



City of Vaughan – Citizen Survey

March 2012

▪ Objectives.....	3
▪ Methodology.....	5
▪ Executive Summary.....	6
▪ Quality of Life.....	10
▪ Services Assessment.....	14
▪ Gap Analysis.....	19
▪ Taxes and Service Costs	24
▪ Communications.....	29

Background and Objectives

- Ipsos Reid is pleased to present to the City of Vaughan the results of the 2012 Citizen Satisfaction Survey.

- Specific areas explored in the research include:
 - ⇒ Top-of-mind issues in need of attention from local leaders;
 - ⇒ Economic confidence among residents;
 - ⇒ Overall impressions of the quality of life in the City of Vaughan;
 - ⇒ Perceptions of City services, including perceived importance and satisfaction;
 - ⇒ Assessment of tax increases and infrastructure;
 - ⇒ Knowledge about Subway expansion and the Vaughan Metropolitan Centre
 - ⇒ Communication and information needs.

- The results in this study build upon and track (where possible) the results of previous research (2011, 2009 & 2007).

- Respondents for this survey were drawn at random and in proportion to the distribution of the population across the City of Vaughan (which include: Concord, Kleinburg, Maple, Thornhill and Woodbridge).
- A total of 500 interviews were completed among residents 18 years of age and older.
- The overall survey results have been weighted by age, gender, and region to reflect the population of the City. A sample of 500 interviews produces results which can be considered accurate within + / - 4.4 percentage points, 19 times out of 20.
- The margin of error will be larger for subgroups.
- The survey was conducted by telephone between February 16th and February 23rd, 2012.
- Where indicated throughout the report, findings are provided in comparison to the most recent results of the Ipsos Reid Municipal Normative Database.

Executive Summary

Quality of Life

- Residents of Vaughan continue to rate the quality of life in the City very high.
- The vast majority of residents feel that their own economic situation and the local economy in Vaughan will improve or stay the same over the next year or so. Very few expect this to get worse.

Top-of-Mind Issues

- Transportation continues to be the top-of-mind issue for Vaughan residents, this issue is twice as important to residents as taxation and municipal government spending, which is now tied with healthcare as the second most important issue in the community.

Satisfaction with Services

- Satisfaction with City services continues to be very high. Residents are most satisfied with Fire services, Garbage, recycling and green bin, followed by road snow removal, and local public libraries.

Gap Analysis / Service Delivery Assessment

- A gap analysis was undertaken to assist the City in prioritizing resources for city services.
- Based on the view of residents: fire services; garbage, recycling and green bins; parks and green spaces; road snow removal; and street repairs, sidewalk and street lighting are all services that continue to require maintenance. Residents deem these services as important and say the City is doing a good job providing the services. The City should continue to focus on these services.
- Hospitals, emergency services and clinics, and planning for the future / planning the expansion of the City are key priority areas for improvement. Residents report these as important services, but have assessed lower satisfaction ratings relative to their delivery.

Taxes and Service Costs

- The vast majority of residents continue to believe they receive good value for their tax dollars.
- City of Vaughan residents are slightly more likely to believe that they receive a better value for tax dollars compared to residents in other communities across Canada.

Balance of Taxation and Services

- Slightly more residents believe that the City should hold the line on increased taxes or user fees even if it means reductions in service, compared to those that would support an increase in taxes or users fees to maintain existing services.

Infrastructure Renewal

- The vast majority of residents support spending money on infrastructure renewal and construction in order to maintain City assets.
- Slightly more residents would oppose raising property taxes to fund infrastructure renewal, compared to those that would support such a policy.

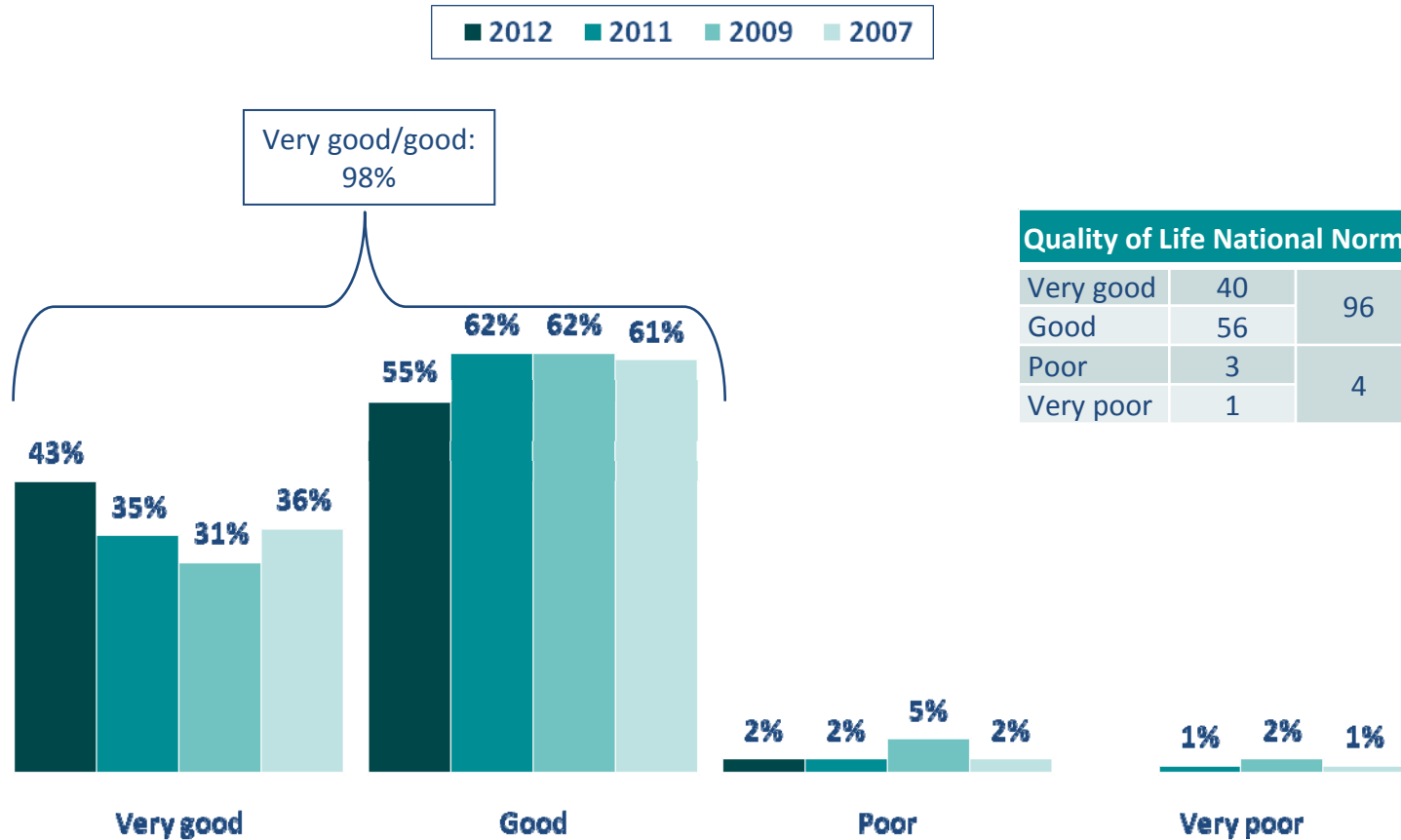
Communications

- Residents continue to feel that the best way to receive communications from the City is through newsletters and brochures via the mail, followed by online communications such as e-newsletters and through the local newspaper.
- Demand for online-based services and communications is strong as the vast majority of residents believe it is important for the City to provide more services and communications online.

Quality of Life

Overall Quality of Life

Residents of the City of Vaughan continue to rate the overall quality of life in the City very highly. At present, 98% say the quality of life is very good (43%) or good (55%). The proportion of residents who rate the quality of life in the City of Vaughan as 'very good' has increased by 7 points since 2007.

