

CITY OF VAUGHAN 2024 BUSINESS SURVEY

Final Report



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01 INTRODUCTION



Objectives & Methodology



BACKGROUND

The City of Vaughan commissioned the 2024 Business survey among business owners or decision-makers in local businesses. The purpose was to gather input from local businesses on their perception and use of municipal business services, and factors influencing business operations and growth, among other topics



METHODOLOGY

Local businesses took part in the study in different ways:

1. 1,000 letters were sent to randomly selected local businesses asking them to take part in the survey. The letter provided additional information on the back page and included a unique access code.
2. Telephone interviews were also conducted among local businesses.
3. Emails were sent to local business email addresses with an open link to take part in the survey.
4. The City of Vaughan website included an open link for businesses to use to take part in the survey.

352 respondents took part in the study (n=276 via telephone and n=77 online).



FIELDING DATES

October 18 to December 10, 2024.



OBJECTIVES

The Business Survey gathers input to help the City better understand the values and perceptions of local businesses on the economic climate, challenges and opportunities, as well as their overall satisfaction with the delivery of programs and services to support Vaughan's economic growth and development. The data collected will help determine how the City can improve its services for businesses.



MARGIN OF ERROR

Margin of error is +/-5.2%, nineteen times out of twenty on overall sample.

Invitation Letter

Wednesday, Oct. 16, 2024



Dear business owner/decision maker,

Participate in Vaughan's 2024 Business Survey to help shape how the City of Vaughan can improve its services for businesses like yours.

The City of Vaughan is surveying local businesses to better understand the values, perceptions and challenges you face.

If you are a **decision-maker** for your business, we want to hear from you!

It only takes approximately 10 minutes to complete – in three easy steps:

1. Go to businessvaughan.ca

2. Enter your unique access code <XXXXXXXX>

3. Complete the survey by **Tuesday, Nov. 19, 2024**

This survey is confidential and voluntary. The Business Survey gathers input to help the City better understand the values and perceptions of local businesses on the economic climate, challenges and opportunities, as well as your overall satisfaction with the delivery of programs and services to support Vaughan's economic growth and development. The data collected will help determine how the City can continue to improve its services for businesses.

The survey is being administered by Ipsos, an independent research organization, on behalf of the City.

If you have any questions about the survey, you can contact surveyqueries@ipsos.com.

Thank you in advance for your time and contribution.

The City of Vaughan

Please turn over 

Have questions about this survey?
Email: surveyqueries@ipsos.com
Phone: 1-833-488-1668



Additional Information



Who is conducting this research?

The City of Vaughan commissioned this research. Ipsos, an independent research organization, is administering the survey on behalf of the City. You can find further information about Ipsos at ipsos.com/en-ca.



Why should I participate in the survey?

The Business Survey is used to gather input from local businesses on their perception and use of municipal business services, and factors influencing business operations and growth, among other topics.

The City values the feedback and opinions of local businesses and the data collected helps determine how the City can continue to improve its services for businesses like yours.



Why was my business selected?

Your business was selected at random from a list of business addresses in Vaughan.



What do I have to do to participate?

If you are the business owner or decision-maker for this business, go to the website at the front of this letter and complete the survey using the unique access code provided to you. Only one decision-maker from your business should participate in the survey. You can complete the survey on a desktop computer, tablet or mobile phone. If you have any questions or would like to complete the survey over the phone, contact surveyqueries@ipsos.com or call the toll-free helpline number at 1-833-488-1668 and leave a message requesting assistance.



How long does the survey take? When will the survey close?

The survey should take about 10 minutes to complete. Please complete the survey as soon as possible. **The survey closes on Tuesday, Nov. 19.**



Are my answers confidential and private?

Any information you provide will be kept confidential as required by law. All collected data will be used for research purposes only and reported at aggregate level.



02 KEY FINDINGS & EXECUTIVE SUMMARY

KEY FINDINGS

1

Vaughan businesses are largely positive about the current environment, with 85% rating it as good or very good. While current business performance is strong, future expectations are more tempered, with most businesses anticipating stability over the next three years.

2

Top business challenges include rising costs, staffing shortages, and real estate. Other roadblocks include limited retail space and traffic congestion.

3

A majority (60%) of businesses plan to invest in new technologies over the next five years. Purpose-driven initiatives (such as DEI or ESG) are also gaining traction, with 56% of businesses having already or in the process of implementing such programs.

4

Nearly a quarter of businesses contacted the City of Vaughan for business-related reasons in the past year, and of those, a strong majority (74%) had their issues resolved.

5

While only 11% of businesses visited the Vaughan Economic Development website in the past year, the vast majority (88%) of those who did find it useful and were able to find the information they needed.

Executive Summary (1/2)

EXPERIENCE, SATISFACTION & AWARENESS OF SERVICES

Vaughan businesses view the current business environment favorably (85% rate it as "good" or "very good"). Key business challenges include staffing difficulties, rent/location costs, and traffic congestion. Rising costs pose the most impactful challenge (33%), alongside staffing (13%) and limited resources/information (8%).

BUSINESS CHALLENGES AND ROADBLOCKS

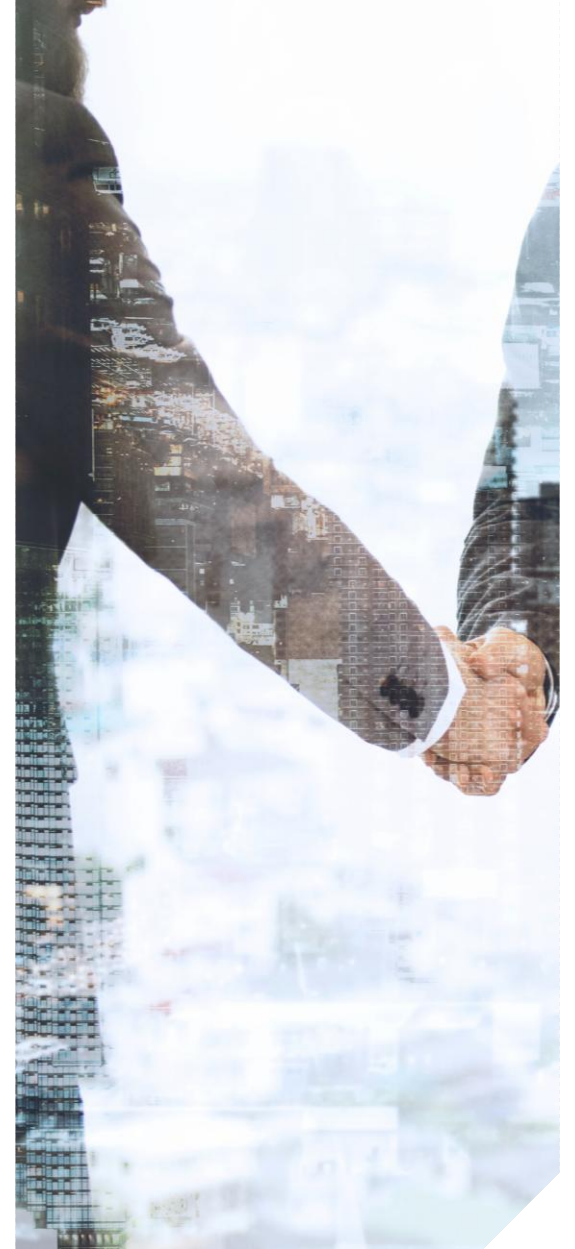
Staffing (30%), rent/location (23%), and traffic (19%) are the top challenges for Vaughan businesses. Other roadblocks include bureaucracy (17%), taxes (13%), and lack of support for small/local businesses (13%). Rising costs (11%), slow market conditions (11%), and construction (9%) also impact business operations.

INVESTING IN NEW OR INNOVATIVE TECHNOLOGIES AND ADOPTION OF PURPOSE-DRIVEN INITIATIVES

Many Vaughan businesses (40%) are embracing digital tools. Six in ten (60%) plan to invest in new technologies over the next five years. A significant number of businesses (56%) have adopted or are implementing purpose-driven initiatives. These include corporate social responsibility (CSR), social enterprise, diversity, equity and inclusion (DEI), and ESG reporting.

CONTACT WITH THE CITY

One-quarter of Vaughan businesses (24%) contacted the City in the past year for business-related reasons. The majority (74%) of those who contacted the City had their reason for contact resolved successfully



Executive Summary (2/2)

COMMUNICATION & WEBSITE USE

Vaughan businesses prefer e-newsletters (44%) and email (29%) for communication from Economic Development. While website usage is currently low (11%), those who visited the Vaughan Economic Development website found it useful (88%) and were able to find the information they needed (49%). This highlights the importance of improving website visibility and user experience to better serve the business community.

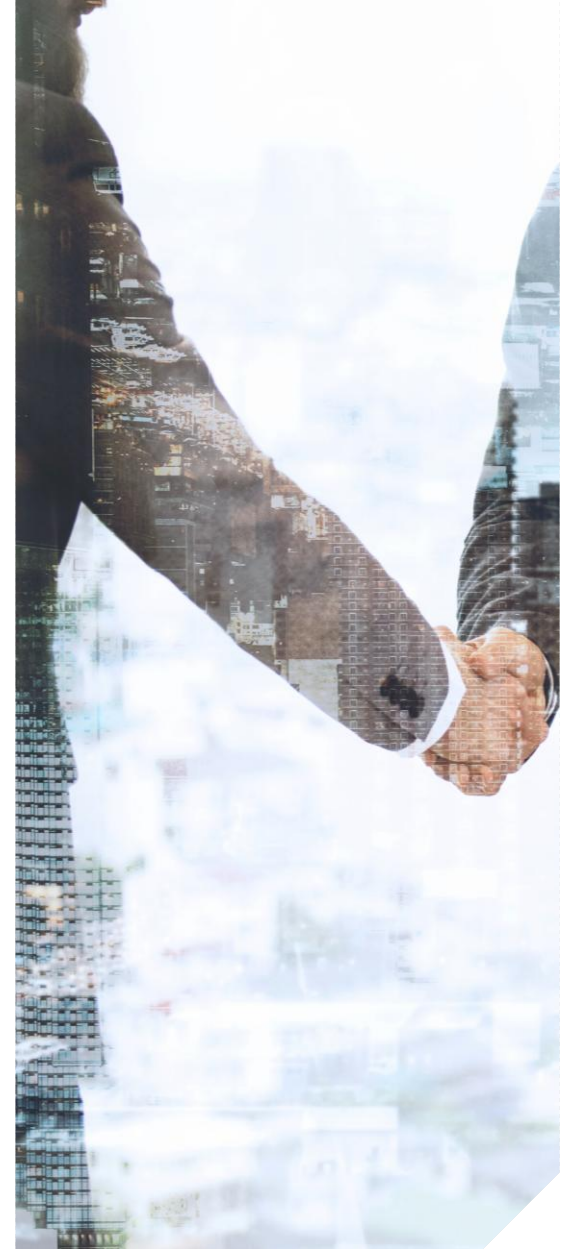
The Vaughan Economic Development website provides valuable content, with a high user satisfaction rate (88%). Those who visited the site found it useful, with nearly half (49%) finding exactly what they needed. However, low overall traffic (11%) suggests a need to increase awareness and promote the website more effectively.

ACCESSIBILITY

The vast majority (92%) of Vaughan businesses agree that the city is physically accessible, with 30% strongly agreeing and 62% somewhat agreeing.

Furthermore, 84% of businesses are actively adapting or have already adapted to meet accessibility standards, including 26% strongly agreeing and 58% somewhat agreeing they've made changes.

Only a small minority (8%) of businesses disagree that Vaughan is a physically accessible community.



03 DETAILED FINDINGS



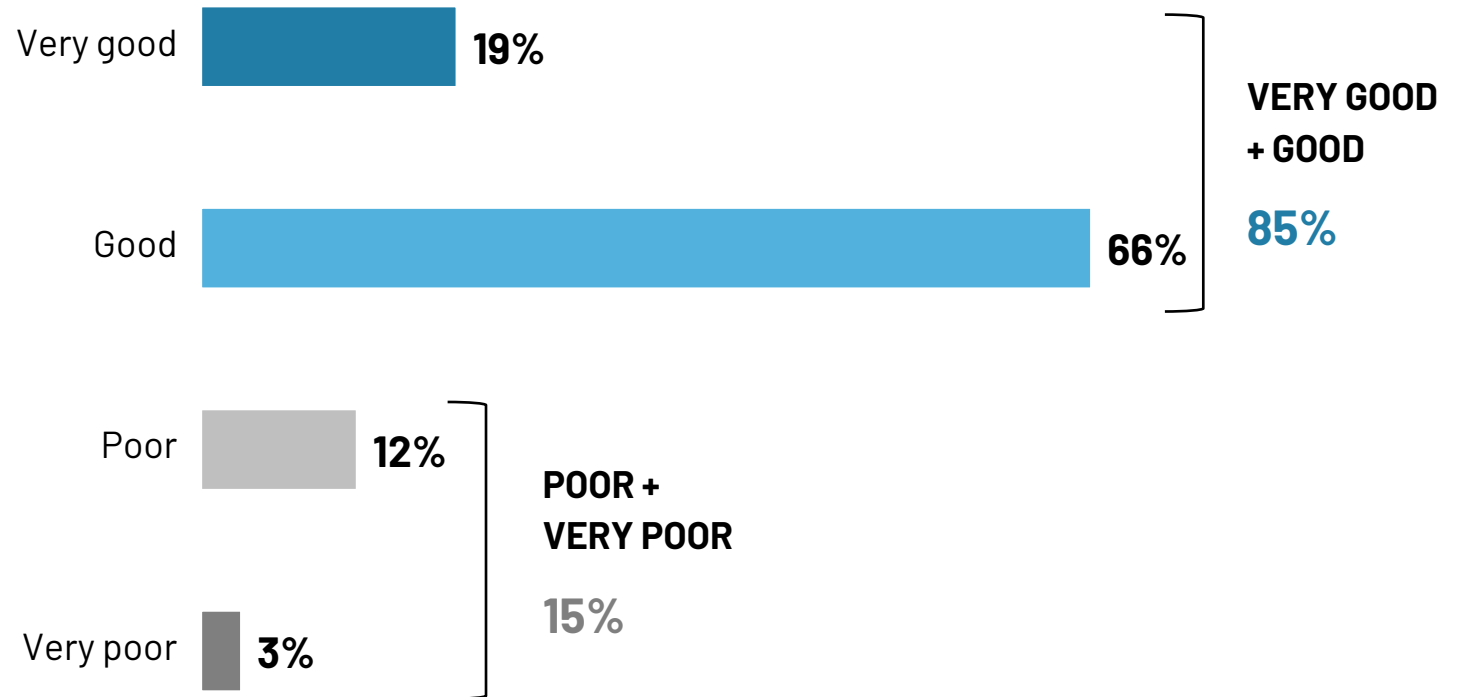
3.1 EXPERIENCE, SATISFACTION & AWARENESS OF SERVICES

City of Vaughan business environment

When asked how they would rate the overall business environment for their business in the city of Vaughan today, a strong majority of businesses said they view Vaughan's current business environment positively.

