

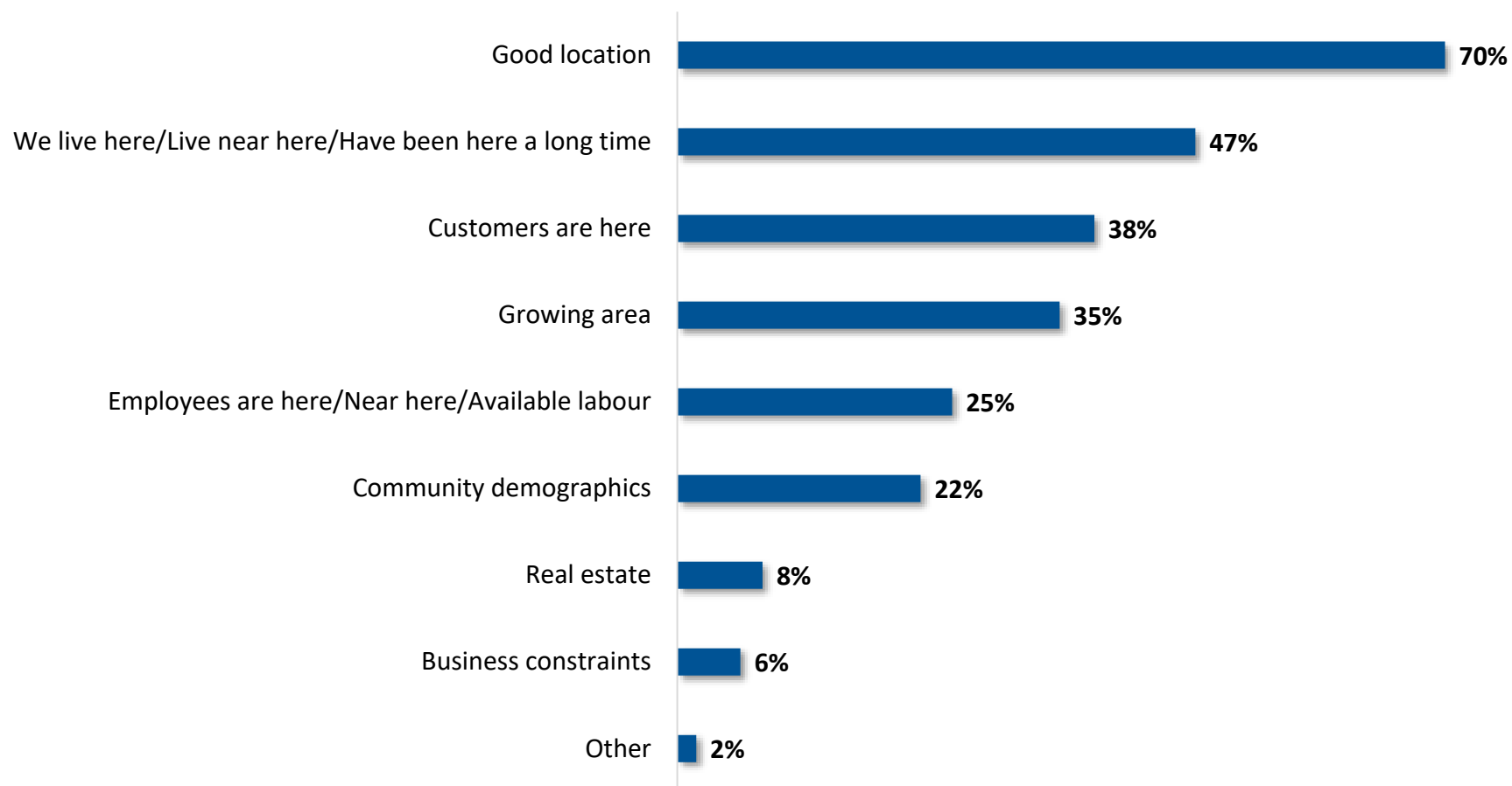
2022 CITIZEN & BUSINESS SURVEYS

Presentation

February 14, 2023

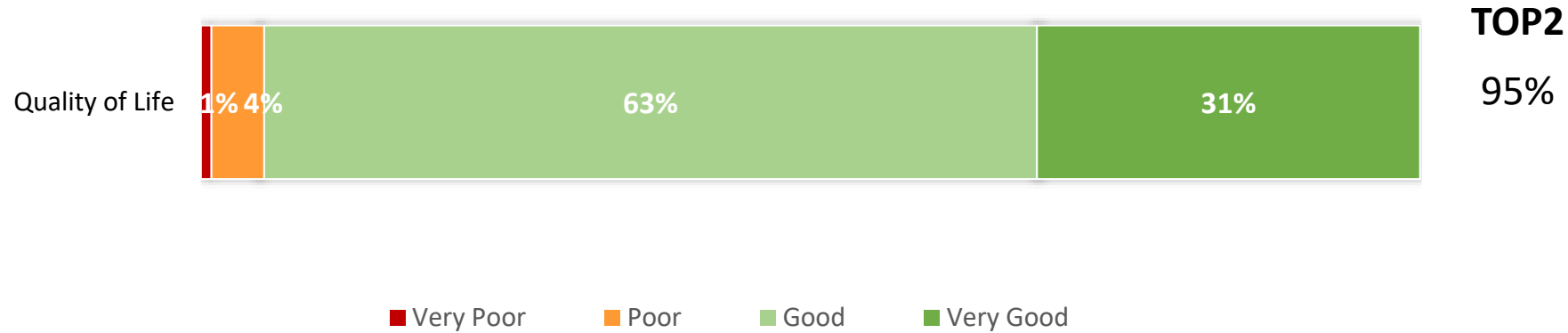
| | |
|---------------------------------|---|
| Fieldwork dates | November 18 th – December 13 th , 2022 |
| Sample | Business owners or decision makers for a business in Vaughan |
| Survey collection method | <ul style="list-style-type: none">• Computer Assisted Telephone Interviewing (CATI)• Computer Assisted Web Interviewing (CAWI) <p><i>Note: Respondents were reached using contact information provided by City of Vaughan, which was drawn from the 2019 York Region Employment Survey. These respondents were contacted via telephone and/or email invitation, depending on the contact information provided.</i></p> |
| Sample size | Total: 347 <ul style="list-style-type: none">• CATI: n=32• CAWI: n=315 |
| Margin of Error | ±5.26% |
| Length of interview | <ul style="list-style-type: none">• CATI: 13.2 mins• CAWI: 13.2 mins |

Advantages of Business Being in Vaughan



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

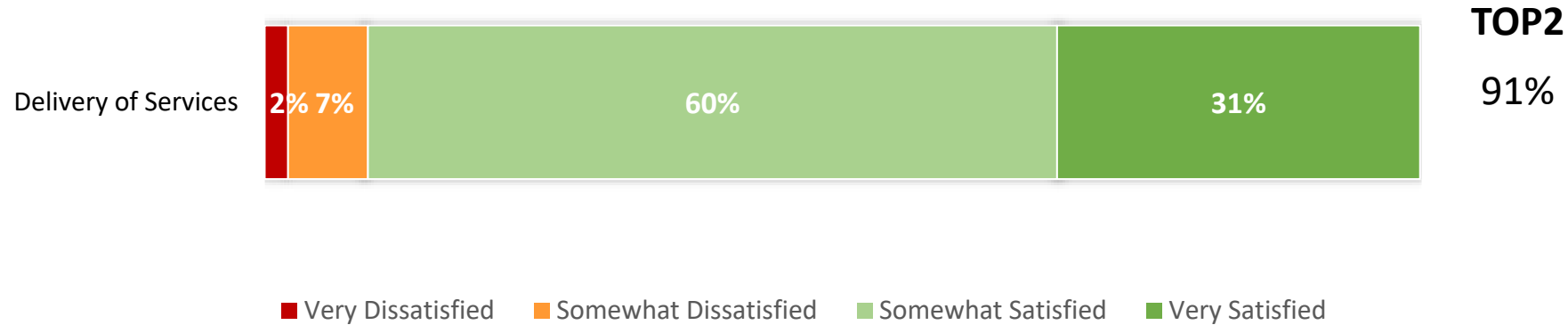
Overall Quality of Life in Vaughan



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

Satisfaction with Delivery of Services

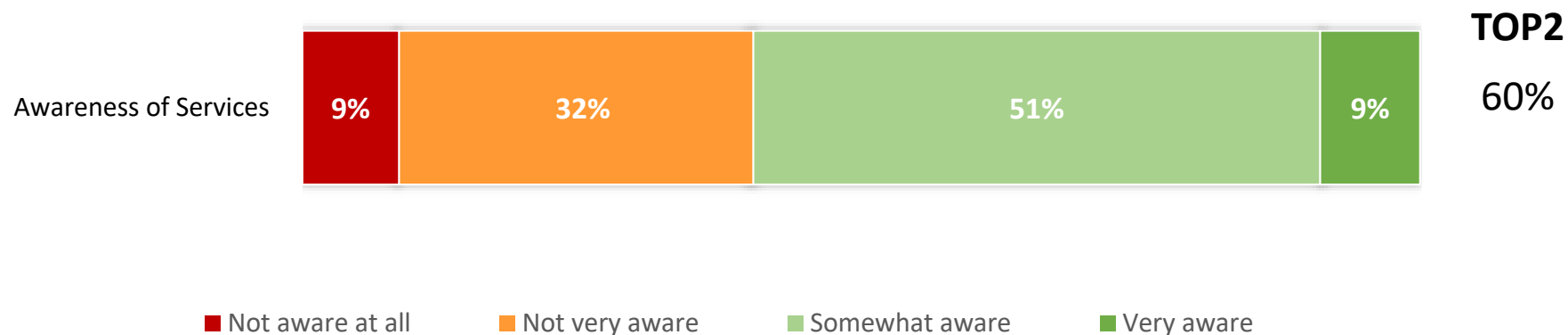
About 9 in 10 (TOP2: 91%) are satisfied with the delivery of services provided by the City of Vaughan.



