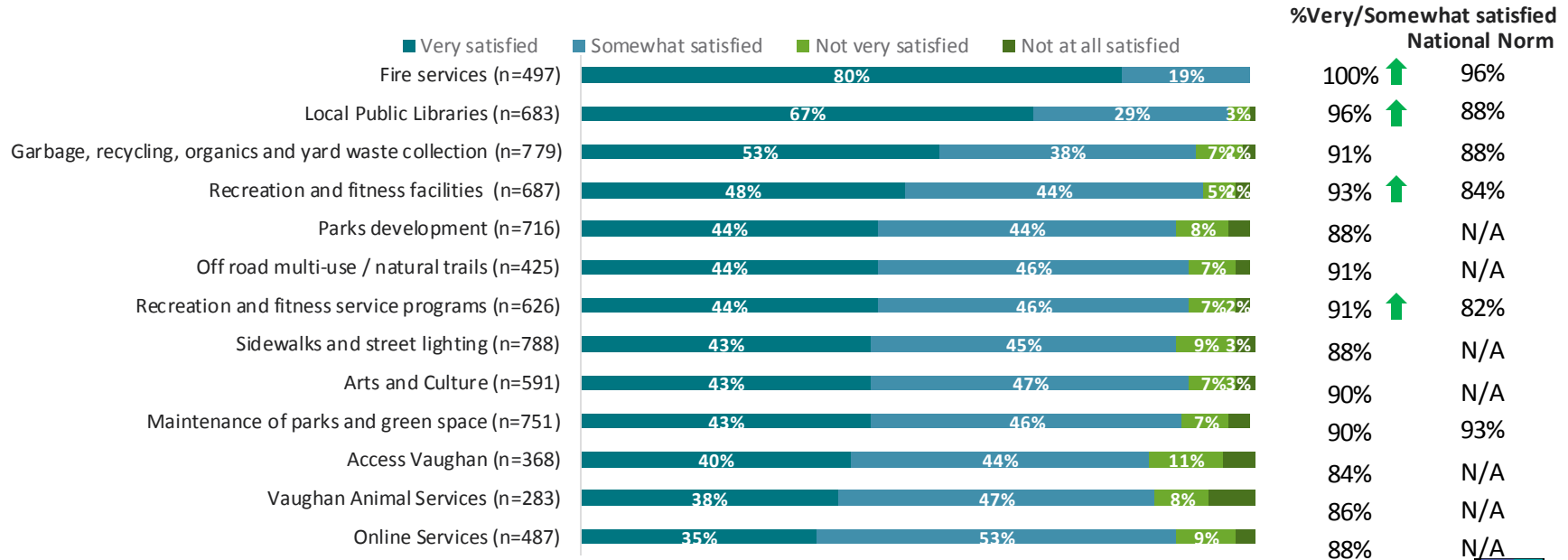
*\*Only values of 3% or above are labelled on the graph.*

Q3. Overall, how satisfied are you with the delivery of all the services provided by the City of Vaughan? Base: All respondents (excl.dk/na) 2018 (n=797); 2016 (n=795); 2014 (n=780); 2012 (n=498); 2011 (n=500)

# SATISFACTION WITH INDIVIDUAL SERVICES (1)

Majorities of six in ten residents or more are satisfied with 24 out of 25 services provided by the City of Vaughan. Residents are most satisfied with fire services and Local Public Libraries (80% and 67%, respectively are “very satisfied”). More than half are also very satisfied with garbage, recycling, organics and yard waste collection (53%).

The City of Vaughan scores higher than the national norm on fire services (100% vs. 96%, respectively), Local Public Libraries (96% vs. 88%), recreation and fitness facilities (93% vs. 84%) and service programs (91% vs. 82%), and on par on garbage, recycling, organics and yard waste collection (91% vs. 88%) and maintenance of parks and green space (90% vs. 93%).



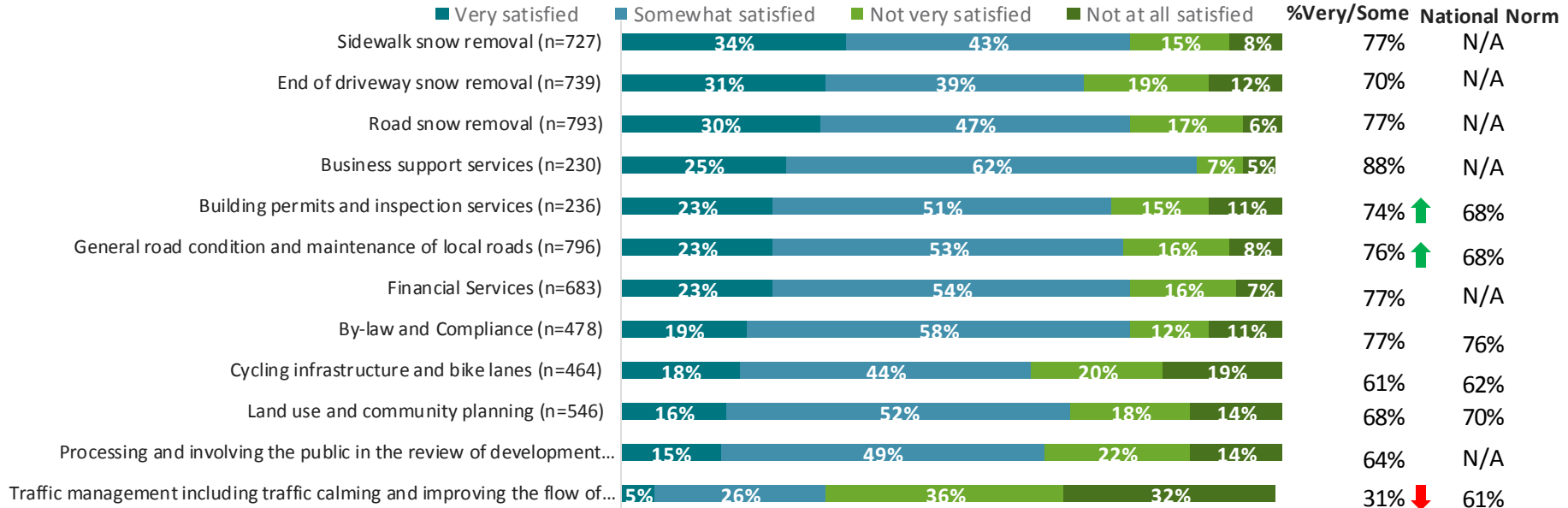
Q4. Please tell me how satisfied you are with each of the following services provided by the City of Vaughan. For each service provided please tell me if you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied. If you don't know or have not had any experience with the service to provide a rating, please say so.  
 How about .... Base: All respondents (excl. dk/na/ not enough experience) 2018 (n=Base vary)

\*Only values of 4% or above are labelled on the graph.

## SATISFACTION WITH INDIVIDUAL SERVICES (2)

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

The City of Vaughan scores higher than the national norm on building permits and inspection services (74% vs. 68%, respectively) and general road condition and maintenance or local/ neighbourhood roads (76% vs. 68%), is on par on bylaw and compliance (77% vs. 76%), cycling infrastructure and bike lanes (61% vs. 62%) and land use and community planning (68% vs. 71%), and is far lower on traffic management (31% vs. 61%).



Q4. Please tell me how satisfied you are with each of the following services provided by the City of Vaughan. For each service provided please tell me if you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied. If you don't know or have not had any experience with the service to provide a rating, please say so.  
How about .... Base: All respondents (excl. dk/na/ not enough experience) 2018 (n=Base vary)

# SATISFACTION WITH INDIVIDUAL SERVICES (TRACKING) (1)

Since 2016, there have been increases in two areas - financial services and traffic flow and community planning (It should be noted that the change in the latter may be affected by a change in wording in the current survey.).

	2009	2011	2012	2014	2016	2018	2016-2018 Performance Gap
Financial services	-	-	-	-	70%	77%	7% ↑
Traffic management including traffic calming and improving the flow of traffic*	-	-	-	-	25%	31%	6% ↑
Sidewalks and street lighting	72%	82%	87%	86%	86%	88%	2%
Land use and community planning	-	72%	74%	70%	67%	68%	1%
Fire services	89%	90%	99%	99%	99%	100%	1%
Recreation and fitness service programs	-	86%	88%	92%	91%	91%	0%
Maintenance of parks and green spaces	-	88%	86%	90%	90%	90%	0%
Garbage, recycling, organics and yard waste collection	80%	88%	91%	88%	91%	91%	0%
Processing and involving the public in the review of development apps	-	-	-	-	65%	64%	-1%
Cycling infrastructure and bike lanes	-	-	-	-	62%	61%	-1%
Parks development	-	-	-	-	89%	88%	-1%

\*\*Prior to 2018: Traffic flow and congestion

- Q4. Please tell me how satisfied you are with each of the following services provided by the City of Vaughan. For each service provided please tell me if you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied. If you don't know or have not had any experience with the service to provide a rating, please say so.
- How about .... Base: All respondents (excl. dk/na/ not enough experience) 2018 (n=Base vary)

## SATISFACTION WITH INDIVIDUAL SERVICES (TRACKING) (2)

Satisfaction is down in four service areas. The biggest drop is seen for road snow removal which hit a historic low in terms of satisfaction, followed by sidewalk snow removal, general road condition and maintenance and online services.

	2009	2011	2012	2014	2016	2018	2016-2018 Performance Gap
Off road multi-use/natural trails	-	-	-	-	92%	91%	-1%
Local Public Libraries	-	86%	92%	94%	97%	96%	-1%
End of driveway snow removal	-	74%	83%	76%	72%	70%	-2%
Arts and culture	-	75%	78%	90%	92%	90%	-2%
Building permits and inspection services	-	-	-	-	77%	74%	-3%
Bylaw and Compliance	-	76%	82%	81%	80%	77%	-3%
Business support services	-	79%	86%	86%	91%	88%	-3%
Access Vaughan	-	-	-	-	88%	84%	-4%
Online services	-	-	-	-	93%	88%	-5% ↓
General road condition and maintenance	-	-	-	-	83%	76%	-7% ↓
Sidewalk snow removal	-	79%	87%	77%	84%	77%	-7% ↓
Road snow removal	-	86%	91%	84%	86%	77%	-9% ↓

# SATISFACTION WITH INDIVIDUAL SERVICES BY WARD

Satisfaction with Vaughan services differs in some cases across the Wards. When it comes to recreation and fitness facilities, residents in Ward 5, home to the Garnet A. Williams Fitness Centre, are more likely to be satisfied compared to those in Wards 1, 3 and 4.

Satisfaction with parks development, including quantity and quality of playgrounds, sports fields and trails among residents of Ward 5, which includes parks such as York Hill District Park, Pierre Elliott Trudeau Park, and the Downham Green Park, are more likely to be satisfied with the service compared to those in Wards 1, 2, and 3.

		W A R D				
TOP2BOX (Very/ Somewhat Satisfied)	Total	Ward 1	Ward 2	Ward 3	Ward 4	Ward 5
Fireservices	100%	100%	100%	100%	100%	99%
Local Public Libraries	96%	97%	95%	93%	100%	96%
Recreation and fitness facilities (including community centres, arenas and pools)	93%	90%	95%	90%	84%	96%
Garbage, recycling, organics and yard waste collection	91%	92%	94%	89%	93%	89%
Recreation and fitness service programs	91%	93%	92%	89%	84%	89%
Off road multi-use/ natural trails e.g. Humber River Trail, Bartley Smith Trail	91%	86%	94%	93%	94%	92%
Maintenance of parks and green space	90%	87%	88%	89%	90%	93%
Arts and Culture (e.g. Canada Day Event, Concerts in the Parks)	90%	91%	91%	84%	83%	93%
Sidewalks and street lighting	88%	89%	88%	86%	87%	88%
Parks development, including quantity and quality of playgrounds, sports fields and trails	88%	86%	86%	85%	85%	94%
Business support services	88%	89%	89%	79%	80%	94%
Online Services	88%	85%	91%	84%	96%	90%
Vaughan Animal Services	86%	91%	89%	84%	92%	79%

 Significantly Higher

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

Q4. Please tell me how satisfied you are with each of the following services provided by the City of Vaughan. For each service provided please tell me if you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied. If you don't know or have not had any experience with the service to provide a rating, please say so.

How about .... Base: All respondents (excl. dk/na/ not enough experience) 2016 (Bases vary); 2018 (n=Bases vary)

# SATISFACTION WITH INDIVIDUAL SERVICES BY WARD

The least satisfied residents with respect to traffic management reside in Ward 1, located in the northern most region of Vaughan, with only 22% of residents indicating that they are satisfied. Higher levels of satisfaction on this service are found in Wards 2, 4, and 5.

On financial services, satisfaction is higher in Wards 3 and 5 especially compared to Ward 2.

		W A R D				
TOP2BOX (Very/ Somewhat Satisfied)	Total	1	2	3	4	5
Access Vaughan, the call centre for Vaughan residents to call for questions about City services	84%	82%	87%	85%	72%	85%
Road snow removal	77%	77%	72%	80%	79%	76%
Sidewalk snow removal	77%	72%	81%	82%	84%	77%
By-law and Compliance	77%	78%	85%	75%	77%	74%
Financial Services, such as property tax bill, bill payments, and city accounting	77%	74%	66%	82%	82%	82%
General road condition and maintenance of local/neighbourhood roads	76%	77%	80%	76%	81%	71%
Building permits and inspection services	74%	69%	79%	74%	92%	75%
End of driveway snow removal	70%	65%	69%	73%	71%	73%
Land use and community planning	68%	68%	75%	58%	85%	69%
Processing and involving the public in the review of development applications	64%	64%	72%	61%	80%	60%
Cycling infrastructure and bike lanes	61%	58%	67%	62%	80%	59%
Traffic management including traffic calming and improving the flow of traffic	31%	22%	38%	31%	48%	35%



**Significantly Higher**

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

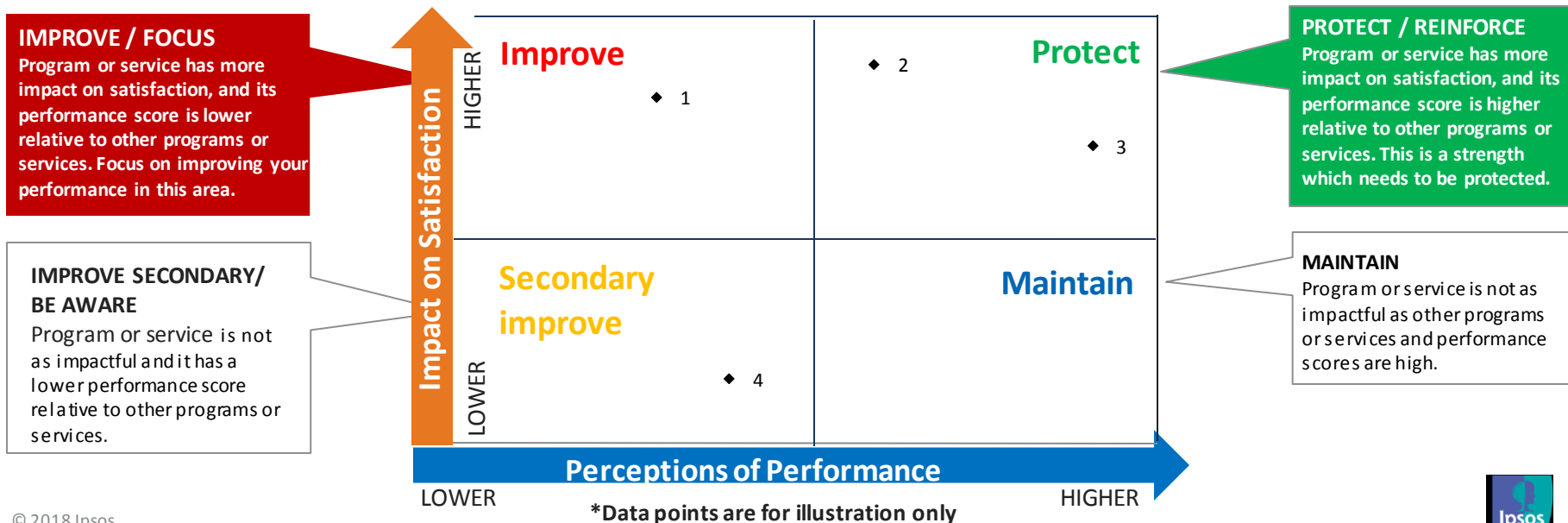
Q4. Please tell me how satisfied you are with each of the following services provided by the City of Vaughan. For each service provided please tell me if you are very satisfied, somewhat satisfied, not very satisfied, or not at all satisfied. If you don't know or have not had any experience with the service to provide a rating, please say so.