Over eight in ten (85%) respondents rated the environment as either "Very Good" (19%) or "Good" (66%), while only 15% offered a negative assessment: 12% "poor" and 3% "very poor".

RATING FOR TODAY'S OVERALL BUSINESS ENVIRONMENT FOR YOUR BUSINESS IN THE CITY OF VAUGHAN



Base: All respondents (n=336)

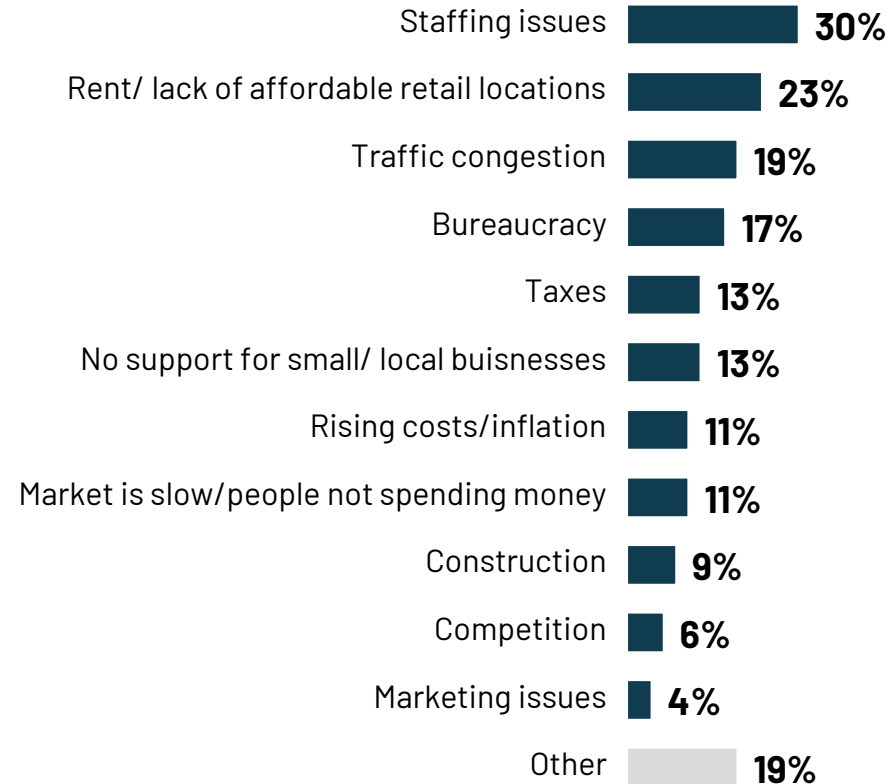
Q1a. How would you rate the overall business environment for your business in the city of Vaughan today? For example, setting up the business, growing the business or finding suitable staff.

Roadblocks or challenges

Staffing issues (30%), rent/lack of affordable retail locations (23%), and traffic congestion (19%) are the top three roadblocks or challenges businesses face in the City of Vaughan.

Other challenges include bureaucracy (17%), taxes (13%), lack of support for small/local businesses (13%), rising costs/inflation (11%), a slow market/low consumer spending (11%), construction (9%), competition (6%), and marketing issues (4%).

BIGGEST ROADBLOCKS OR CHALLENGES TO DOING BUSINESS IN THE CITY



Economy, staffing, congestion, rising crime, occupancy costs.



Rent too high, unskilled work force, utilities too high, Internet down often



There is not enough publicity for the business to grow as there is no option to showcase your business or promote your business. Hence, business is struggling to meet expenses and is not profitable.



High Taxes, very low collaboration a the small business from the city of Vaughan

Base: Rated business environment as poor/very poor (n=47)
Q1b. What are the biggest roadblocks or challenges to doing business in the city?

Business advantages

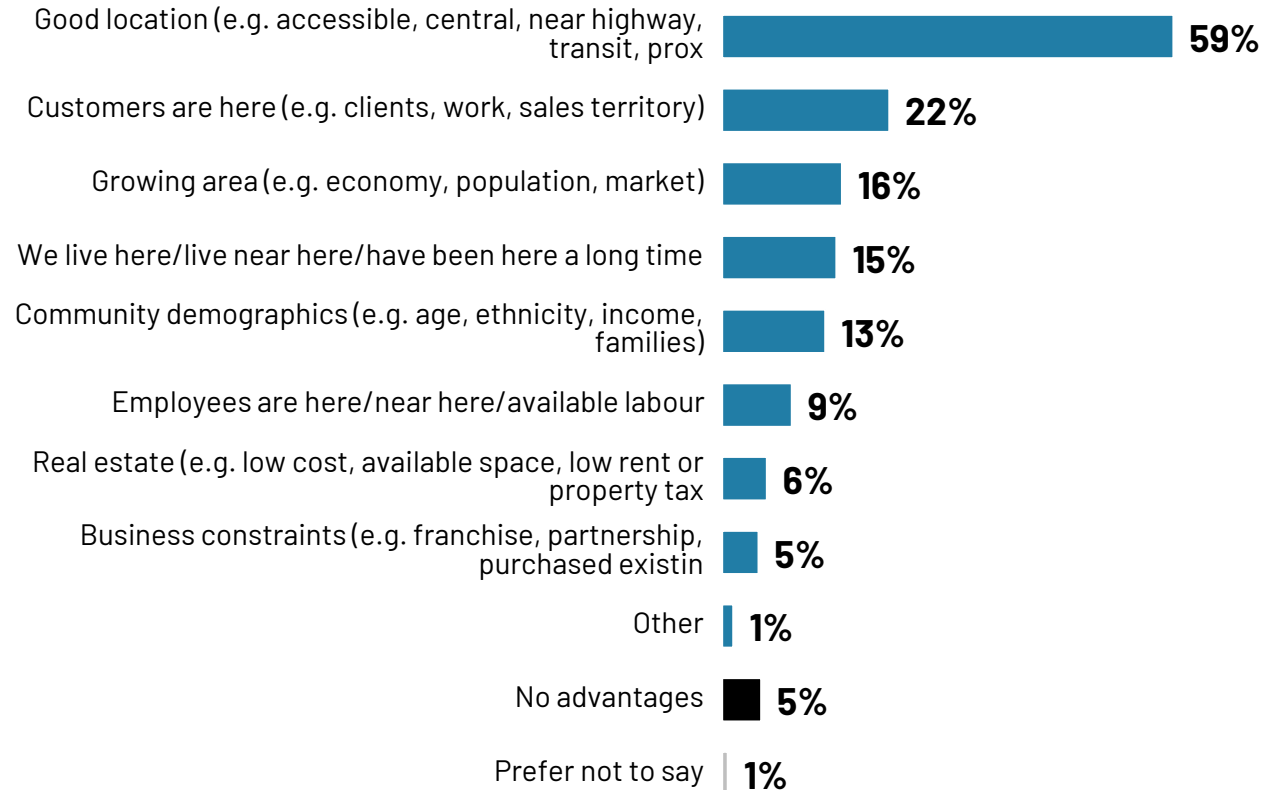
The primary advantages of doing business in Vaughan are its strategic location (59%), strong customer base (22%), and growth potential (16%).

Businesses appreciate Vaughan's accessibility, central location within the Greater Toronto Area, proximity to highways and transit, and established client networks.

Other advantages include community demographics (13%), employee availability (9%), real estate factors (6%), and business continuity considerations (5%).

These factors combine to create a favorable environment for businesses seeking to establish, operate, and expand their operations.

BUSINESS ADVANTAGES BY BEING IN VAUGHAN



Base: All respondents (n=275)

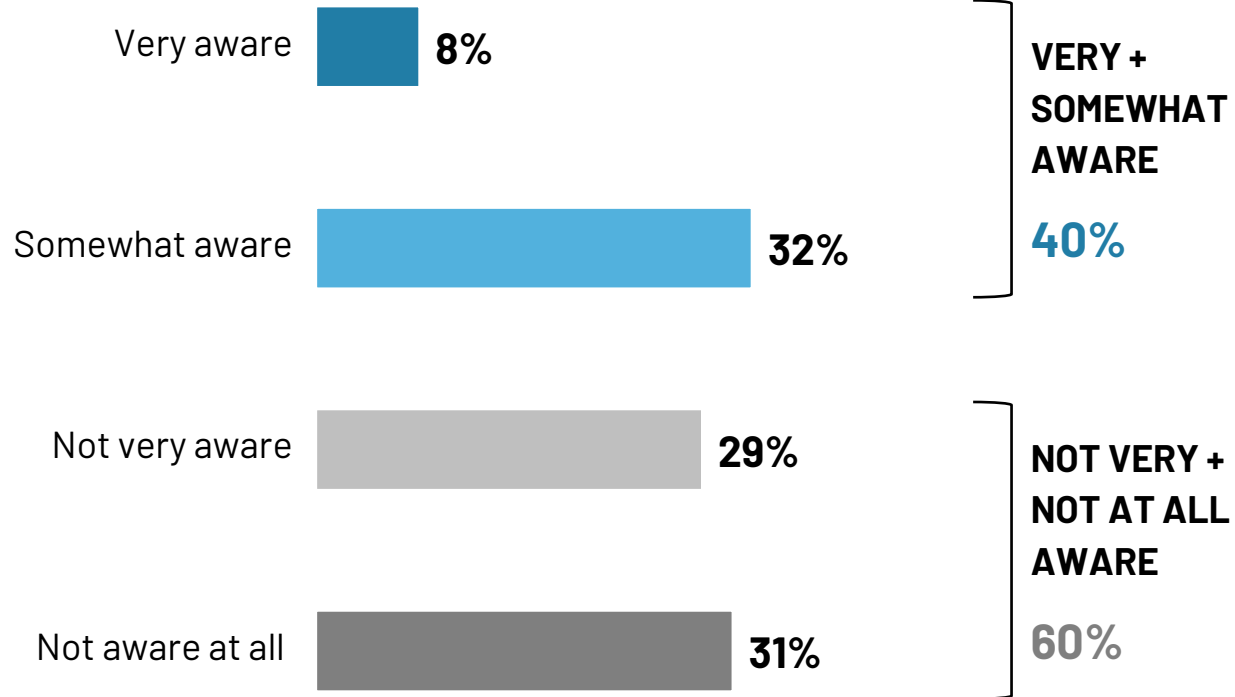
Q2. In your experience, what are the advantages your business has by being in Vaughan?

Awareness of services for local businesses

Four in ten (40%) businesses in Vaughan are “very aware” or “somewhat aware” of the services the City of Vaughan provides to local businesses, while 60% are “not very aware or not aware at all”.

This suggests an opportunity for the City of Vaughan to increase awareness and utilization of its business support services.

AWARENESS OF THE SERVICES CITY OF VAUGHAN PROVIDES SPECIFICALLY TO LOCAL BUSINESSES



Base: All respondents (n=351)
Q3. Generally, how aware are you of the services that the City of Vaughan provides specifically to local businesses?