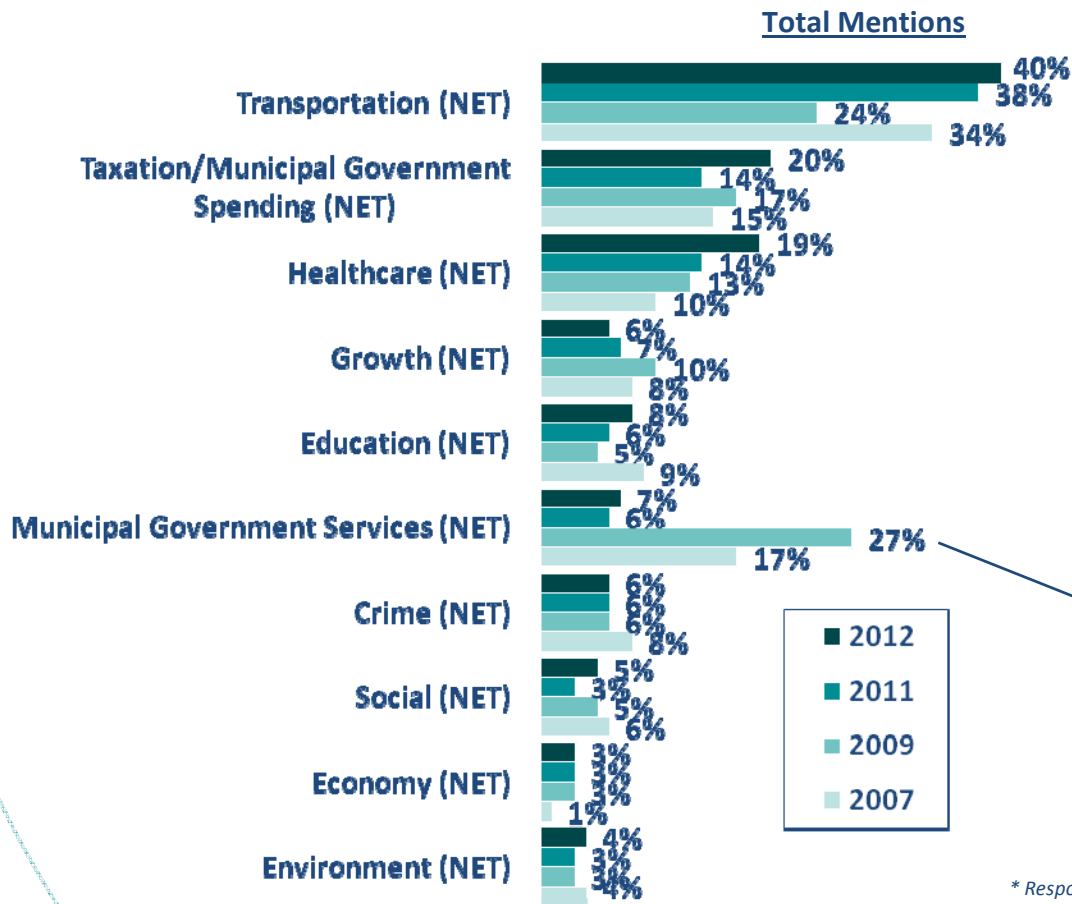


Quality of Life National Norms		
Very good	40	96
Good	56	
Poor	3	4
Very poor	1	

Q2. How would you rate the overall quality of life in The City of Vaughan today? Base: All respondents (n=500); 2011 (n=500); 2009 (n=300); 2007 (n=300).

Top-of-Mind Issues

Transportation-related issues continue to be top-of-mind among Vaughan residents. Currently, four-in-ten (40%) residents cite transportation as the issue of greatest importance to them. The transportation issues of highest importance include traffic and road congestion (11%) and the lack of public transportation (6%). One-in-five (20%) residents also cite taxation and municipal government spending as the most important issue facing their community, an increase of 6 points since 2011.



National Municipal Norms	
Transportation	28%
Crime	14%
Social	14%
Growth	14%
Spending/Taxation	10%
Gov't Services	12%
Education	8%
Environment	7%
Economy	7%
Healthcare	7%

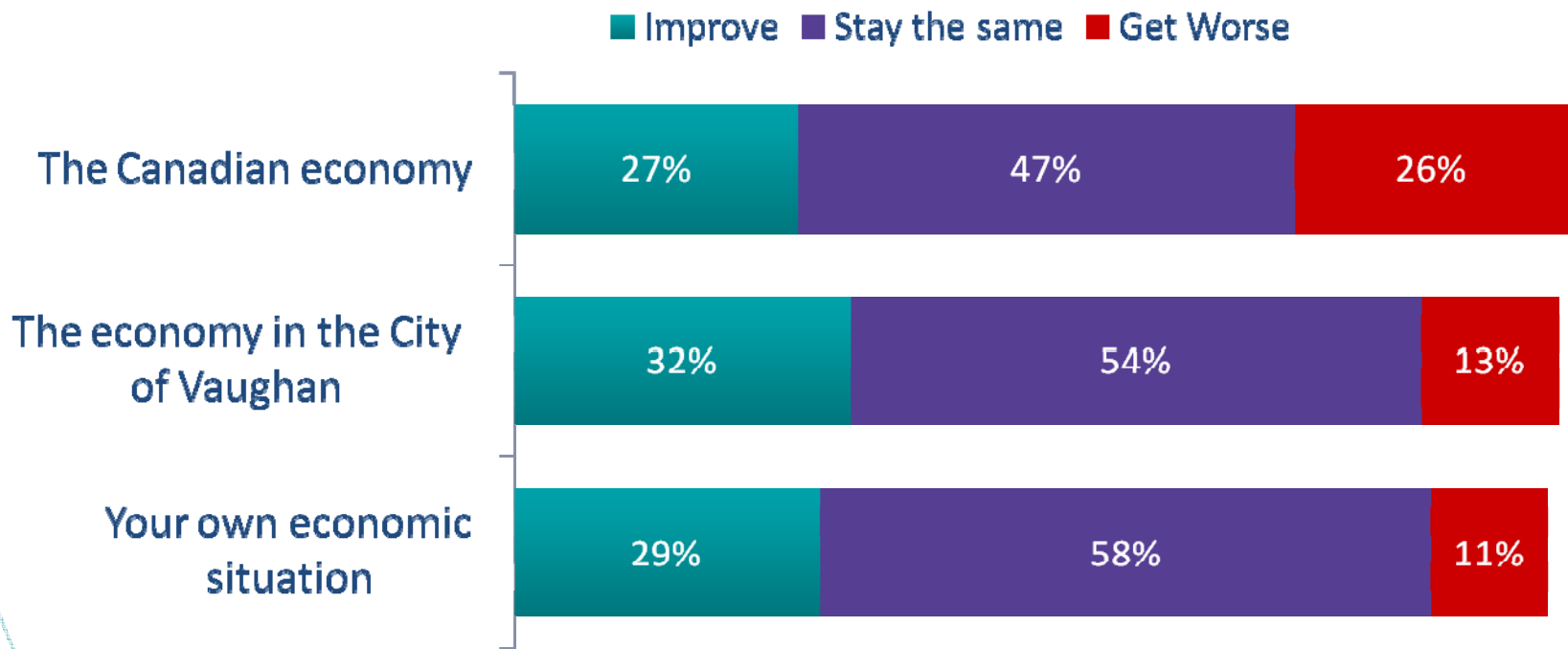
	2012	2011	2009
Discord on Council	0%	0%	10%
Snow Removal	1%	2%	7%
Garbage Services	2%	2%	5%

* Responses less than 3% (2011) are not shown

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 local leaders? [RECORD FIRST MENTION] Are there any others? Base: All respondents (n=500); 2011 (n=500); 2009 (n=300); 2007 (n=300).

Economic Confidence

About three-in-ten (32%) residents expect that the economy in the City of Vaughan will improve over the next year or so. Similarly, three-in-ten (29%) also expect their own economic situation to improve over the next year. Overall, Vaughan residents are more pessimistic about the Canadian economy, compared to the economy in the City of Vaughan (26% expect Canadian economy to get worse, compared to only 13% who expect an economic slowdown in Vaughan over the next year or so).