How about .... Base: All respondents (excl. dk/na/ not enough experience) 2016 (Bases vary); 2018 (n= Bases vary)

# GAP ANALYSIS

## UNDERSTANDING THE PRIORITIES

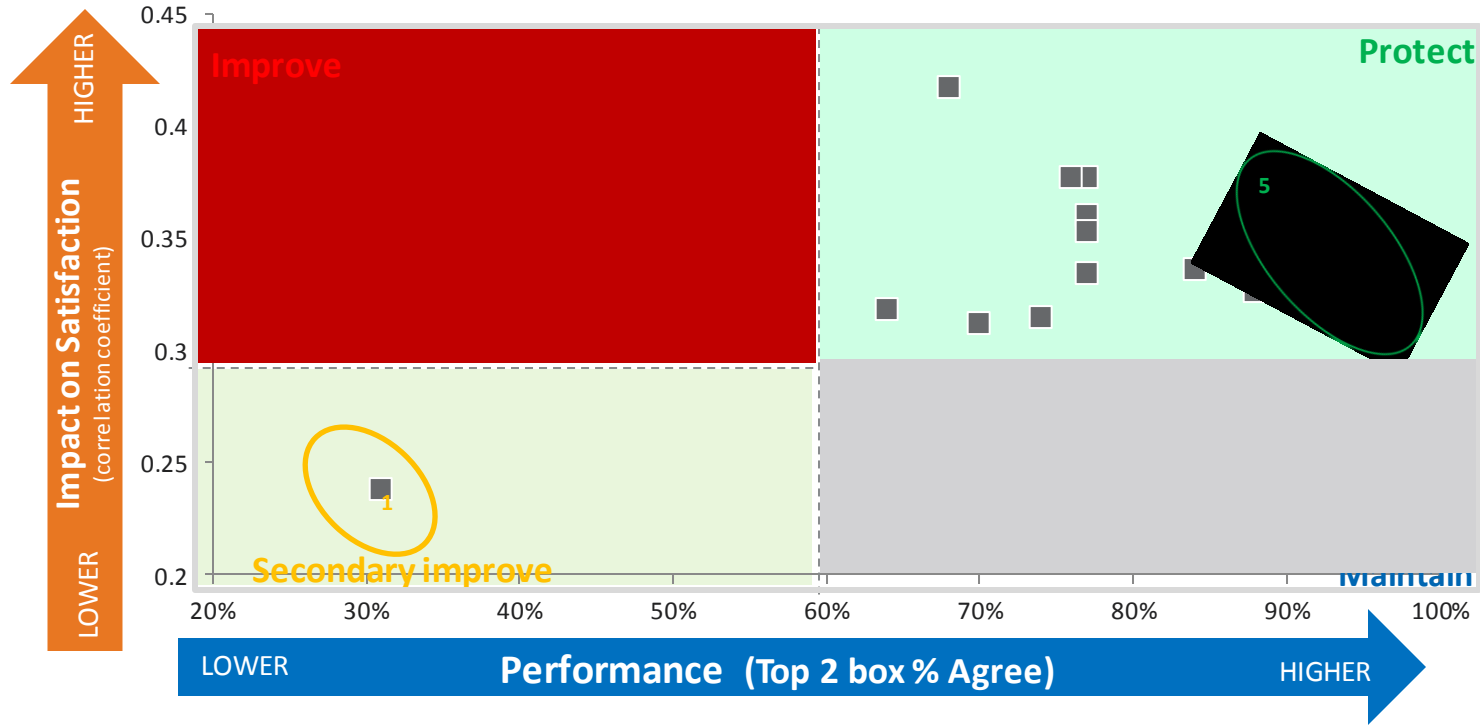
A priority matrix allows for decision makers to identify priorities for improvement by comparing how well residents feel the City of Vaughan is performing with how much impact that area has on residents' overall satisfaction. It helps to answer the question 'what can we do to improve satisfaction. Each driver or component will fall into one of the quadrants explained below, depending on its impact on overall satisfaction and its performance score (provided by survey respondents).



# GAP ANALYSIS



Primary Areas for Improvement  
Secondary Areas for Improvement  
Primary Areas for Protection  
Primary Areas for Maintenance



	Protect
1	Recreation and fitness facilities
2	Garbage, recycling, organics and yard waste collection
3	Recreation and fitness service programs
4	Maintenance of parks and green space
5	Business support services

	Secondary Improvement
1	Traffic management including traffic calming and improving the flow of traffic

# RESULTS OF THE GAP ANALYSIS

## AREAS FOR PROTECTION ARE:

- **Recreation and fitness facilities**
- **Garbage, recycling, organics and yard waste collection**
- **Recreation and fitness service programs**
- **Maintenance of parks and green space**
- **Business support services**
- These are areas of strength for the City of Vaughan, as these services are of high importance and high satisfaction levels. The City should continue to maintain and protect these areas as they correlate highly with overall satisfaction with service delivery among residents. The performance scores for these service lines have seen little movement compared to 2016.

## PRIMARY AREAS FOR IMPROVEMENT ARE:

- Although there are no specific primary areas for improvement identified through the Gap Analysis for the City of Vaughan due to the overall high levels of satisfaction with the delivery of City provided services, the City should continue to focus on providing high quality programs and services to residents in all areas, while continuing to focus on transportation-related issues.

## SECONDARY AREAS FOR IMPROVEMENT ARE:

- **Traffic management**
- Although traffic management is a topic that has less of an impact on overall satisfaction, it continues to rank among the lowest areas of satisfaction among residents. Residents provide a higher rating of satisfaction with traffic management policies and procedures since 2016 and the City should continue to focus on this topic moving forward.

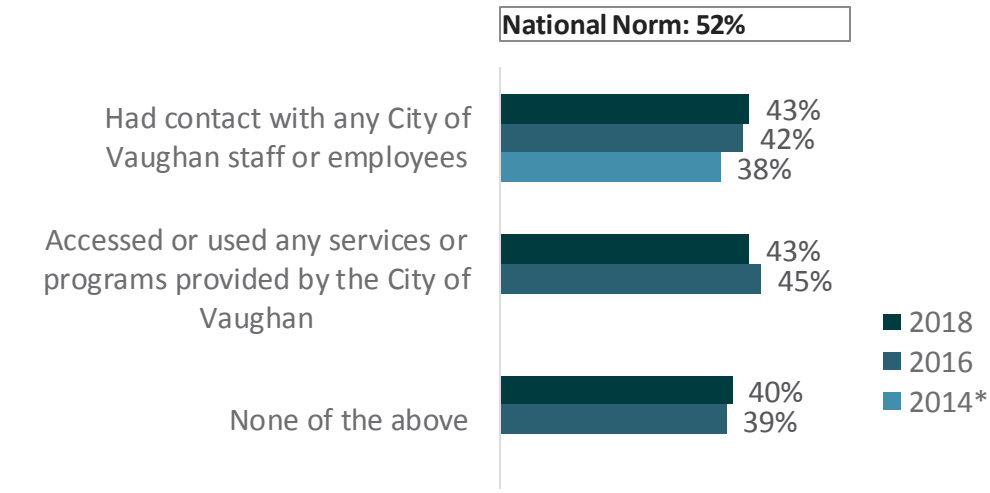
# INTERACTION WITH THE CITY

# CONTACT WITH CITY IN PAST 12 MONTHS

Similar to 2016, four in ten (43%) residents indicate that they had contact with City of Vaughan staff or employees. The same proportion (43%) say they accessed or used any services or programs provided by the City of Vaughan. Four in ten (40%) residents did not have contact with city staff or services.

The proportion of residents who say they have had contact with City staff is lower than the national norm (43% vs. 52%, respectively).

Contact with City staff is higher among those between the ages of 35 and 54 than among those aged 18-34 and those aged 55 and older (53% vs. 34% and 38%). Also, those who have children under 18 in the household are more likely than those who do not to be more likely to have both had contact with City staff (50% vs. 39% and have accessed or used any programs or services provided by the City (53% vs. 39%) in the past 12 months.



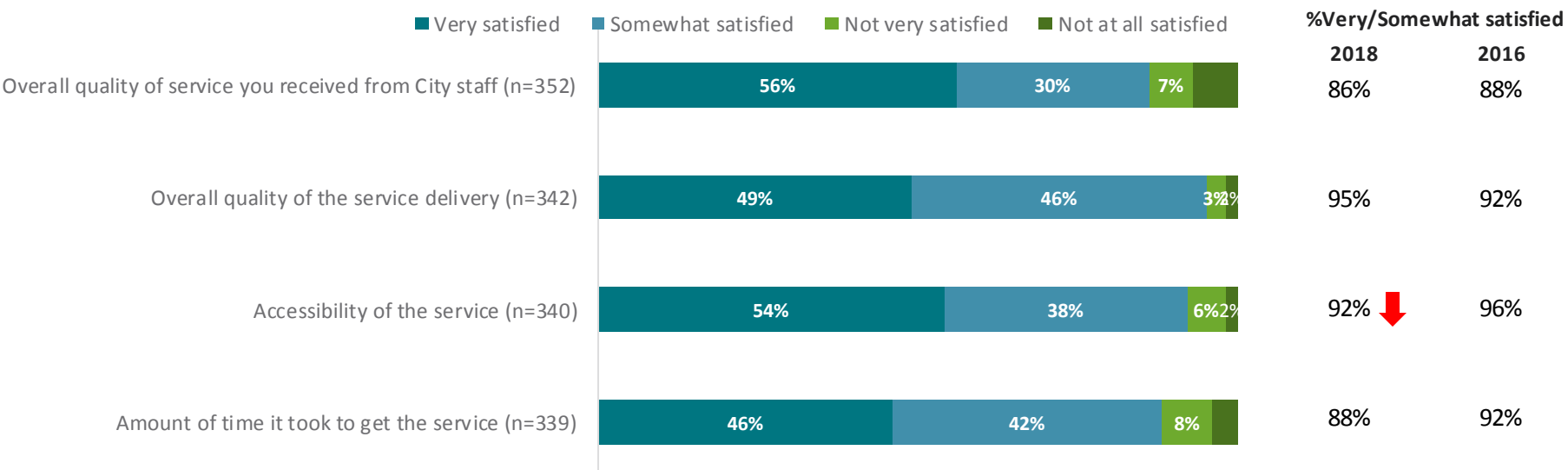
Contact with City of Vaughan	Age		
	18-34	35-54	55+
Had contact with any staff or employee	34%	53%	38%
Accessed or used any services or programs	49%	49%	32%
None	37%	35%	48%

# SATISFACTION WITH SERVICE DELIVERY

Among those who accessed or used services or programs provided by the City, large majorities of more than nine in ten express satisfaction with their most recent experience with the City. Residents continue to be most satisfied with accessibility of the service (54%), followed by overall quality of the service delivery (49%) and amount of time it took to get the service (46%).

Since 2016, fewer residents are satisfied with accessibility of the service (down 4 points).

Among those who contacted City staff or employees, almost nine in ten express satisfaction with their most recent experience, including 56 percent who are “very satisfied.”



Q10. Based on this most recent experience with the City, how satisfied were you with the [insert statement]? Base: Respondents who had contact with City of Vaughan staff or employees in the past 12 months (excl. dk/na) 2018 (Base varies); 2016 (Base varies)

Q10. Based on this most recent experience with the City, how satisfied were you with the [insert statement]? Base: Respondents who accessed services or programs provided by the City of Vaughan in the past 12 months (excl. dk/na) 2018 (Base varies); 2016 (Base varies)

\*Only values of 3% or above are labelled on the graph.

# SATISFACTION WITH SERVICE DELIVERY BY WARD

Across all wards, those residents who accessed services or programs express high levels of satisfaction. Residents of Ward 5 are more likely than those in Wards 1, 2 and 3 to be satisfied with the accessibility of the service.

Among those who had contact with City staff or employees, there are some differences by Ward in perceptions of overall quality of service they received from staff. Residents in Wards 1 and 5 are more likely than those in Ward 2 to be satisfied.

		W A R D				
TOP2BOX (Very / Somewhat Satisfied)	Total	1	2	3	4	5
Overall quality of service you received from City staff	86%	90%	76%	81%	61%	90%
Overall quality of the service delivery for the program or service that you accessed	95%	96%	90%	95%	85%	96%
Accessibility of the service	92%	91%	83%	91%	90%	98%
Amount of time it took to get the service	89%	91%	83%	88%	95%	89%



**Significantly Higher**

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

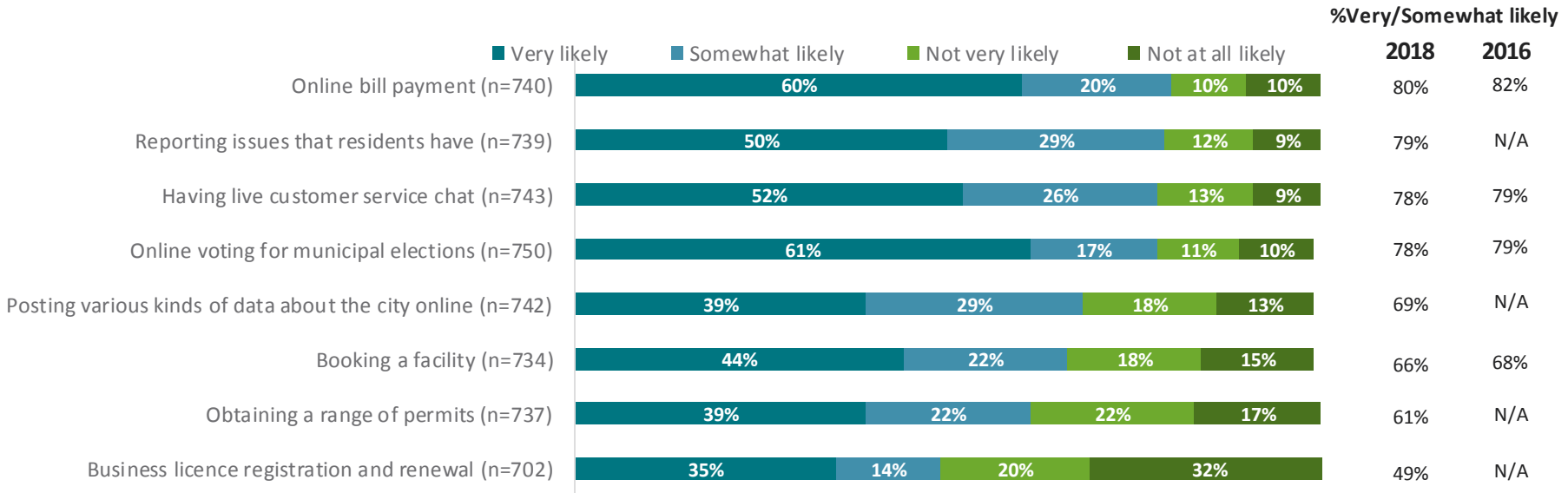
Q10. Based on this most recent experience with the City, how satisfied were you with the [insert statement]? Base: Respondents who had contact with City of Vaughan staff or employees in the past 12 months (excl. dk/na) 2018 (Base varies); 2016 (Base varies)

# LIKELIHOOD TO USE ONLINE SERVICES

Residents were informed that the City of Vaughan is considering expanding how it delivers services online and asked the likelihood of using specific services online.

Among those who have Internet access, majorities of six in ten or more indicate that they are likely to use nearly all these services online. Residents are most likely to say they would use online bill payment (60% say very likely) and online voting (61%) and least likely to register or renew a business licence (35%), with 32 percent indicating they are “not at all likely” to use this online service.

Those between the ages of 18 and 54 are more likely than those aged 55 and older to be “very likely” to use most of these services.