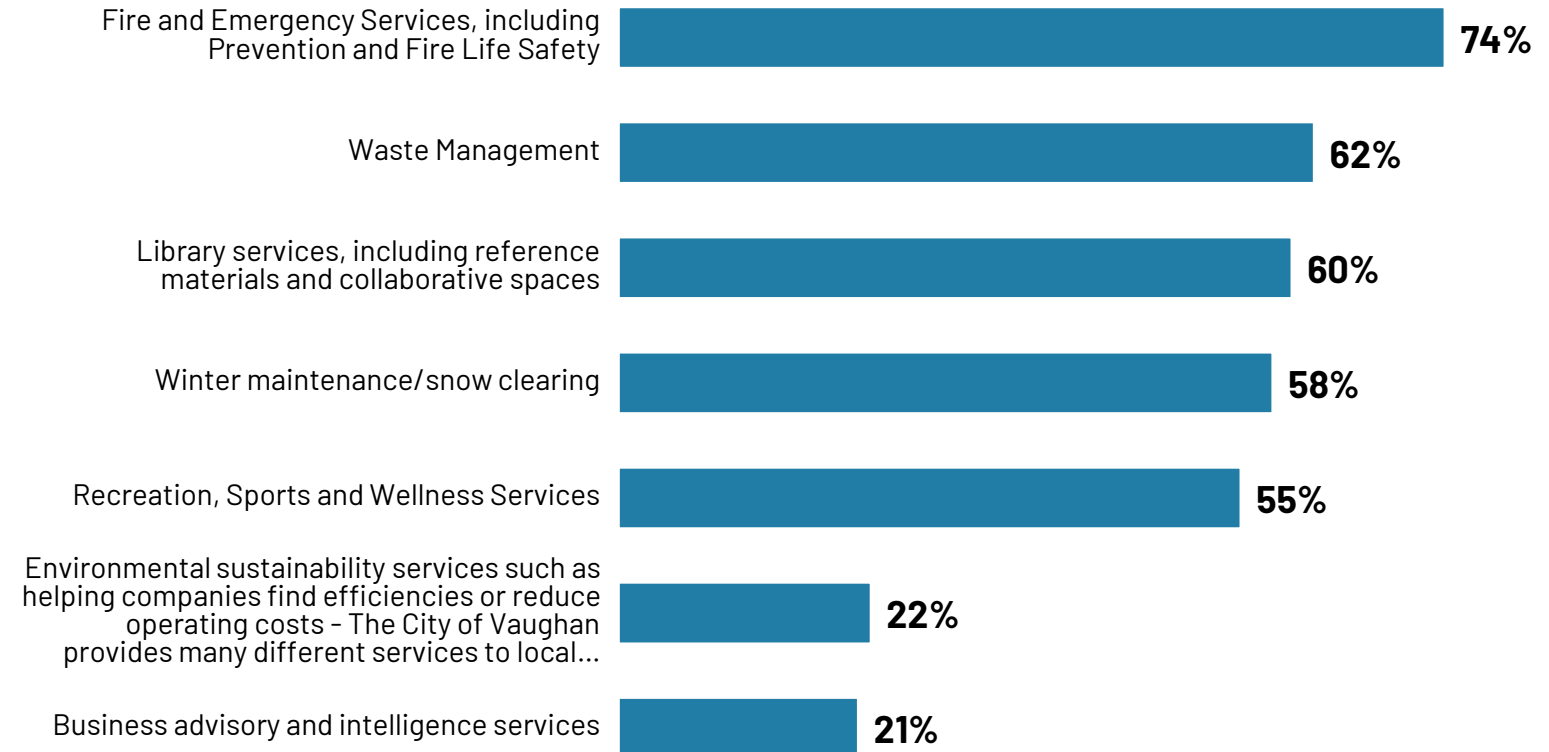
Business services heard of

The most known services offered by the City of Vaughan to local businesses are fire and emergency services (74%), waste management (62%), library services (60%), winter maintenance/snow clearing (58%), and recreation, sports and wellness services (55%).

One in five (22%) are aware of environmental sustainability services and business advisory and intelligence services (21%).

There is a potential need for the City of Vaughan to better communicate the full range of services available to local businesses, particularly those focused on business development and support.

CITY OF VAUGHAN'S DIFFERENT SERVICES FOR LOCAL BUSINESSES HEARD OF



Base: All respondents (n=352)

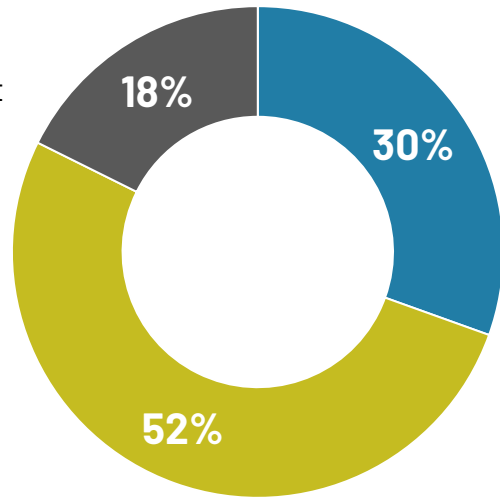
Q4. The City of Vaughan provides many different services to local businesses. Please indicate whether or not you have heard about the following.

Business outlook

Currently, Vaughan's businesses demonstrate a positive outlook, with 30% experiencing growth and 52% maintaining stability. However, future projections are more conservative. Over the next three years, almost two thirds (65%) of businesses anticipate growth, while around three in ten (27%) predict stable conditions. Employment forecasts for the next two years align with this cautious optimism: 41% of businesses expect to maintain staffing levels and 52% foresee growth.

CURRENT STATE OF BUSINESS

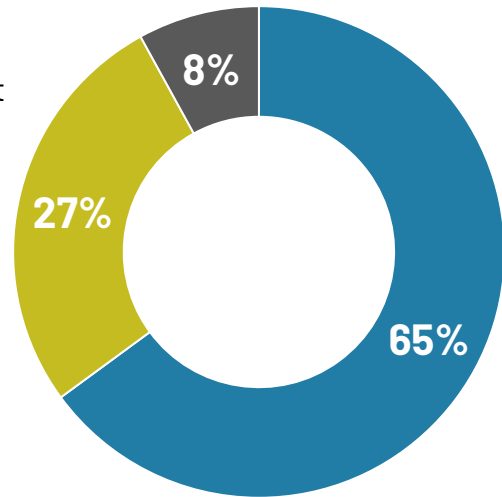
- Growing
- Staying about the same
- Declining
- Prefer not to say



Base: All respondents (n=351)
Q5. Right now, would you say your business is growing, declining or staying about the same?

OUTLOOK OVER THE NEXT 3 YEARS

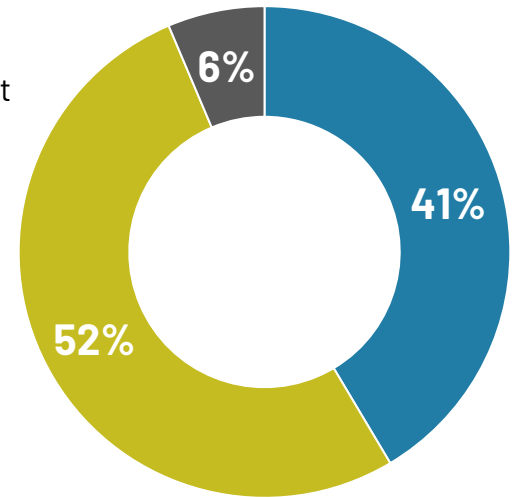
- Grow
- Stay about the same
- Decline
- Prefer not to say



Base: All respondents (n=325)
Q6. Thinking about your business outlook over the next three years, do you expect business to...

EMPLOYMENT NEEDS OVER NEXT 2 YEARS

- Grow
- Stay about the same
- Decline
- Prefer not to say



Base: All respondents (n=345)
Q7. Are the projected employment needs for your company's facility expected to grow, stay about the same or decline over the next two years?

Business challenges

General costs (34%), are the biggest challenge facing businesses in Vaughan, followed by staffing issues (24%) and the cost of real estate (18%).

Other significant challenges include traffic congestion (16%), competition (14%), municipal/property taxes (11%), lack of capital/resources (9%), marketing (9%), government red tape/restrictions (9%), and slow market conditions/economic issues (9%),

While the overall business environment rating is positive, the wide range of challenges underscores the complexity of the current business environment in Vaughan.

BIGGEST CHALLENGES FACED BY YOUR BUSINESS



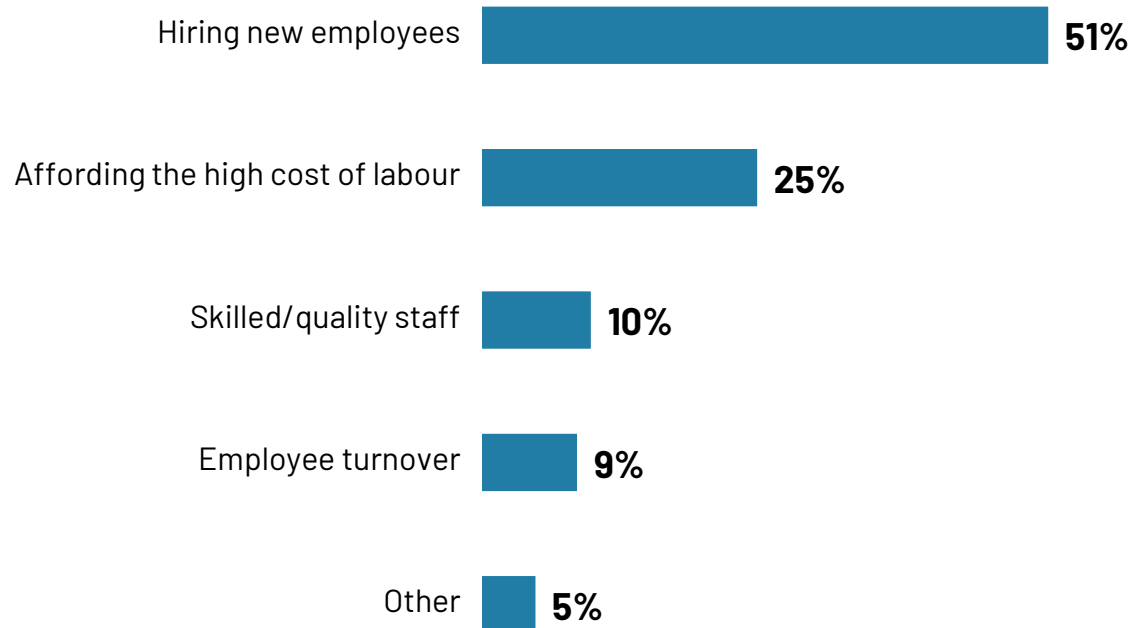
Base: All respondents (n=352)

Q8. What would you say are the biggest challenges your business faces, if any?

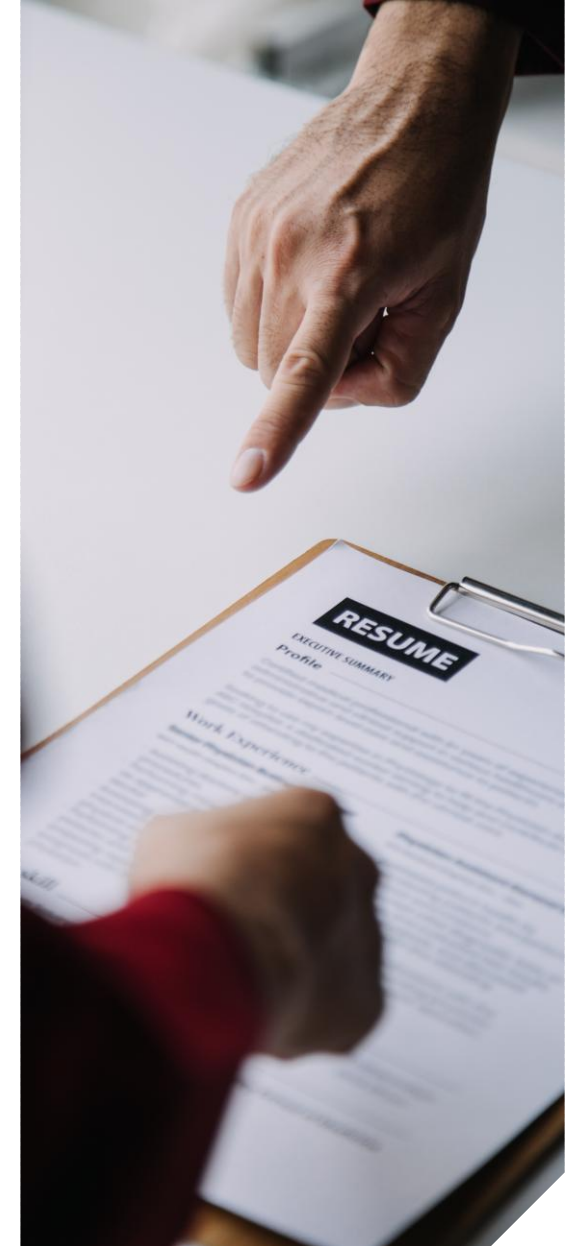
Staffing issues

Among those who mentioned “staffing” as a big challenge business faces, hiring new employees (51%) is the biggest staffing challenge, followed by affording the high cost of labor (25%) and finding skilled/quality staff (10%). Employee turnover (9%) and other staffing issues (5%) are also mentioned as challenges.

TYPE OF STAFFING ISSUE THAT IS THE BIGGEST CHALLENGE IN YOUR BUSINESS



Base: Mentioned staffing as a big challenge business faces (n=80)
Q9. You mentioned staffing is a big challenge your business faces. What type of staffing issue is the biggest challenge for your business?

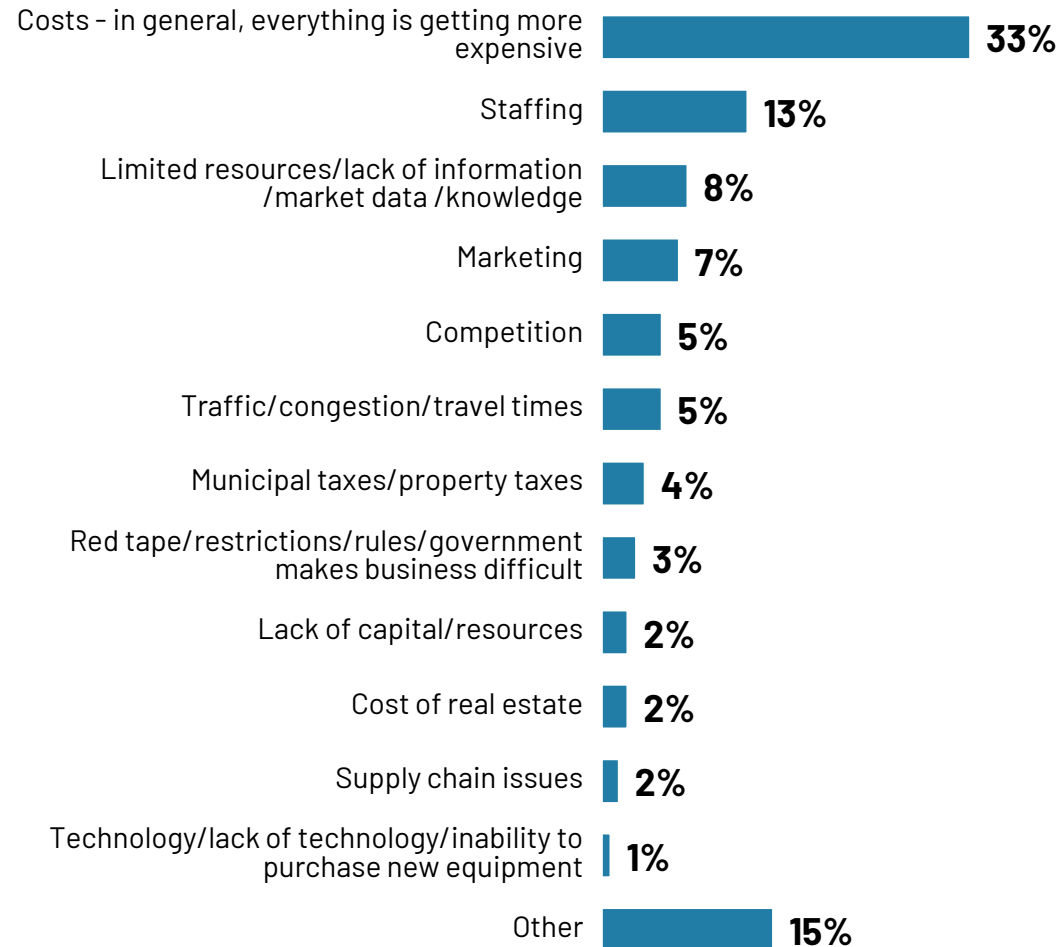


Most impactful business challenge

Rising costs (33%) are the single most impactful challenge for businesses in Vaughan, followed by staffing issues (13%) and limited resources/lack of information/market data/knowledge (8%).