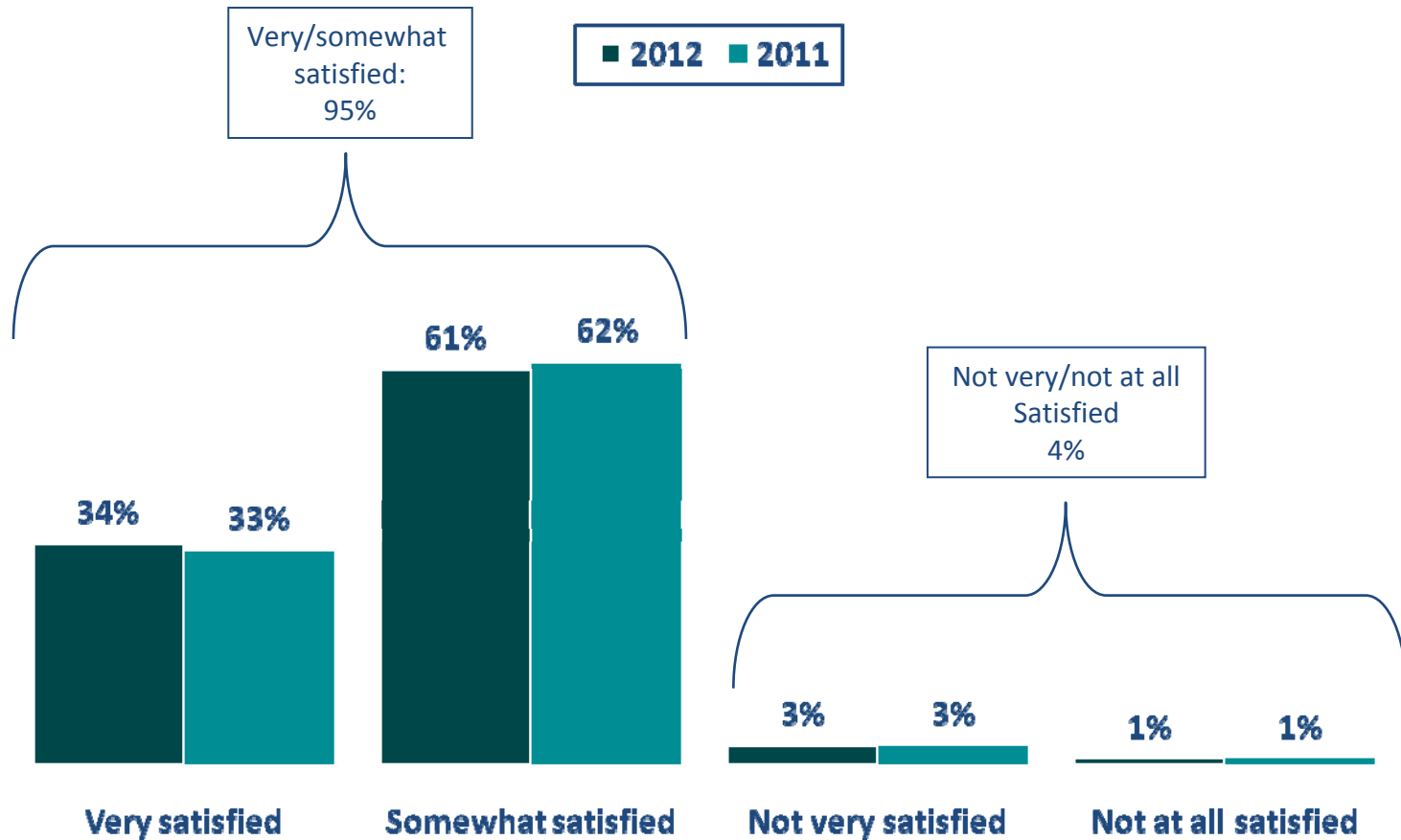


Q2a. Thinking about the next year or so, do you, yourself, generally feel that [INSERT ITEM] will (READ LIST AS NECESSARY)? How about...?
 Base: All respondents (n=500)

Service Assessment

Overall Satisfaction with Services

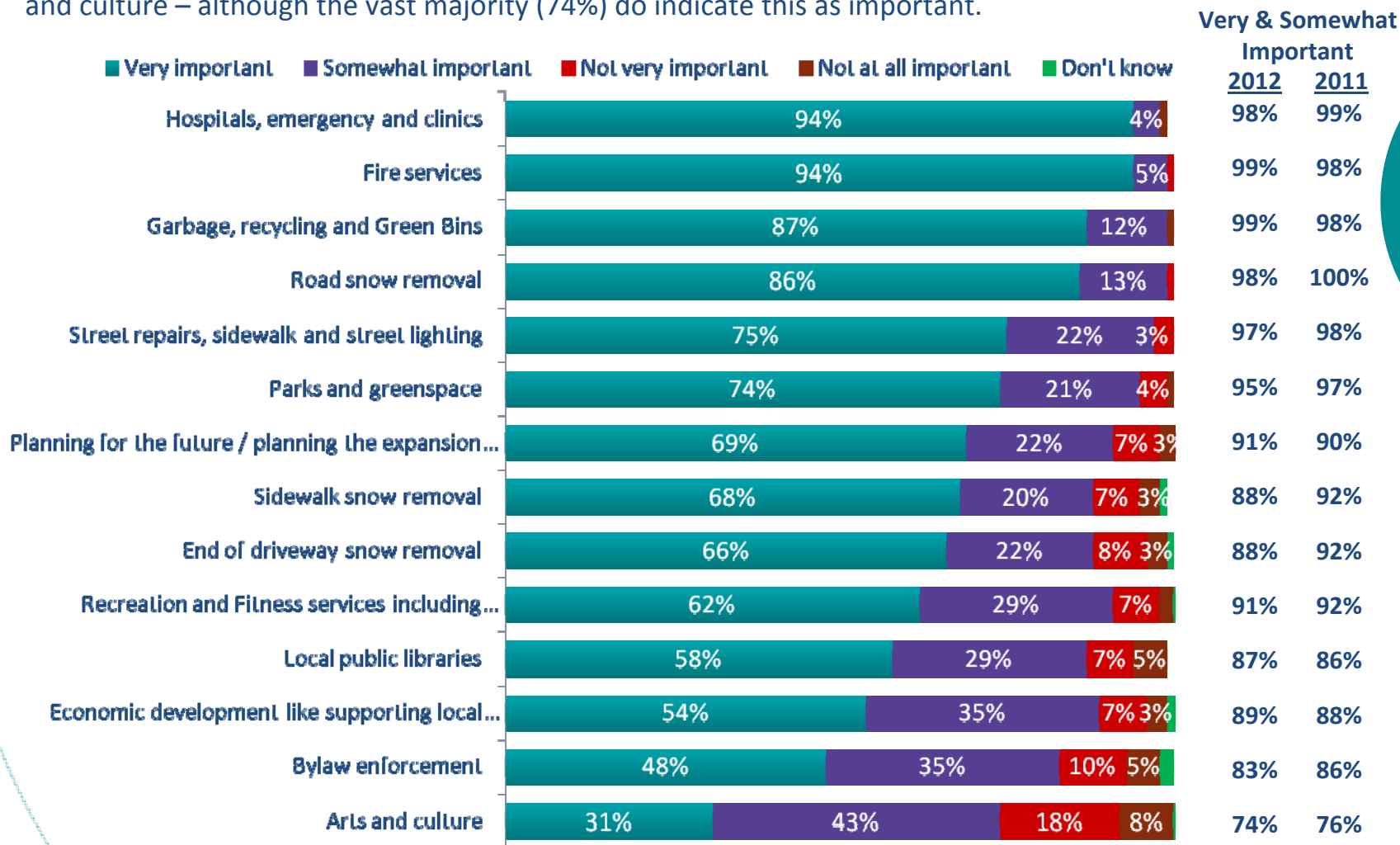
Satisfaction with City services continues to be very high. At present, 95% of residents indicate that they are at least somewhat satisfied with the quality of services provided to them. Only four percent express dissatisfaction.



Q5d. And overall, how satisfied are you with the delivery of all the services provided by the City of Vaughan? Base: All respondents (n=500); 2011 (n=500).

Importance of Individual Services

Residents place the highest level of importance on hospitals and emergency health care services, fire services, garbage and recycling services, and road snow removal. On the other hand, residents place less importance on arts and culture – although the vast majority (74%) do indicate this as important.



Q5a. Now I'd like to ask you about your perceptions of the job the City of Vaughan is doing in providing services. I will read you a list of services provided by the City of Vaughan and for each I would like you to tell me how important the service is to you and your household. How important is this service to you?

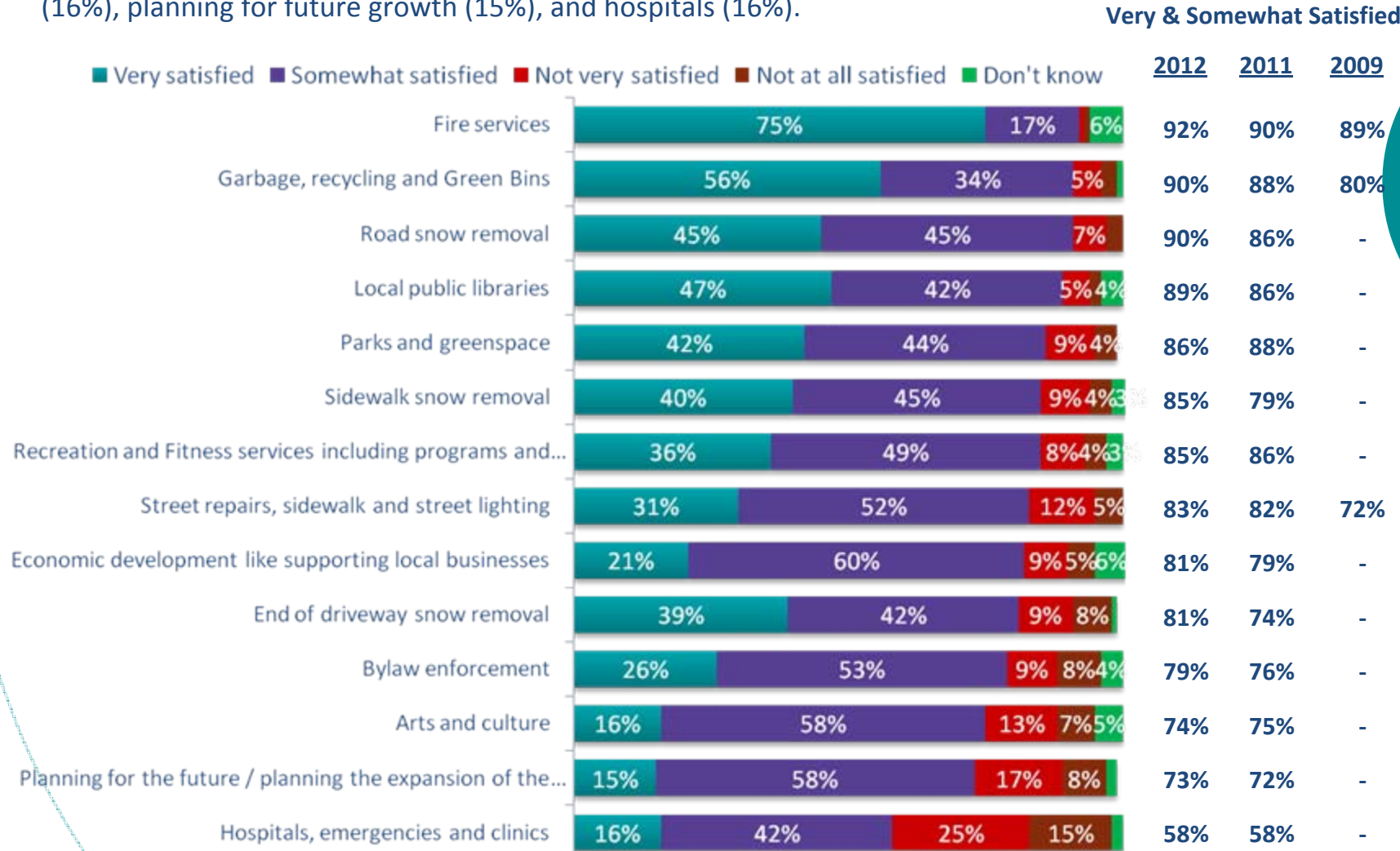
Base: All respondents (n=500); 2011 (n=500).