Awareness of Services Provided to Local Business

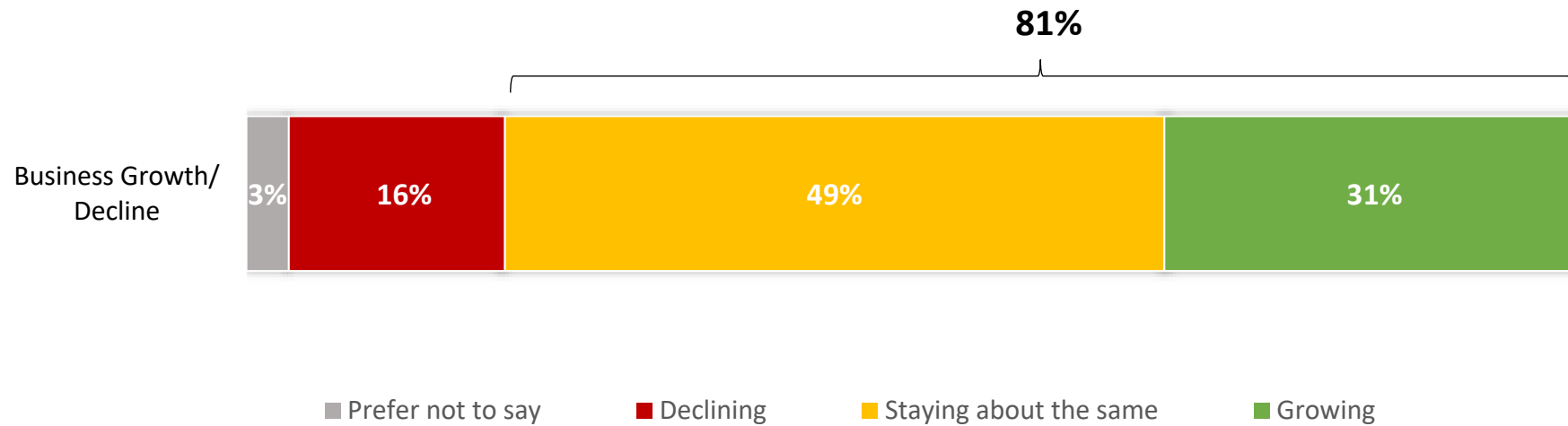


6 in 10 (TOP2: 60%) respondents are aware of the services that City of Vaughan provides to local businesses.



Business Growth / Decline

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



Biggest Challenges that the Business Face



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

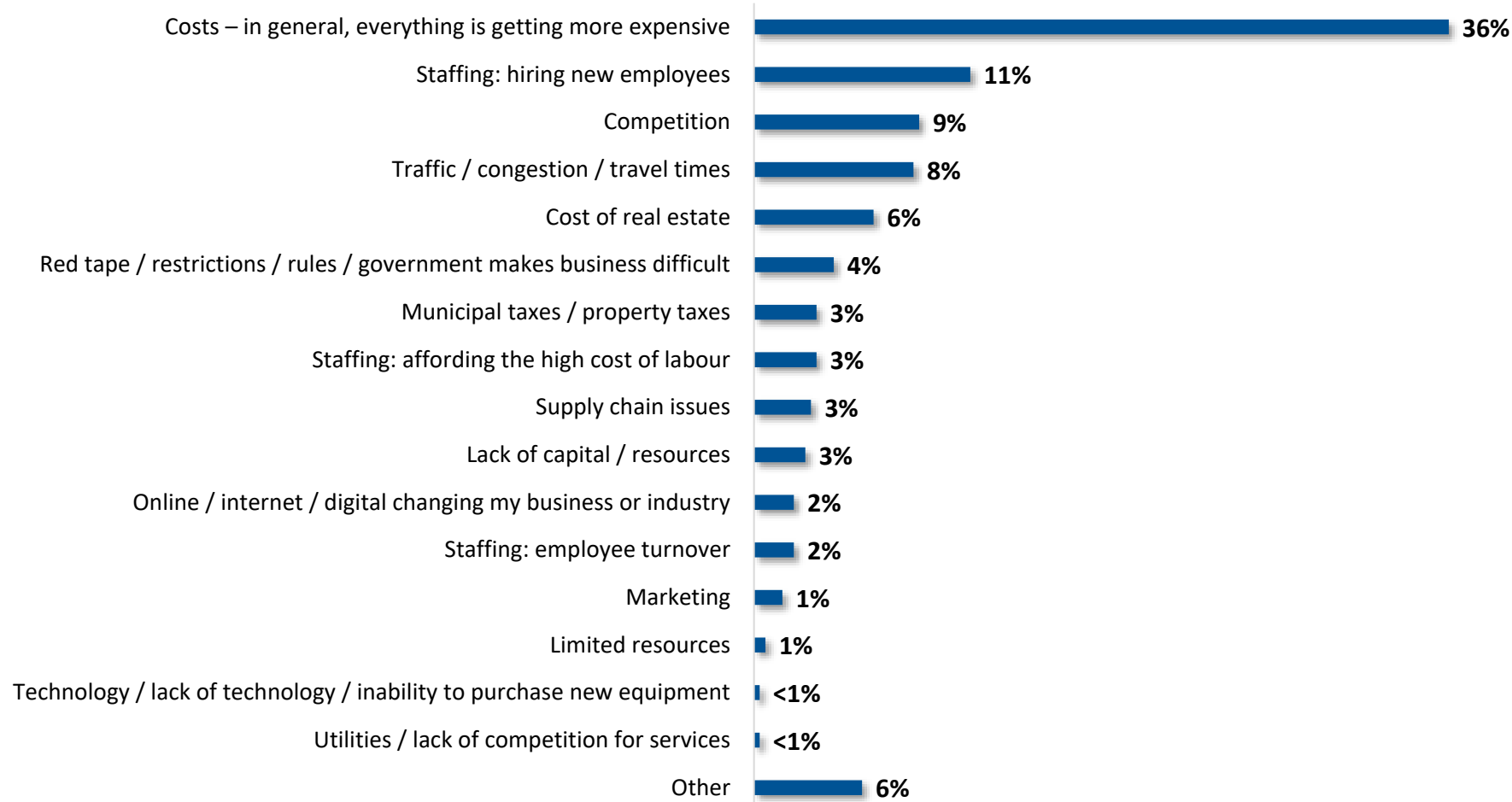
Traffic (39%), hiring new employees (36%), and affording the high cost of labour (33%) are the other top mentioned challenges.