Q11. The City of Vaughan is considering expanding how it delivers services online. Thinking about this, how likely would you be to use the following online services? If you do not have Internet access on a regular basis, please say so. Base: All respondents (excl. dk/na and those with no Internet access); 2018 (Bases vary)

# LIKELIHOOD TO USE ONLINE SERVICES BY WARD

Residents of Ward 2 are significantly more likely than those in Wards 3 and 4 to use online bill payment (87% vs. 76% and 72%, respectively).

As well, residents of Ward 2 are significantly more likely than residents of Ward 5 to use posting of various kinds of data about the city online (75% vs. 63%), booking a facility online (75% vs. 60%), and registering and renewing a business licence (58% vs. 45%).

		W A R D				
TOP2BOX (Very / Somewhat Likely)	Total	1	2	3	4	5
Online bill payment, for taxes, water bills, and so on	80%	80%	87%	76%	72%	79%
Reporting issues that residents have and tracking the resolution of these issues	79%	79%	82%	76%	77%	79%
Having live customer service chat to help residents answer any questions online quickly	78%	77%	80%	77%	84%	79%
Online voting for municipal elections	78%	78%	79%	80%	84%	77%
Posting various kinds of data about the city online, including financial data about the city, land use data, and so on	69%	71%	75%	71%	71%	63%
Booking a facility, such as in a community centre, meeting room, and so on	66%	69%	75%	67%	58%	60%
Obtaining a range of permits, including fireworks display permits, building permits, and so on	61%	63%	64%	61%	58%	58%
Business licence registration and renewal	49%	50%	58%	47%	41%	45%



**Significantly Higher**

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

Q11. The City of Vaughan is considering expanding how it delivers services online. Thinking about this, how likely would you be to use the following online services? If you do not have Internet access on a regular basis, please say so. Base: All respondents (excl. dk/na and those with no Internet access) 2018 (n= Bases vary); 2016 (Bases vary)

# LIKELIHOOD TO USE ONLINE SERVICES – BY AGE

Residents between the age of 18-34 and 35-54 are more likely to say they would use the following online services compared to residents aged 55+ with the exception of having live customer service chat, and posting various kinds of data about the city. A similar trend follows for high income earners, as they are more likely to use the mentioned services compared to lower income earners.

Very likely to use online services	Age			Income				
	18-34	35-54	55+	Less than 40,000	40,000 to less than 80,000	80,000 to less than 120,000	120,000 to less than 160,000	160,000+
Online bill payment	62%	66%	52%	45%	53%	57%	72%	64%
Reporting issues that residents have and tracking the resolution of these issues	53%	55%	41%	36%	39%	44%	57%	61%
Having live customer service chat	51%	56%	48%	36%	48%	52%	53%	56%
Online voting	65%	69%	49%	39%	45%	58%	66%	75%
Posting various kinds of data about the city online, including financial data about the city, land use data, and so on	35%	43%	38%	31%	34%	34%	50%	53%
Booking a facility	52%	50%	31%	31%	33%	43%	57%	55%
Obtaining a range of permits, including fireworks display permits, building permits, and so on	45%	44%	26%	32%	26%	36%	43%	53%
Business licence registration and renewal	36%	41%	26%	18%	29%	33%	39%	40%

 Significantly Higher

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

Q11. The City of Vaughan is considering expanding how it delivers services online. Thinking about this, how likely would you be to use the following online services? If you do not have Internet access on a regular basis, please say so. Base: All respondents (excl. dk/na and those with no Internet access) 2018 (Bases vary)

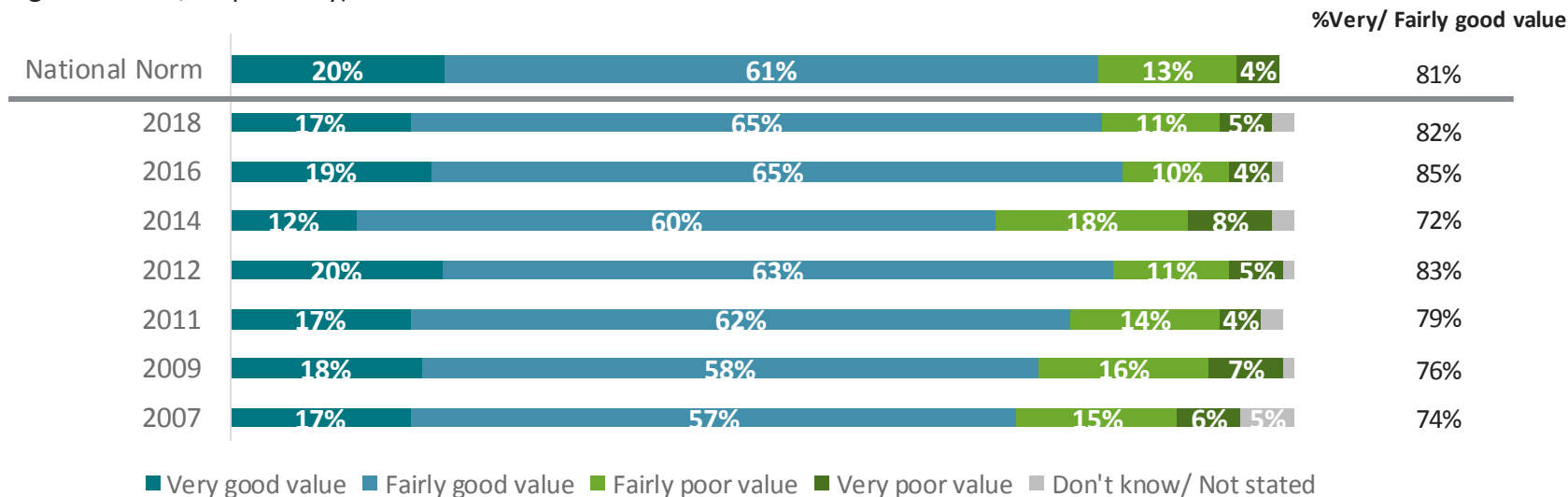
# TAXES AND SERVICE COSTS

# VALUE FOR TAX DOLLARS

Eight in ten (82%) residents believe they are getting good value for their tax dollar. This figure is unchanged compared to 2016.

The perception of good value for tax dollars is on par with the national norm (82% vs. 81%, respectively).

There is little significant difference across demographic subgroups, but those aged 55 and older are more likely than younger residents to think they get “very good value” for their tax dollars (23% among those aged 55 and older vs. 12% among those aged 18-34 and 15% among those aged 35 to 54, respectively).



*\*Only values of 4% or above are labelled on the graph.*

Q12. Thinking about all of the programs and services you receive from The City of Vaughan, would you say that overall you get good value or poor value from your tax dollars? Is that ... Base: All respondents 2018 (n=806) 2016 (n=800); 2014 (n=800); 2012 (n=500); 2011 (n=500); 2009 (n=300); 2007 (n=300)

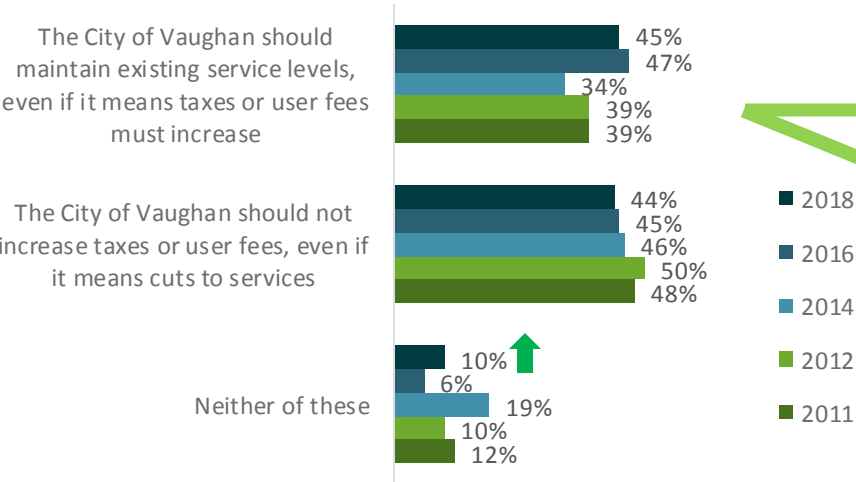
# BALANCE OF TAXATION AND SERVICES

Residents were informed that Vaughan City Council has committed to a maximum tax rate increase of not more than three percent per year and presented with two options regarding taxation and services.

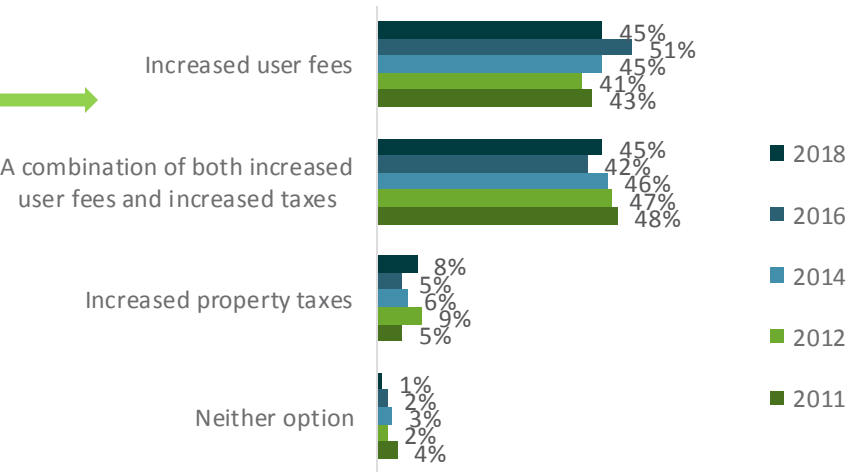
Similar to 2016, residents are divided on the issue –45% say the City of Vaughan should maintain existing service levels, even if it means taxes or user fees must increase, while 44% say the City of Vaughan should not increase taxes or user fees, even if it means cuts to services. However, there has been a four-point increase in the proportion of residents who choose neither of these options (10%).

Of those who believe the City should maintain current service levels, opinion remains divided as to how to pay for the cost increases: 45% favour increased user fees, and the same proportion (45%) prefer a combination of both increased user fees and increased taxes. Similar to past waves, few (8%) opt for increased property taxes. Similar to past waves, few (8%) opt for increased property taxes.

Perceptions around taxation and services



Preferred action to maintain service levels



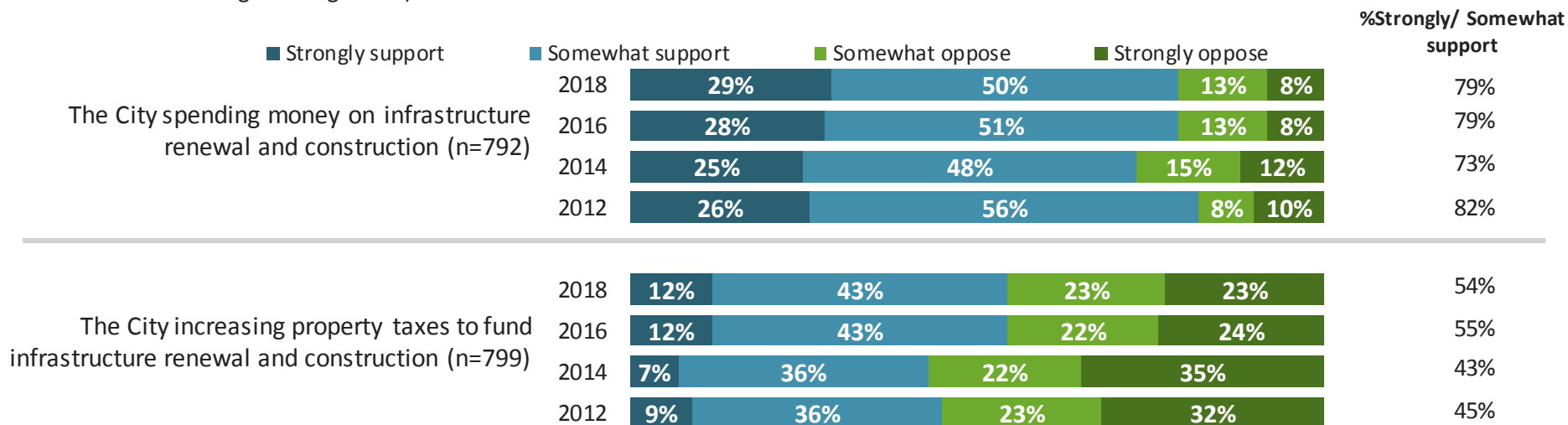
Q13. As you may know, Vaughan City Council has committed to a maximum tax rate increase of not more than three per cent per year. Which of the following comes closest to your own point of view? Base: All respondents 2018 (n=806); 2016 (n=800); 2014 (n=800); 2012 (n=500); 2011 (n=500)  
Q14. If maintaining service levels meant an increased cost to provide these services, which of the following options would you most prefer? Base: Those who said the City of Vaughan should maintain existing service levels even if it means taxes or user fees must increase 2018 (n=365); 2016 (n=375); 2014 (n=275); 2012 (n=194); 2011 (n=194)

# SPENDING ON INFRASTRUCTURE RENEWAL

After significant increases in 2016, perceptions on spending on infrastructure renewal have stabilized. A large majority of eight in ten (79%) residents strongly (29%) or somewhat (50%) support the City spending money on infrastructure renewal and construction.

There continues to be less support for the City increasing property taxes to fund infrastructure renewal and construction, with just over half (54%) of residents saying they would strongly (12%) or somewhat (43%) support these actions – those residents that are strongly opposed to this are double those residents who would strongly support this.

Residents aged 18-34 are more likely than older residents to support both the City spending money on infrastructure renewal and construction (88% vs. 74% among those aged 35-54 and 79% among those 55+), and the City increasing property taxes to fund these actions (61% vs. 49% among those aged 35-54 and 56% among those aged 55+).



Q15. Property taxes in the City of Vaughan in part allow the City to spend money to renew infrastructure. By infrastructure we mean assets like roads, bridges, storm sewers, parks, recreation Centres, arenas, libraries and other City facilities. In the future the City may need additional funds to maintain City assets. Do you strongly support, somewhat support, somewhat oppose or strongly oppose the following... Base: All respondents (excl. dk/na) 2018 (Varies Bases); 2016 (Varied bases); 2014 (Varied bases); 2012 (Varied bases)

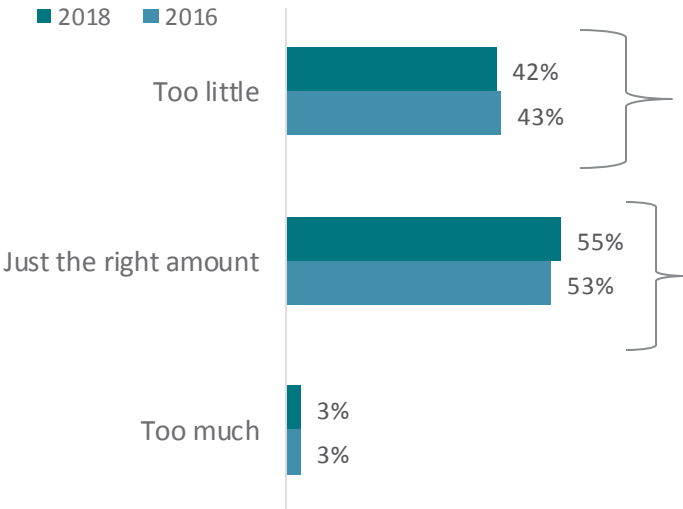
# COMMUNICATIONS

# PERCEIVED AMOUNT OF INFORMATION RECEIVED FROM THE CITY OF VAUGHAN

Most residents (55%) believe they are receiving just the right amount of information about the City of Vaughan. A sizeable proportion of 42% say they are receiving too little, while very few (3%) residents say they are receiving too much information. These findings are on par with 2016.

Men are more likely than women to believe they receive too little information (47% vs. 36%, respectively), while women are more likely than men to report receiving just the right amount (60% vs. 49%). Generationally, younger residents aged 18-34 are more likely than their older counterparts to think they receive too little information (51% among 18-34 year old vs. 39% among 35-54 year old and 37% among aged 55 and older), while those age 35 and older are more likely than their younger counterparts to say they are receiving just the right amount (59% among 55 and older and 57% among aged 35-54 vs. 45% among 18-34 year old).