*Percentages under 3% not shown.

**Where possible 2009 results are shown.

Satisfaction with Individual Services

Residents are most satisfied with fire and garbage/recycling services provided (75% and 56% are very satisfied, respectively). On the other hand, fewer than one-in-five residents are 'very satisfied' with arts and culture services (16%), planning for future growth (15%), and hospitals (16%).



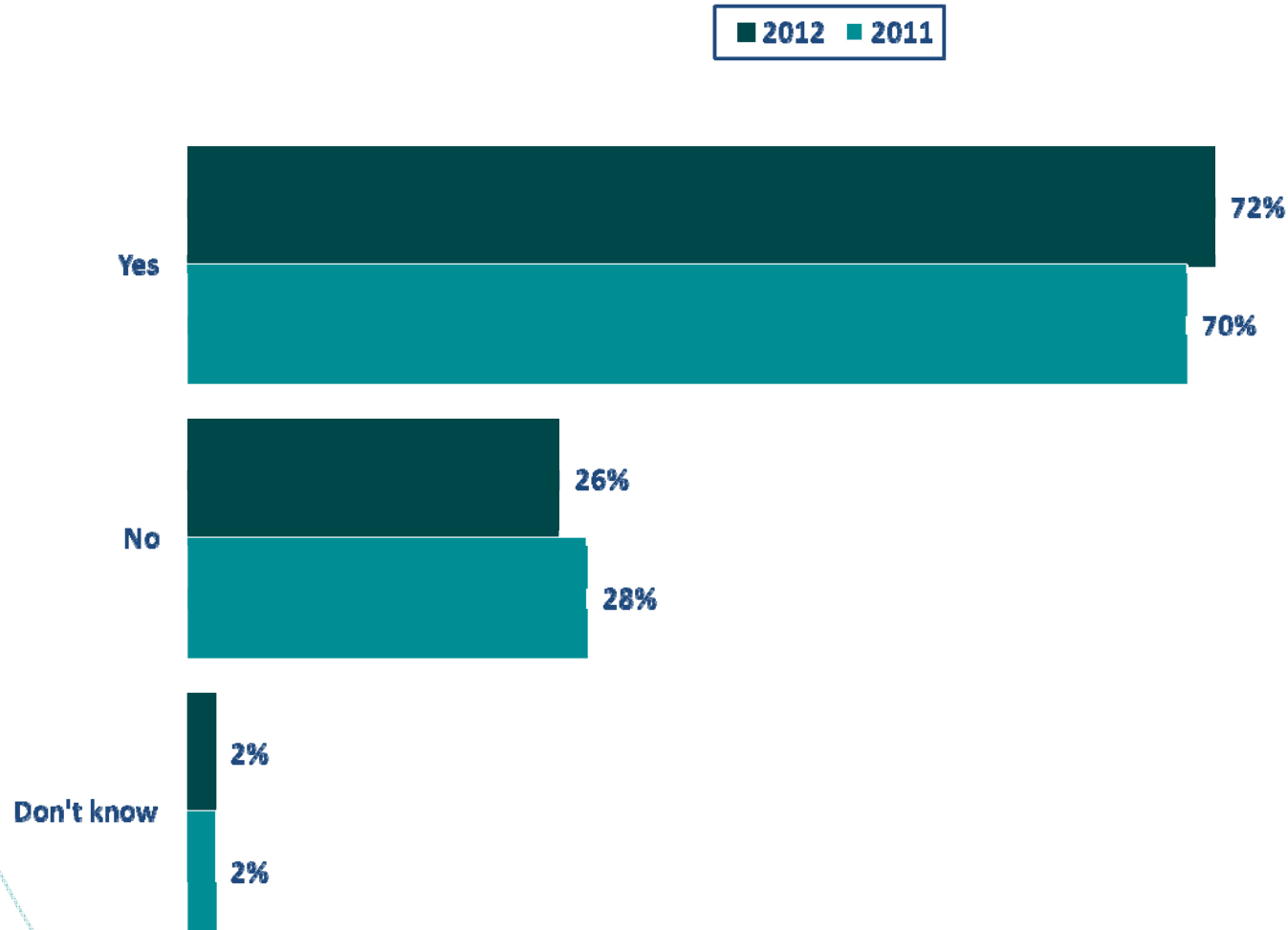
Q5b. And based on your personal experience how would you rate the value you and your family receive from each of these services? Are you?
 Base: All respondents (n=500); 2011 (n=500).

*Percentages under 3% not shown.

**Where possible 2009 results are shown.

Arts and Lifestyle Amenities

Two-thirds (72%) of residents believe that the City of Vaughan has the arts and lifestyle amenities that they need. One quarter (26%) disagree.