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

Sample: n=347

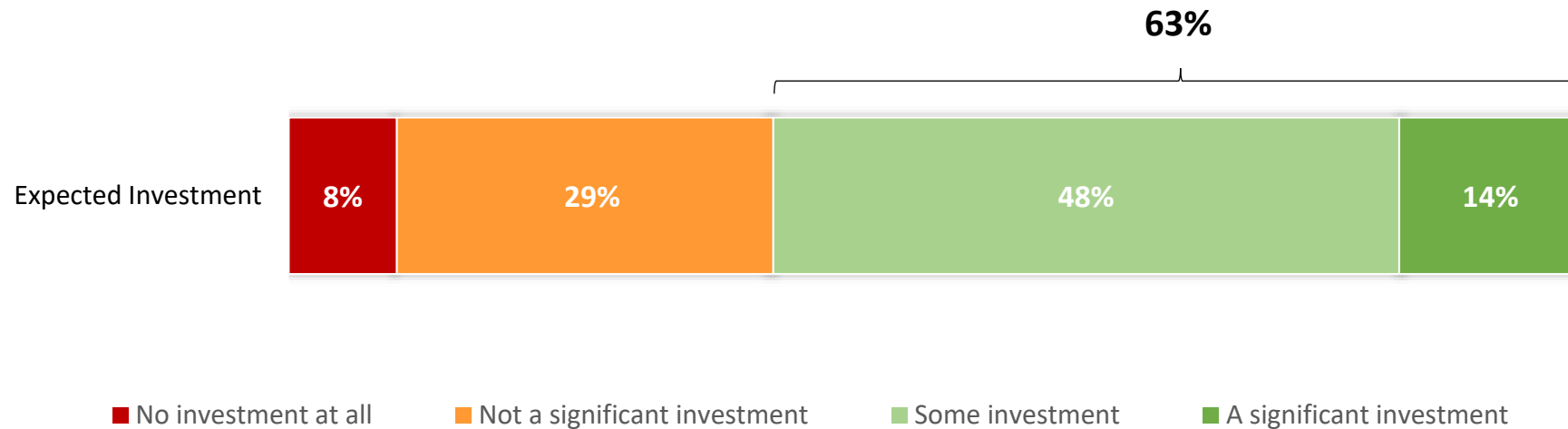
Framework: All respondents

Most Impactful Challenge that the Business Face



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

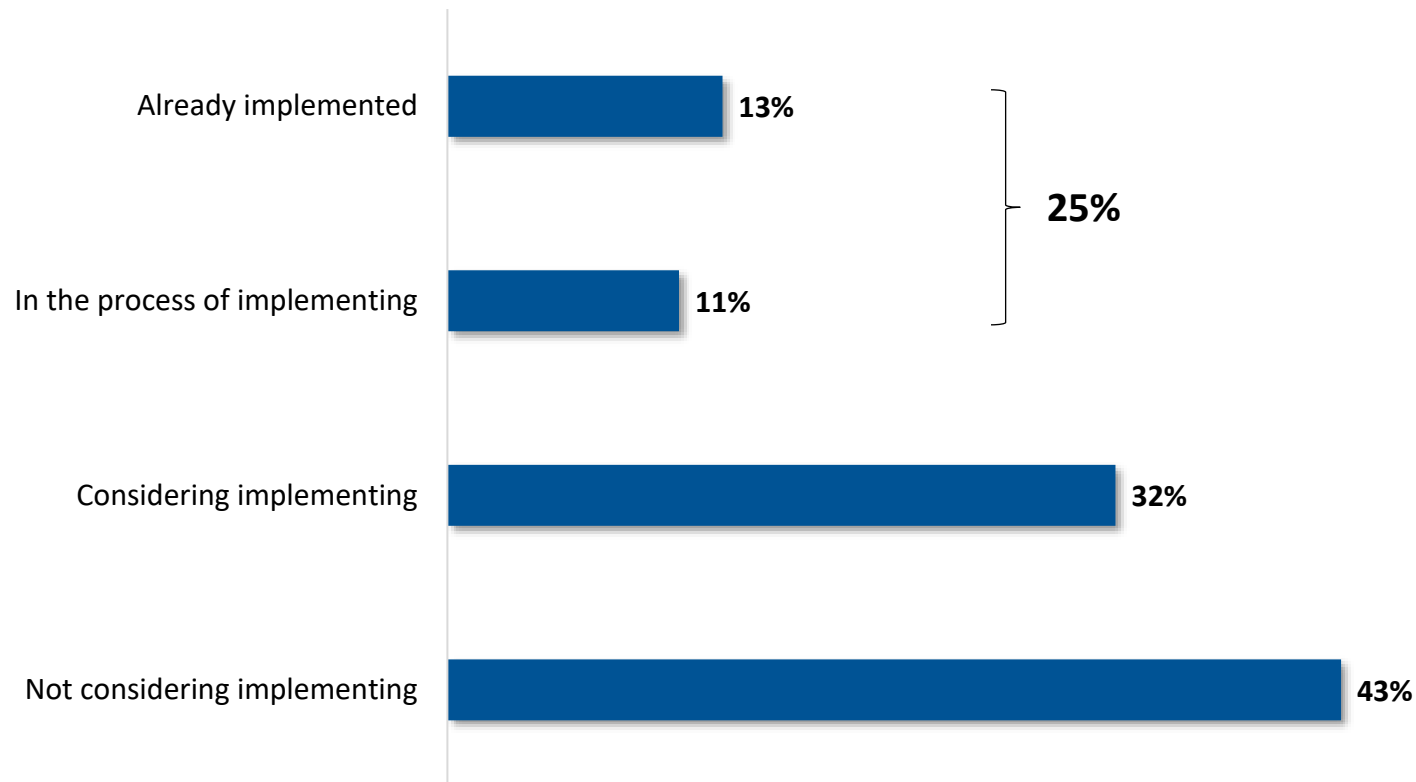
Expected Investment in New / Innovative Technology



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

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

Implementation of Purpose-driven Initiative



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

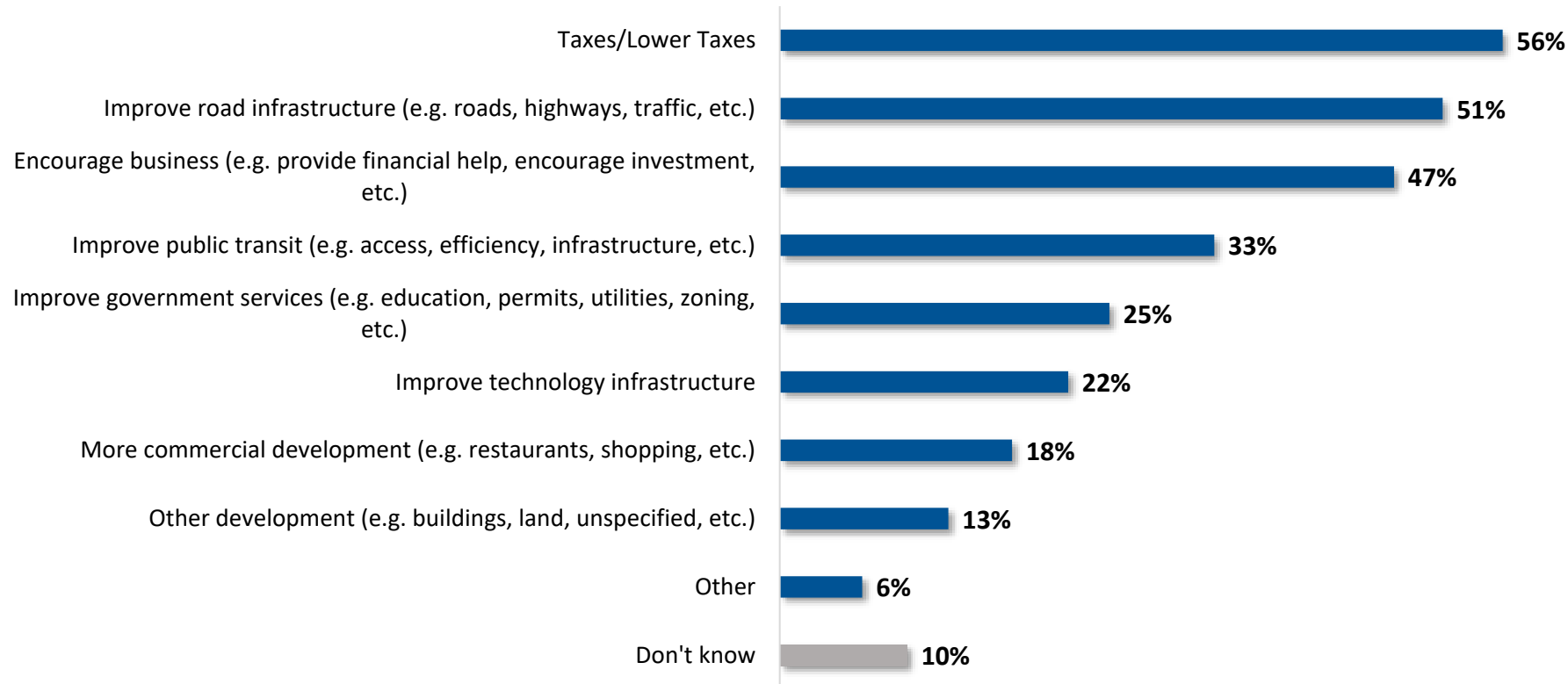
On the other hand, a quarter of respondents (TOP2: 25%) have implemented or in the process of implementing purpose-driven initiatives.

Question Q10: Have you implemented or is your business considering implementing purpose-driven initiatives? Some examples of purpose-driven initiatives could be corporate social responsibility (CSR), social enterprise, diversity, equity, and inclusion (DEI) initiatives, and/or environmental, social and governance (ESG) reporting.

