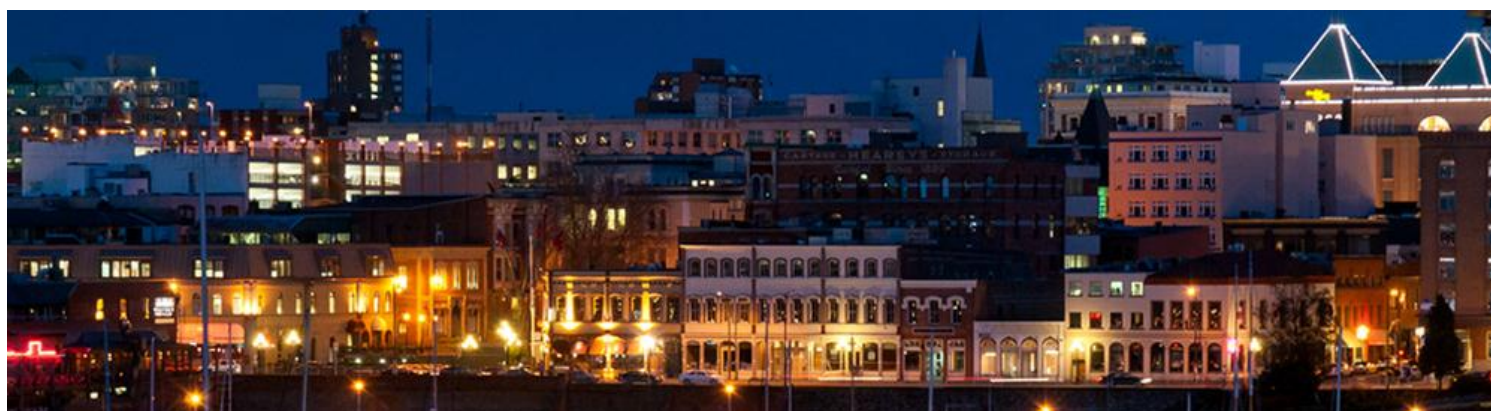




Ipsos Reid



City of Victoria 2013 Business Survey

May 2013



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Executive Summary

Overall Context

The City of Victoria continues to perform well according to its business stakeholders;

- Eight-in-ten business operators regard the City's business climate favourably
- The majority hold positive attitudes toward the City's rules and regulations
- Most have positive perceptions of their immediate business location—although current attitudes are less favourable than they were in 2010 when it comes to the safety and security of staff and customers and the ease of finding parking near their location. Today, less than one-half of businesses agree that it is easy to find parking near their location
- Businesses' perceptions of downtown Victoria continue to be predominantly positive

However, for some aspects business operators are not quite as positive in their views of the City and community as they were in 2010.

- When it comes to City operations, scores have eroded slightly since 2010; still, at present one-half or more of businesses express positive views
- Around eight-in-ten businesses are satisfied with the overall level and quality of services provided by the City, however this score has declined directionally since 2010
- Positive attitudes toward values for taxes have declined among businesses from 71% in 2010 to the current level of 60%, and
- Among businesses that have had contact with the City in the past 12 months, overall satisfaction has declined from 82% in 2010 to 67%.

Business Climate

Overall perceptions of Victoria's business climate continue to be predominately positive.

Eight-in-ten businesses describe Victoria as either a "very good" or "good" place to operate a business. When asked what they like best about operating a business in Victoria, businesses mention things such as the City's local people/community, location, that they have lived here a long time, weather, size and beauty. This indicates that much of what businesses like about operating a business in Victoria focuses on things that are largely outside of the City's control. On the other hand, the survey suggests the City could impact some of the things that businesses dislike about operating a business in Victoria, including parking, high taxes and homelessness.

The majority of businesses see the City's rules and regulations as accessible, fair, and easy to understand. Some businesses are dissatisfied with the number of rules and regulations.

Future Business Plans

Expansion is on the minds of many business operators. Twice as many businesses are planning expanding than who are planning downsizing or closing in the next five years.

Despite the continuing economic challenges, 28% of businesses anticipate expanding in the next five years; this is more than double the number that anticipates downsizing or closing down in this timeframe. Overall, these findings point to an optimistic outlook and potential economic growth in Victoria's business community.

Just over two-in-ten businesses plan on relocating to another location in the next five years. Of this, over one-third plan on moving to another location within the City of Victoria, while one-half plan on relocating outside the city.

Business Location

Businesses generally feel favourably towards their immediate business location, although businesses mention a number of times that parking could be improved.

The majority of businesses are satisfied the appearance of buildings and public amenities in their immediate business area. This was also the case in 2010.

Business operators are less positive than they were in 2010 when it comes to security and parking. At present, less than one-half agree with the statement "it is easy to find parking in the area where my business is located".

Downtown Victoria

As in 2010, business operators' perceptions of downtown Victoria are predominately favourable with the exceptions of parking and night time safety. The vast majority of businesses agree Victoria's downtown core is safe during the day and has a good range of shops, entertainment, and services that meet the community's needs. At least three-quarters also express a positive perception of downtown's overall cleanliness and daytime and evening vibrancy. However, businesses clearly think that parking and night-time safety could be improved.

On a positive note, perceptions of safety at night in the downtown core have improved among business stakeholders since 2010.



Issue Agenda and Priority Setting

Businesses want local leaders to focus on transportation and social issues. Taxation and municipal spending is in third place.

Poverty and homelessness are the most significant social issues. The City has made positive strides since 2010, with the proportion of businesses mentioning social issues declining from 42% to current levels of 28%.

For businesses, the most important transportation-related concern is parking.

City Operations

Over half of business operators are pleased with the overall direction the City is taking and a similar proportion believe that the City the City listens to businesses; Perceptions of City operations are not as positive as they were in 2010. The majority agree that the City keeps them informed.

City Services

Eight-in-ten businesses are satisfied with the overall level and quality of services provided by the City of Victoria. Businesses are also satisfied each of the specific services tested. Services that attain the lowest satisfaction scores are enforcement of bylaws and building permits and inspections. These areas merit attention by the City.

Financing

The majority of businesses believe they receive good value for their municipal tax dollars. Yet, ground has been lost on this regard since 2010, when six-in-ten business operators said that they received good value for their taxes as compared to the current level of half of business operators.

Attitudes toward the trade-off between taxes and service levels have shifted since 2010: businesses operators now prefer service cuts over tax increases.

If given a choice between tax increases or service cuts, more businesses in Victoria would prefer cuts in service (44%) than would prefer increased taxes (36%). This is a change in attitudes since 2010, when 53% preferred increased taxes while 36% opted for cuts in services.

Businesses prefer to cut services in order to maintain the current tax level rather than to cut services in order to reduce taxes.

Communication

There is room to increase the amount of information disseminated to businesses. One-half of businesses state that they receive too little information from the City. Business operators would like more information about a wide range of information, including:



- Budget/municipal government spending
- Future development plans
- Future infrastructure work, and
- Financial/business information (trends, number of competitors etc).

Good ways to consult with businesses include online surveys, email and feedback forms. Businesses are less interested in providing input through online discussion forums and telephone surveys.