Residents residing in Wards 1 and 4 are more likely to believe they are receiving too little information, while those in Wards 2, 3 and 5 are more likely to say they are receiving just the right amount.



Gender		Age			Ward				
Male	Female	18-34	35-54	55+	1	2	3	4	5
47%	36%	51%	39%	37%	53%	34%	42%	49%	33%

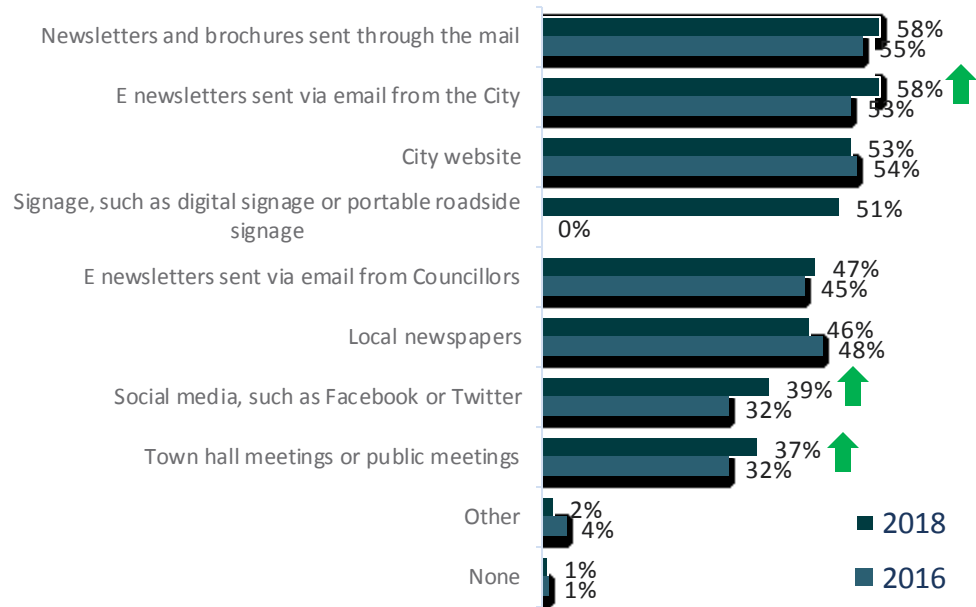
Gender		Age			Ward				
Male	Female	18-34	35-54	55+	1	2	3	4	5
49%	60%	45%	57%	59%	44%	61%	55%	48%	62%

Q16. In your opinion, do you currently receive (READ LIST) information from the City of Vaughan? Base: All respondents 2018 (n=806); 2016 (n=800)

# PREFERRED METHODS OF CONTACT WITH THE CITY OF VAUGHAN

Newsletters and brochures sent through the mail (58%) and E newsletters sent via email from the City (58%), followed by the City website (53%), and signage (5%) are the most preferred methods of contact with the City of Vaughan, and preference for e-newsletters is up five points from 2016. Growing proportions also cite social media, such as Facebook or Twitter (39%, up 7 points), and town hall or public meetings (37%, up 5 points).

Residents aged 35 to 54 tend to prefer most of these methods of contact (with the exception of local newspapers and town hall meetings), while those aged 18 to 34 show a preference for the City website and social media, and those 55 and older preferring newsletters and brochures sent through the mail and town hall meetings.



Methods of Contact	Age		
	18-34	35-54	55+
News letters and brochures sent through the mail	46%	57%	67%
E news letters sent via email from the City	51%	67%	53%
City website	56%	61%	42%
Signage, such as digital signage or portable roadside signage	45%	59%	48%
E news letters sent via email from Councillors	40%	57%	42%
Local newspapers	42%	45%	49%
Social media, such as Facebook or Twitter	64%	42%	18%
Town hall meetings or public meetings	29%	38%	41%
Other	4%	2%	1%
None	4%	-	-

Significantly Higher

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

Q17. What are your preferred methods for City of Vaughan communicating with you? Base: All respondents 2018 (n=806); 2016 (n=800)

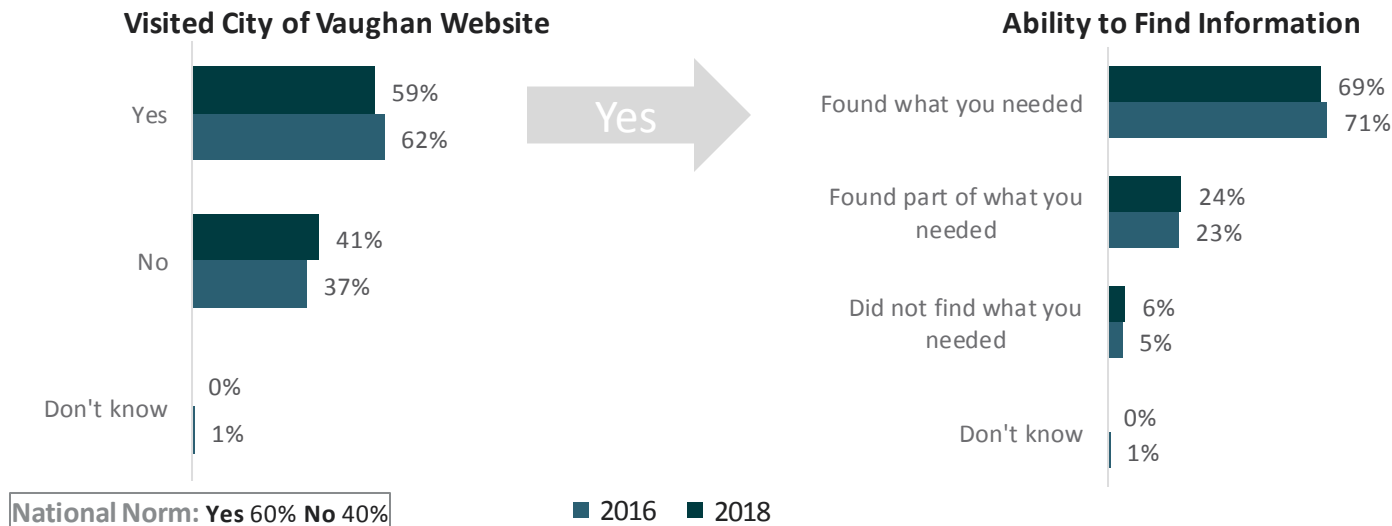
# USE AND ASSESSMENT OF CITY WEBSITE

Similar to in 2016, six in ten (59%) residents report visiting the City of Vaughan's website in the past 12 months.

Use of the City's website is on par with the national norm (59% vs. 60%, respectively).

Use of the City's website is higher among residents under age 55 than older residents (age 18-34 years:60%, 67% and age 35-54 years:67% vs. 55 and older:48%).

Among past 12-month visitors to the City's website, seven in ten (69%) found what they needed. Three in ten found part of what they needed (24%) or did not find what they needed (6%). These findings are consistent with the 2016 wave.



Q18. Have you been to the City of Vaughan's website in the past 12 months? Base: All respondents 2018 (n=806); 2016 (n=800)

Q19. In searching for the desired information on the City's website, did you find what you were looking for? Base: Those who have been to the City's website in the past 12 months 2018 (n=465); 2016 (n=493)

# USE OF CITY WEBSITE – BY WARD

Use of the City’s website within the past 12 months is higher among Wards 1, 2 and 5.

		W A R D				
Used City Website in Past 12 Months	Total	1	2	3	4	5
Yes	59%	64%	70%	46%	39%	57%
No	41%	36%	30%	54%	57%	43%

 Significantly Higher

Minimum Base: 30 (\*\*), Small Base: 100 (\*)

Q18. Have you been to the City of Vaughan’s website in the past 12 months? Base: All respondents 2018 (n=806); 2016 (n=800)

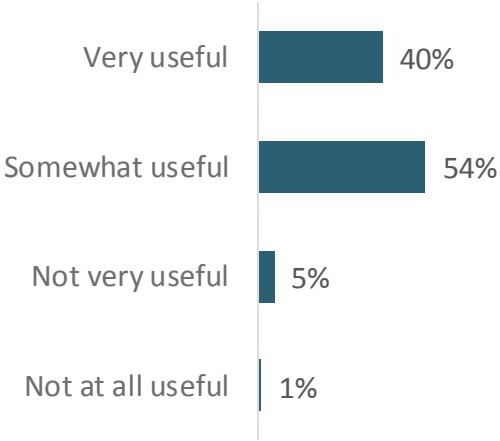
# USEFULNESS OF THE CITY'S WEBSITE

Among past 12-month visitors to the City’s website, more than nine in ten (94%) found the content and information available on the website to be useful, including 40% who found it “very useful.”

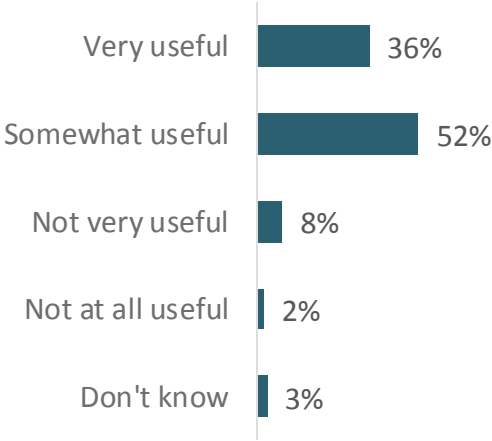
A slightly smaller proportion, nine in ten (88%) found the types of online services available on the website useful, including 36% who found these services “very useful.”

There are no significant differences among demographic subgroups.

**Content and information available on the website**



**Types of online services available on the website**

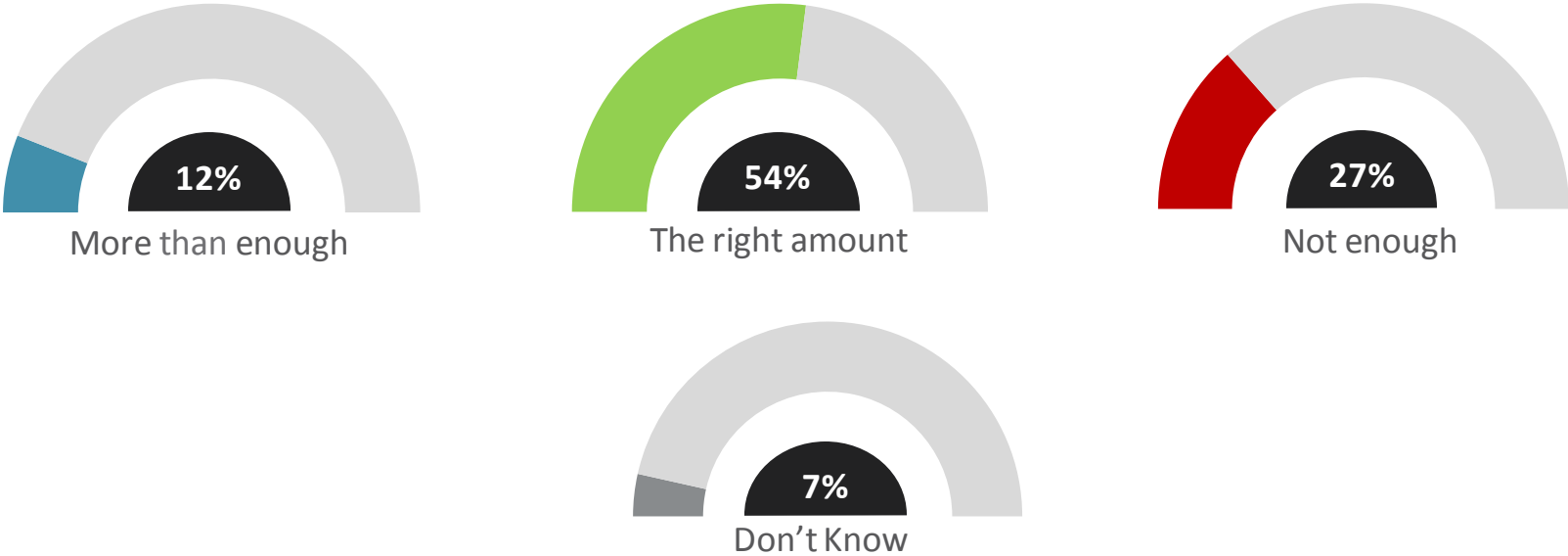


# PUBLIC ENGAGEMENT

# AVAILABILITY OF ARTS, LIFESTYLE AND CULTURAL AMENITIES IN THE CITY

Most residents (54%) believe there is just the right amount of arts, lifestyle, and cultural amenities available in the City of Vaughan. One-quarter (27%) say there is not enough, while one in ten (12%) believe there is more than enough, and just under one in ten (7%) don't know.

Residents aged 18-34 are more likely than their older counterparts to say that there are not enough of these amenities in the city (18-34: 41% vs. 35-54:22% and 55 and older: 21%), while those aged 35 and older are more likely than those aged 18-34 to think there are the right amount of these amenities in the city (55 and older:59% and 35-54:56% vs. 18-34:45%).

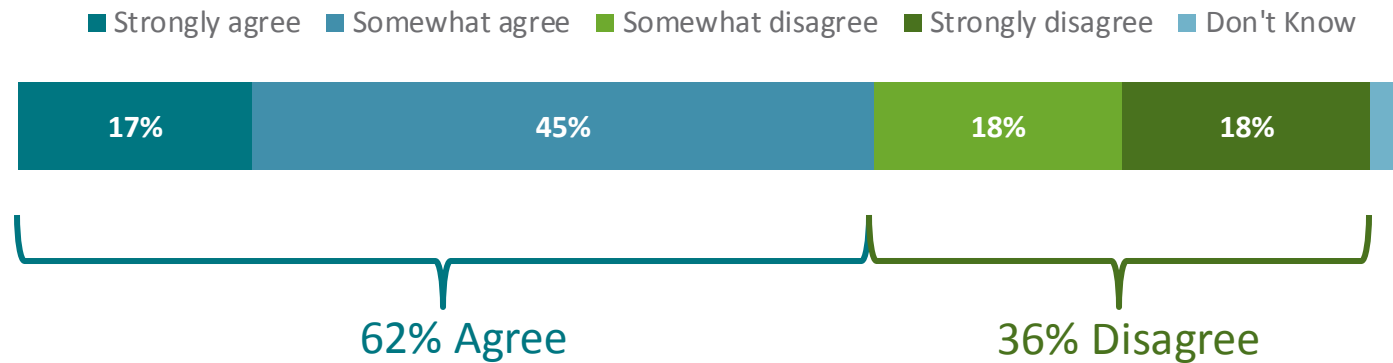


Q23a. Would you say that there are more than enough, not enough, or the right amount of arts, lifestyle, and cultural amenities available to you in the City of Vaughan?  
Base: 2018 (n=806)

# ABILITY TO INFLUENCE MUNICIPAL DECISIONS BY PARTICIPATING IN PUBLIC ENGAGEMENT EVENTS

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

Younger residents between the ages of 18-34 are more likely than those 55 and older to agree that they can influence municipal decisions through their participation in public engagement events (68% vs. 57%, respectively).



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## GAME CHANGERS

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At Ipsos we are passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions.

We believe that our work is important. Security, simplicity, speed and substance applies to everything we do.

Through specialisation, we offer our clients a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative.

By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

“GAME CHANGERS” – our tagline – summarises our ambition.

# Vaughan Business Survey

Prepared by: Forum Research

January 11, 2019

# Survey Research Method

Three 1-hour focus group discussions were held with key informants from multiple sectors including manufacturing, professional service, supply chain, arts and culture, small business and entrepreneurs (less than 20 employees).

The quantitative survey that followed was informed by key information collected in the focus groups.

Fieldwork Dates	Focus Groups – November 8 Survey – November 30 - December 14
Method	Computer Assisted Telephone Interviewing (CATI)
Criteria for Participation	Business owner/Senior Management operating out of Vaughan
Sample Size	212
Margin of Error	± 6.73%, 19 times out of 20

TOP2 indicates the sum of the two positive answer options. BTM2 indicates the sum of the two negative answer options

## Reasons your Business is located in Vaughan

- Many respondents indicated Vaughan is a good location for their business (39%)
- They live in Vaughan (21%)
- Their customers are located in Vaughan (20%)
- The vast majority (TOP2 = 95%) indicated the overall quality of life in the city of Vaughan is very good or good.