Sample: n=347

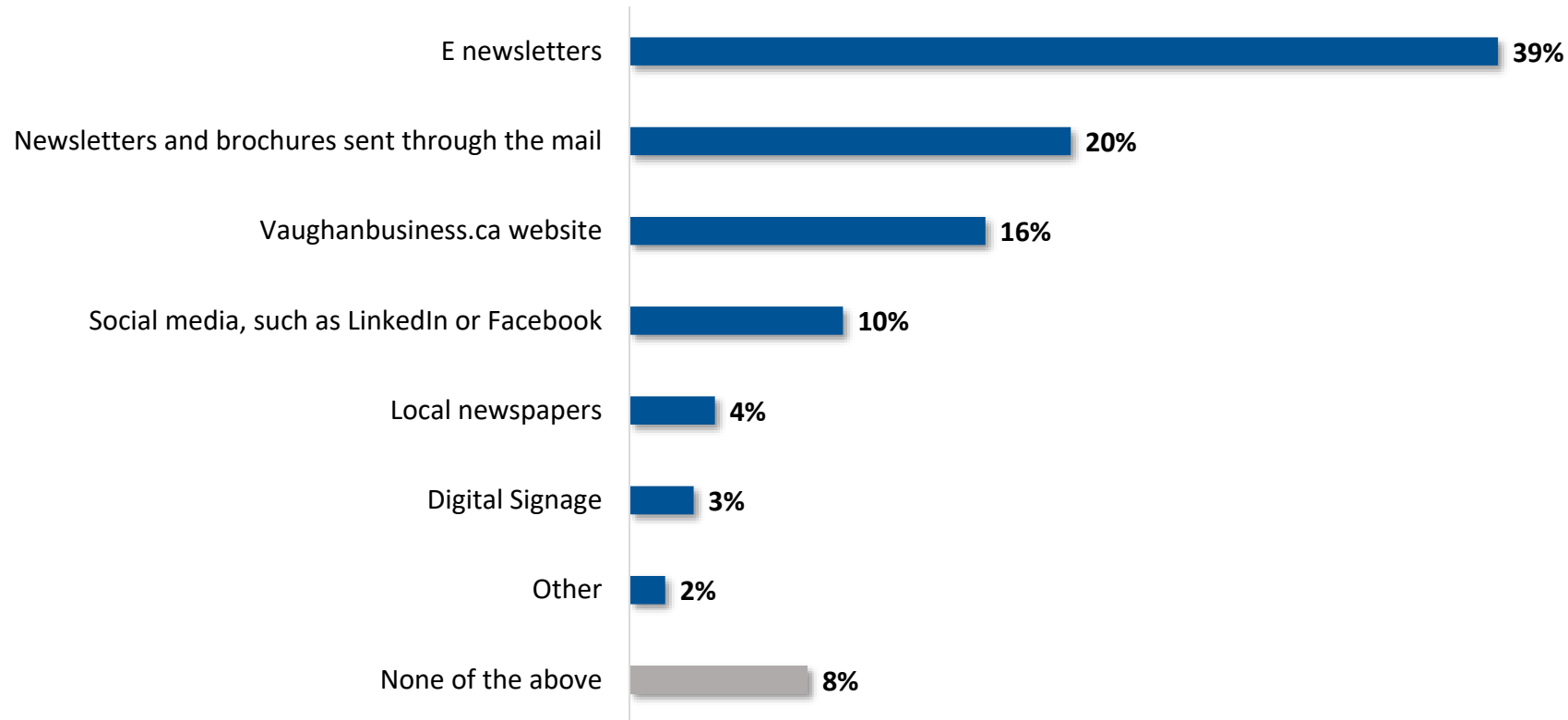
Framework: All

Areas to Focus Economic Development Efforts



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

Preferred Channels of Communication



Newsletters is the most preferred channel of receiving communications from Vaughan Economic Development, be it e-newsletters (39%) or via mail (20%).

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

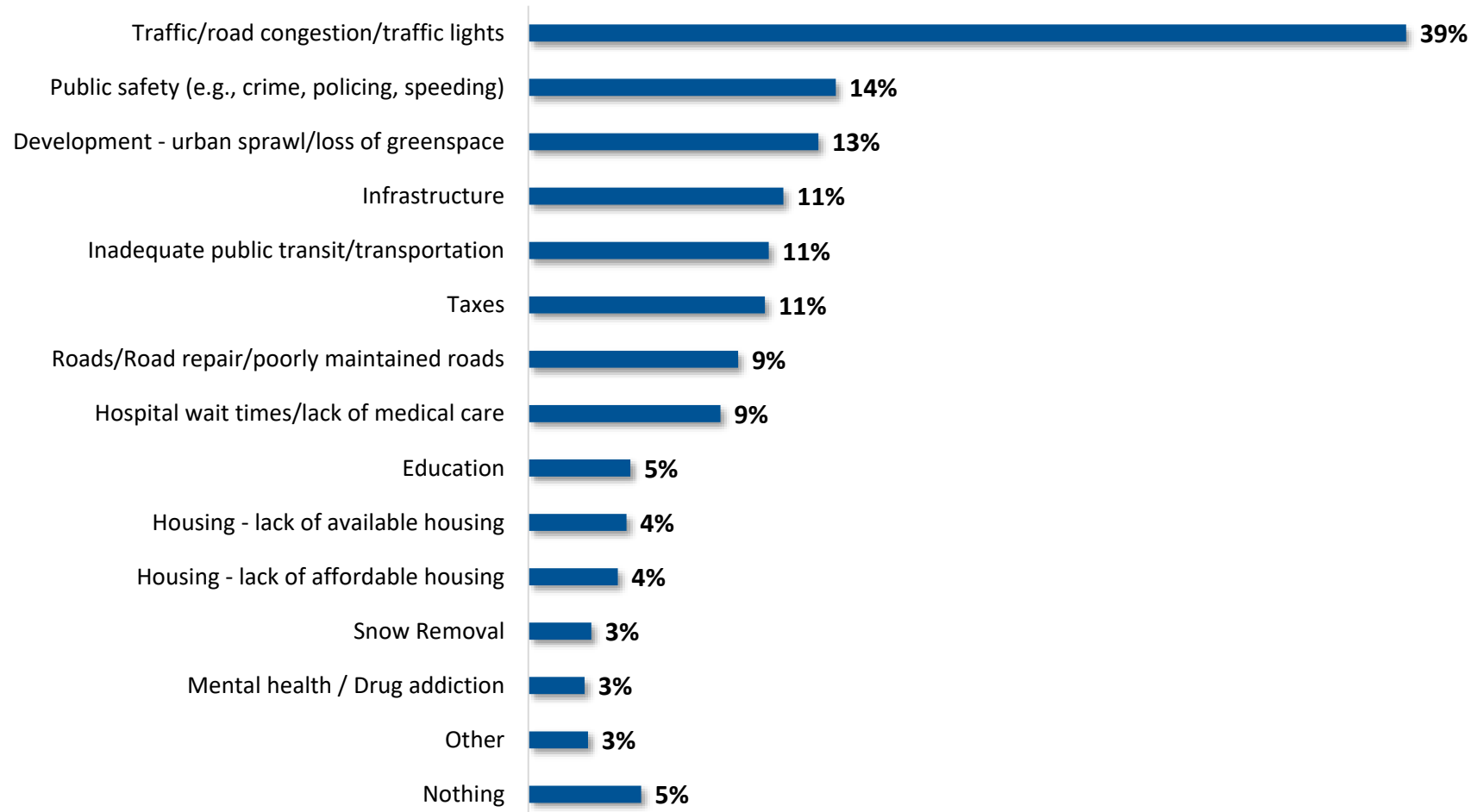
Question Q14: What are your preferred methods to receive communications from Vaughan Economic Development? Please select all that apply.