Just under half of businesses are aware of opportunities to provide input to the City of Victoria, and 54% have done so. Many of those who have not provided feedback did not know they could do so, but many others didn't have any particular reason to do so, or were too busy.

Customer Service

Contact experiences are predominately satisfactory; however, business operators are less satisfied than they were in 2010. Satisfaction with both staff helpfulness and speed of service have declined significantly.

Emergency Preparedness

Most businesses still do not have an emergency preparedness kit. The majority (71%) of businesses do not have an emergency preparedness kit that includes enough food, water, and other supplies for them and their staff for a minimum of three days.

Comparisons to the Citizen Survey

As also seen in 2010, businesses generally take a more critical view of the City of Victoria than citizens. While businesses' overall perceptions of the City of Victoria are predominately positive, comparisons to the Citizen Survey show that businesses tend to be slightly more critical than citizens in a number of areas, including perceptions of downtown Victoria and City operations, satisfaction with municipal services, and value for tax dollars.

Citizens and businesses are generally aligned in terms of important municipal issues. Social and transportation-related issues are the top concerns for businesses and citizens alike. However, the transportation issues that each focuses on are different. For citizens, the top transportation related mention is the Johnson Street Bridge while businesses focus on parking.

Businesses are much less likely to mention municipal government services and are more likely to mention taxation/municipal government spending, the economy and crime.

Citizens prefer tax increases over service cuts, while businesses prefer that services be cut rather than face tax increases.

Citizens and businesses are generally aligned when it comes to how they would like to provide input to the City on important local issues.

Introduction

Background

In order to continually meet and exceed the expectations of its community, the City of Victoria conducts regular surveys that provide a comprehensive assessment of the public's satisfaction levels, attitudes, needs, and priorities. While past surveys have specifically targeted citizens, 2010 and 2013 studies also include a statistically robust sample of Victoria businesses. The results of the surveys will provide the City of Victoria with valuable insight into the opinions of citizens and businesses and will serve as key input into the City's long-term planning processes.

The following report presents the results specific to the Business Survey, although comparisons have been made to the Citizen Survey where appropriate. The overall Citizen Survey results are reported under separate cover.

Objectives

The 2013 Business Survey main objectives are to:

- Identify the issues seen as most in need of attention from local leaders;
- Assess perceptions of Victoria's overall business climate;
- Understand future business plans (expand, downsize, close, relocate);
- Assess perceptions of immediate business locations;
- Assess perceptions of the City of Victoria's downtown core;
- Measure satisfaction with specific City services;
- Assess perceptions of the City's municipal operations;
- Determine perceived value for taxes and preferred funding options;
- Understand which municipal priorities are most important to businesses;
- Assess perceptions of the City's communication with businesses;
- Determine the incidence of contacting the City, measure satisfaction with contact experiences and preferred methods of inviting input from businesses; and,
- Assess businesses' emergency preparedness.

Norms

Unlike the Citizen Survey, where municipal norms are available to evaluate the City of Victoria's performance relative to other municipalities, there are no municipal norms for the Business Survey.



Methodology

Ipsos Reid conducted a total of 300 telephone interviews with a randomly selected representative sample of Victoria businesses. The sample for this survey was provided by the City of Victoria and respondents had to confirm they operate a business at one or more locations in Victoria in order to qualify for the research. Respondents were further screened to ensure that interviews were conducted with the person who is responsible for the overall management and direction of their company at that location. This approach replicates the methodology used for the 2010 survey.

All interviews were conducted between April 2 and 23, 2013. Overall results are accurate to within ± 5.7 percentage points, nineteen times out of twenty. The margin of error will be larger for sample subgroups.

Detailed Findings

Business Climate

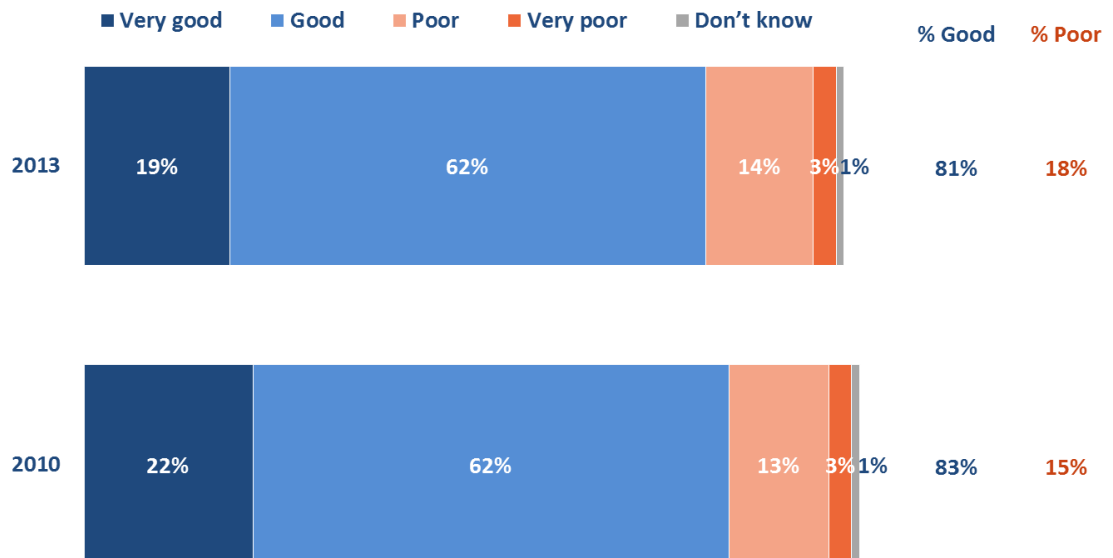
Victoria's Overall Business Climate

Perceptions of Victoria's overall business climate remain predominately positive.

The clear majority (81%) of businesses in Victoria believe that the city is either a "very good" (19%) or "good" (62%) place to operate a business. Only 18% feel otherwise, including 3% saying "very poor" and 14% rating Victoria's overall business climate as "poor".

Opinions are markedly similar to those measured among businesses in 2010.