Marketing (7%), competition (5%), traffic congestion (5%), and municipal/property taxes (4%) also present notable challenges.

OF THE CHALLENGES YOU SELECTED, WHICH ONE WOULD YOU SAY IMPACTS YOUR BUSINESS THE MOST?



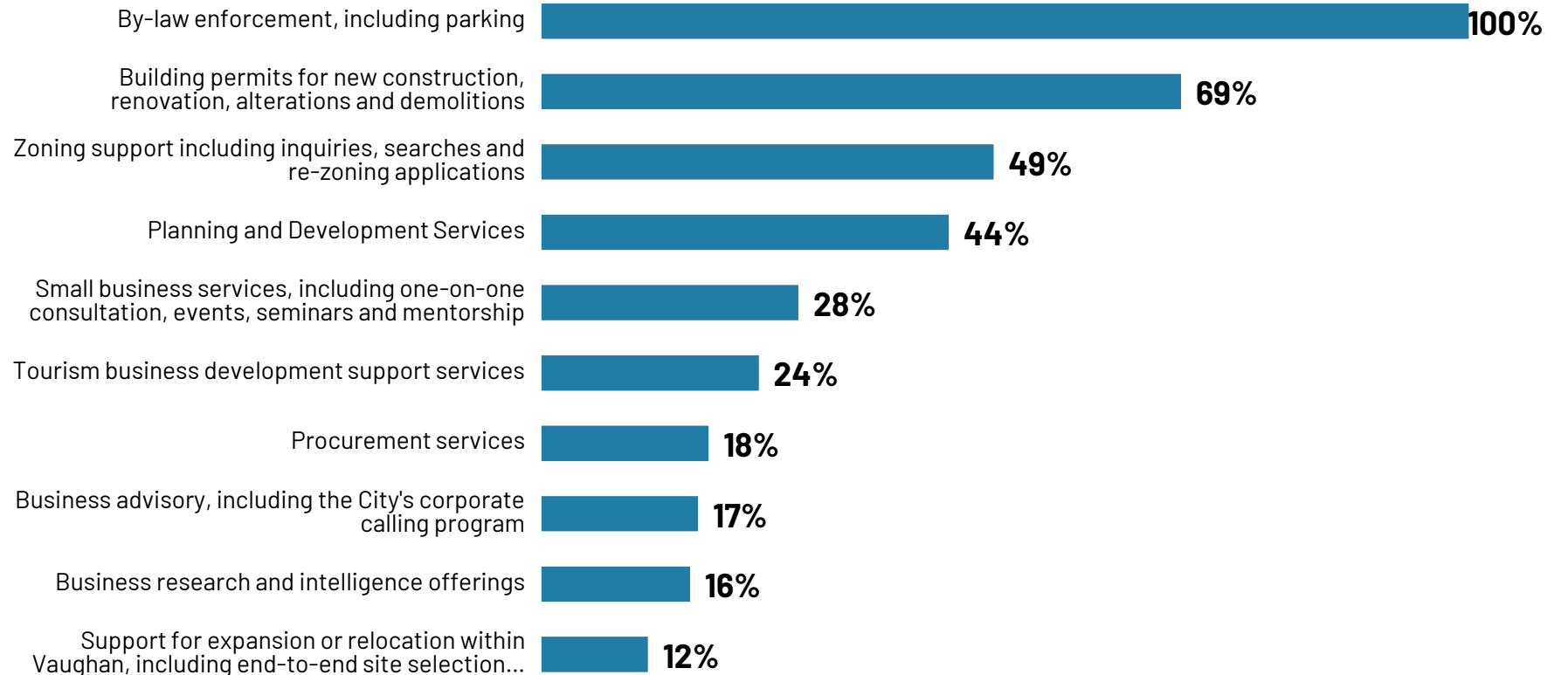
Base: Of the challenges, who impacts your business the most (n=131)
Q10. Of the challenges you selected, which one would you say impacts your business the most?

Additional business services are aware of

All businesses are aware of by-law enforcement (100%). Building permits (69%) and zoning support (49%) are the recognized additional services offered by the City of Vaughan to local businesses. Planning and Development Services (44%) and small business services (28%) are also relatively well-known.

However, awareness drops for other services such as tourism business development support (24%), procurement services (18%), business advisory services (17%), business research and intelligence offerings (16%), and support for business expansion or relocation (12%).

AWARE OF CITY OF VAUGHAN'S ADDITIONAL SERVICES FOR LOCAL BUSINESSES



Base: All respondents (n=352)
Q11. Please select whether or not you have heard of the following services.

3.2

DIGITAL TRANSFORMATION & PURPOSE DRIVEN INITIATIVES



Digital resiliency or innovation initiatives

Four in ten (40%) Vaughan businesses are embracing digital tools and strategies. Among those who have undertaken digital resiliency or innovation initiatives, these initiatives primarily focus on online marketing tactics such as social media adoption, SEO, Google My Business or e-mail marketing (35%), as well as e-commerce (22%), and digital inventory management (16%).

DIGITAL RESILIENCY OR INNOVATION INITIATIVES BUSINESS HAS UNDERTAKEN

40%
of respondents state their business **has undertaken** digital resiliency or innovation initiatives



Base: All respondents (n=350)
Q12. Has your business undertaken any digital resiliency or innovation initiatives?

Base: Business has undertaken digital resiliency or innovation initiatives (n=139)
Q13. And what types of digital resiliency or innovation initiatives has your business undertaken?

Digital resiliency or innovation initiatives needing support

When asked which type of digital resiliency or innovation initiatives their business would need increased support with, Vaughan businesses would welcome more support for online marketing tactics (27%), using AI (8%), and e-commerce (7%).

Mobile applications, Internet of Things technology, and digital inventory management are other areas where businesses seek additional support.

DIGITAL RESILIENCY OR INNOVATION INITIATIVES BUSINESS WOULD NEED INCREASED SUPPORT WITH



Base: All respondents (n=328)
Q14. Which type of digital resiliency or innovation initiatives would your business need increased support with, if any?

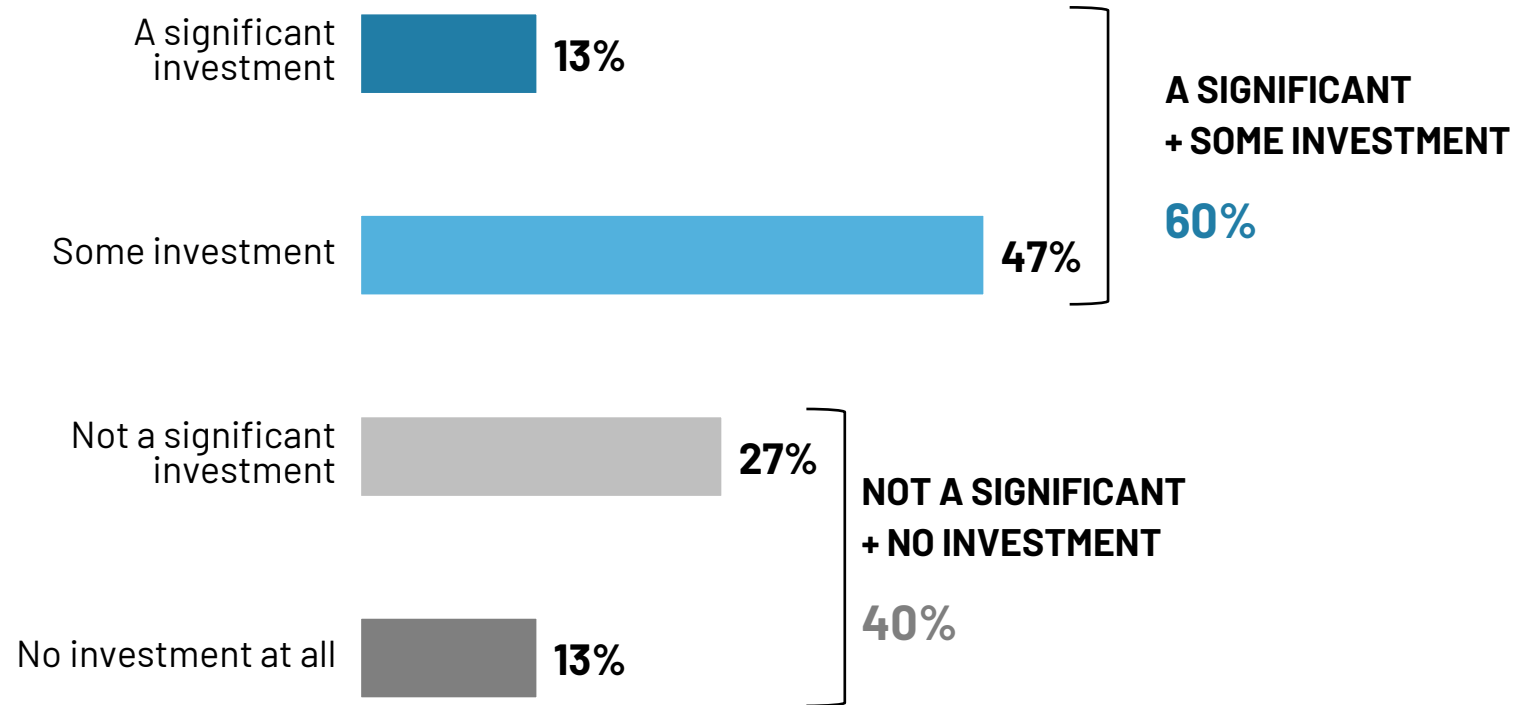
Investing in new or innovative technology

60% of Vaughan businesses anticipate making at least some investment in new or innovative technologies over the next five years, with 13% planning significant investments and 47% expecting to make more moderate investments.

However, four in ten (40%) do not foresee significant technology investments, with 27% anticipating only minor investments and 13% planning no investment at all.

This suggests a divide in the business community, with some embracing technological advancement while others remain hesitant.

LEVEL OF INVESTMENT EXPECTED IN NEW OR INNOVATIVE TECHNOLOGY FOR BUSINESS IN NEXT 5 YEARS



Base: All respondents (n=348)
Q15. In the next five years, how much of an investment do you expect you will you make in new or innovative technology for your business?

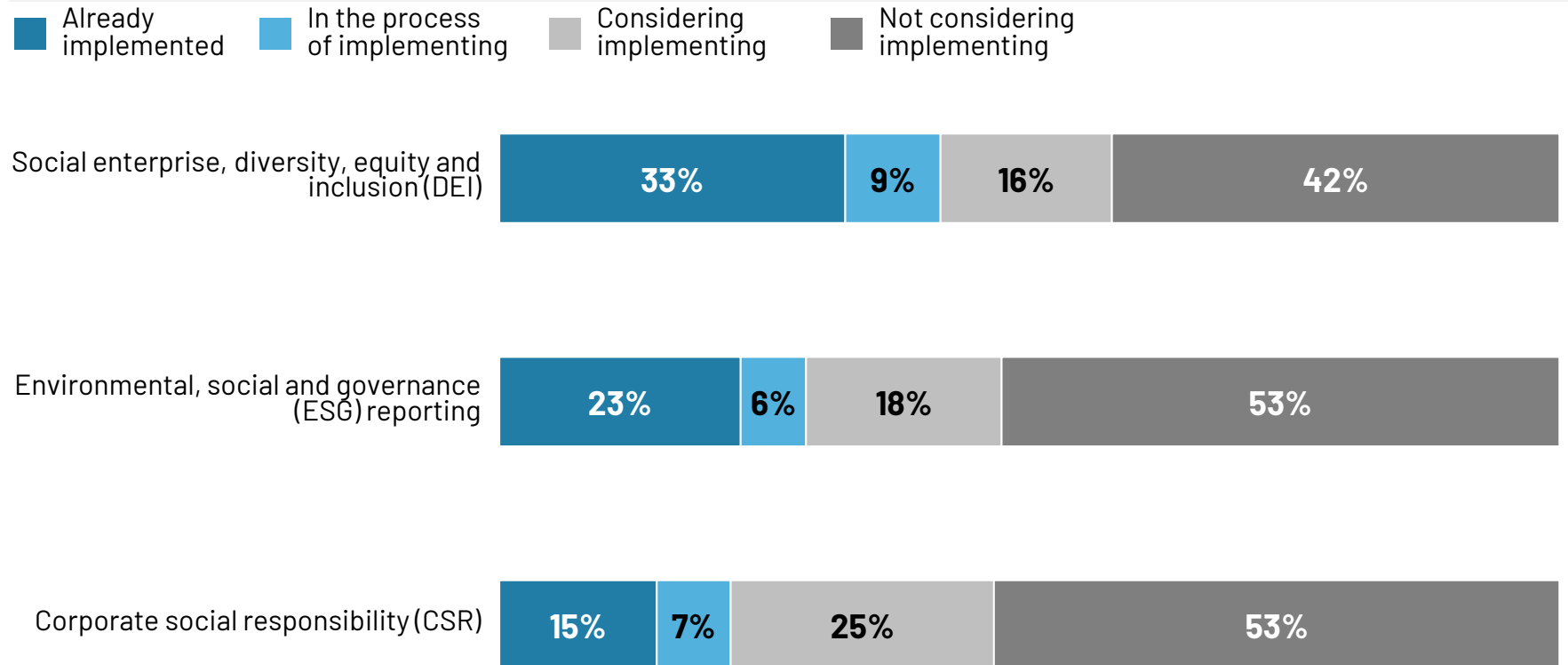
Purpose-driven initiatives

A combined 56% of Vaughan businesses have already implemented (33%) or are in the process of implementing (23%) purpose-driven initiatives related to social enterprise, diversity, equity, and inclusion (DEI), environmental, social, and governance (ESG) reporting, and corporate social responsibility (CSR).