Sample: n=315

Framework: Those who completed the survey online

| | |
|---------------------------------|---|
| Fieldwork dates | November 17 th – December 16 th , 2022 |
| Sample | Respondents in the City of Vaughan who are 18 years of age or older |
| Survey collection method | <p>Computer Assisted Telephone Interviewing (CATI)</p> <ul style="list-style-type: none">• CATI sample was drawn using random digit dialing (RDD) among City of Vaughan respondents. A mix of landline and cell phone sample was used to reach cell phone-only households.• Results throughout this report have been statistically weighted by age and gender, to ensure that the sample reflects the target population according to 2021 Census data.• CAWI data was collected through an open link hosted on the City of Vaughan’s website between Nov. 15 and Dec. 19, 2022. The sample from CAWI consist of only self-selected respondents, who have chosen to take part in the survey on their own accord, and all having computer access and internet connection. Due to this fact, CAWI data is not presented as it is affected by self-selection bias and cannot be representative of Vaughan demographics. |
| Margin of Error | ±3.46% |
| Sample size | n=804 |
| Length of interview | 19.7 min |

Top of Mind Issues



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

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

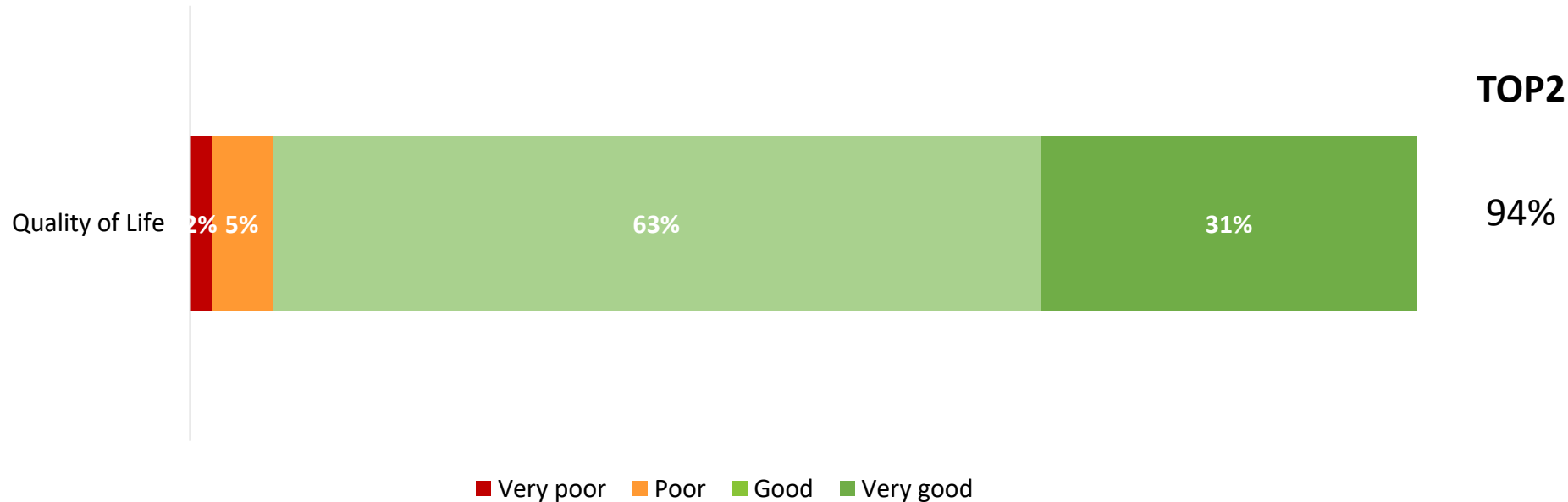
*note: not shown if <3%

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

Sample: n=769

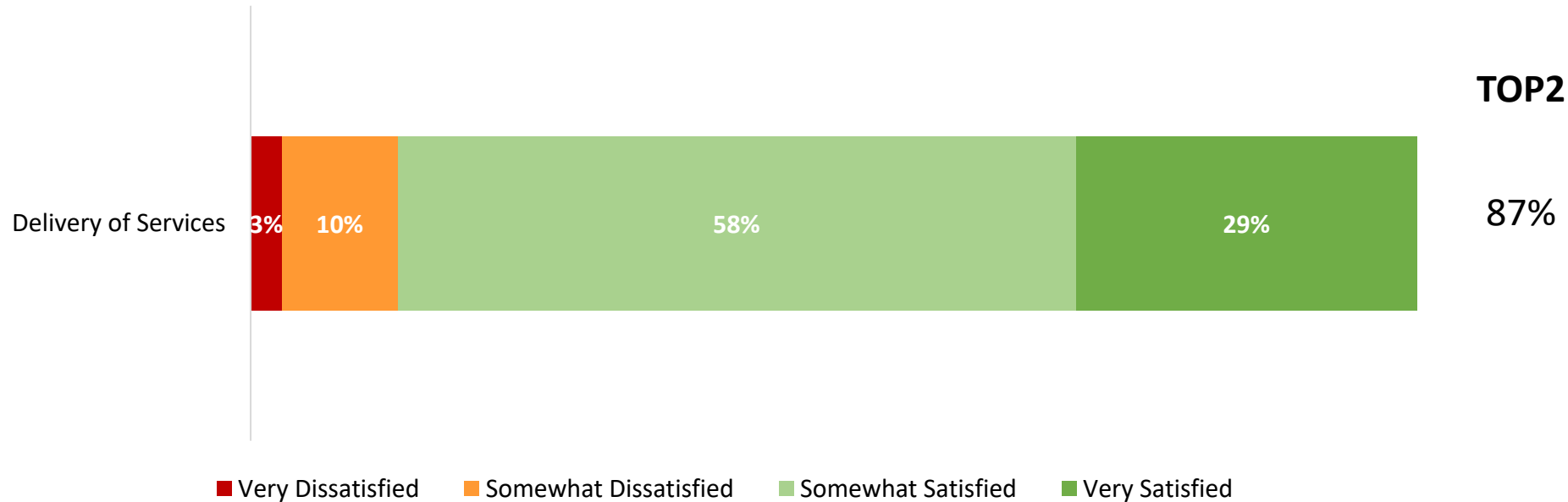
Framework: All respondents (exc. Don't know / Refused)

Overall Quality of Life in Vaughan



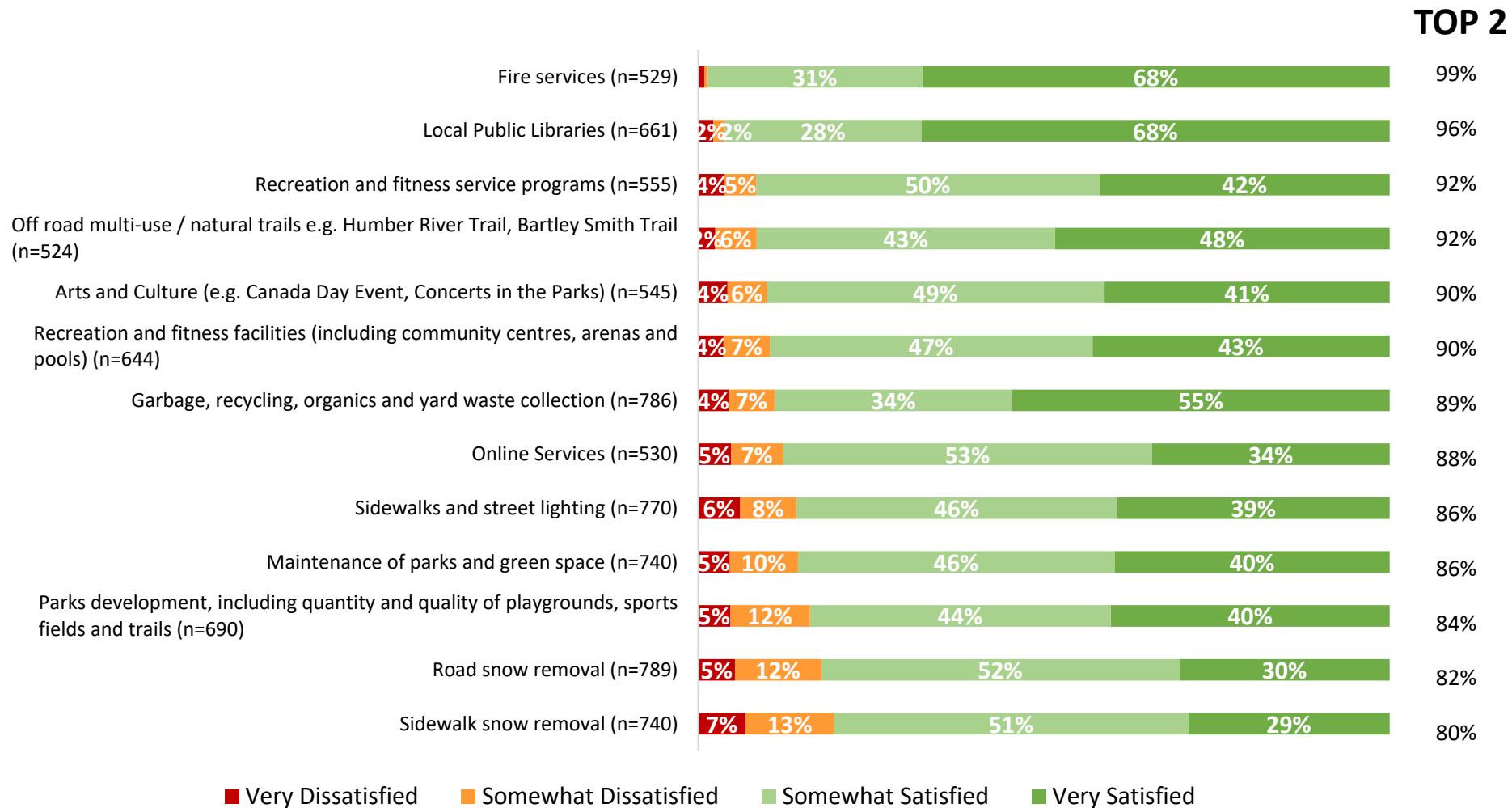
The vast majority of respondents are positive towards the overall quality of life in the City of Vaughan, with over 9 in 10 (TOP2: 94%) rating the quality of life as good or very good.