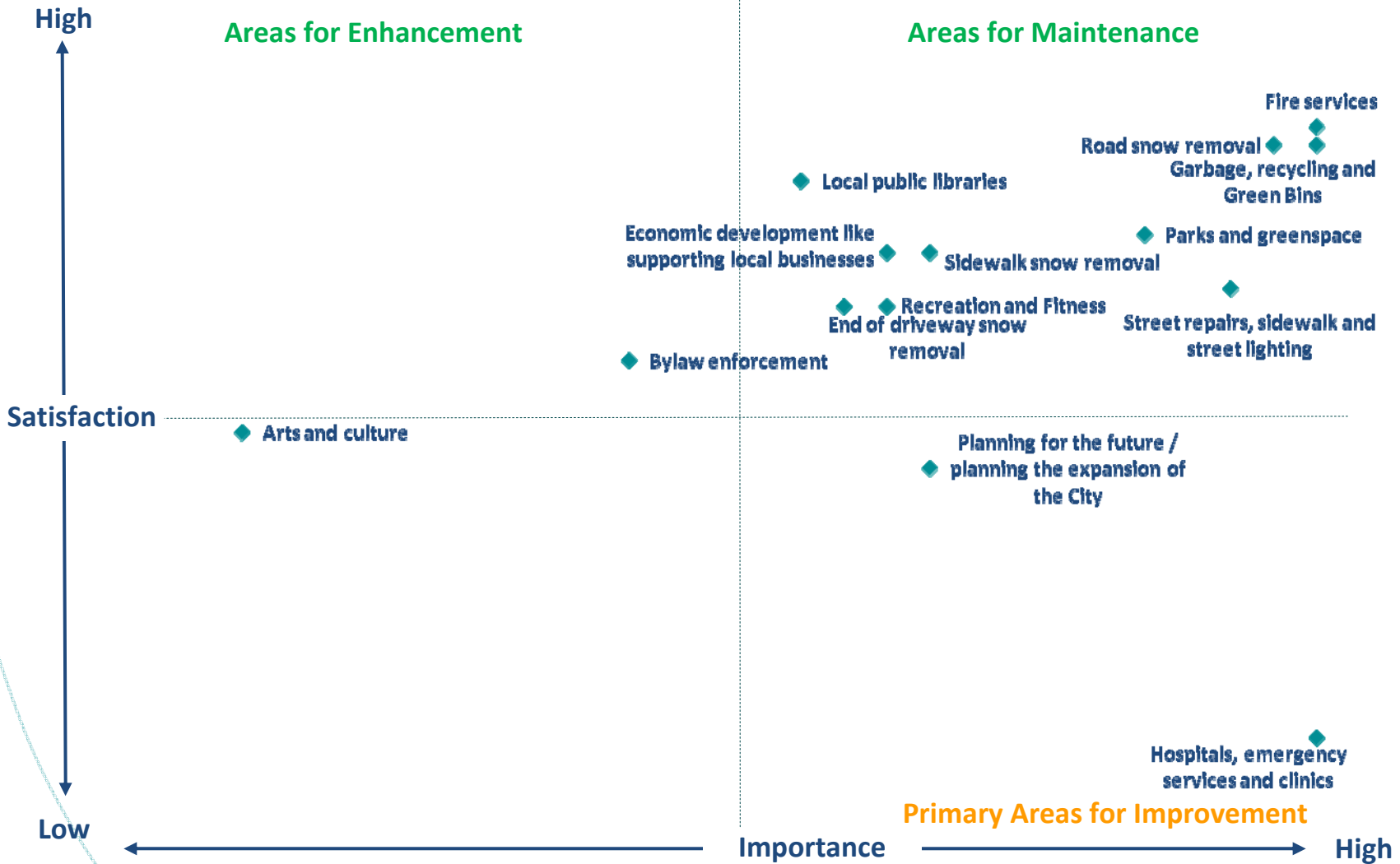


Q4b. Does the City of Vaughan have the arts, lifestyle and recreational amenities you need? Base: All respondents (n=500); 2011 (n=500).

Gap Analysis

Using the Gap Analysis

- Importance scores are plotted horizontally across the bottom of the chart (along the X-axis). Satisfaction scores are plotted vertically (along the Y-axis).
- Typically, it is most advantageous to focus on improving services that are of high importance to residents but where satisfaction is relatively low. However, it can also make sense to focus on lower importance items if you can make a big difference.
- **On the graph, three areas are identified:**
 - Areas for maintenance – services of relatively high importance and current satisfaction is good. The focus here is on maintaining the current level of service.
 - Primary areas for improvement – services that are considered important, but with lower satisfaction scores. The focus here is on improving these services to increase satisfaction.
 - Areas for enhancement – services with lower satisfaction scores, but are considered relatively less important to residents. The focus here is on at least maintaining, and where feasible, improving these services to increase satisfaction.



Areas for maintenance are:

- ⇒ Fire services
 - ⇒ Garbage, recycling and Green Bins
 - ⇒ Parks and green space
 - ⇒ Road snow removal
 - ⇒ Street repairs, sidewalk and street lighting
- From the 2009 tracking data we are able to see that satisfaction levels have increased since 2009 with: Street Repairs, Sidewalk and Street Lighting (+11); Garbage, Recycling and Green Bins (+11); By-law Enforcement (+9); and Fire Services (+3). A particular emphasis should be placed on maintaining these services as they are of high importance with strong (and increased) satisfaction levels.

Primary areas for improvement are:

- ⇒ Hospitals, emergencies and clinics
 - ⇒ Planning for the future / planning the expansion of the City
- Services listed under areas for improvement are those which citizens gave a high importance ranking and relatively low satisfaction ranking. Most notable is residents' satisfaction levels with services from hospitals, emergencies and clinics which continue to be very low (58%) and show no change from 2011, while the service itself is perceived as highly important (99%). This is an important area for improvement.
 - The results also show that planning for the future is an additional area of high importance and relatively low satisfaction ranking.
 - Improvements have been made in previous areas for improvement, notably End of Driveway Snow Removal (+8) and Sidewalk Snow Removal (+6) since last year. These services have moved from 'Areas of Improvement' to 'Areas of Maintenance' as a result of this improvement. However, considering the warm winter in 2012, these services should be monitored closely in the future.

Addressing the Importance and Satisfaction Gap

No single solution stands-out as a way to address the shortfall between service importance and satisfaction, rather residents mention a variety of steps that can be taken, including: better financial planning, better prioritization of the needs of the community, and more public consultation. Three-in-ten (29%) residents could not name anything that could be done to address the shortfall.

First Mentions

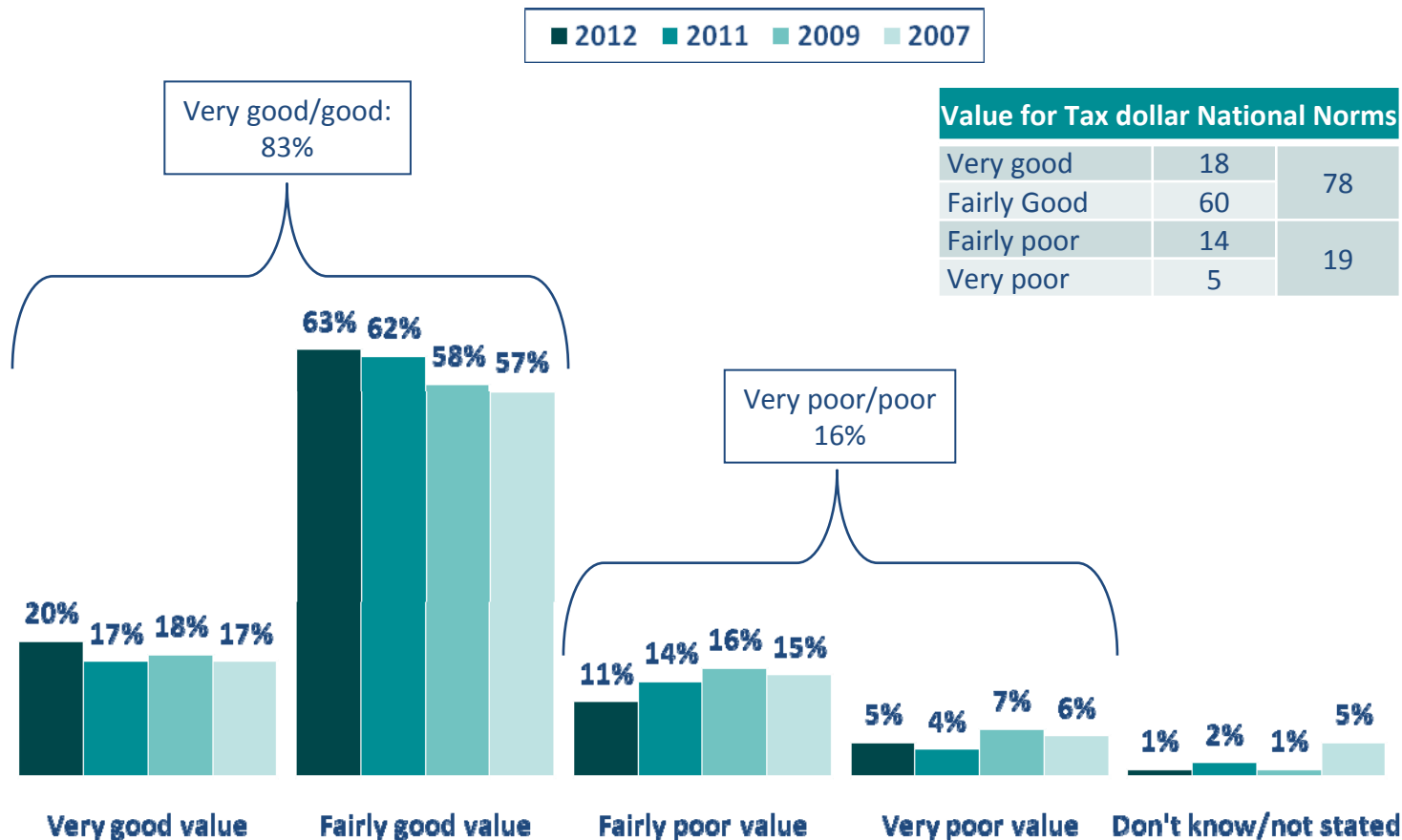


Q5c. Now thinking about some of the services which you feel are important, but did not give high satisfaction rankings, how should the City most effectively address the difference between importance and satisfaction? Are there any others? Base: All respondents (n=500); 2011 (n=500).

Taxes and Service Costs

Value for Tax Dollars

Residents continue to believe they receive good value for money from their tax dollars on the programs and services they receive from the City. At present, 83% agree they receive at least fairly good value for their tax dollars (an increase of four points since 2011). Only 16% believe that they receive a poor value for their tax dollars.



Q6. 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 very or fairly good/poor value? Base: All respondents (n=500); 2011 (n=500); 2009 (n=300); 2007 (n=300).

Tax Value Linked to Service Satisfaction

As in previous years, attitudes towards value of tax dollars and overall service satisfaction are linked. As shown below, among those who are very satisfied with City services, 41% also believe that they receive very good value for their tax dollars and an additional 53% say they receive fairly good value for their tax dollars.