Victoria's Overall Business Climate



Q2. Overall, how would you rate the City of Victoria as a place to operate a business? Would you say...
Base: All Respondents (n=300); 2010 (n=300)



Analysis by key subgroups shows that perceptions of Victoria's overall business climate are more positive (combined "**very good/good**" responses) among:

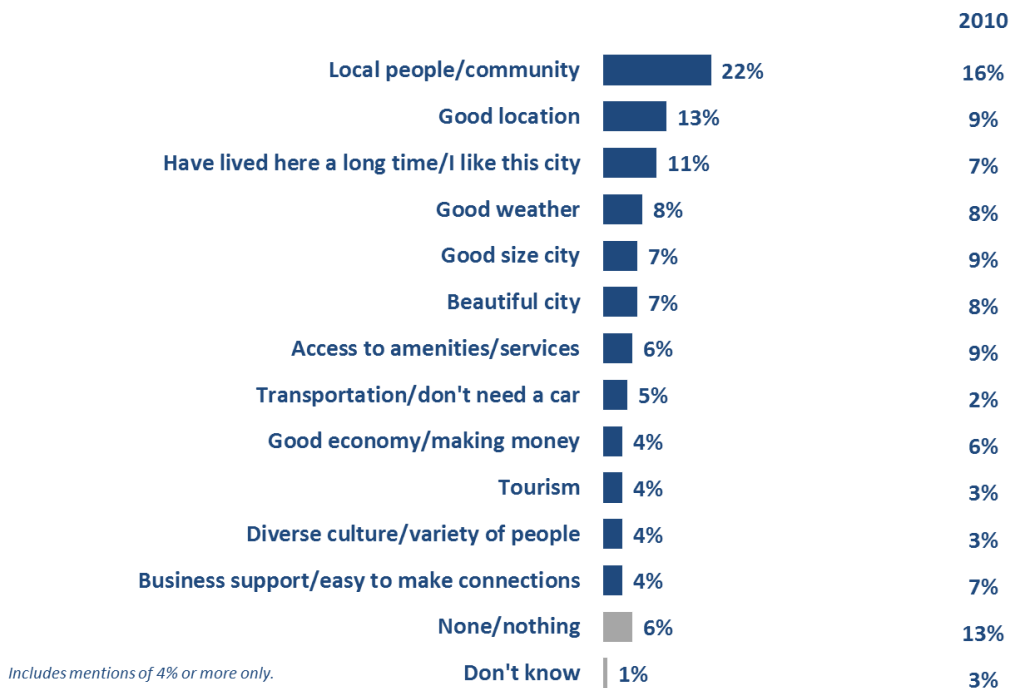
- Business operators who plan to expand or remain the same (85% of those who plan expansion and 83% of those with no plans for change as opposed to 63% of those who plan to downsize or close);
- Those that are satisfied with the City's overall services (91%, compared to 42% of dissatisfied business operators);
- Those that say they receive good value for their municipal taxes (93%, compared to 60% of those rating the value of their taxes poorly);
- Those who have **not** had recent contact with the City (90% of those who have not had contact vs. 76% among those that have); and,
- Female business operators are more positive (90% of females vs. 76% of males).

Best Part about Operating a Business in Victoria

Much of what businesses like about operating a business in Victoria focuses on things that are largely outside the City's control.

As viewed in 2010, the aspect that business operators are most likely to mention about operating a business in Victoria, is the City's "local people/community" tops the list (mentioned by 22% in 2013 and 16% in 2010). Business operators also mention Victoria's "good location" (13%), that they have lived here a long time (11%), "good weather" (8%) and that it is a "good size city" (7%) and a "beautiful city" (7%), among others.

Best Part about Operating a Business in Victoria



Q3. What do you like best about operating a business in the City of Victoria?
Base: All Respondents (n=300); 2010 (n=300)

Worst Part about Operating a Business in Victoria

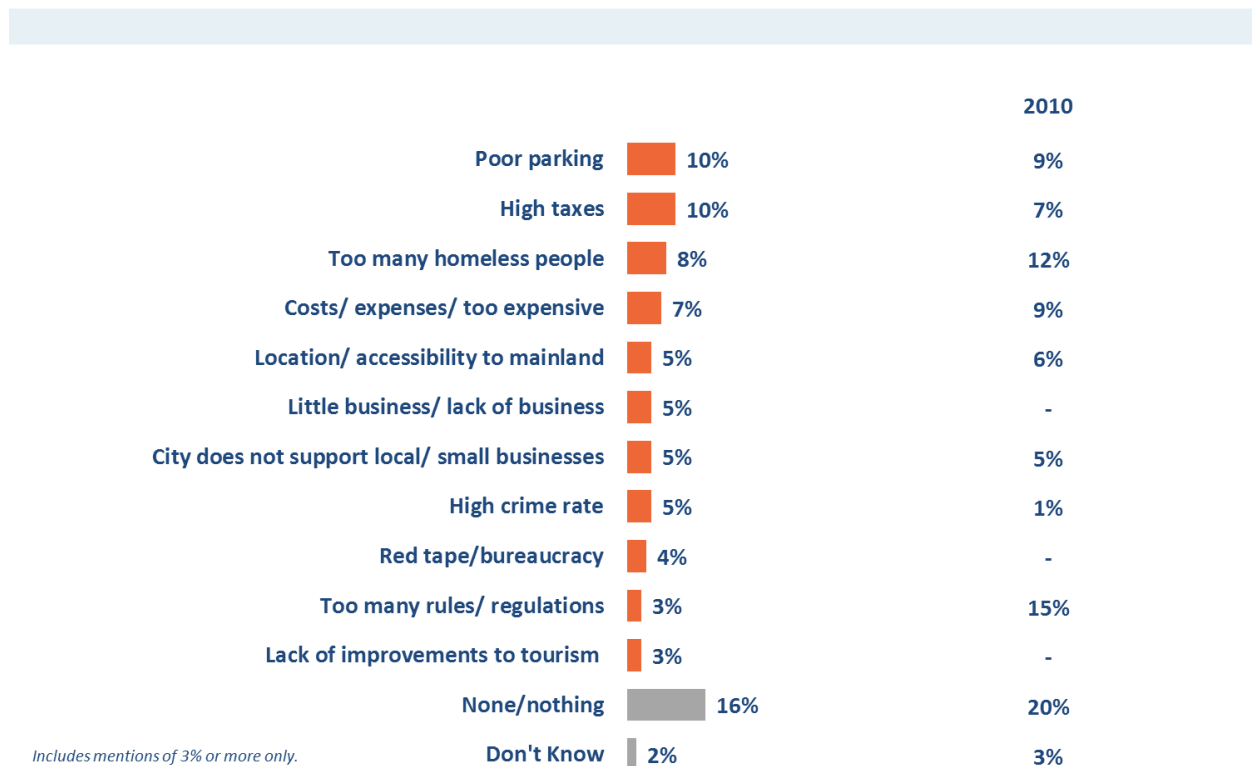
The City can take steps to address some of the things that businesses dislike about operating a business in Victoria.

When business operators consider what they like least about operating a business in the City of Victoria, the top three mentions are “poor parking” (10%), “high taxes” (10%) and “too many homeless people” (8%).

Some businesses also complain of “the costs/too expensive” to run a business in Victoria (7%), “lack of business” (5%) and complain that the “City does not support small/local businesses” (5%).

In 2010, “too many rules/regulations” was a common mention, but this year business operators are *less* likely to mention this (15% in 2010, compared with only 3% currently).

Worst Part about Operating a Business in Victoria



Q4. And, what do you like least about operating a business in the City of Victoria?
Base: All Respondents (n=300); 2010 (n=300)

City Actions to Attract and Maintain Businesses

Business operators suggest that actions to address complaints about parking, the downtown core, taxes and homelessness are the most important that the City can take to attract and retain business in the City.

When business operators are asked what the most important action the City can take to attract and retain business in the City, they mainly reiterate the items identified as the worst aspects of running a business in the City. They mention “improve parking” (9%), “improve the downtown core” (9%), and “reduce/lower taxes” (7%) and “clean up homelessness” (6%).