Satisfaction with Delivery of Services



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

Satisfaction of Services Provided



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

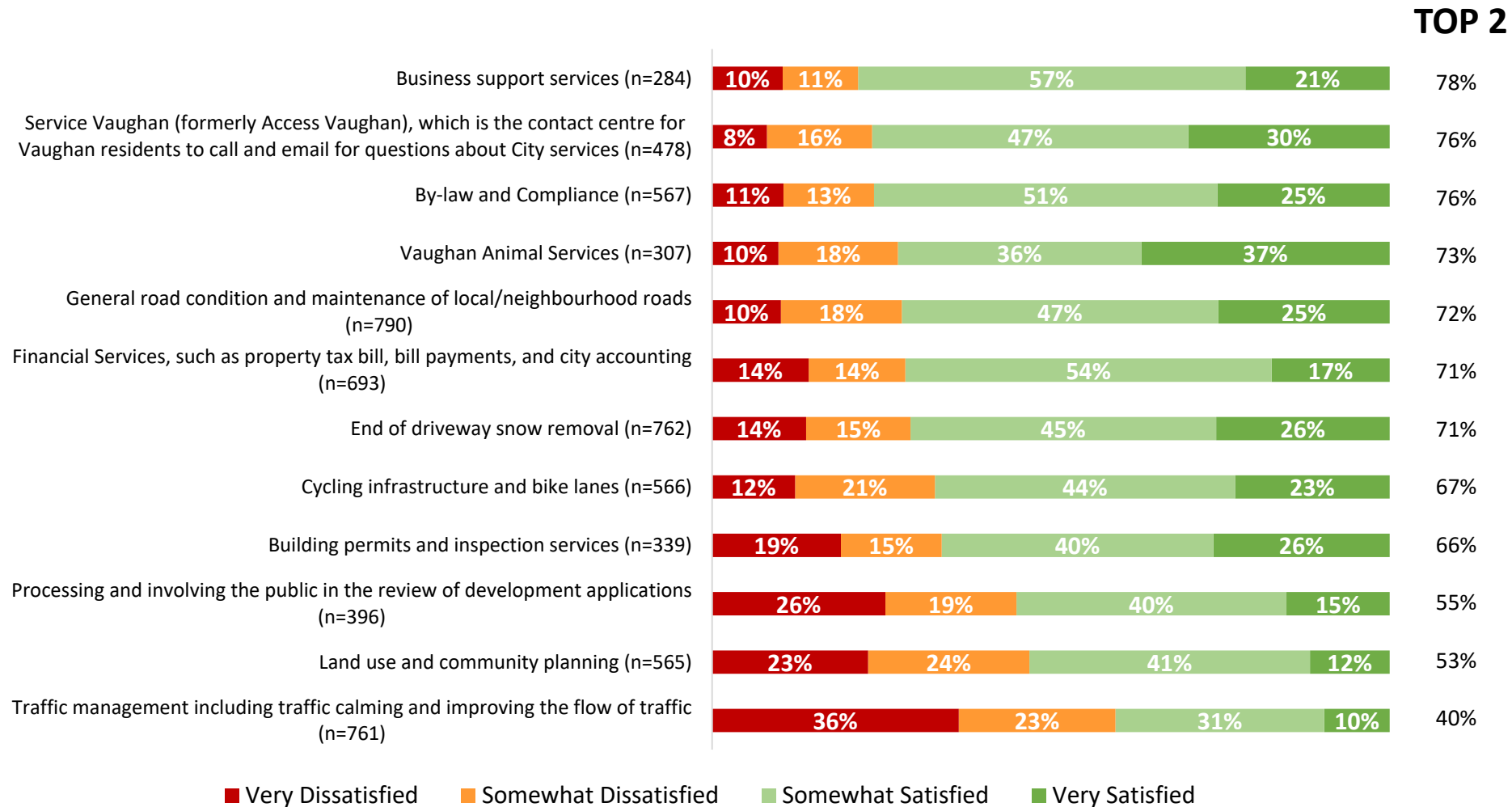
Respondents are most satisfied with fire services (TOP2: 99%), and more than 9 in 10 are satisfied with local public libraries (TOP2: 96%), recreation and fitness service programs (TOP2: 92%), and off-road multi-use / natural trails (TOP2: 92%)

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

Sample: Shown in chart above; varies for each area

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

Satisfaction of Services Provided (cont.)



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

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

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

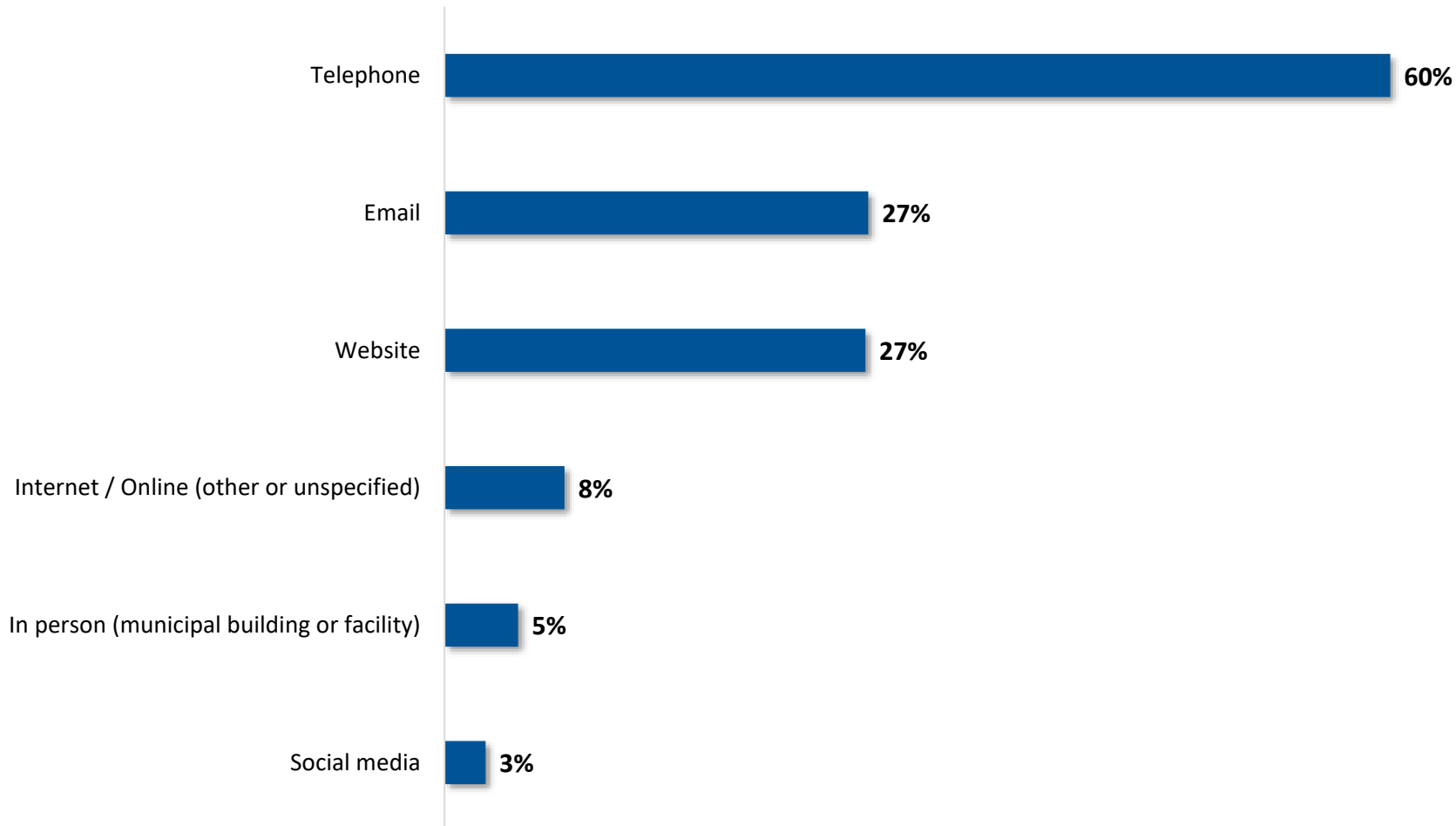
Sample: Shown in chart above; varies for each area