Another 15% are considering implementing such initiatives, while 29% are not currently considering them.

This highlights an opportunity to further encourage and support businesses in adopting these initiatives.

STAGE OF IMPLEMENTATING PURPOSE-DRIVE INITIATIVES



Base: All respondents (n=Varies)

Q16. Have you implemented or is your business considering implementing purpose-driven initiatives related to - Corporate social responsibility (CSR), Social enterprise, diversity, equity and inclusion (DEI), Environmental, social and governance (ESG) reporting.

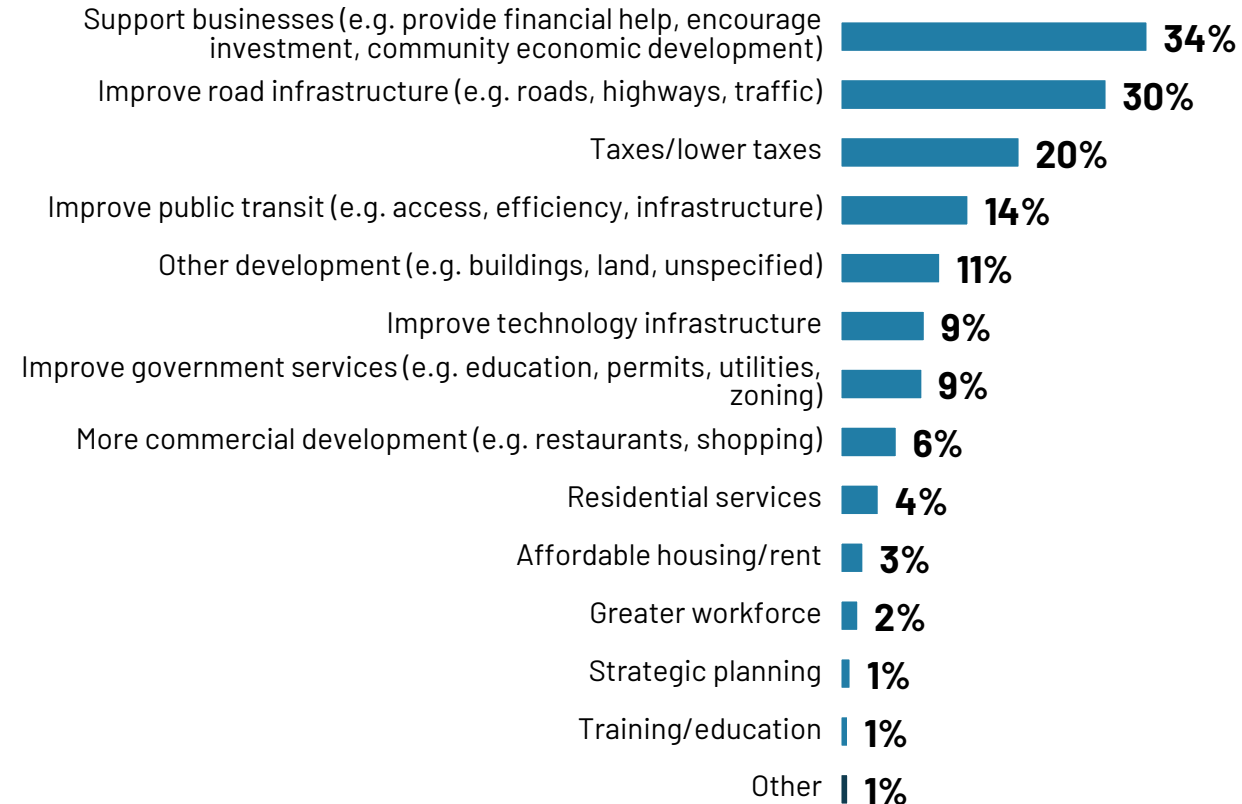
...

Digital resiliency or innovation initiatives needing support

Businesses in Vaughan prioritize support in several key areas over the next five years. These include supporting businesses through financial aid and community economic development (34%), improving road infrastructure (30%), lowering taxes (20%), enhancing public transit (14%), and other development projects (11%).

Improving technology infrastructure (9%), government services (9%), commercial development (6%), residential services (4%), affordable housing (3%), workforce development (2%), strategic planning (1%), and training/education (1%) are also areas where businesses would like to see increased focus.

OVER THE NEXT FIVE YEARS, SPECIFICALLY WHERE SHOULD THE CITY OF VAUGHAN BE FOCUSING ITS ECONOMIC DEVELOPMENT EFFORTS?

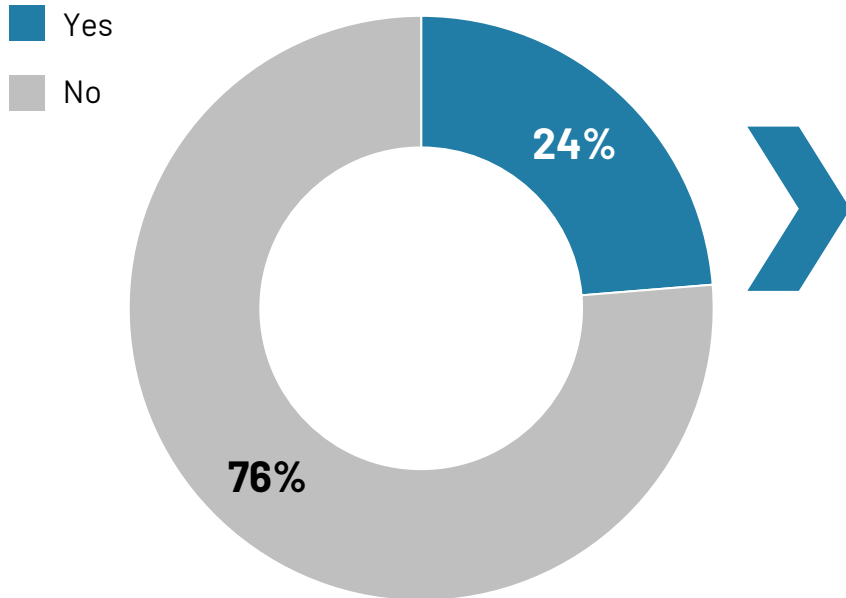


Base: All respondents (n=352)
Q17. Over the next five years, specifically where should the City of Vaughan be focusing its economic development efforts?

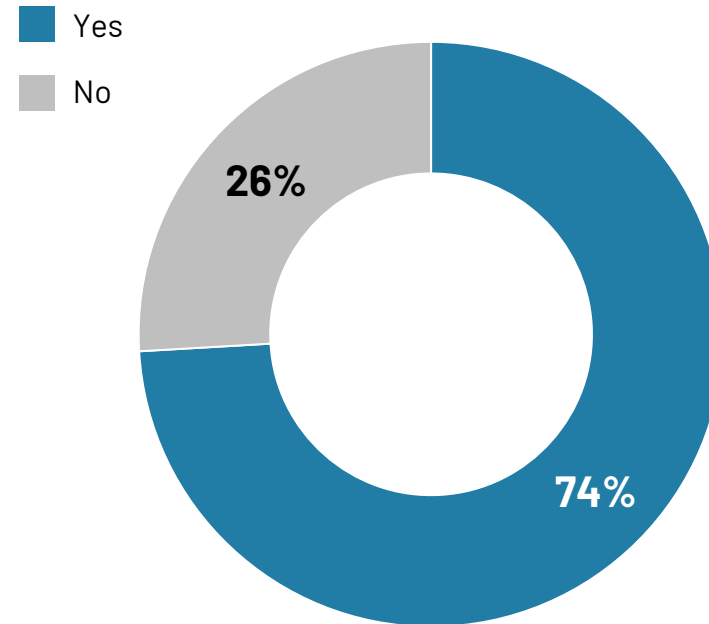
Contacting the City of Vaughan

In the past 12 months, a quarter of Vaughan business (24%) contacted the City for business-related reasons. Of those who contacted the City, three quarters (74%) had their issue resolved, while 26% did not.

CONTACTED CITY FOR A BUSINESS-RELATED REASON IN PAST 12 MONTHS



REASON FOR CONTACT WAS RESOLVED



Base: All respondents (n=350)
Q18. In the last 12 months have you contacted the City of Vaughan for a reason related to your business? By business related, we mean an inquiry, question, application related to a municipal process, or request related to your business.

Base: Contacted city of Vaughan for business-related reason (n=81)
Q19. Thinking of your most recent contact, would you say that the reason for your contact with the City was resolved?



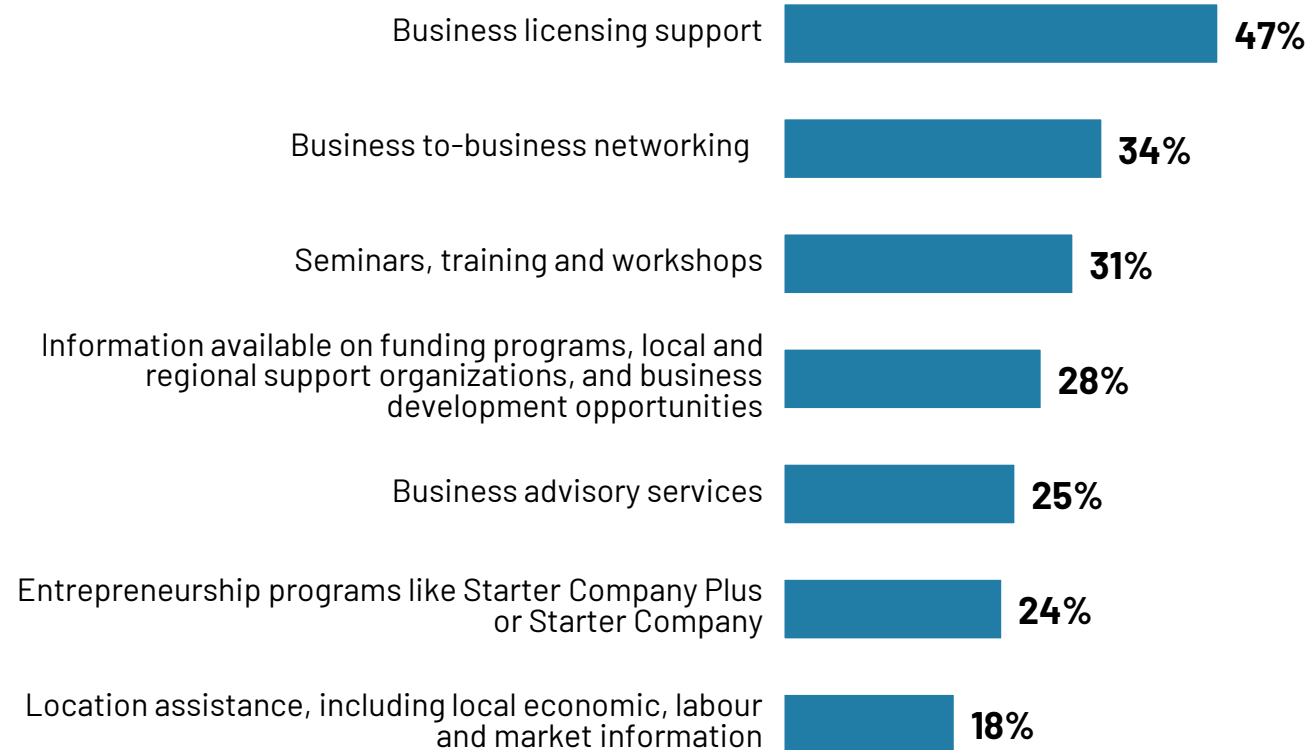
Aware of services

Business licensing support (47%), business-to-business networking (34%), and seminars, training, and workshops (31%) are the most recognized services provided by the City of Vaughan.

Information on funding programs and business development opportunities (28%), business advisory services (25%), and entrepreneurship programs (24%) are also relatively well-known. While location assistance services are known by 18% of respondents.

These findings suggest opportunities to increase awareness of certain City of Vaughan services, particularly those related to funding, advisory support, and entrepreneurship.

AWARE OF SERVICE PROVIDED BY THE CITY OF VAUGHAN



Base: All respondents (n=352)
Q20. I'm going to read you a list of services provided by the City of Vaughan; please indicate whether or not you are aware of them.