## Services provided by Vaughan

- The majority (TOP2 = 52%) of respondents indicated they were very aware or somewhat aware of the services that the City of Vaughan provides to local businesses.
- 9-in-10 respondents (TOP2 = 91%) are satisfied with the delivery of services provided by the City of Vaughan.
- Looking only at large businesses (100+ employees), respondents are satisfied with the delivery of services provided by the city (TOP2 = 94%).

# Executive Summary

Respondents have heard of about half of the services. The services are grouped by known and less known.

Known Services (At least 50% of respondents have heard of the service):	Less Known Services (33% or less of respondents have heard of the service):
Fire and Emergency Services (80%)	Entrepreneurship Programs (17%)
Bylaw Enforcement (72%)	Location Assistance (18%)
Building Standards (68%)	Procurement Services (23%)
Business Licenses (67%)	Small Business Services (25%)
Library (61%)	Environmental Sustainability services (26%)
Waste Management (60%)	Sponsorship/Advertising (29%)
Recreation, Sports and Wellness Services (57%)	Economic Development Services (32%)
Planning and Development Services (52%)	Business to Business Networking (33%)

## Business Growth

- The vast majority (TOP2 = 93%) indicated their business is growing or staying about the same.

## Challenges

The top 5 challenges for businesses are:

- Competition (15%)
- Costs (10%)
- Traffic/Congestion/ Travel Times (10%)
- Customers/Sales (9%)
- Staffing (8%)

## Digital/Innovative Technology

- The majority (TOP2 = 61%) of respondents indicated they are not strongly negatively affected or not affected at all by digital or online products/competitors.
- The majority (TOP2 = 67%) of respondents estimated they will spend a significant/some investment on new/innovative technology for their business.

## Vaughan Metropolitan Centre

- The majority (TOP2 = 52%) of respondents indicated the City of Vaughan is effectively promoting the Vaughan Metropolitan Centre as a location where businesses want to invest.
- However, about 2-in-10 (22%) indicated the City of Vaughan is not effectively promoting the Vaughan Metropolitan Centre at all.
- The majority of respondents from Large businesses indicated the City of Vaughan is not effectively promoting the Vaughan Metropolitan Centre (BTM2 = 53%).

## Services: Focus Areas

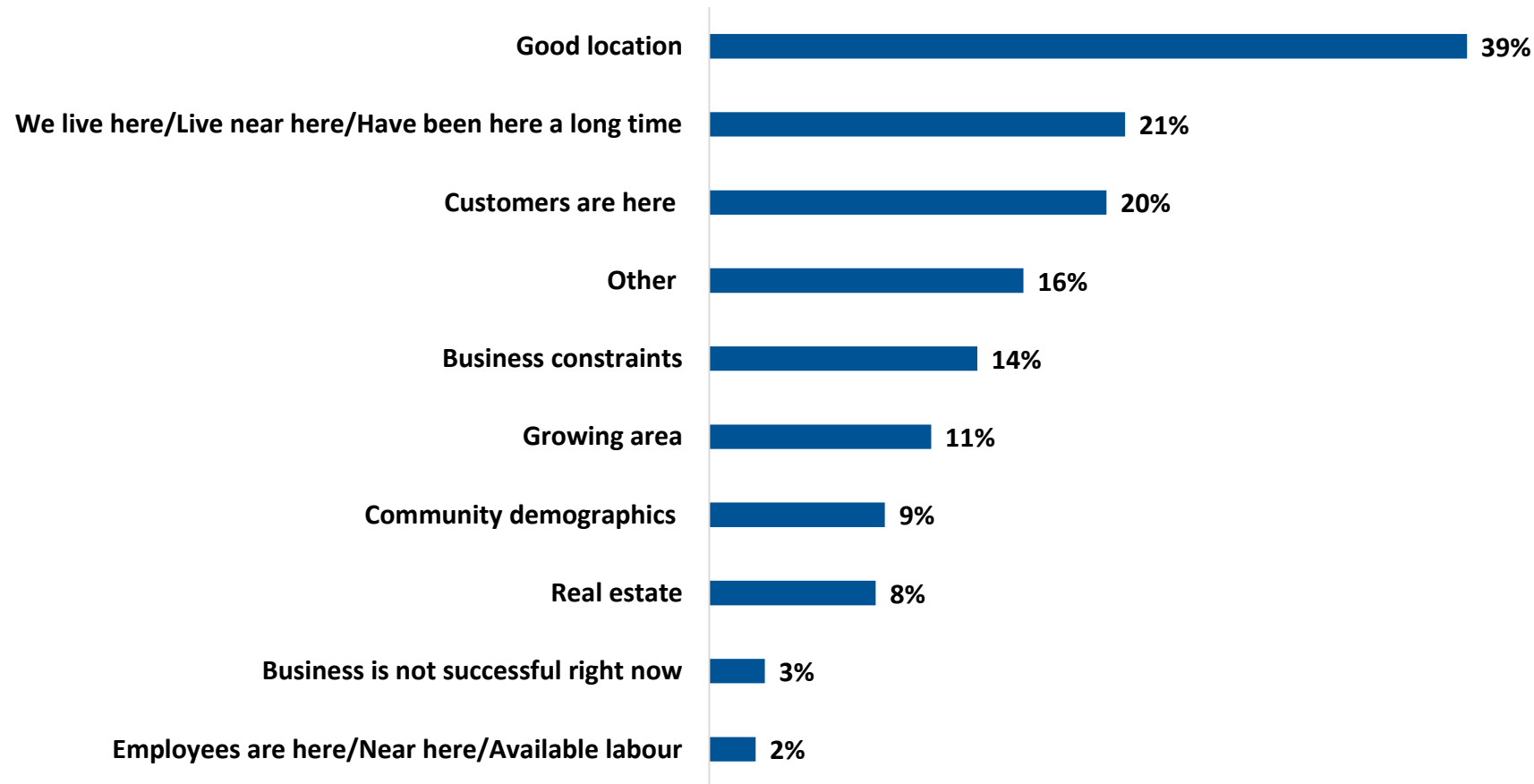
- The City of Vaughan could consider focusing its economic development efforts to improve road infrastructure (40%), encourage businesses (26%) and improve public transit (18%).

## Contacting the City of Vaughan

- Just over 3-in-10 respondents have contacted the city of Vaughan for a reason related to their business (37%).
- Of those who contacted the City, almost 7-in-10 indicated the reason for their contact was resolved to their satisfaction (68%).

# Key Findings

## Reasons your Business is Located in Vaughan



Respondents were asked to list some of the reasons their business is located in Vaughan.

Many respondents indicated Vaughan is a good location for their business (39%), they live in Vaughan (21%), or their customers are located in Vaughan (20%).

# Reasons your Business is Located in Vaughan



Respondents were asked what are some of the reasons your business is located in Vaughan. Here are some of the responses on location:

**“Due to location. We are near the airport, close to major 400 highways.”**

**“It's the location I chose. Good relationship with my customers. Providing the jobs required.”**

**“Location. It's close to highways and the business we are serving. Traffic times, the lower rent than in other cities we've looked at.”**

# Reasons your Business is Located in Vaughan



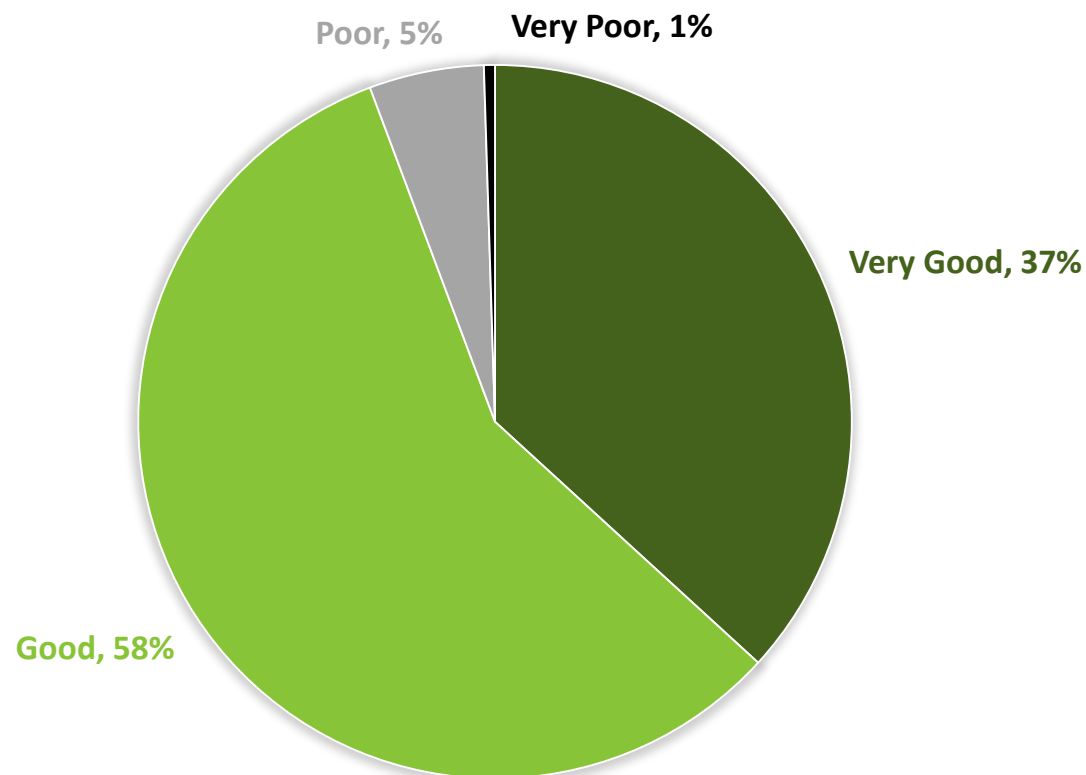
Respondents were asked what are some of the reasons your business is located in Vaughan. Here are some of the responses on living in Vaughan, and their customers are located in Vaughan:

**“This is where we live and it's close to our house, it's a historical older building it's been around for nearly fifty years. Our customer base: we have a lot of repeat customers and word of mouth”**

**“We're here for the last 12 years. Good relationship with patients.”**

# Key Findings

## QUALITY OF LIFE IN VAUGHAN



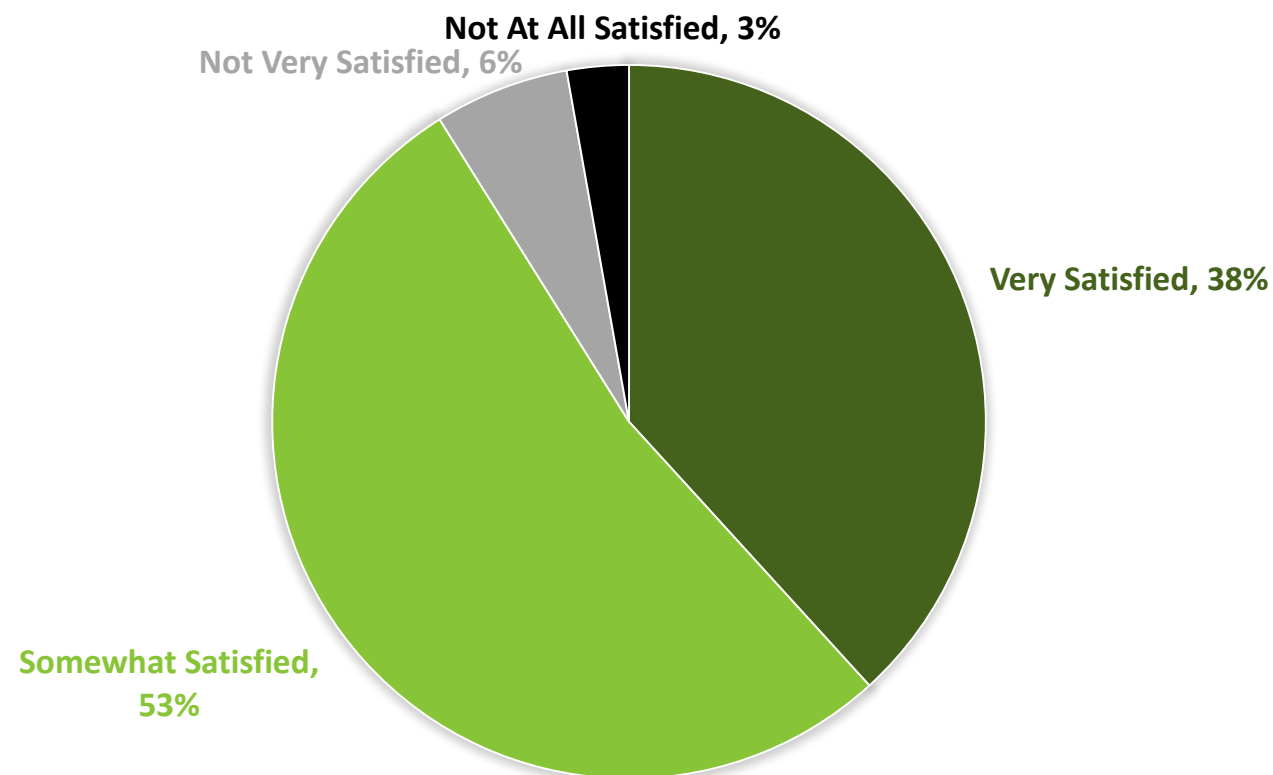
Respondents were asked to rate the overall quality of life in the City of Vaughan using a 4-point scale.

The vast majority (TOP2 = 95%) indicated the overall quality of life in the City of Vaughan is very good or good.



# Key Findings

## SATISFACTION WITH DELIVERY OF SERVICES

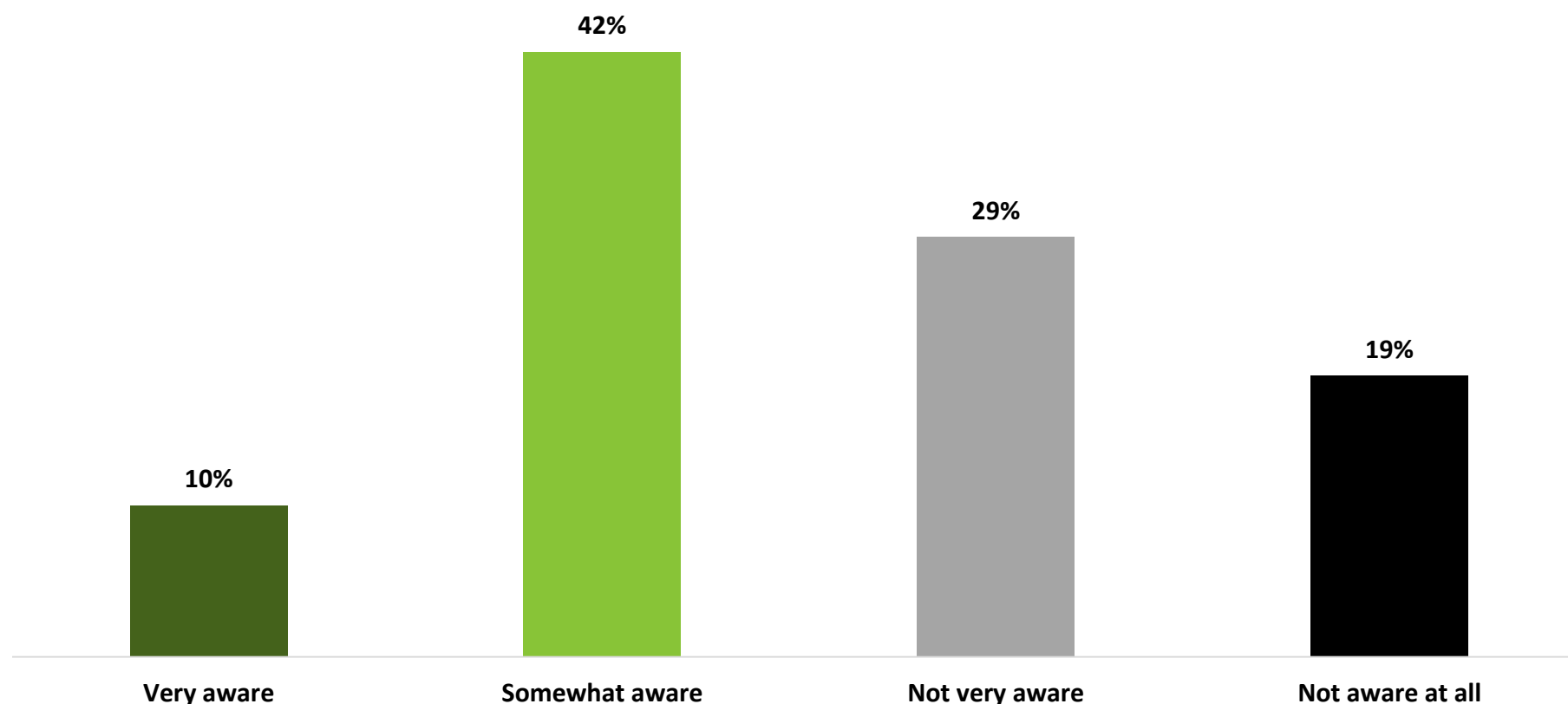


Respondents were asked how satisfied they are with the delivery of services provided by the City of Vaughan on a 4-point scale.