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

Gap Analysis – Summary

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

Preferred Methods of Contacting the City



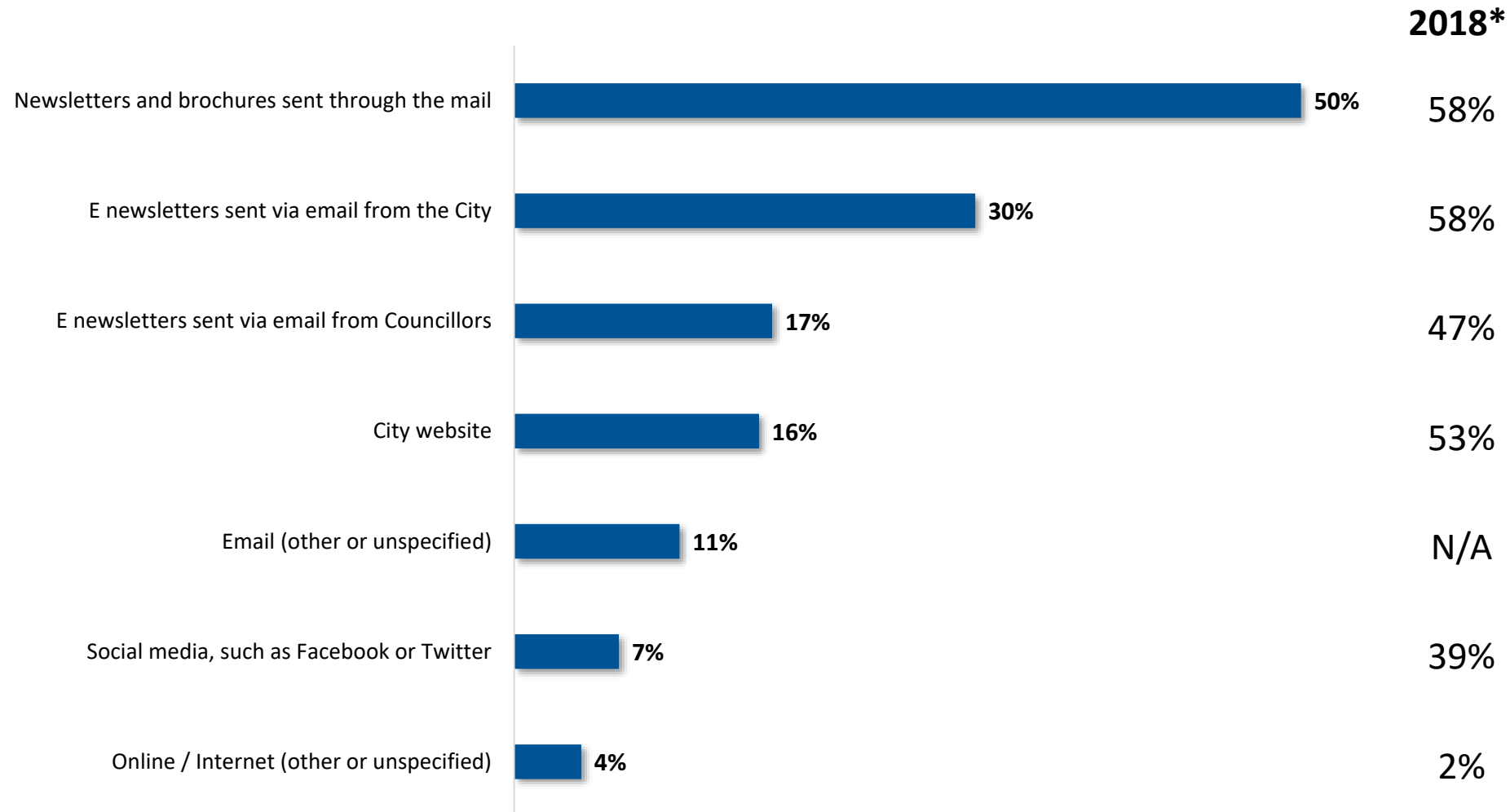
When it comes to contacting the City for advice, information, or to inquire about a service, 3 in 5 (60%) prefer to do so via telephone.

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

*note: not shown if <3%

Question Q14: And what is your preferred method to contact the City of Vaughan for advice, information, or to inquire about a service? [Multi-mention]
Sample: n=794
Framework: All respondents (exc. Don't know)

Methods for Receiving Information



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

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

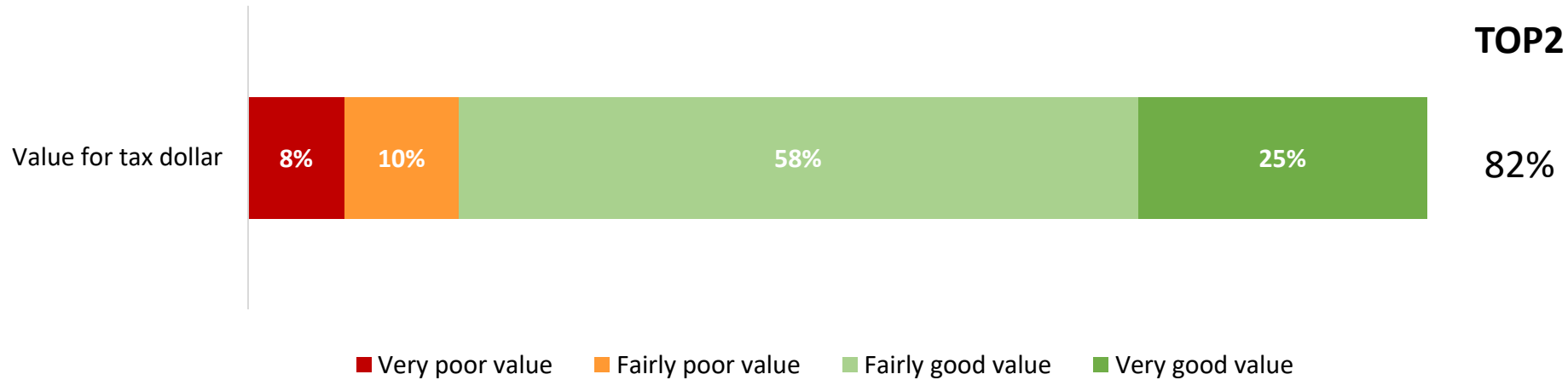
*note: not shown if <3%

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

Sample: n=796

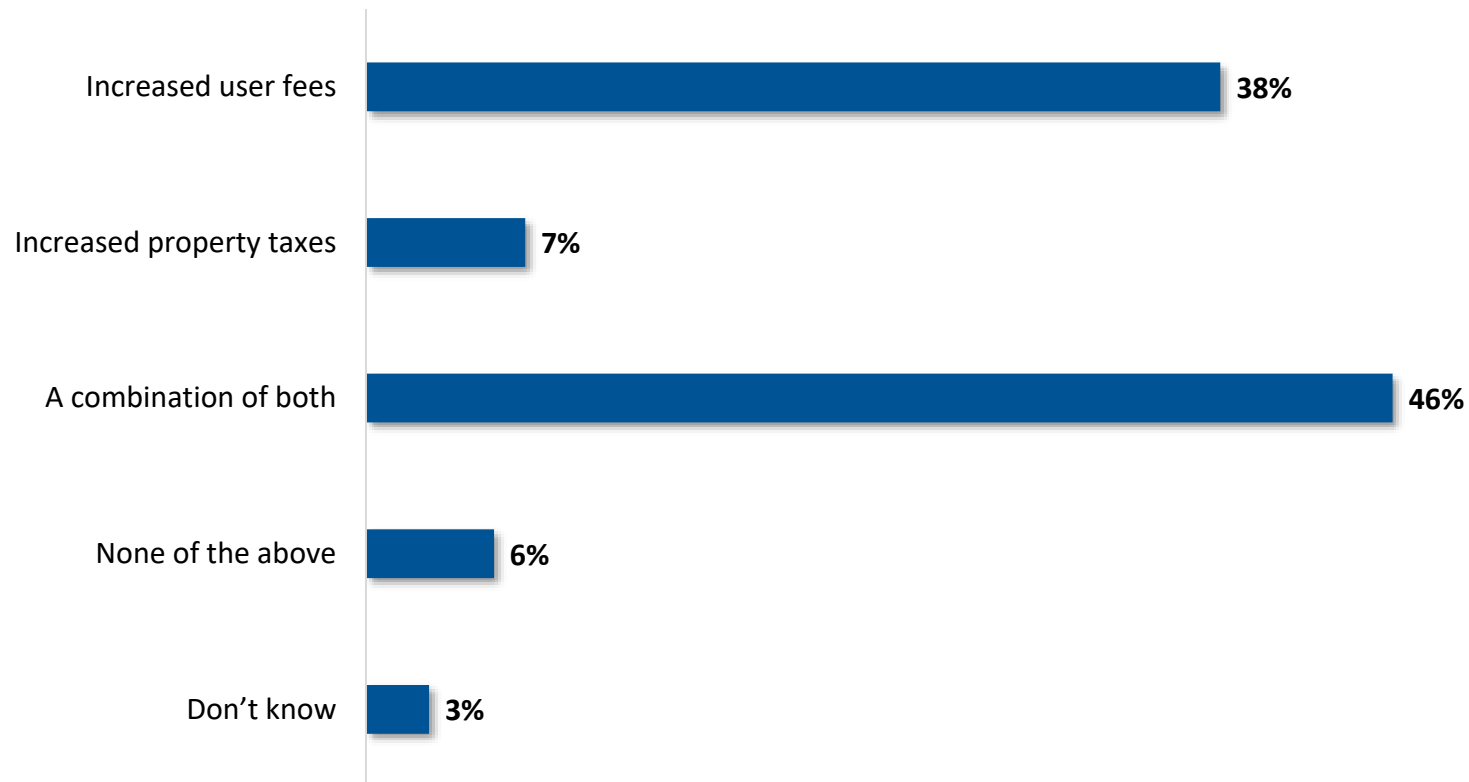
Framework: All respondents (exc. Don't know)