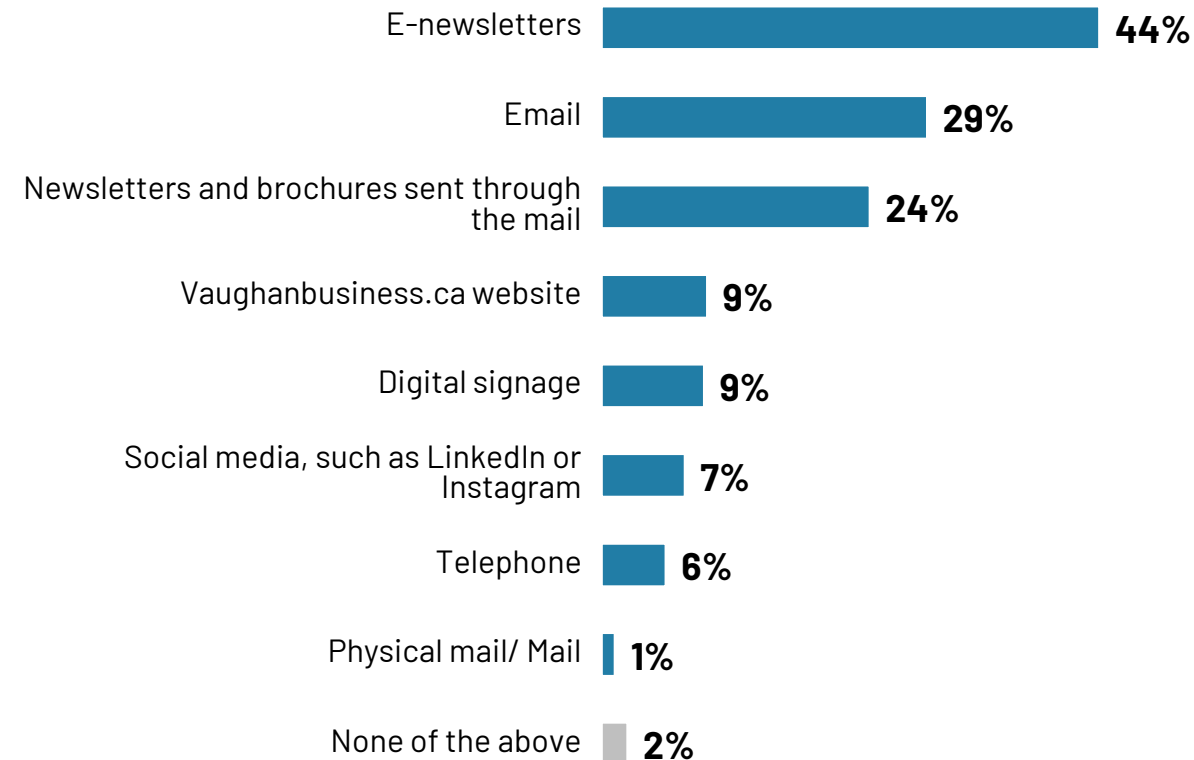
3.3 COMMUNICATION & WEBSITE USE

Receiving communications

When asked what their preferred methods to receive communications from Vaughan Economic Development were, over four in ten (44%) said E-newsletters, followed by email (29%), mail (24%).

Lowest on the list are website updates (9%), digital signage (9%), and social media (7%).

PREFERRED METHODS FOR RECEIVING COMMUNICATIONS FROM VAUGHAN ECONOMIC DEVELOPMENT



Base: All respondents (n=352)
Q21. What are your preferred methods to receive communications from Vaughan Economic Development?

Vaughan Economic Development's website

Only one in ten (11%) of businesses reported having visited Vaughan Economic Development's website in the past year.

Of those who did visit the site, 88% found it very or somewhat useful with nearly half (49%) finding exactly what they needed and 41% finding at least part of what they were looking for.

This suggests that while the website's content is generally considered valuable by those who use it, there's an opportunity to increase awareness and drive more traffic to the site.

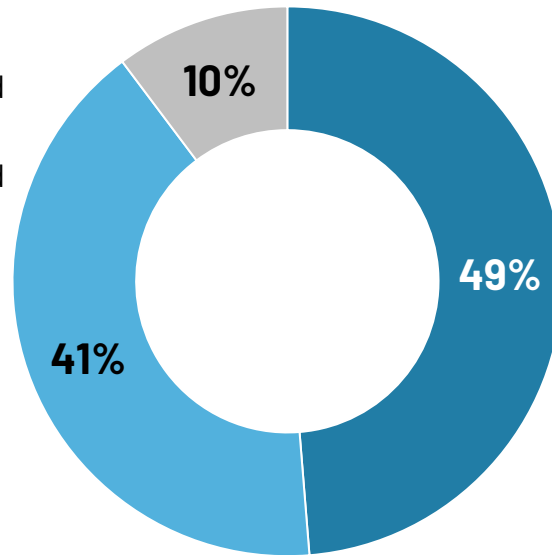


11%

of business owners **have visited** Vaughan Economic Development's website in the past 12 months

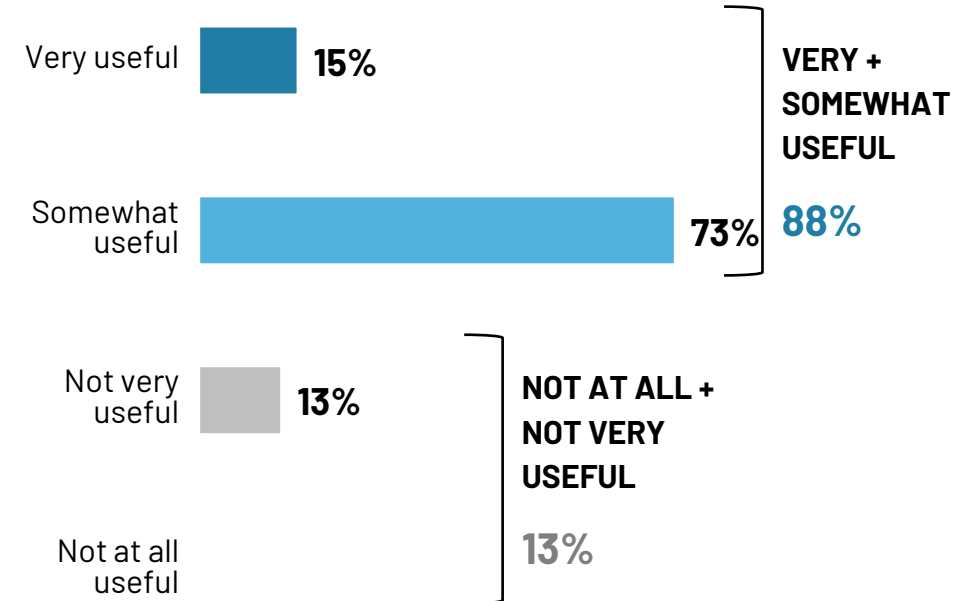
FOUND DESIRED INFO AT VAUGHANBUSINESSS.CA

- Found what I needed
- Found part of what I needed
- Did not find what I needed



Base: Visited website in past 12 months (n=39)
Q22B. In searching for the desired information on vaughanbusiness.ca, did you find what you were looking for?

USEFULNESS OF CONTENT AVAILABLE ONLINE



Base: Visited website in past 12 months (n=40)
Q22C. Overall, how useful was the content available on vaughanbusiness.ca?

Base: All respondents (n=351)
Q22A. Have you been to Vaughan Economic Development's website (vaughanbusiness.ca) in the past 12 months?

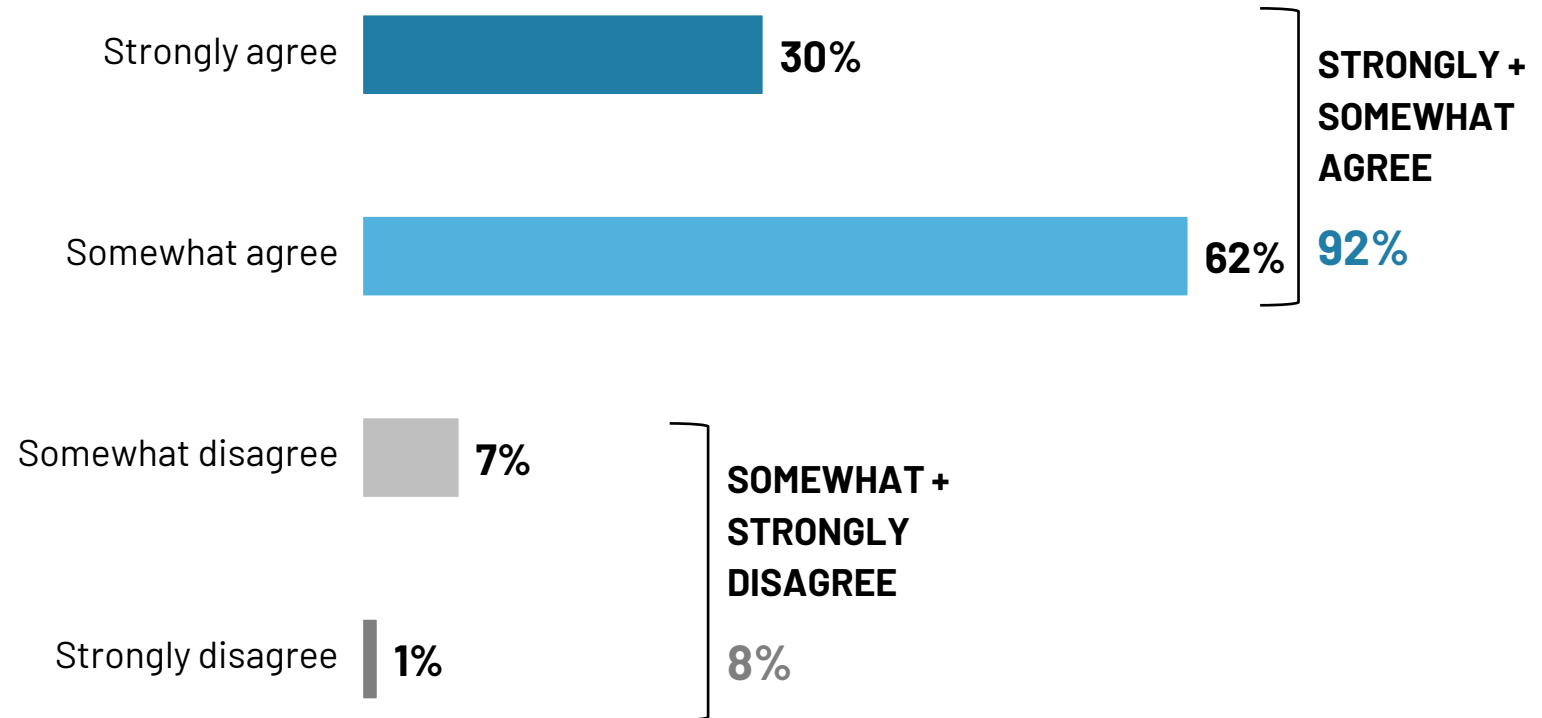
3.4 ACCESSIBILITY

Agreement with accessibility statement

A strong majority (92%) of Vaughan businesses agree that the city is a physically accessible community, with 30% strongly agreeing and 62% somewhat agreeing.

A small minority (8%) disagree with this statement.

STATEMENT: GENERALLY SPEAKING, THE CITY OF VAUGHAN IS A PHYSICALLY ACCESSIBLE COMMUNITY



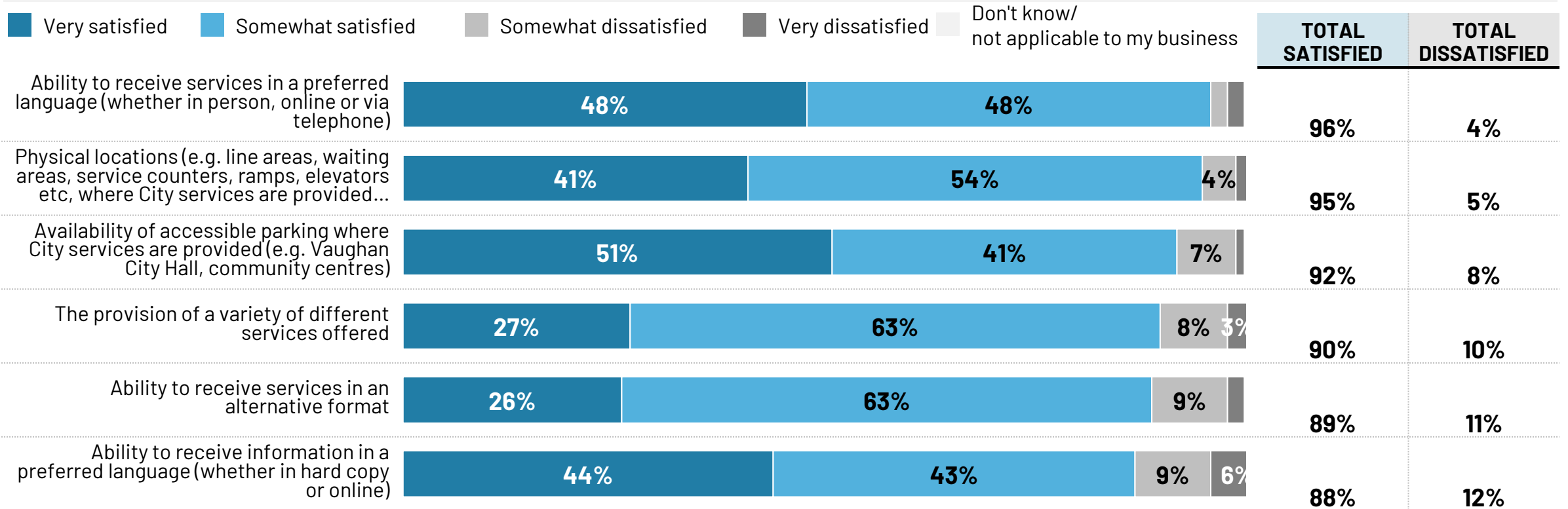
Base: All respondents (n=344)

Q23. To what extent do you agree or disagree with the following statement: Generally speaking, the city of Vaughan is a physically accessible community.