The vast majority (TOP2 = 91%) are satisfied with the delivery of services provided by the City of Vaughan.

# Key Findings

**Generally, how aware are you of the services that the city of Vaughan provides specifically to local businesses?**



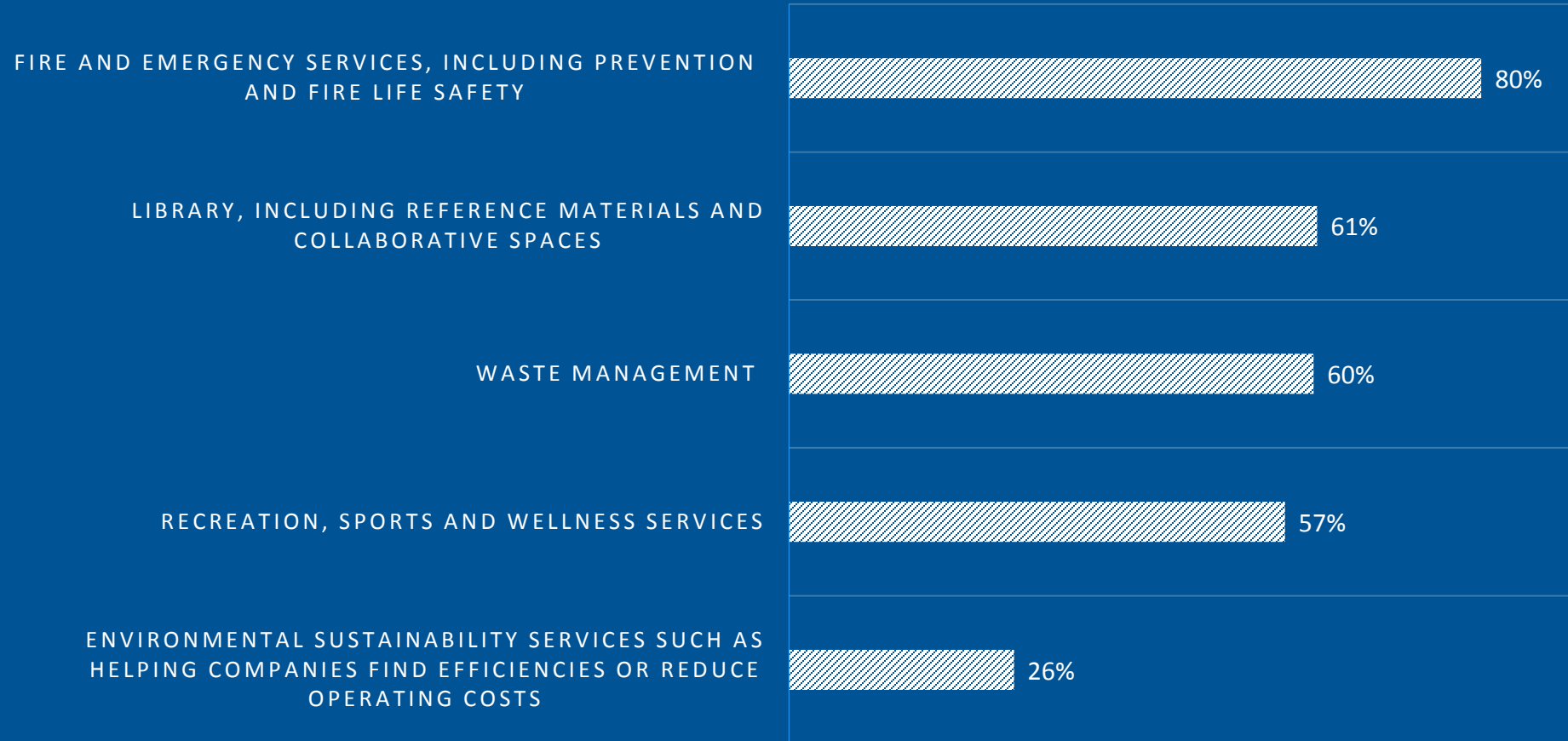
Respondents were asked how aware they are of the services Vaughan provides to local businesses using a 4-point scale.

The majority (TOP2 = 52%) of respondents indicated they were very aware or somewhat aware of the services that the City of Vaughan provides to local businesses.



# Key Findings

## SERVICES BUSINESSES HAVE HEARD ABOUT



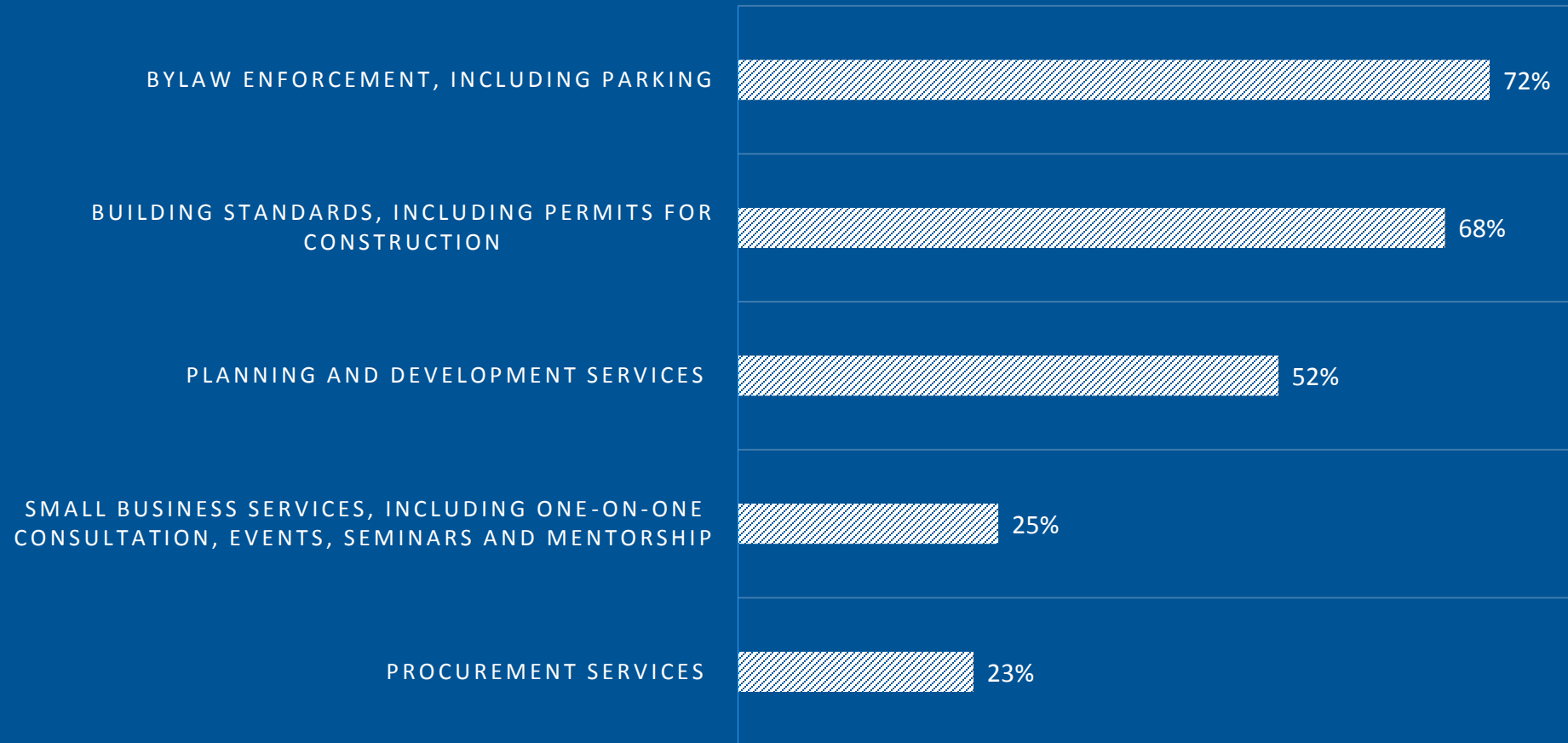
The majority of respondents have heard about:

- Fire and Emergency Services (80%)
- Library (61%)
- Waste Management (60%)
- Recreation, Sports and Wellness Services (57%)

However, only a quarter of respondents have heard about Environmental Sustainability services (26%)

# Key Findings

## SERVICES BUSINESSES HAVE HEARD ABOUT



The majority of respondents have heard about:

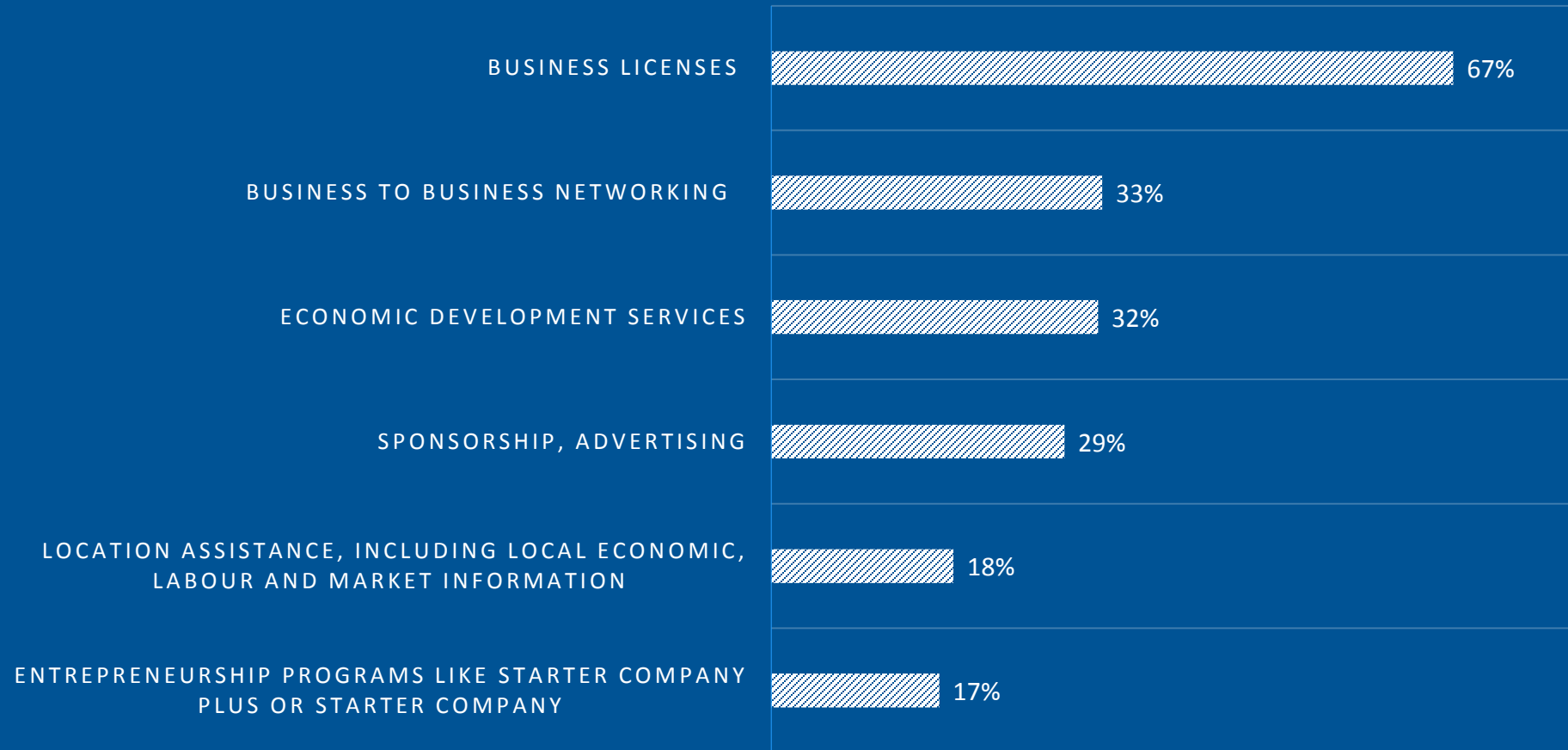
- Bylaw Enforcement (72%)
- Building Standards (68%)
- Planning and Development Services (52%)

However, only a quarter of respondents have heard about:

- Small Business Services (25%)
- Procurement Services (23%)

# Key Findings

## SERVICES BUSINESSES HAVE HEARD ABOUT



The majority of respondents have heard about:

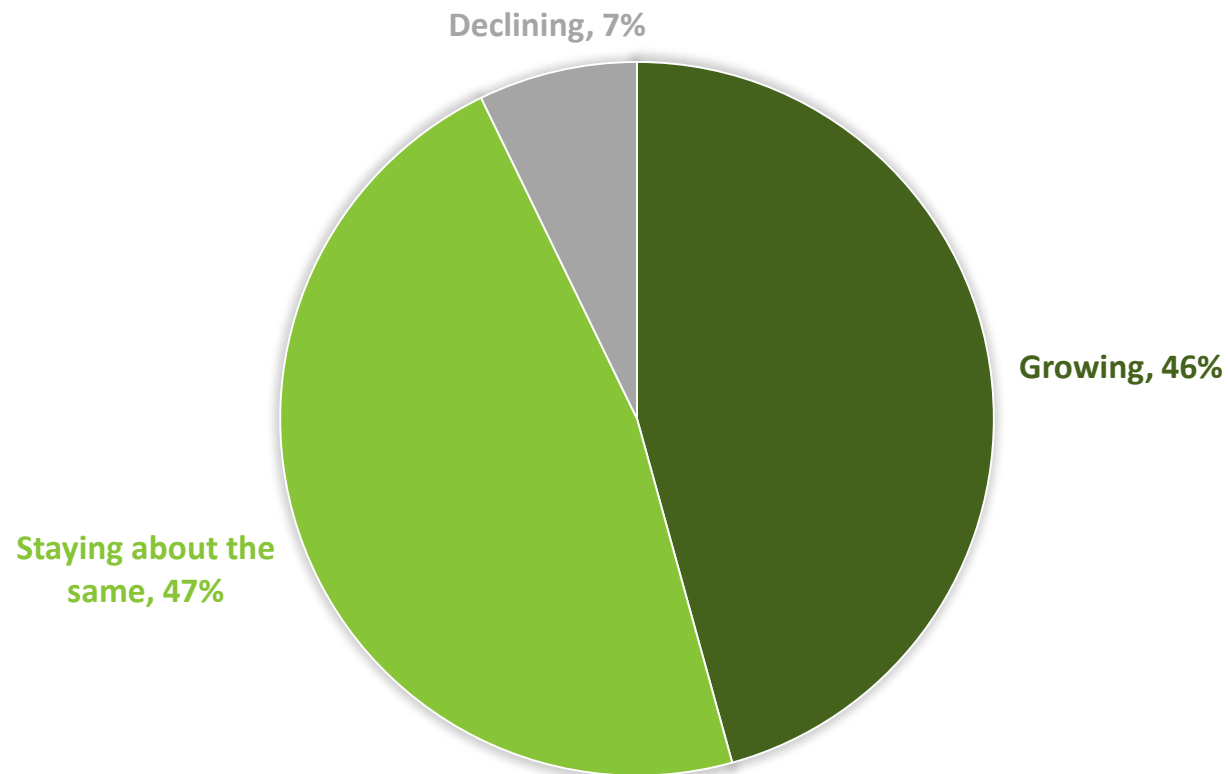
- Business Licenses (67%)