	Satisfaction With City Services				
	Total	Very Satisfied	Somewhat Satisfied	Not Very Satisfied	Not at all Satisfied
	n=500	n=173	n=306	n=17**	n=3**
Very good value	20%	41%	9%	6%	-
Fairly good value	63%	53%	72%	31%	-
Fairly poor value	11%	3%	14%	40%	-
Very poor value	5%	3%	5%	24%	100%
Don't know	1%	1%	1%	-	-

* Caution should be used when interpreting data with small base sizes.

Q6. 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 very or fairly good/poor value? Base: All respondents (n=500)

Balance of Taxation and Services

Half of residents (50%) believe that the City should not increase taxes or user fees even if it results in service cuts. About four-in-ten (39%) residents say the City should maintain current service levels even if by doing so the City needs to increase taxes or user fees. Among those who believe the City should maintain current service levels, attitudes are split as to how to pay for cost increases. 47% favour a combination of user fees and an increase in property taxes, while 41% prefer increased user fees. These figures are unchanged from 2011.

■ 2012 ■ 2011

The City of Vaughan should not increase taxes or user fees, even if it means cuts to services



The City of Vaughan should maintain existing service levels, even if it means taxes or user fees must increase



Preferred Method to Cover Increased Costs

■ 2012 ■ 2011

A combination of both increased user fees and increased property taxes



Increased user fees



Increased property taxes



Neither option



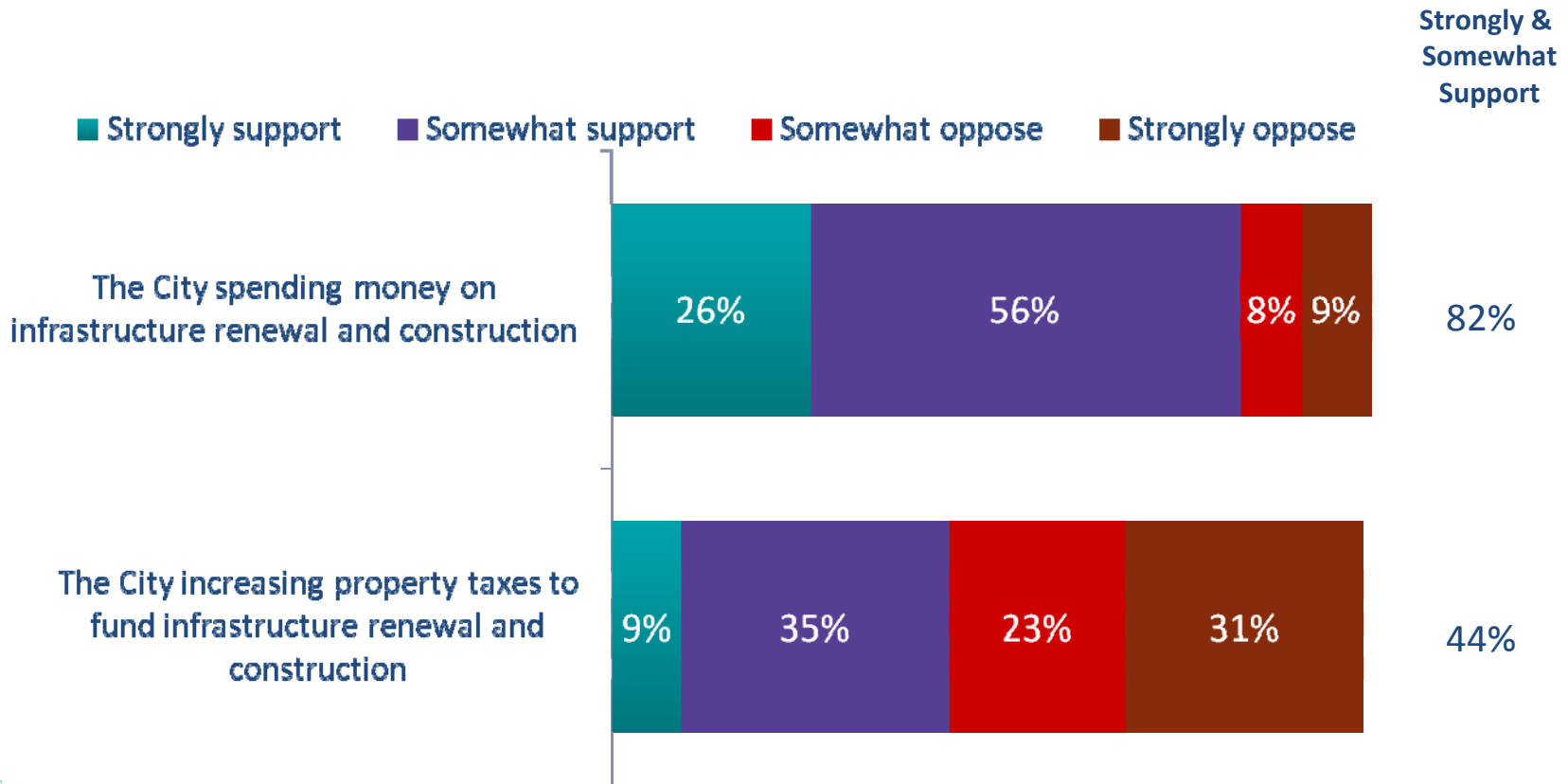
National Norms		
Cut Services to maintain current tax level	22	33
Cut services to reduce taxes	11	
Increase taxes to enhance or expand services	22	54
Increase taxes to maintain services at current level	32	

Q16. Which of the following comes closest to your own point of view? Base: All respondents (n=500); 2011 (n=500).

Q17. If maintaining service levels meant an increased cost to provide these services, which of the following options would you most prefer? Base : answered at Q16: The city of Vaughan should maintain existing service levels, even if it means taxes or user fees must increase (n=194); 2011 (n=194).

Spending on Infrastructure Renewal

The vast majority (82%) of residents support (26% strongly support and 56% somewhat support) the City spending money on infrastructure renewal and construction. Residents are slightly more likely to oppose an increase in property taxes to fund these developments (54% oppose an increase in property taxes, while 44% support an increase).

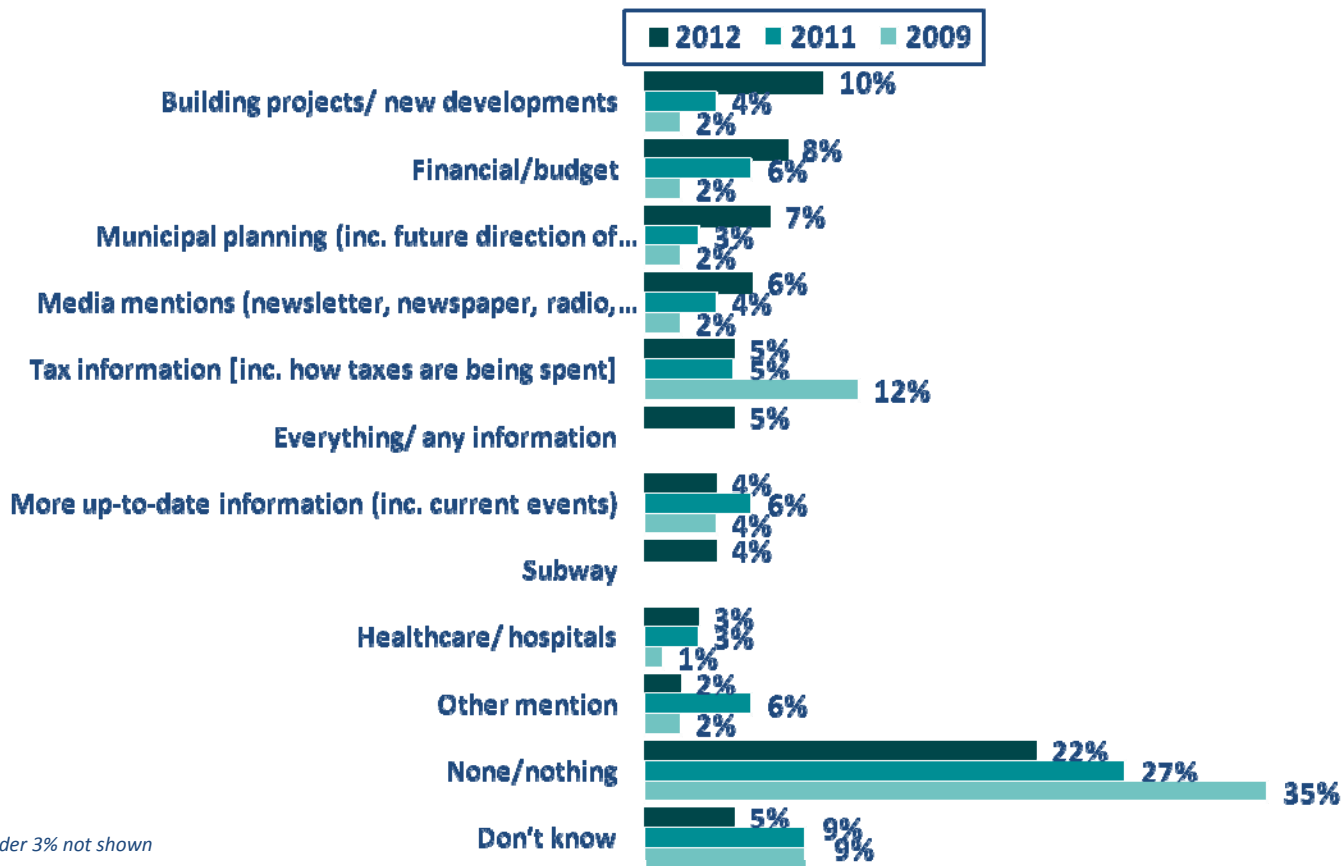


Q17a. Property taxes in the City of Vaughan in part allow the City to spend money to renew infrastructure. By infrastructure we mean assets like roads, bridges, storm sewers, parks, recreation centers, arenas, libraries and other City facilities. In the future the City may need additional funds to maintain City assets. Do you strongly support, somewhat support, somewhat oppose or strongly oppose the following... Base: All respondents (n=500)