Other minor suggestions include general marketing activities such as “promote tourism” (5%), “attract business” (4%) and “more advertising/marketing” (3%) that the City could undertake.

City Actions to Attract and Maintain Business



Includes mentions of 3% or more only.

Q13a. What is the most important action the City can take to attract and retain business in the City in general?
Base: All Respondents (n=300)

Perceptions of the City's Rules and Regulations

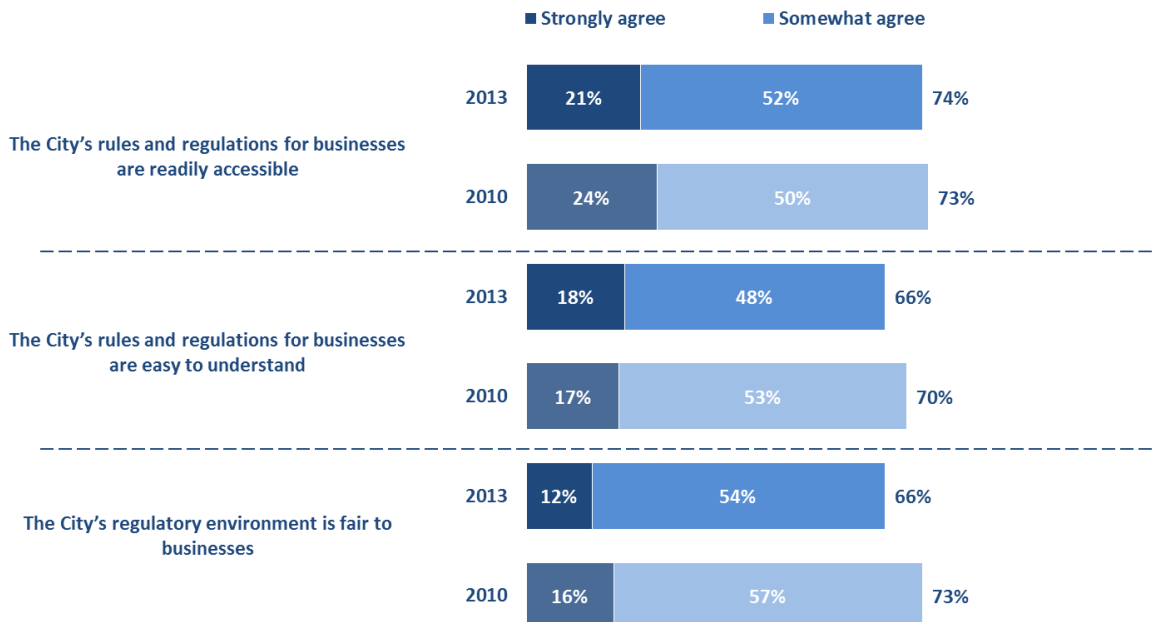
Overall, the City's rules and regulations are generally seen as accessible, fair, and easy to understand.

When specifically asked about the City's rules and regulations, between two-thirds and three-quarters of business operators agree that these are readily accessible, fair, and easy to understand. Specifically:

- 74% agree that "the City's rules and regulations for businesses are readily accessible" (21% "strongly agree");
- 66% agree that "the City's rules and regulations for businesses are easy to understand" (18% "strongly agree"); and,
- 66% agree that "the City's regulatory environment is fair to businesses" (12% "strongly agree").

Positive attitudes toward the City's rules and regulations may appear to have eroded slightly since 2010; however, these changes are not statistically significant.

Perceptions of the City's Rules and Regulations



Q5. Please tell me if you agree or disagree with each of the following statements. The first one is [INSERT ITEM]. (Is that strongly or somewhat agree/disagree?) How about
Base: All Respondents (n=300); 2010 (n=300)



Subgroups of businesses that are more likely to *agree* with the statements about rules and regulations include:

- Business operators who consider Victoria to be a good place to operate a business;
- Businesses that expect to expand or remain the same are more likely to agree that “the City’s regulatory environment is fair to businesses” (75% of those that expect to expand and 67% of those who expect to stay the same, as opposed to 34% among businesses that expect to downsize or close); and,
- Operators that are satisfied with City services are more likely to agree with all of the statements as compared to those who are dissatisfied.

Future Business Plans

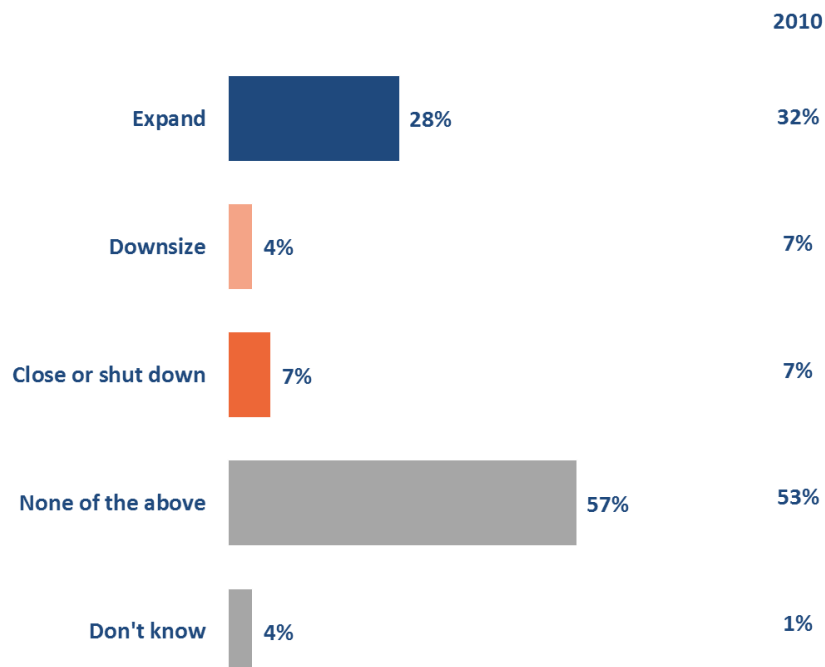
Business Plans in the Next Five Years

As in 2010, businesses are more than twice as likely to anticipate expanding as they are downsizing or closing in the next five years.

Twenty-eight percent of businesses anticipate expanding in the next five years. This is more than double the number that anticipate downsizing (4%) or closing/shutting down (7%). This indicates an optimistic outlook on the part of business operators and potential economic growth in Victoria's business community.

These findings are consistent with the 2010 measure.