Satisfaction with accessibility (1/2)

Excluding those who say they don't know or that this service is not applicable to their business, almost all (96%) Vaughan businesses report high satisfaction levels with the accessibility of receiving services in a preferred language (in person, online or via telephone) and physical locations where with city services are provided (95%). Local businesses are also highly satisfied with the availability of parking where City services are offered (92%) and the provision of a variety of different services (90%).

OVERALL SATISFACTION WITH THE ACCESSIBILITY OF THE FOLLOWING AREAS OF SERVICES PROVIDED BY THE CITY OF VAUGHAN



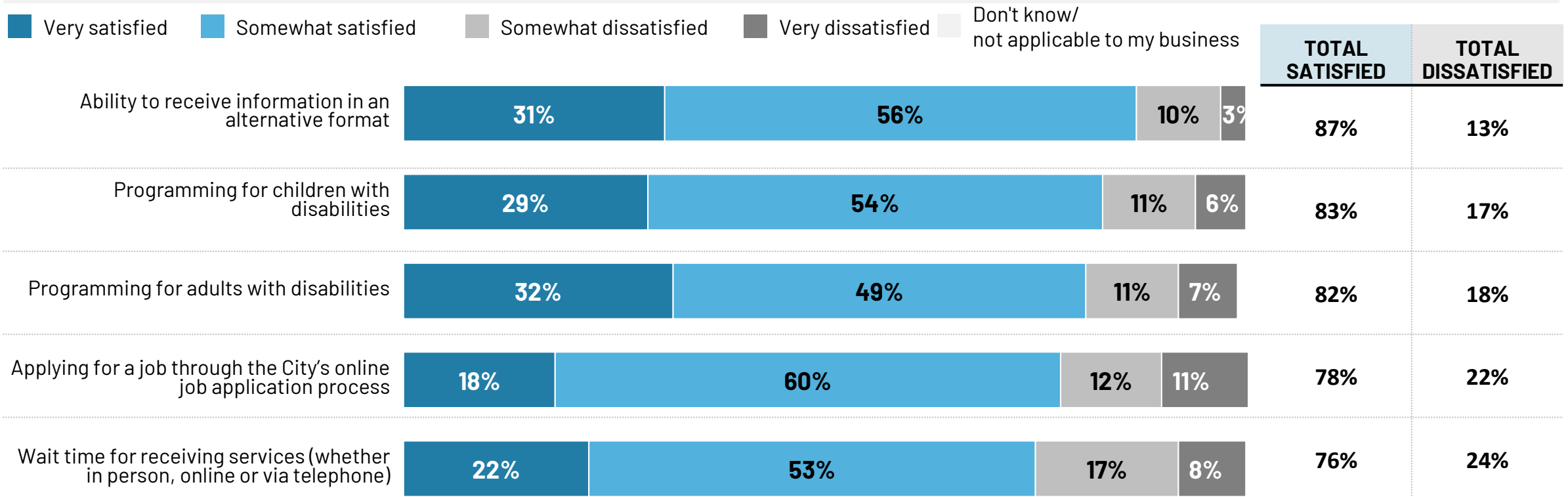
Figures <3% not shown

Base: All respondents, excluding don't know/not applicable to my business (n=Base Varies*)
 Q24. How satisfied or dissatisfied are you with the accessibility of the following areas of services provided by the City of Vaughan?

Satisfaction with accessibility (1/2)

Excluding those who say they don't know or that this service is not applicable to their business, slightly lower satisfaction levels are reported for the accessibility of applying for a job through the City's online job application process (78%) and wait time for receiving services (whether in person, online or via telephone) but still over three quarters are satisfied with these services (76%).

OVERALL SATISFACTION WITH THE ACCESSIBILITY OF THE FOLLOWING AREAS OF SERVICES PROVIDED BY THE CITY OF VAUGHAN



Figures <3% not shown

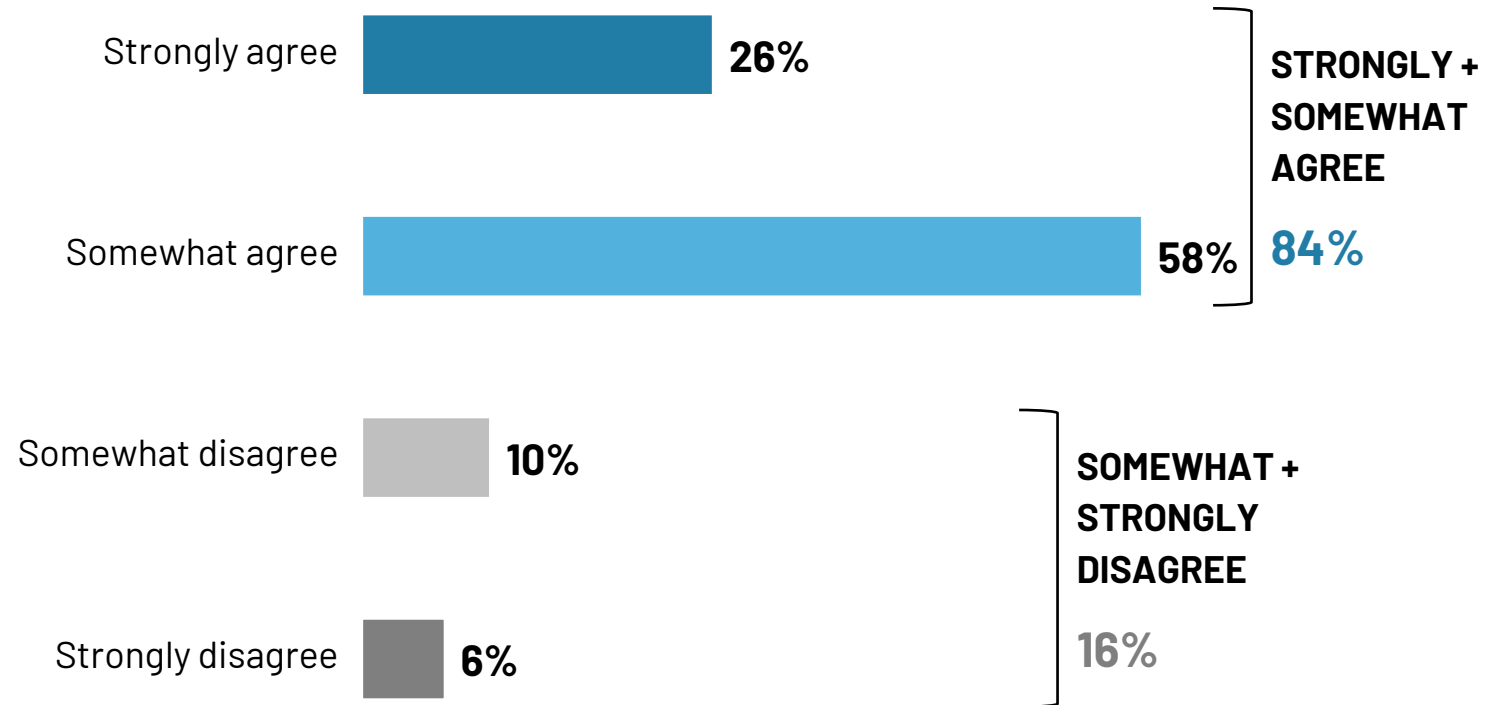
Base: All respondents, excluding don't know/not applicable to my business (n=Base Varies*)
Q24. How satisfied or dissatisfied are you with the accessibility of the following areas of services provided by the City of Vaughan?

Agreement with business accessibility statement

A substantial majority (84%) of Vaughan businesses affirm they are either actively adapting or have already made changes to meet accessibility standards. This includes physical modifications, adjustments to services, or changes to information formats.

Of those businesses, 26% strongly agree and 58% somewhat agree with the statement about making changes to meet accessibility standards.

STATEMENT: GENERALLY SPEAKING, OUR BUSINESS IS MAKING/HAS MADE CHANGES TO MEET ACCESSIBILITY STANDARDS



Base: All respondents (n=325)

Q25. How much do you agree or disagree with the following statement: Generally speaking, our business is making/has made changes to meet accessibility standards (e.g., physical changes for accessibility, services or information in an alternative format).

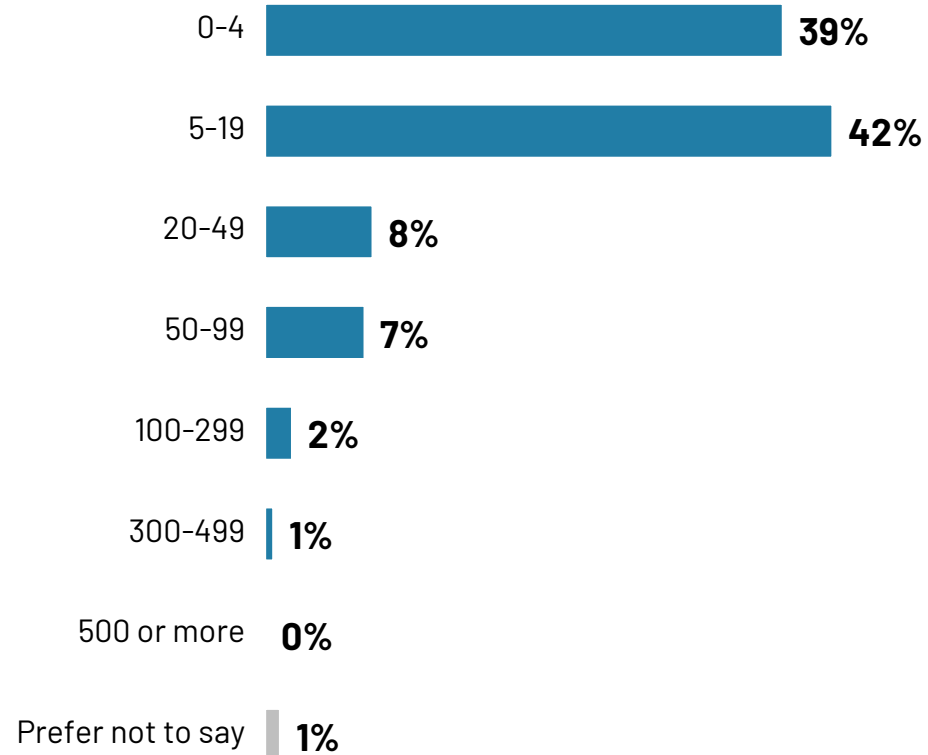
4. PROFILE OF BUSINESSES

Number of employees

Almost half of the business surveys (42%) have 5-19 employees, and 39% have 4 or less employees, indicating a prevalence of small businesses in Vaughan. 15% of businesses have 20-49 employees

A smaller percentage of businesses have 100-499 employees (3%), and none of the businesses surveyed reported having 500+ employees.

NUMBER OF EMPLOYEES THE BUSINESS HAS



Base: All respondents (n=352)
D1. How many employees does your business have? Your best guess is okay.

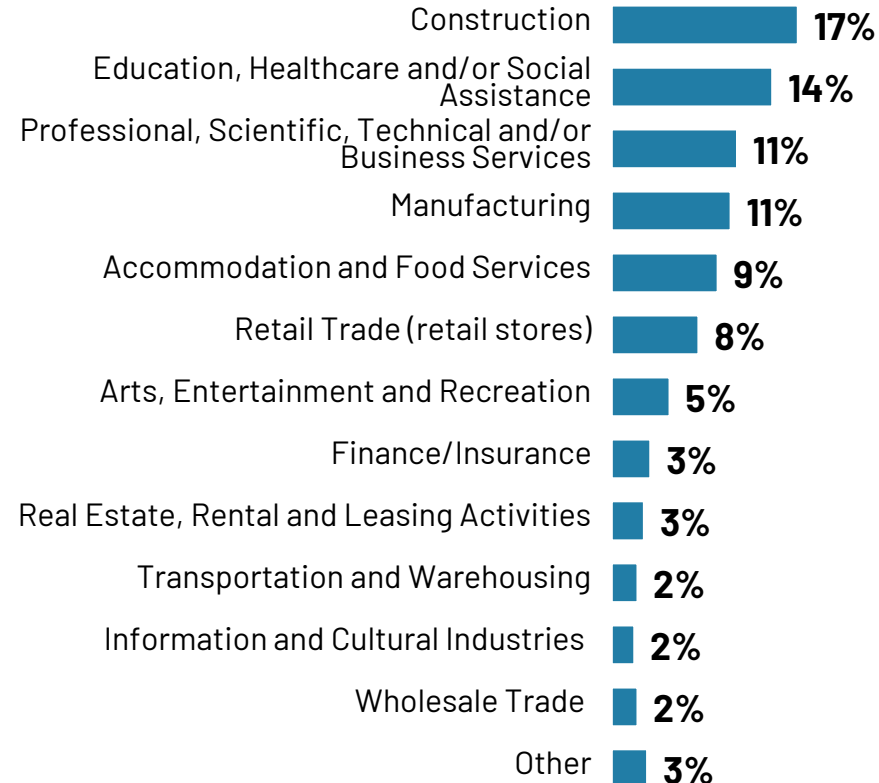
Primary sector

The most common primary sectors for businesses in Vaughan are Construction (17%), Education, Healthcare and/or Social Assistance (14%), and Professional, Scientific, Technical and/or Business Services (11%).

Manufacturing (11%), Accommodation and Food Services (9%), and Retail Trade (8%) also represent significant portions of the Vaughan business landscape.

Other sectors include Arts, Entertainment and Recreation (5%), Finance/Insurance (3%), Real Estate (3%), Transportation and Warehousing (2%), Information and Cultural Industries (2%), and Wholesale Trade (2%).