Communications

Information Needs

Although there is no single information need that stands-out among residents, one-in-ten (10%) mention wanting more information about building projects/new developments (up 6 points from 2011), followed by information about City finances and budget (8%, up 2 points since 2011) and municipal planning (7%, up 4 points since 2011) are cited most often. Almost three-in-ten (27%) residents cannot mention or do not know any additional information that they would like to receive from the City.

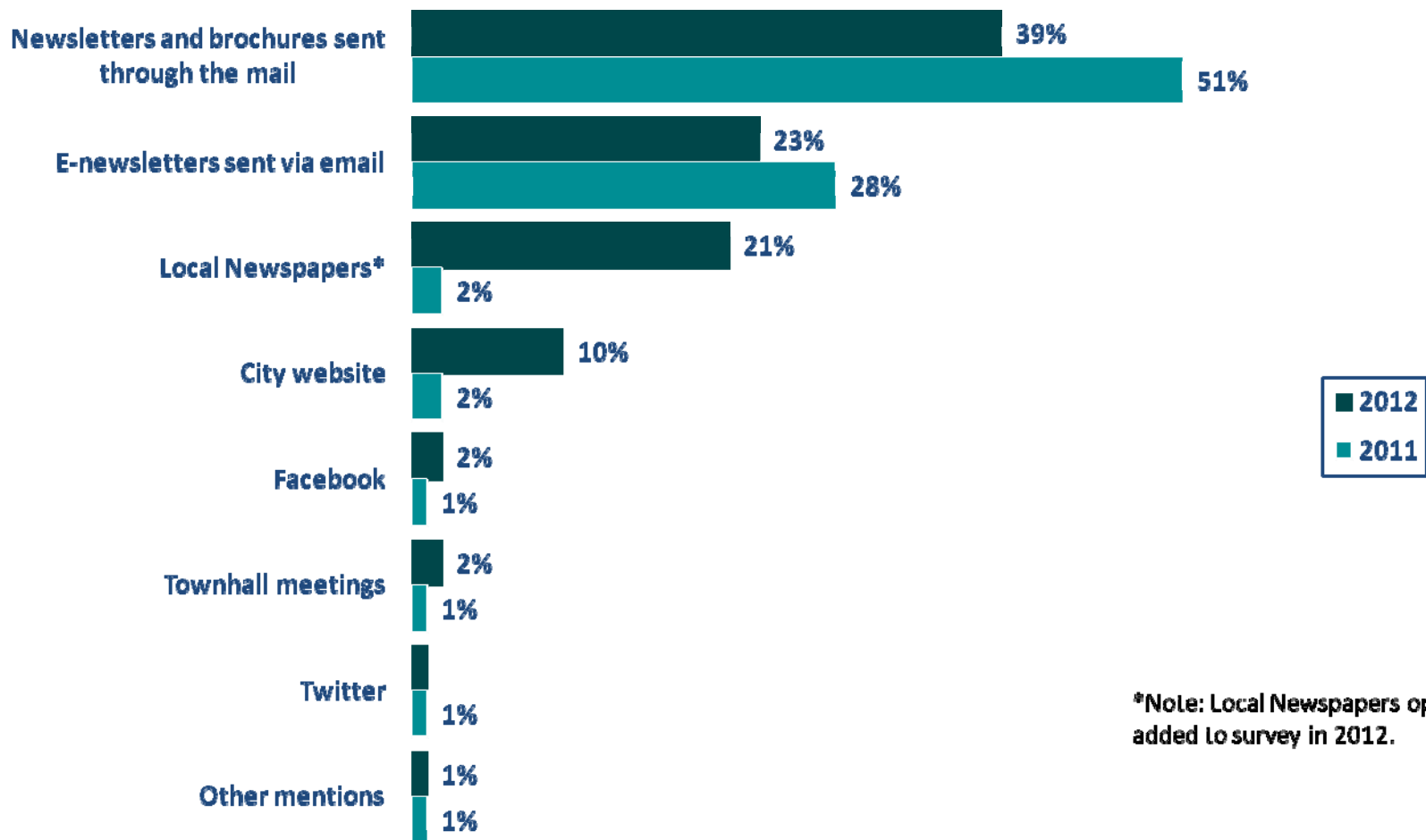


*Responses under 3% not shown

Q9. Thinking about your information needs, what kinds of information do you want The City of Vaughan to provide you with? [RECORD FIRST MENTION] Any others?
 Base: All respondents (n=500); 2011 (n=500).

Preferred Information Source

Mailed newsletters and brochures continue to be the most preferred communication vehicles among residents, however fewer residents mention this option (39%, a decrease of 12 points since 2011). One-quarter of residents (23%, down 5 points) would most prefer communications by e-newsletters via email. In 2012, one-in-ten now mention the City website (up 8 points).



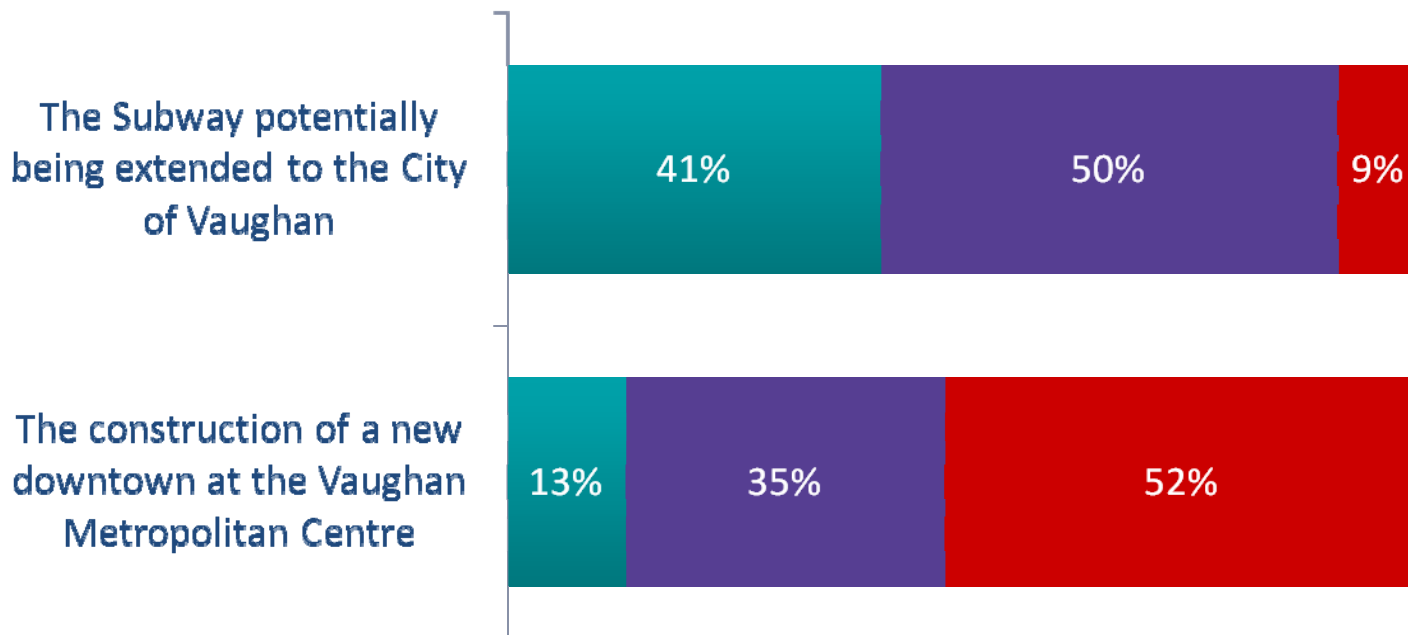
*Note: Local Newspapers option added to survey in 2012.

Q19. How would you most prefer to receive information from The City of Vaughan? Base: All respondents (n=500); 2011 (n=500).