Business Plans in the Next Five Years



Q6. Does your business have plans to (READ LIST) in the next five years?
Base: All Respondents (n=300); 2010 (n=300)

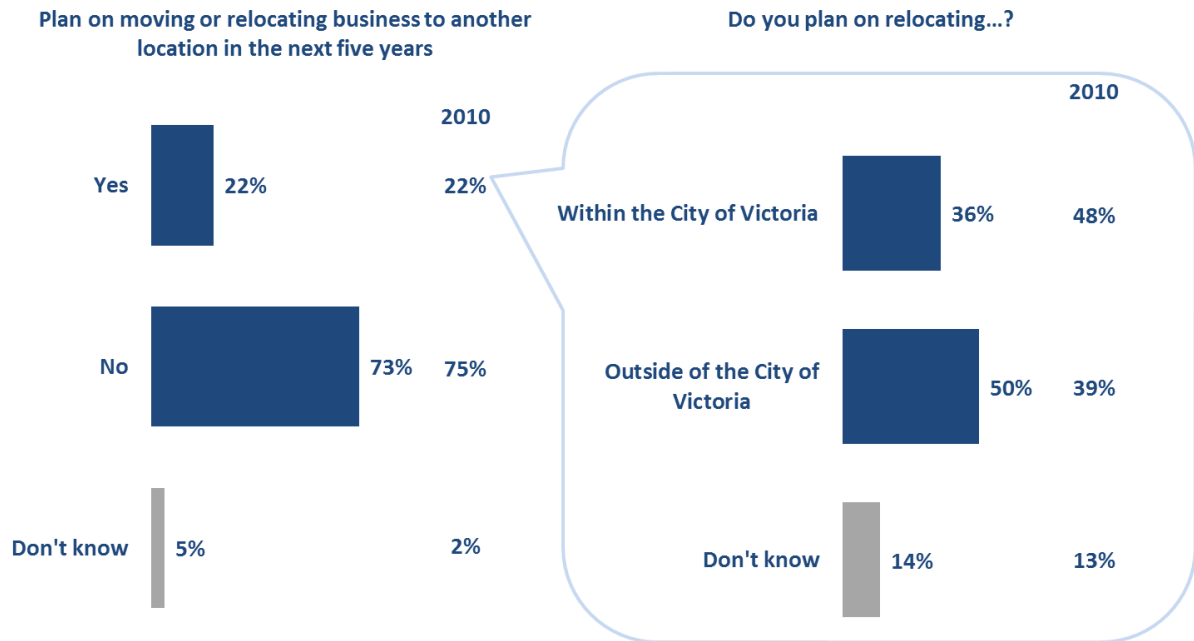
Relocation

Just over two-in-ten businesses plan on relocating to another location in the next five years.

Overall, 22% of businesses plan on moving or relocating to another location in the next five years. Of this, 36% plan on moving to another location within the City of Victoria while one-half plan on relocating outside of the City. This result is very similar to that attained in the 2010 survey.

In viewing the comparison between 2013 and 2010, it may appear that fewer business operators are planning on expanding within the City; however, these changes are not statistically significant due to small base sizes.

Relocation



**Caution, small base sizes*

Q7. Do you plan on moving or relocating your business to another location in the next five years?

Base: All Respondents (n=300); 2010 (n=300)

Q8. Do you plan on relocating (READ LIST)?

Base: Plan on moving or relocating business to another location in the next five years (n=66)*; 2010(n=67)*



Businesses that are more likely to anticipate moving or relocating **to another location** in the next five years include:

- Those that say Victoria is a poor place to operate a business (32%, compared to 20% of those with a positive perception of Victoria's overall business climate); and,
- Those that are dissatisfied with the City's overall services (44%, compared to 17% of satisfied respondents).

Business Location

Perceptions of Immediate Business Location

Businesses generally feel favourably towards their immediate business location, although concerns with parking resurface.

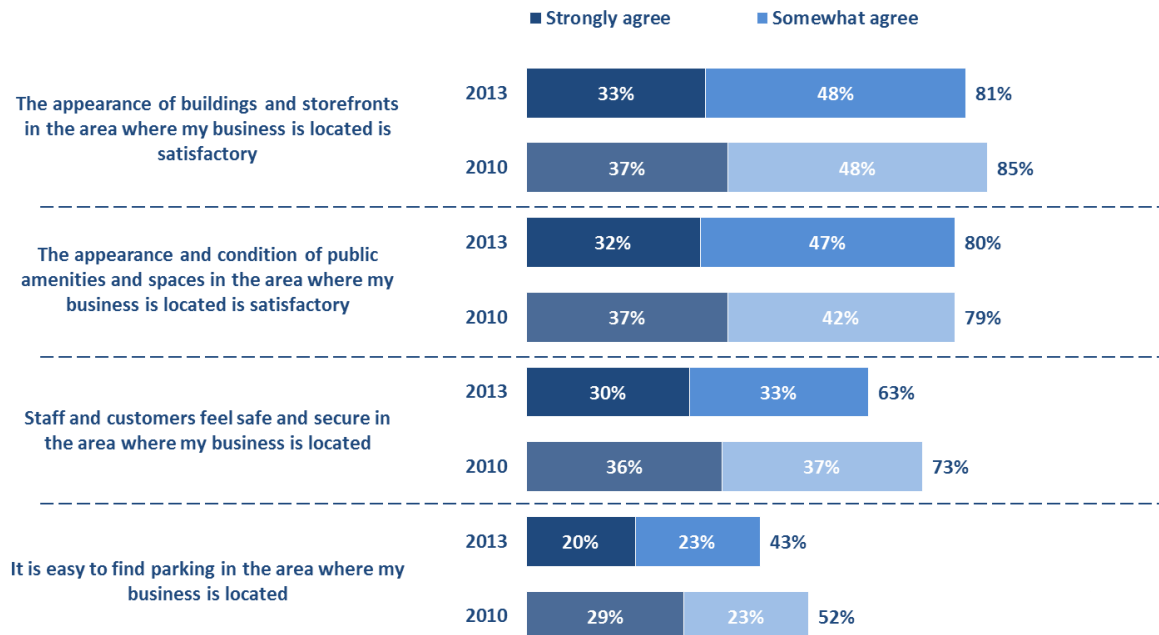
The majority of businesses are satisfied with the appearance of buildings and with the public amenities in their area. This was also the case in 2010. Specifically, at present:

- 81% agree “the appearance of buildings and storefronts in the area where my business is located is satisfactory” (33% “strongly agree”); and,
- 80% agree “the appearance and condition of public amenities and spaces in the area where my business is located is satisfactory” (32% “strongly agree”).

Business operators are less positive than they were in 2010 when it comes to security and parking. Specifically:

- Less than two-thirds of businesses agree that “staff and customers feel safe and secure in the area where my business is located” (30% “strongly agree”). This level of agreement is lower than that measured in 2010 when 73% agreed, and 36% strongly agreed;
- Less than one-half (43%) agree that “it is easy to find parking in the area where my business is located” (20% “strongly agree”). Again, this is lower than the 2010 measure, when 52% agreed and 29% agreed strongly.

Perceptions of Immediate Business Location



Q11. I'm now going to read some statements about the area where your business is located and would like you to tell me if you agree or disagree with each one. The first one is [INSERT ITEM]. (Would that be strongly or somewhat agree/disagree)? How about [INSERT ITEM]?
 Base: All Respondents (n=300); 2010 (n=300)

Business operators who are satisfied with City services are more likely to agree with all business location attributes as compared to those who are dissatisfied. The same results are seen among operators who consider that they receive good value for their taxes as compared to their counterparts.

Downtown Victoria

Perceptions of Downtown Victoria

As in 2010, business operators' perceptions of downtown Victoria are predominately positive with the exception of parking and night time safety.