However, only one third or fewer respondents have heard about:

- Business to Business Networking (33%)
- Economic Development Services (32%)
- Sponsorship/Advertising (29%)
- Location Assistance (18%)
- Entrepreneurship Programs (17%)

# Key Findings

## BUSINESS GROWTH/DECLINE

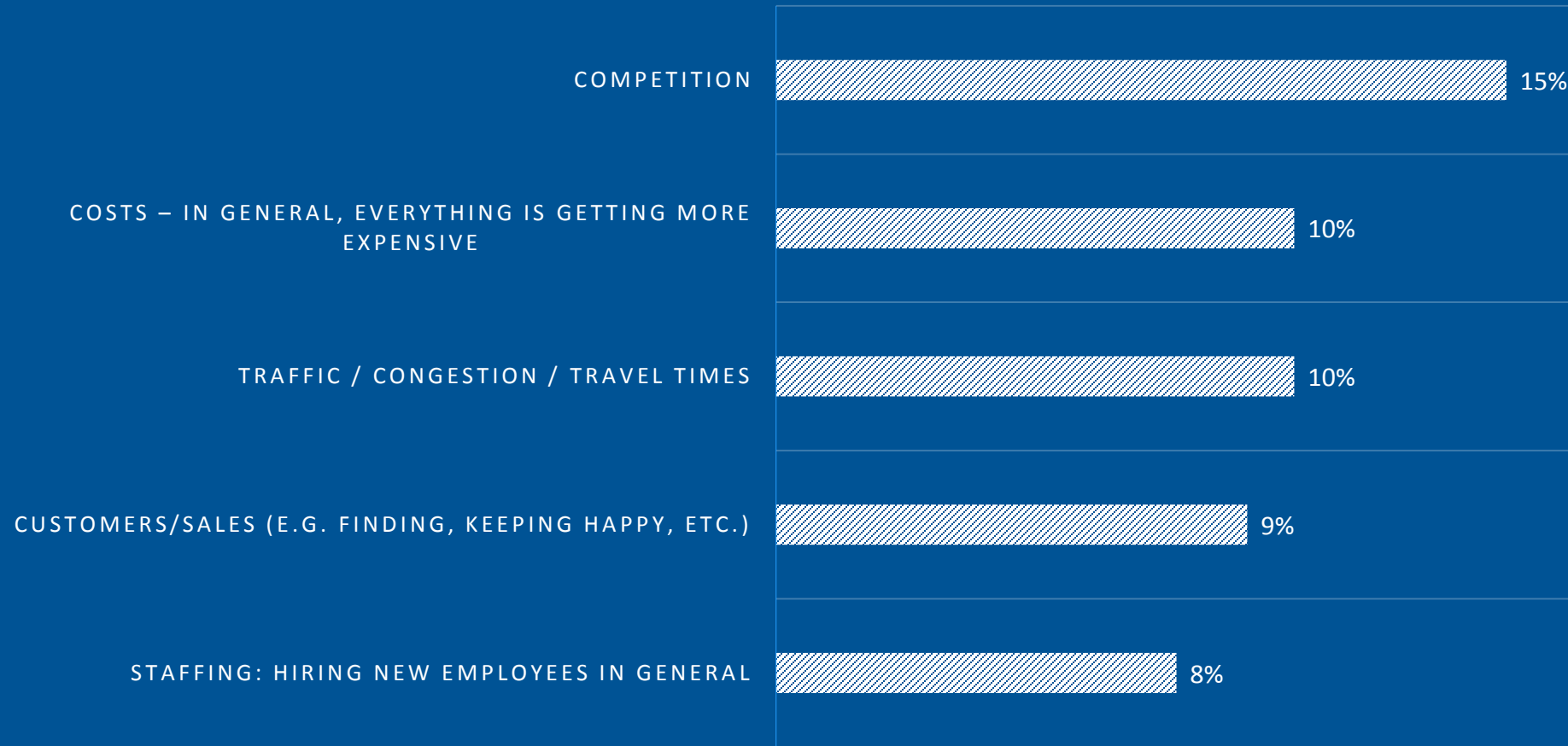


Respondents were asked about the current growth/decline of their business.

The vast majority (TOP2 = 93%) indicated their business is growing or staying about the same.

# Key Findings

## TOP 5 CHALLENGES FOR BUSINESSES

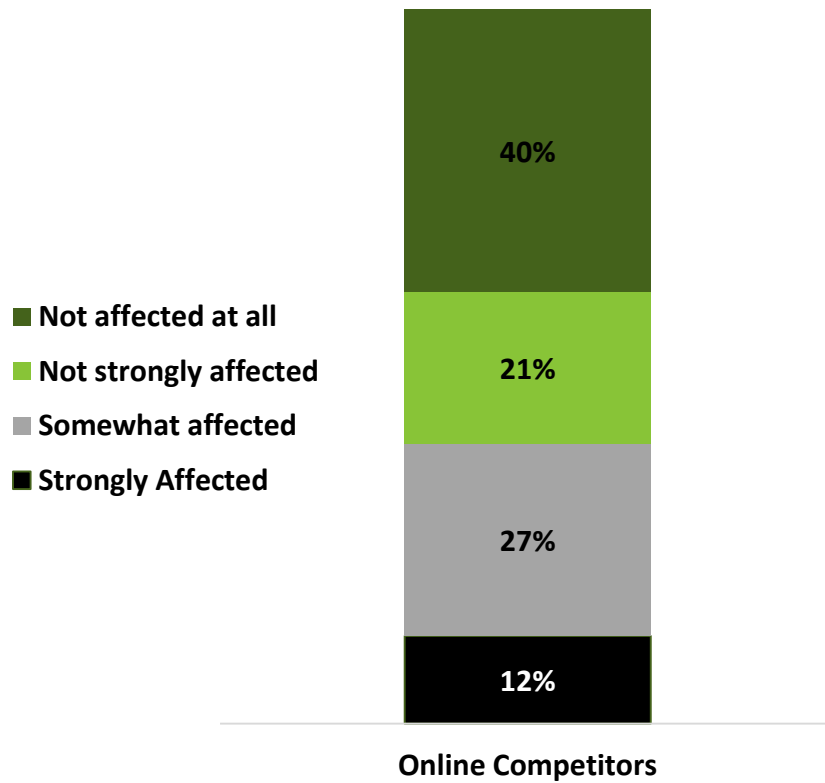


The top 5 challenges for businesses are:

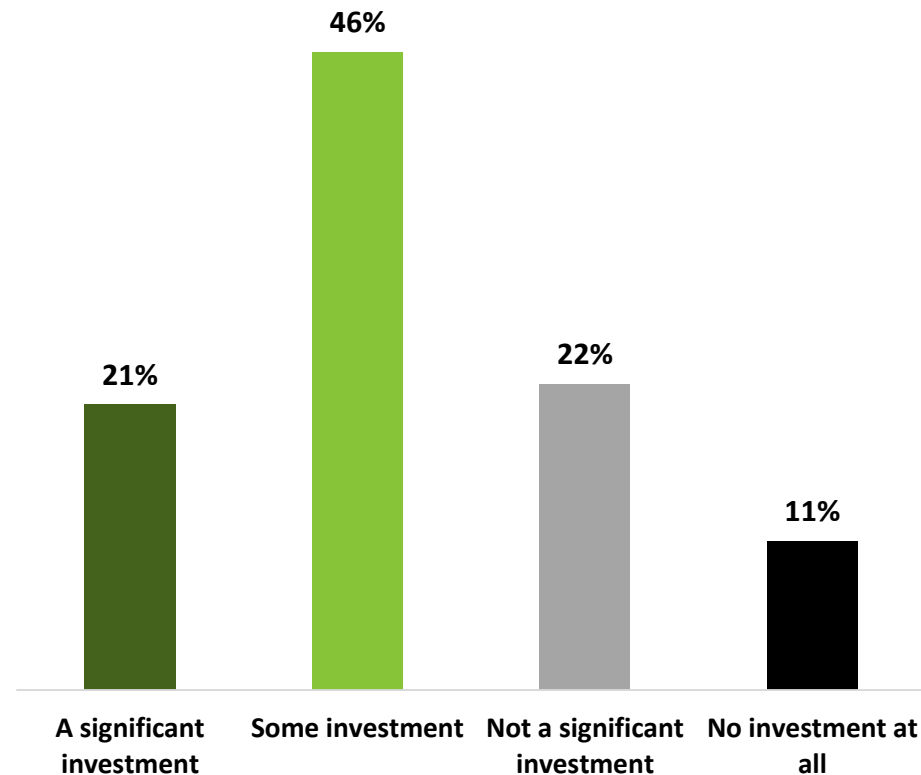
1. Competition (15%)
2. Costs (10%)
3. Traffic/Congestion/Travel Times (10%)
4. Customers/Sales (9%)
5. Staffing (8%)

# Key Findings

How much is your business, if at all, being negatively affected by digital or online products or competitors?



In the next five years, how much of an investment do you expect you will make in new or innovative technology for your business?

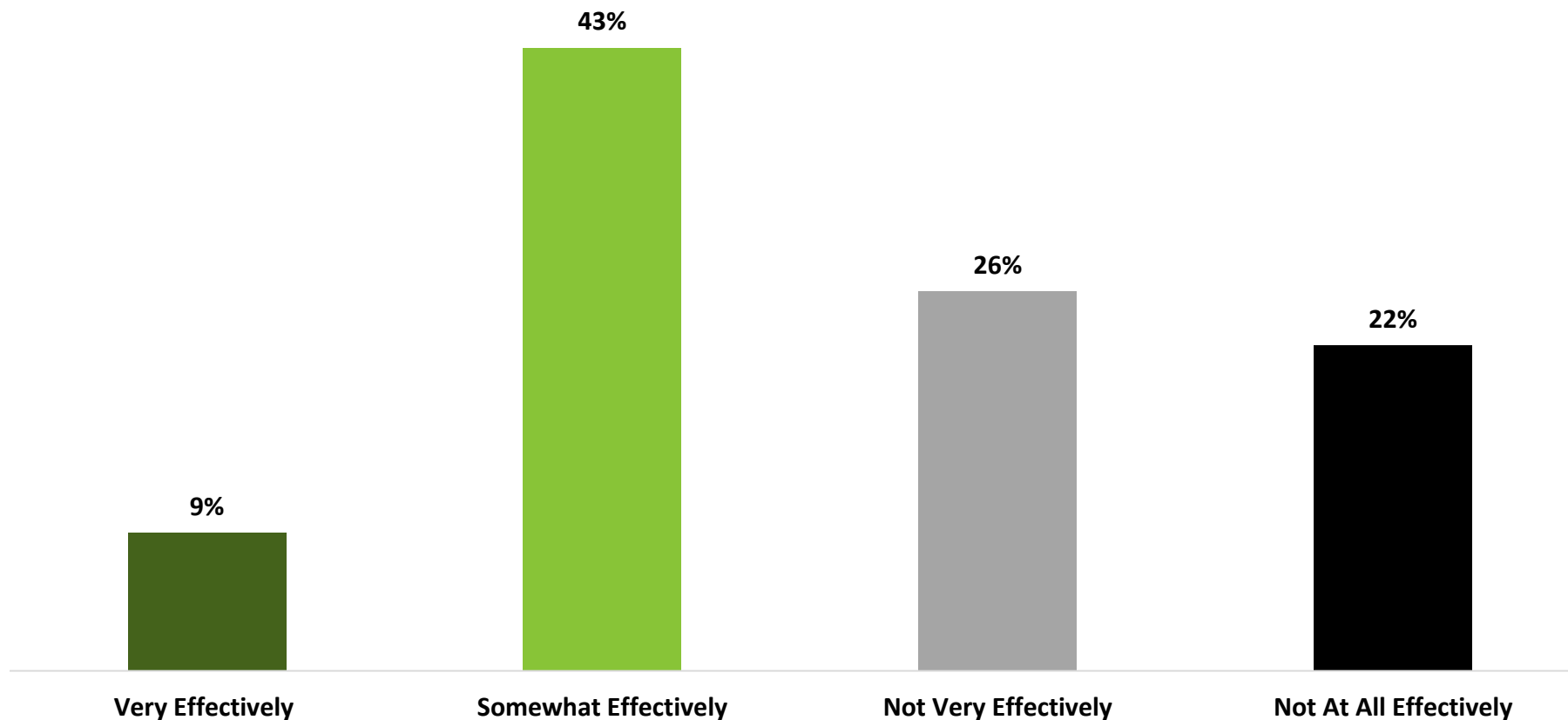


The majority (TOP2 = 61%) of respondents indicated they are not strongly negatively affected or not affected at all by digital or online products/competitors.

The majority (TOP2 = 67%) of respondents estimated they will spend a significant/some investment on new/innovative technology for their business.

# Key Findings

**How effectively is Vaughan promoting the Vaughan Metropolitan Centre as a location where businesses want to invest?**



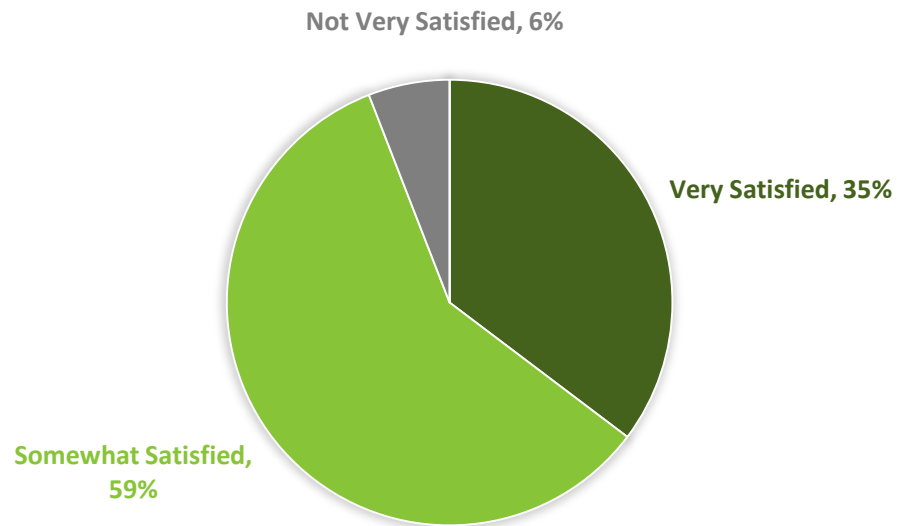
Respondents were asked to rate how effectively Vaughan is promoting the Vaughan Metropolitan Centre as a location where businesses want to invest on a 4-point scale.

The majority (TOP2 = 52%) of respondents indicated the City of Vaughan is effectively promoting the Vaughan Metropolitan Centre as a location where businesses want to invest.

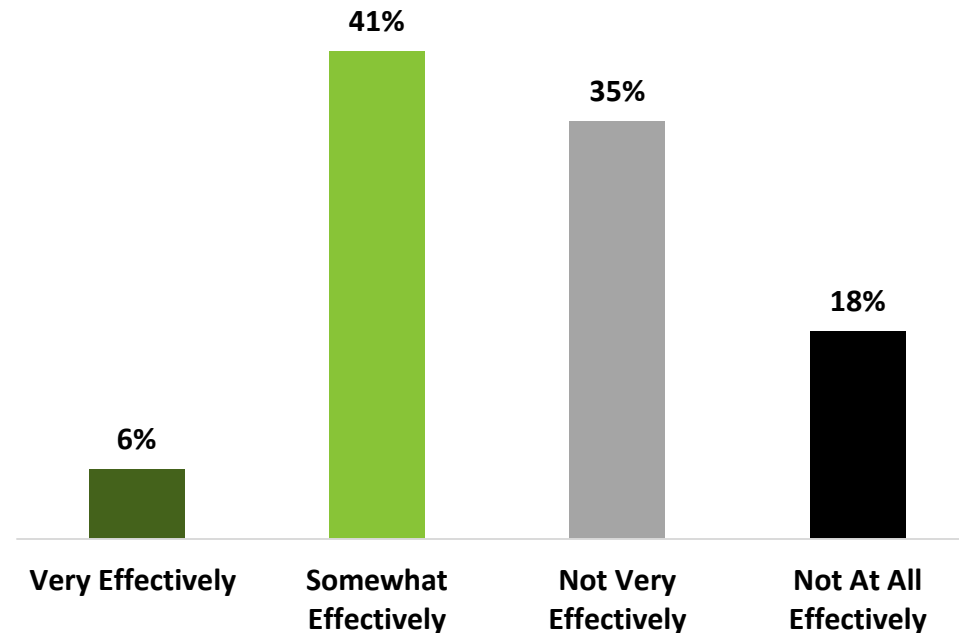
However, about 2-in-10 (22%) indicated the city of Vaughan is not effectively promoting the Vaughan Metropolitan Centre at all.