Value for Tax Dollars



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

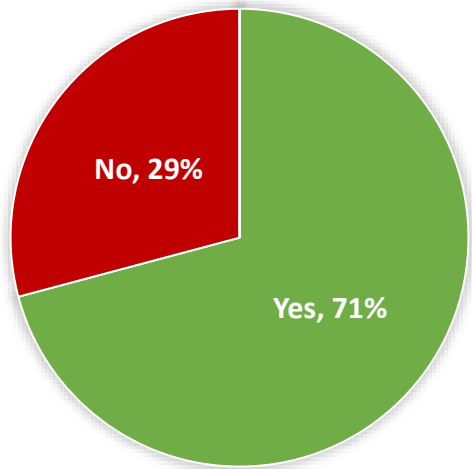
Balance of Taxation and Services



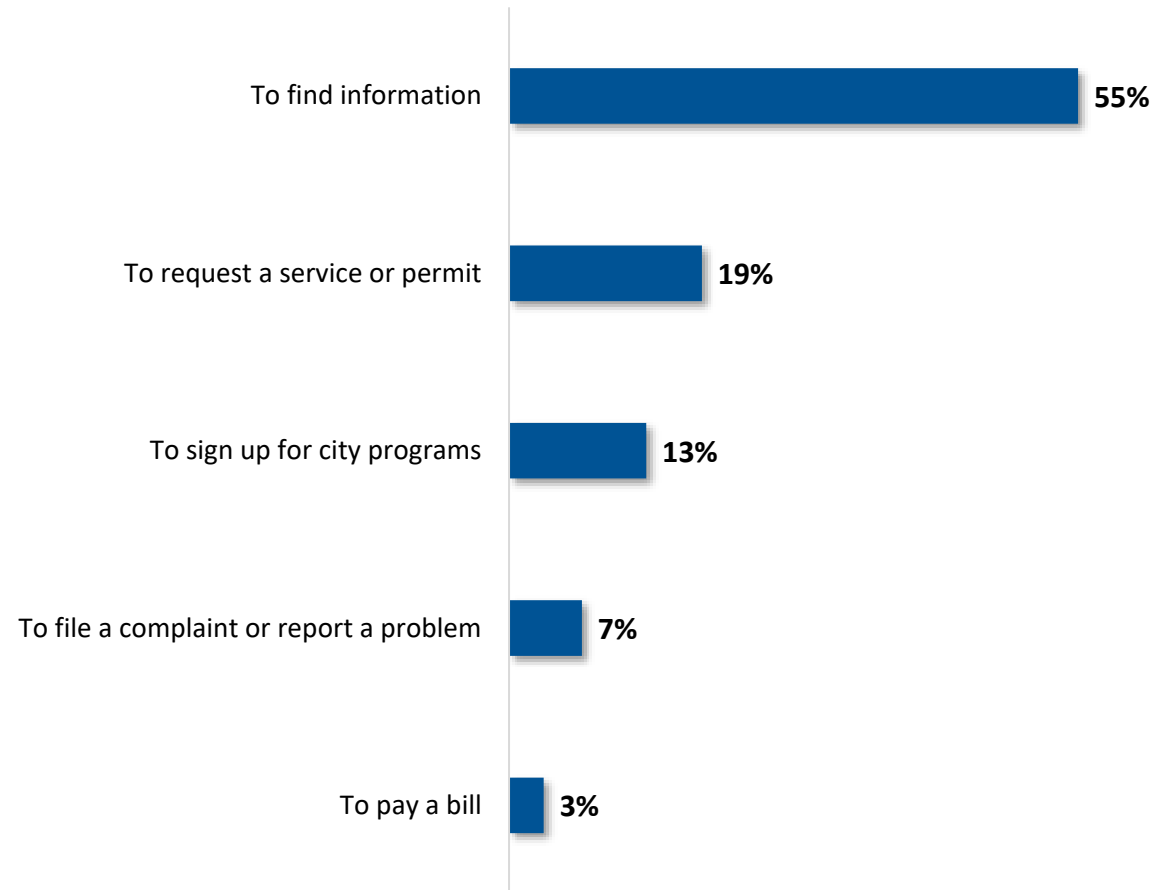
If maintaining service levels or adding services and facilities meant an increased cost to provide these services, the plurality of respondents (46%) would prefer to pay for this through a combination of both increase user fees and increase property taxes.

Reasons for Visiting City of Vaughan's Website

Visited The City of Vaughan's Website



Reason for Website Visit



7 in 10 respondents (71%) have visited City of Vaughan's website in the past 12 months.

- The most common reason for respondents' last visit to the City's website was to find information (55%), followed by requesting a service or permit (19%).

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

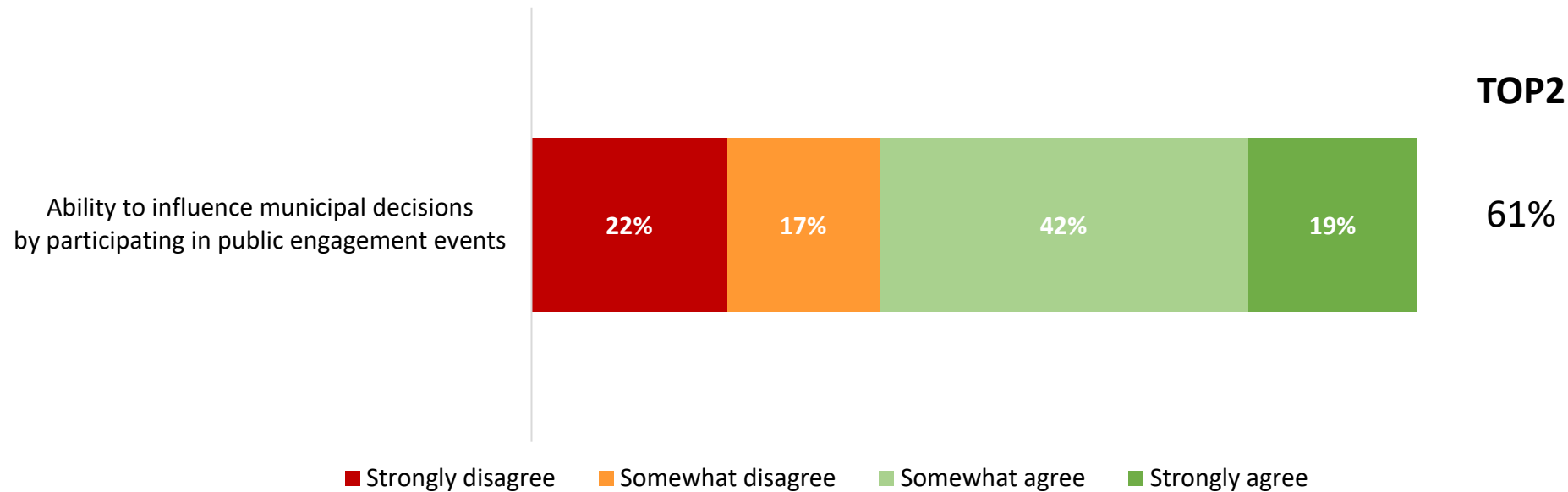
*note: not shown if <3%

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

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

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

Ability to Influence Municipal Decisions



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