The vast majority (86%) of businesses agree “the downtown core is safe during the day”, including 43% that “strongly agree” with this statement. And, 83% agree that “the downtown core has a good range of shops, entertainment, and services that meet the community’s needs”, including 36% saying they “strongly agree” with this statement.

At least three-quarters of businesses also express a positive perception of downtown’s cleanliness and vibrancy during the day. While perceptions of downtown’s evening vibrancy are more tempered, the majority of businesses still demonstrate a positive perception in this regard. Specifically:

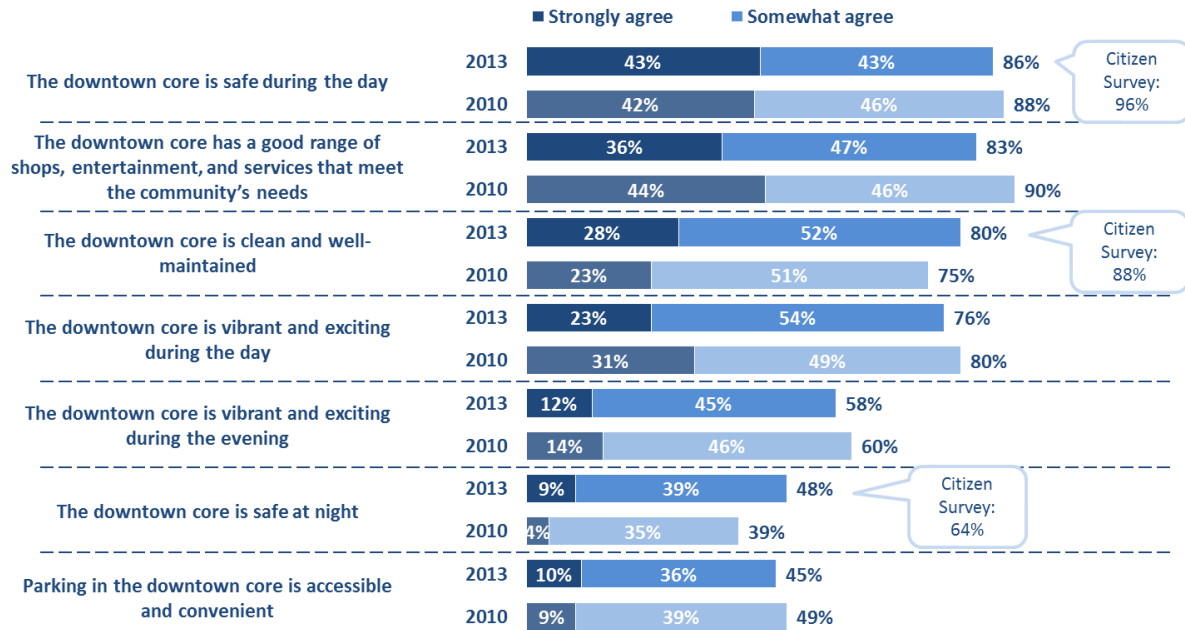
- 80% agree “the downtown core is clean and well-maintained” (28% “strongly agree”);
- 76% agree “the downtown core is vibrant and exciting during the day” (23% “strongly agree”); and,
- 58% agree “the downtown core is vibrant and exciting during the evening” (12% “strongly agree”).

While businesses generally take a positive view of downtown Victoria, they clearly think parking and night time safety could be improved. Only half (48%) of businesses agree that “the downtown core is safe at night” (9% “strongly agree”); and a similar proportion (45%) agree that “parking in the downtown core is accessible and convenient” (10% “strongly agree”).

Citizens and businesses demonstrate similar perceptions of downtown Victoria with a few exceptions: Businesses are more critical than citizens of downtown Victoria’s day time safety (86% of businesses agree safe vs. 96% of citizens), cleanliness (80% of business agree clean vs. 88% of citizens), and night time safety (48% of businesses agree safe vs. 64% of citizens).

Compared to the 2010 survey, business operators are less likely to agree that the downtown has a good range of shops and services (83% currently vs. 90% in 2010), and more likely to agree that the downtown core is safe at night (48% in 2013 as compared to 39% in 2010).

Perceptions of Downtown Victoria



Q12. Please tell me if you agree or disagree with each of the following statements about the city's downtown core. The first one is [INSERT ITEM]. (Is that strongly or somewhat agree/disagree?) How about [INSERT ITEM]?
Base: All Respondents (n=300); 2010 (n=300)

Business operators who are likely to be positive about the downtown core as compared to their counterparts include:

- Businesses that regard Victoria as a good place to operate a business;
- Businesses that expect to expand;
- Those that are satisfied with City services; and,
- Business operators who believe that they get good value for their taxes.

Issue Agenda and Priority Setting

Top-of-Mind Issues

On an unprompted basis, businesses want local leaders to focus on social issues most of all. Transportation-related issues also rank high on businesses' issue agenda.

Social and transportation issues tie as the most important issue facing the business community, and are the issues that should receive the greatest attention from their local leaders. Each is identified by 28% of business operators.¹ Taxation and municipal spending is in third place, mentioned by 20% of businesses.

Most of the mentions of social issues involve poverty and homelessness, as was the case in 2010. The City has made positive strides in this regard, as the proportion of businesses mentioning social issues has declined from 42% in 2010 to current levels of 28%.

Transportation issues tie with social issues as the most important issue facing the community (28%). For businesses, the specific transportation related concerns include "parking" (18%), "traffic congestion" (4%), and general "transportation" mentions (5%).

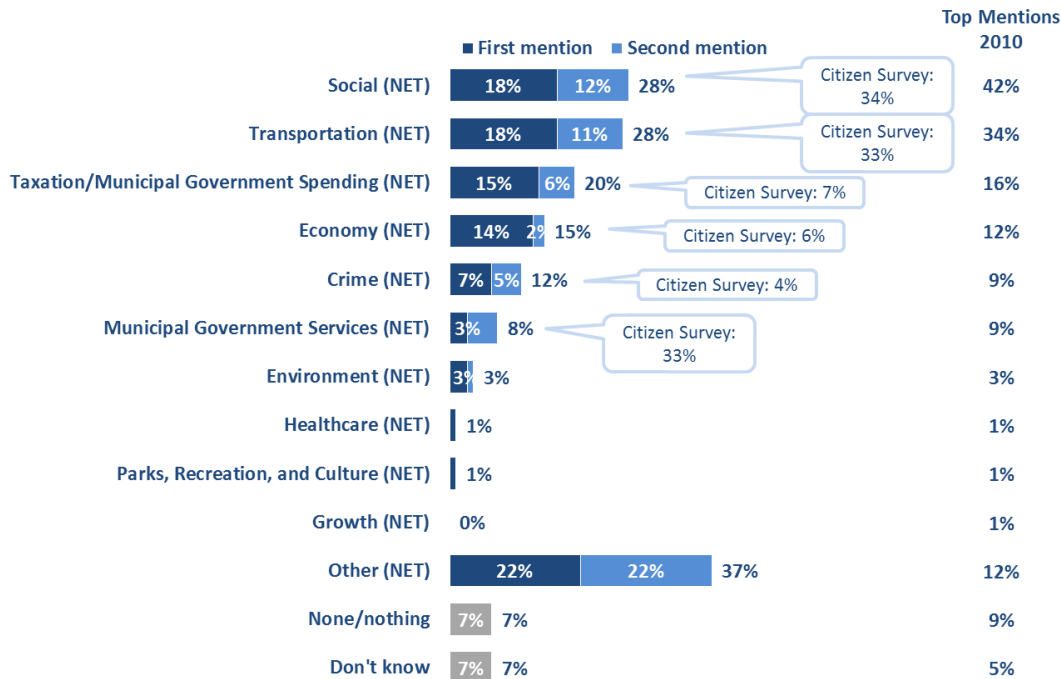
In addition to social issues and transportation, the third issue that businesses would like to see receive greater attention from local leaders is taxation/municipal government spending (20%). Mentioned less frequently are the economy (15%), crime (12%) and municipal government services (8%). Other issues are mentioned by 3% or fewer of business operators.