PRIMARY SECTOR THE BUSINESS OPERATE



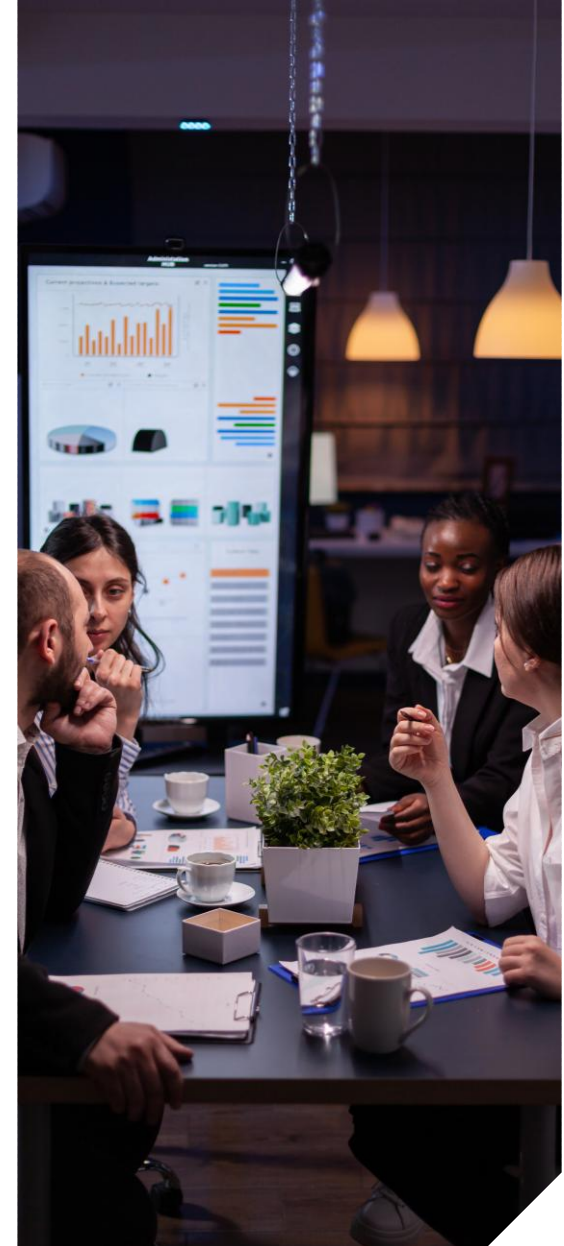
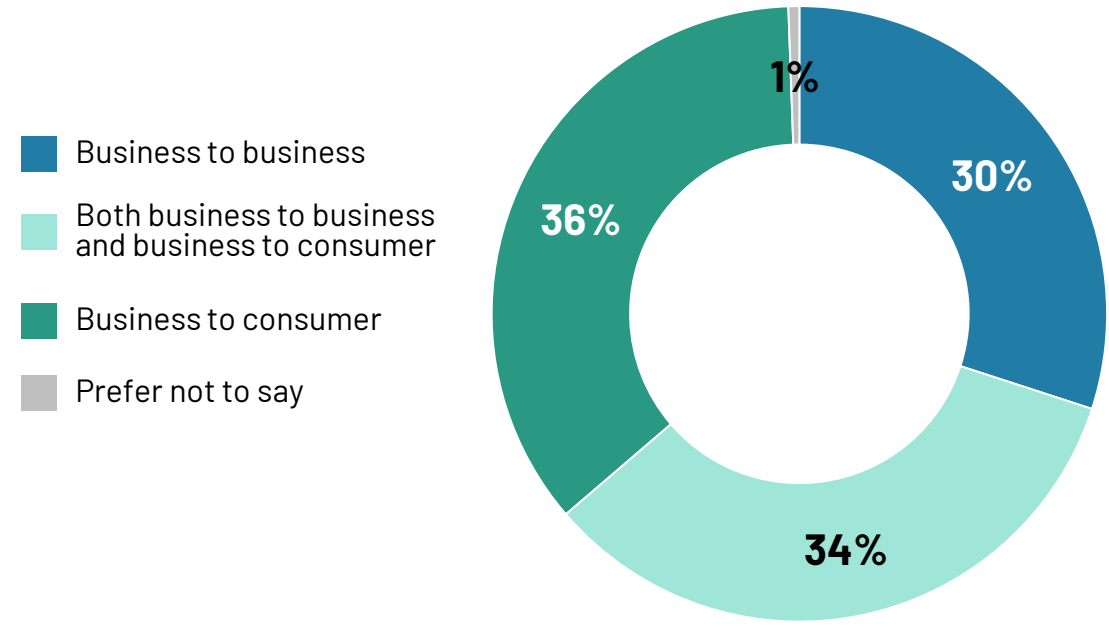
Base: All respondents (n=350)
D2. In what sector does your business primarily operate?

Business model

Business-to-business (36%), business-to-consumer (34%), and a near equal split of both (30%) are the primary business models in Vaughan.

This diverse mix reflects the varied nature of businesses operating within the city, catering to both other businesses and individual consumers.

PRIMARY BUSINESS MODEL

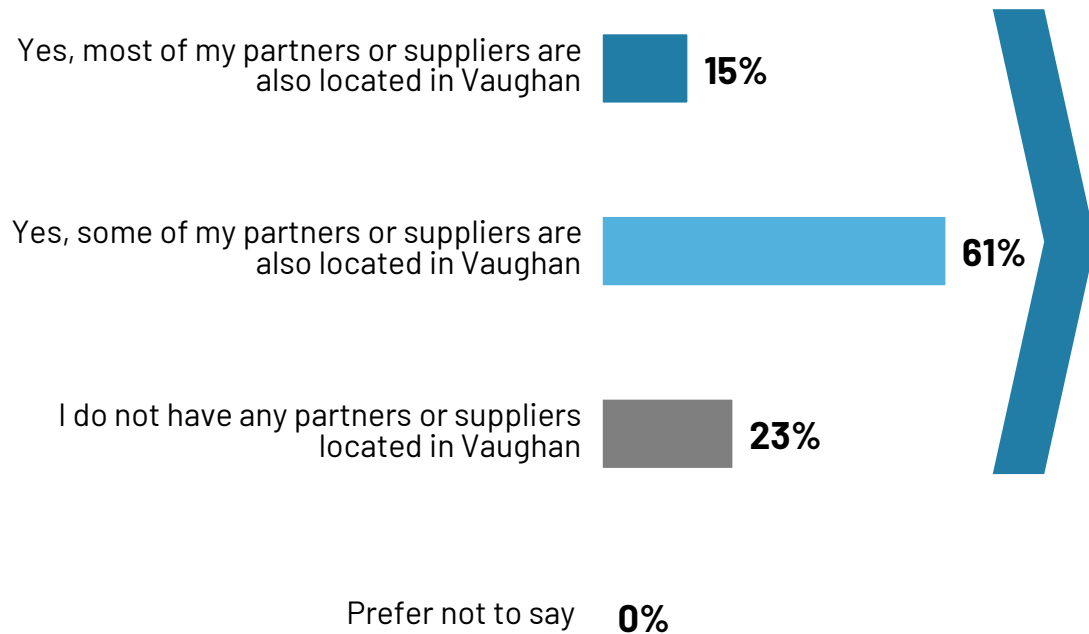


Base: All respondents (n=350)
D3. Would you say that your business model is primarily business to business, business to consumer or close to equal parts of both?

Partners or suppliers location

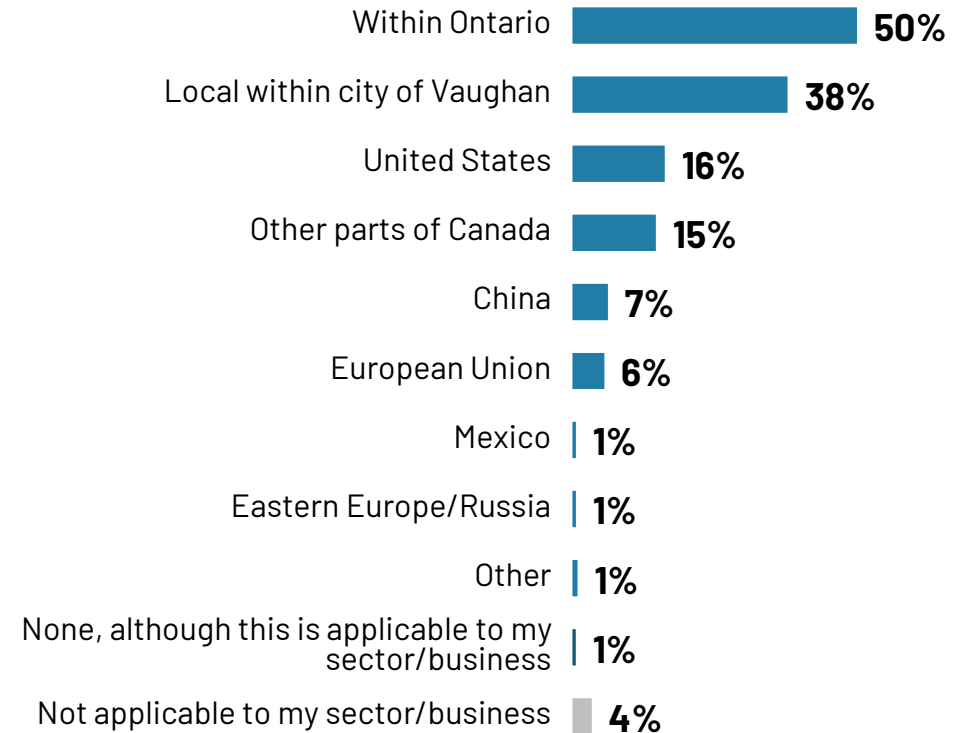
61% of businesses source some or most of their partners/suppliers from within Vaughan, while 23% do not source any locally. Looking at the broader supply chain, the majority (50%) of principal suppliers are located within Ontario, with 38% being local to Vaughan. The United States (16%) and other parts of Canada (15%) are also significant sources of suppliers.

SOURCING PARTNERS OR SUPPLIERS FROM WITHIN VAUGHAN



Base: All respondents (n=325)
D4. Are you sourcing partners or suppliers from within Vaughan?

LOCATION OF COMPANY'S PRINCIPAL SUPPLIERS TODAY



Base: All respondents (n=323)
D5. Where are your company's principal suppliers located today?

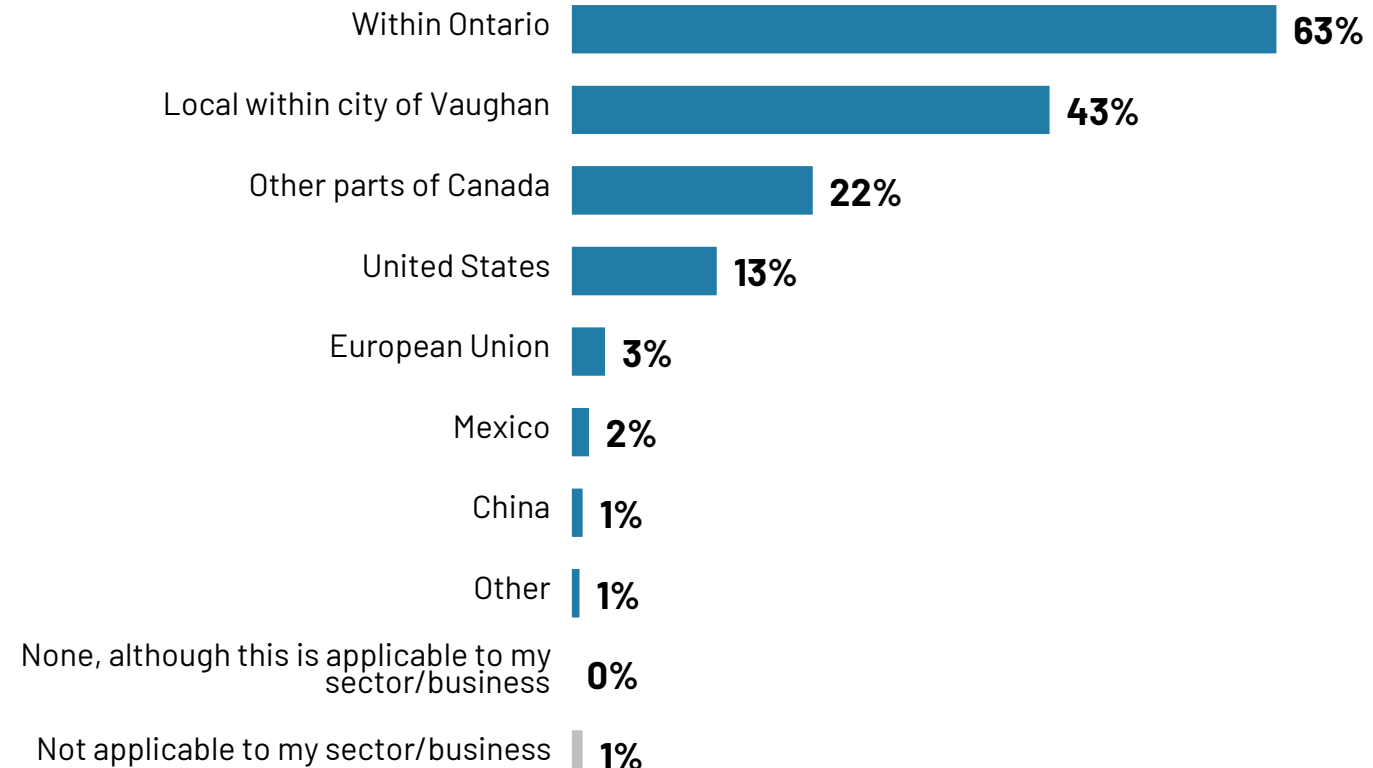
Primary market and customers

The primary market for Vaughan businesses is within Ontario (63%), with a significant portion (43%) being local within the city itself.

Other parts of Canada (22%) and the United States (13%) also represent important markets.

This suggests that Vaughan businesses primarily serve a regional customer base, but also have a presence in national and international markets.

WHERE COMPANY'S PRIMARY MARKETS AND CUSTOMERS LOCATED TODAY



Base: All respondents (n=351)
D6. Where are your company's primary markets and customers located today?

THANK YOU

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