# Key Findings – Large Businesses

## SATISFACTION WITH DELIVERY OF SERVICES



## How effectively is Vaughan promoting the Vaughan Metropolitan Centre as a location where businesses want to invest?



Looking only at Large businesses (100+ employees), respondents are satisfied with the delivery of services provided by the city (TOP2 = 94%).

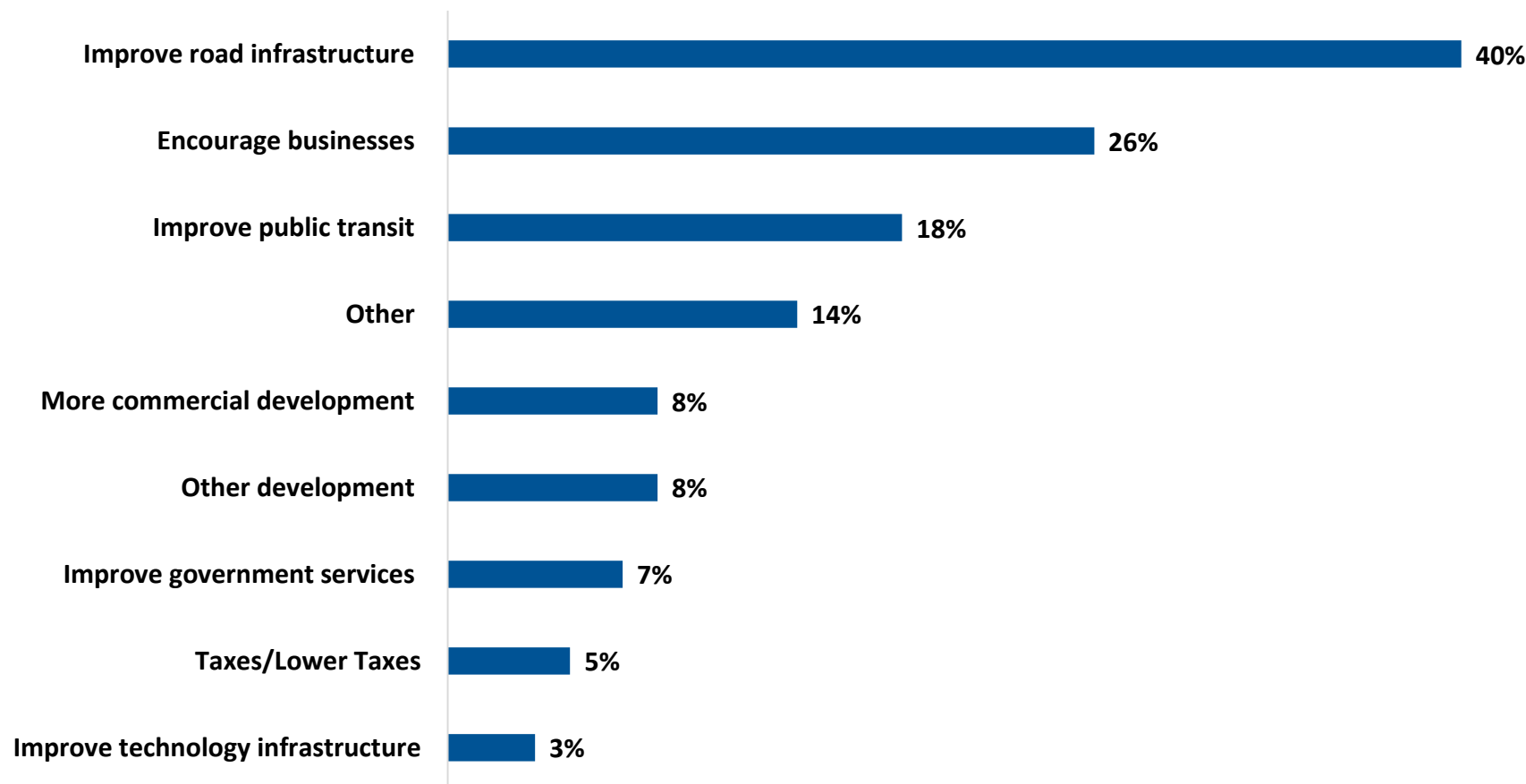
The top 5 challenges for large businesses are focused around costs, resources and staffing.

The majority of respondents from Large businesses indicated the City of Vaughan is not effectively promoting the Vaughan Metropolitan Centre (BTM2 = 53%).



# Key Findings

## Areas to Focus Economic Development Efforts



Respondents were asked to list where the city of Vaughan should be focusing its economic development efforts over the next five years.

The City of Vaughan could consider focusing its economic development efforts to improve road infrastructure (40%), encourage businesses (26%) and improve public transit (18%).

# Areas to Focus Economic Development Efforts



Respondents were asked where the City of Vaughan should be focusing its economic development efforts. Here are some of the responses on improve road infrastructure, encouraging businesses and improve public transit:

**“Definitely traffic and making general business popular here and connecting with Toronto.”**

**“Alleviating gridlock and manage flow of traffic. Start encouraging use of public transport. Get people moving all over the city in a cost efficient manner and in an environmentally conscious manner.”**



# Areas to Focus Economic Development Efforts



Respondents were asked where the City of Vaughan should be focusing its economic development efforts. Here are some of the responses on improve road infrastructure, encouraging businesses:

**“Improving traffic as the city is growing and traffic has increased.”**

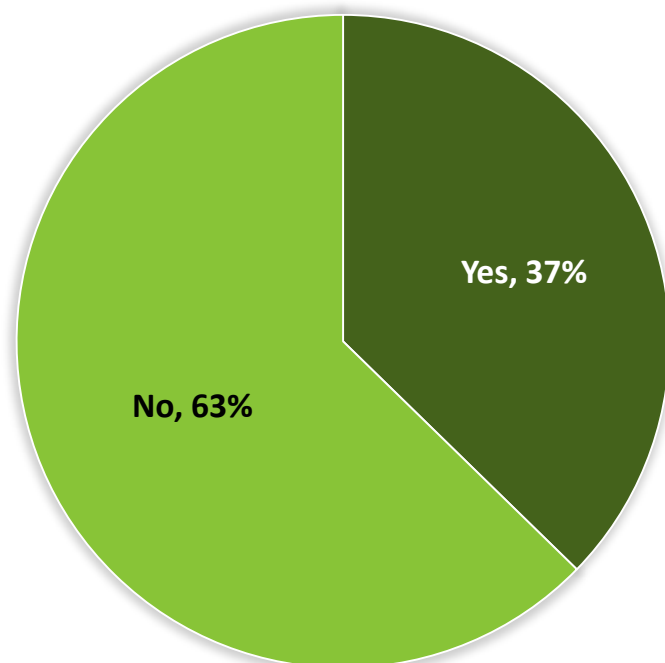
**“Support the businesses that exist instead of allowing space to bring in more business.”**

**“Helping small businesses by lower taxes and making regulations easier.”**

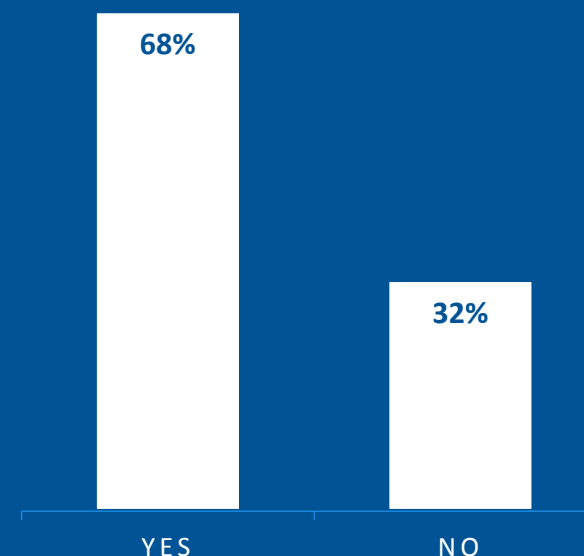


# Key Findings

## CONTACTED CITY: BUSINESS RELATED



## WAS THE REASON RESOLVED TO YOUR SATISFACTION?



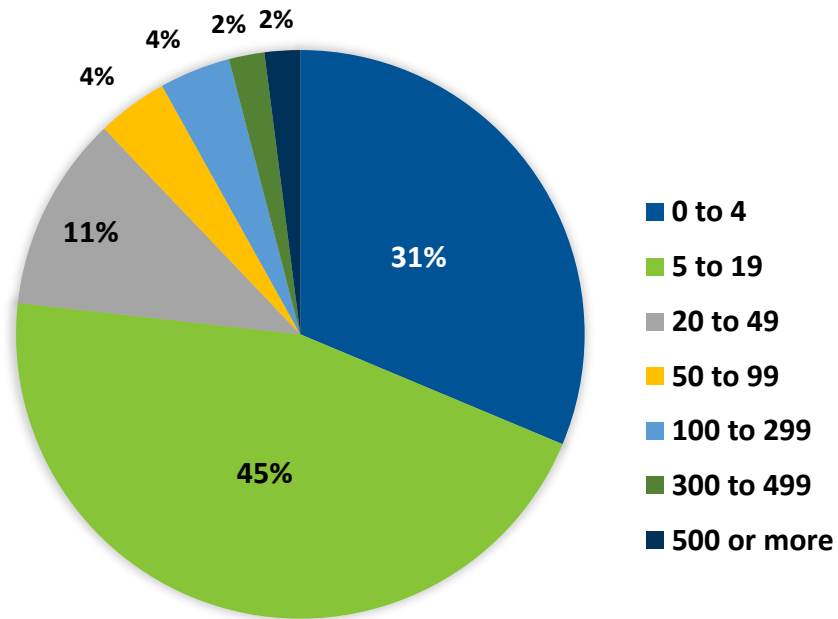
Just over 3-in-10 respondents have contacted the City of Vaughan for a reason related to their business (37%).

Of those who contacted the City, almost 7-in-10 indicated the reason for their contact was resolved to their satisfaction (68%).

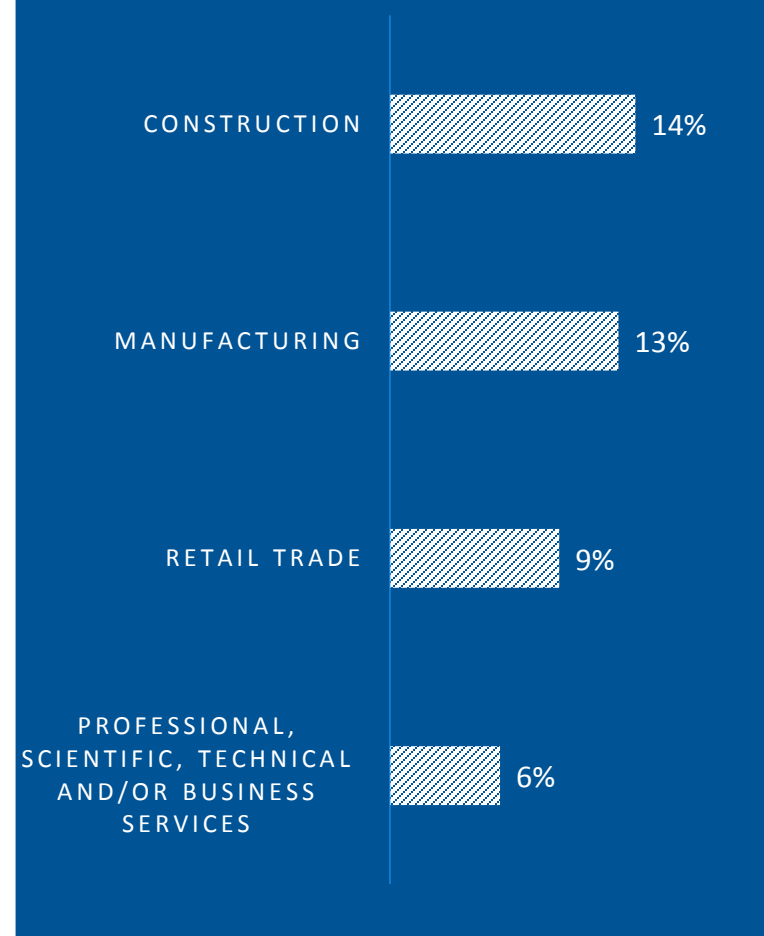


# Respondent Information

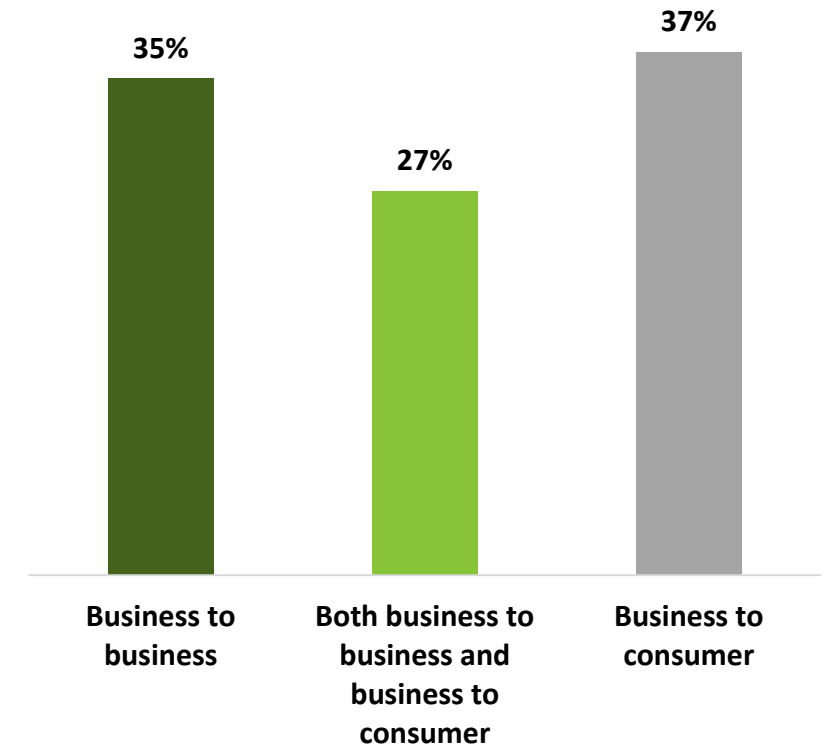
## NUMBER OF EMPLOYEES



## TOP 5 SECTORS



How effectively is Vaughan promoting the Vaughan Metropolitan Centre as a location where businesses want to invest?



**Question:** [Left] How many employees does your business have? [Middle] In what sector does your business primarily operate? [Right] Would you say that your business model is primarily business to business, business to consumer, or close to equal parts of both?

**Sample:** [Left] 206; [Middle] 212; [Right] 212

**Framework:** All

# Next Steps

- Businesses are satisfied with the quality of life and the delivery of services provided by the City.
- Businesses have mixed feelings about the effectiveness of the City's promotion of the Vaughan Metropolitan Centre for a location where businesses should invest.
  - The City should consider further research into the promotion of the Vaughan Metropolitan Centre.
- One of the top challenges for businesses, both small and large, is costs in general.
  - The City could use this finding for future planning initiatives.
- Businesses are not aware of the entrepreneurship programs offered by the city of Vaughan, Sponsorship services, and location assistance.
  - The could consider additional advertising for these lesser known services.
- Many businesses will be investing in new/innovative technology for their businesses.
  - The City could consider offering technical assistance or other offers for future planning initiatives.
- Businesses have suggested that the City focus its economic development efforts to improve road infrastructure, encourage businesses, and improve public transit.