The Citizen Survey results show that social and transportation-related issues are also the top concerns for citizens. However, citizens are much more likely to mention municipal government services (33% of citizens vs. 8% of businesses). Citizens are less likely than businesses to mention taxation/municipal government spending (7% of citizens vs. 20% of businesses.), the economy (6% vs. 12%) and crime (4% vs. 12%).

Both citizens and businesses identify transportation as an important priority, however, the issues that each focuses on are different. For businesses, the number one transportation related mention is parking (18% of businesses vs. 1% of residents), while citizens are more likely to mention bridges – primarily the Johnson Street bridge (15% of citizens vs. no mentions by businesses).

¹This question was open-ended, meaning that respondents were not prompted in their responses. Individual comments were then coded into specific categories and grouped together in broad themes called "Nets".

Top-of-Mind Issues



Q1. As a business operating in the City of Victoria, 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? [ACCEPT 1 MENTION] Are there any other important local issues?
Base: All Respondents (n=300); 2010 (n=300)

The top concerns are important to all subgroups by business operator type. Businesses that do not regard the business climate in Victoria positively, are dissatisfied with City services and who think they receive poor value for their taxes are more likely than their counterparts to mention “taxation/municipal spending” as one of the key issues. Male business operators are also more likely than females to mention “taxation/municipal spending” (27% of males as compared to 9% of female business operators).



City Operations

Perceptions of City Operations

Just over half of business operators are pleased with the overall direction the City is taking and think the City listens to businesses; however, perceptions of City operations are not as positive as they were in 2010.

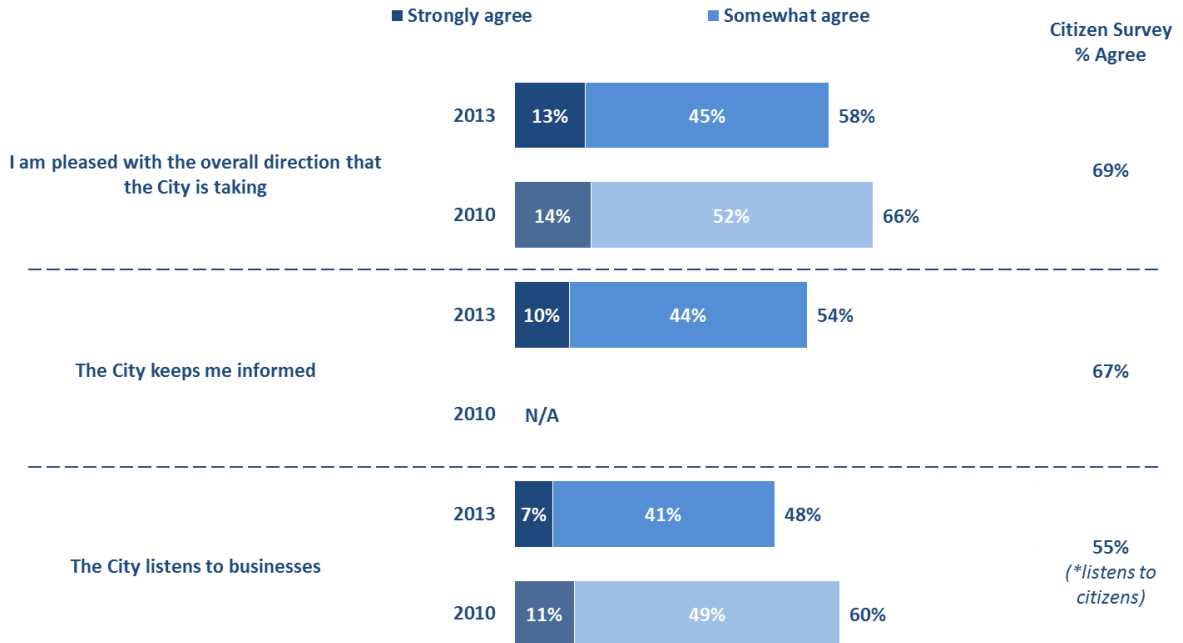
Overall, 58% of businesses agree with the statement “I am pleased with the overall direction that the City is taking” (13% “strongly agree”). Fifty-four percent agree that “the City Keeps me informed” (10% strongly agree), while 48% agree “the City listens to businesses” (7% “strongly agree”).

Citizens are more likely than businesses to agree with all three measures of City operations. They are pleased with the direction the City is taking (69% of citizens vs. 58% of businesses), agree that “the City keeps me informed” (67% of citizens vs. 54% of businesses) and agree that the City listens to them (55% of citizens vs. 48% of businesses)².

The City has lost ground with regard to business operators’ perceptions of City operations since 2010. Currently, businesses are less likely to agree that “I am pleased with the overall direction that the City is taking (58% vs. 66% in 2010), and also less likely to agree that “the City listens to businesses” (48% as compared to 60% in 2010).

² Businesses were asked the extent to which they agreed the City listens to businesses while citizens were asked the extent to which they agreed the City listens to citizens.

Perceptions of City Operations



Q15. Please tell me if you agree or disagree with each of the following statements. The first one is [INSERT ITEM]. (Is that strongly or somewhat agree/disagree?) How about [INSERT ITEM]?
 Base: All Respondents (n=300); 2010 (n=300)

Agreement (combined “**strongly/somewhat agree**” responses) with these statements is *higher* among those that say Victoria is a good place to operate a business, plan for business expansion, are satisfied with the City’s services, and think they receive good value for their municipal tax dollars.