Knowledge About Subway Extension and Vaughan Metropolitan Centre

The vast majority (91%) of residents know at least something about the Subway being potentially extended to the City of Vaughan, four-in-ten (41%) 'know a great deal' about this. Half (52%) of residents have never heard about the construction of a new downtown at the Vaughan Metropolitan Centre. Only about one-in-ten (13%) 'know a great deal' about this, while about one-third (35%) 'know a little' about this.

■ Know a great deal about
 ■ Know only a little about
 ■ First time I have heard of it

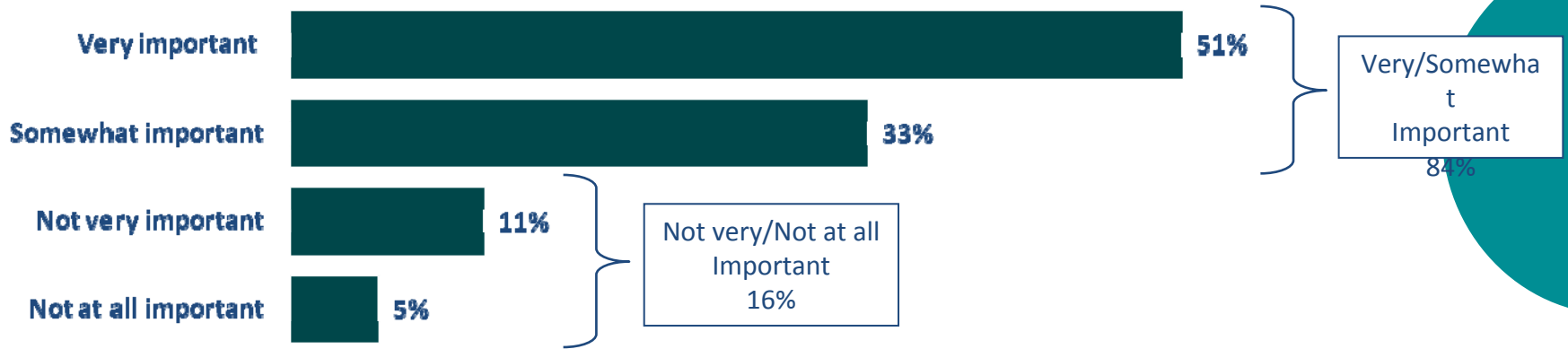


Q17d. Do you know a great deal, only a little or is this the first you have heard about... [INSERT ITEM] will (READ LIST)? How about...?
 Base: All respondents (n=500)

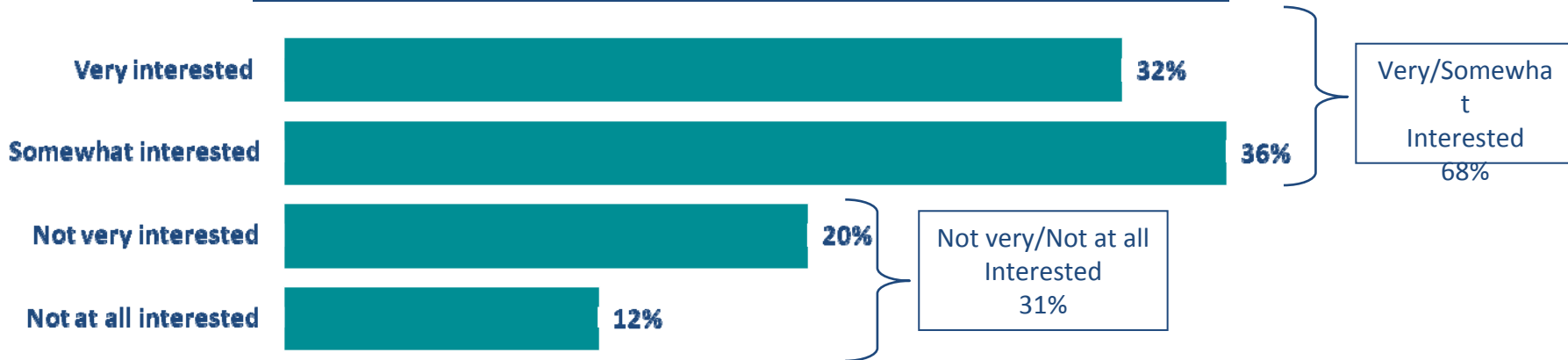
Online Communications

Demand for online-based services and communication is strong as the vast majority (84%) of residents believe that it is important for the City to increase online-based services and communications to residents. Seven-in-ten (68%) residents would be interested in personally receiving more online-based services and communications

Importance of Increasing Online Services and Communications



Personal Interest in Online Services and Communications



Q19a. How important is it that the City of Vaughan increases its online based services and communications to residents?

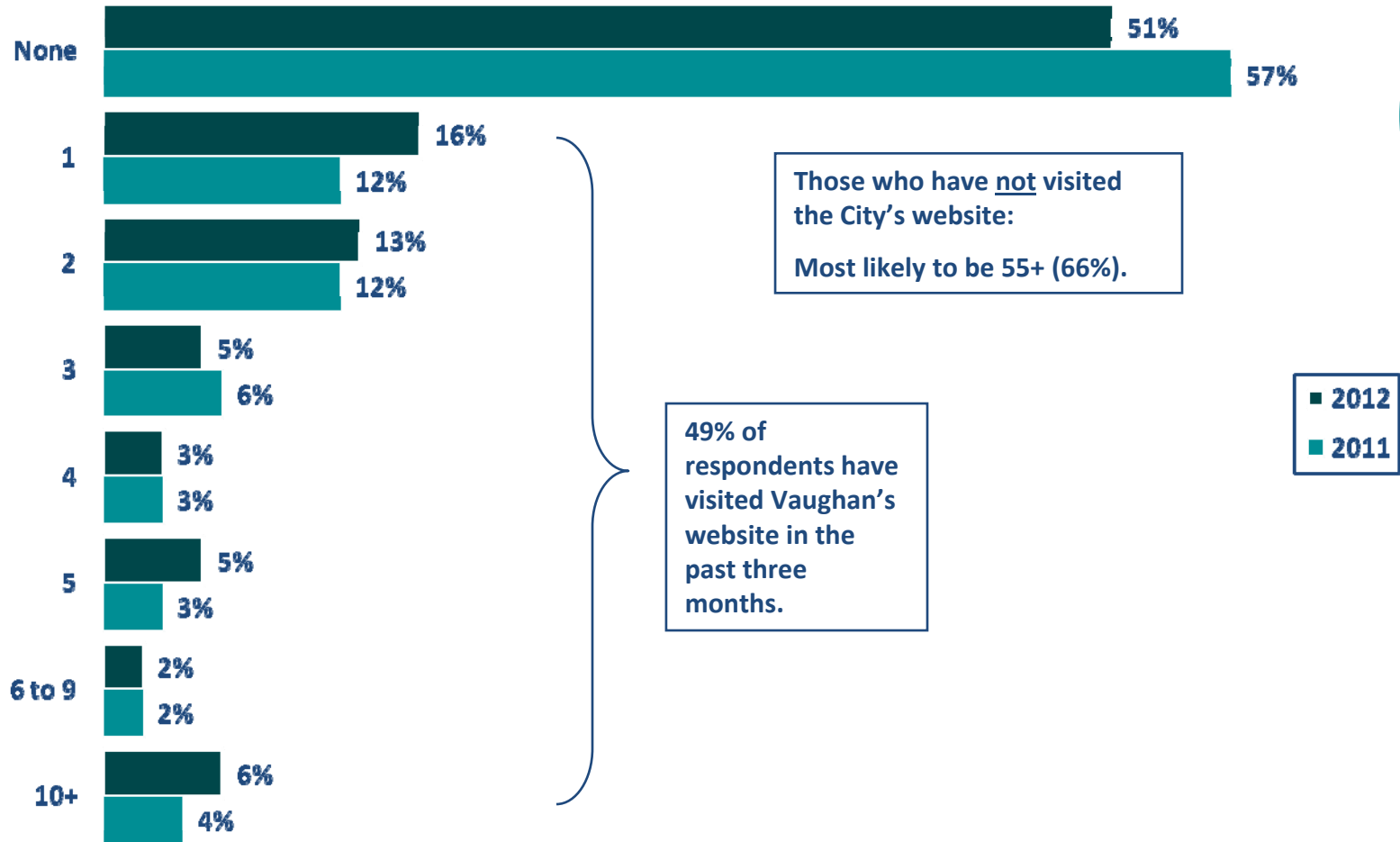
Base: All respondents (n=500)

Q19d. And how interested are you personally in receiving more online based services and communications from the City of Vaughan?

Base: All respondents (n=500)

Frequency of Visiting City Website

More residents have visited the City of Vaughan website over the past three months in 2012, compared to the previous year (49%, compared to 43% in 2011).



Q18. In the past three months, how many times have you visited the City's website?
Base: All respondents (n=500); 2011 (n=500)



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