City Services

Overall Satisfaction with City Services

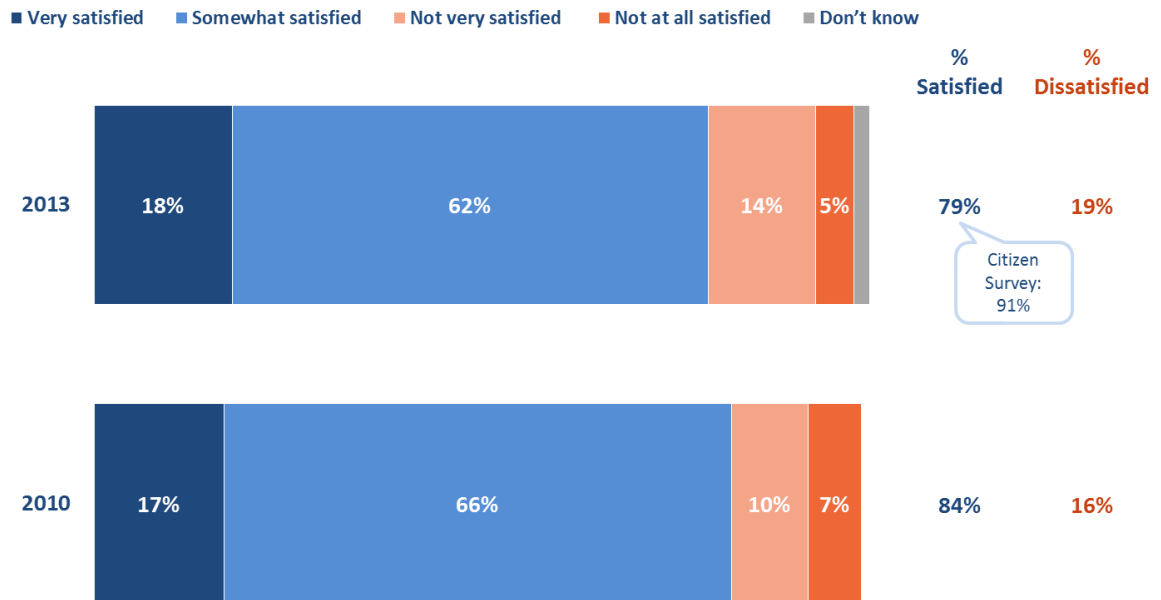
Most businesses are satisfied with the overall level and quality of services provided by the City of Victoria.

Around eight-in-ten (79%) businesses are satisfied with the overall level and quality of services provided by the City of Victoria. Of this, 18% are “very satisfied” and 62% are “somewhat satisfied”. The remaining operators express a more negative view, including 5% saying “not at all satisfied” and 14% saying “not very satisfied”.

While the majority of businesses express a positive view of the City’s overall services, businesses are still less likely than citizens to be satisfied in this regard (79% of businesses vs. 91% of citizens).

The proportion of businesses that are satisfied with City services has declined directionally, but not significantly since 2010. Currently 79% of business operators state that they are satisfied, as compared to 84% in 2010.

Overall Satisfaction with City Services



Q13. How satisfied are you with the overall level and quality of services provided by the City of Victoria? Would you say (READ LIST)?
Base: All Respondents (n=300); 2010 (n=300)

The sub-groups that express significantly *higher* overall satisfaction with the City's services include:

- Those that say Victoria is a good place to operate a business;
- Businesses that expect to expand or to remain the same;
- Operators who believe that they receive good value for their municipal tax dollars; and,
- Female business operators.

Satisfaction with Specific Services

Businesses are also satisfied with all of the specific services tested.

The majority of businesses are satisfied with all of the services tested, although clearly some are more satisfactory than others³.

Overall, businesses are most satisfied with the following services:

- “Fire Department services” (99% satisfied, 72% “very satisfied”);
- “Business licensing” (91% satisfied, 44% “very satisfied”);
- “City website” (91% satisfied, 35% “very satisfied”); and,
- “City beautification such as signage, landscaping, public art, and street banners” (89% satisfied, 40% “very satisfied”);
- “Lighting, condition and maintenance of streets and sidewalks” (86% satisfied, 31% “very satisfied”); and,
- “Design of streets, public spaces, and boulevards” (81% satisfied, 26% “very satisfied”).

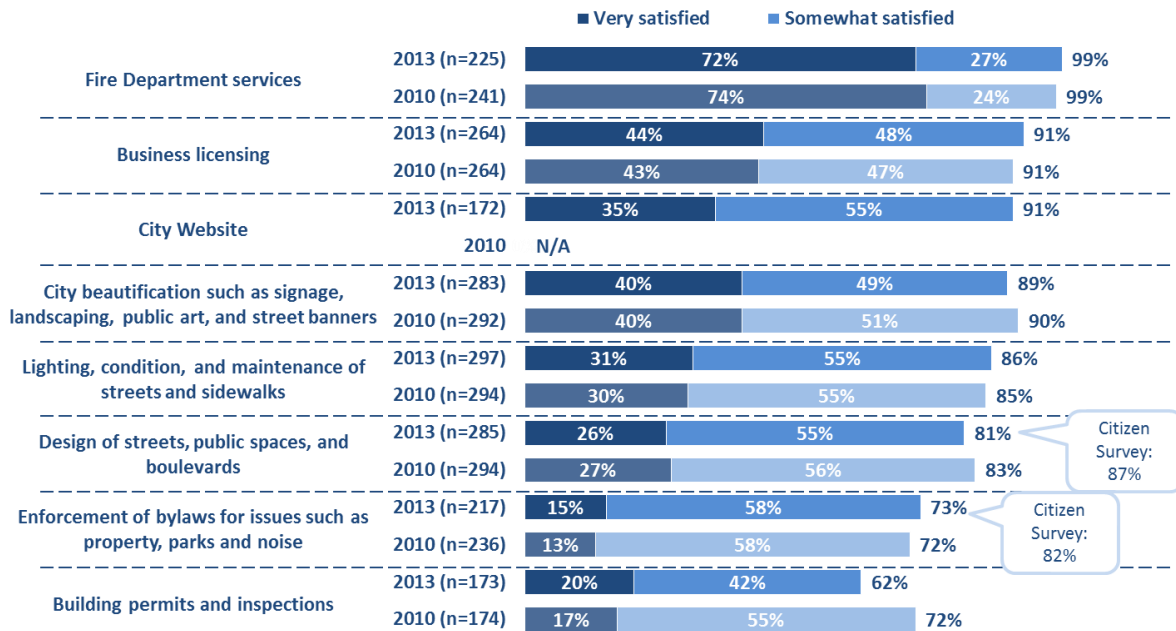
Services achieving lower satisfaction scores include:

- “Enforcement of bylaws for issues such as property, parks and noise” (73% satisfied, 15% “very satisfied”); and,
- “Building permits and inspections” (62% satisfied, 20% “very satisfied”).

Citizens tend to be more satisfied with “design of streets, public spaces, and boulevards” (87% percent of citizens vs. 81% of businesses) and “enforcement of bylaws for issues such as property, parks and noise” (82% percent of citizens vs. 73% of businesses).

³ Satisfaction ratings have been recalculated to only include those with an opinion – e.g., excludes those saying not applicable or don't know.

Satisfaction with Specific Services



Q14. Please rate how satisfied you are with each of the following services on a scale of (READ LIST). If you are unfamiliar with or have no experience with a particular service, simply say 'not applicable' and I'll move on to the next item. The first one is [INSERT ITEM]. How about [INSERT ITEM]?

Base: Respondents with an opinion (e.g., excludes those saying not applicable/don't know) (n=varies)

The sub-groups that express significantly *higher* satisfaction with at least some of the specific City services are very similar to the groups who are more satisfied with services overall, i.e.:

- Those that say Victoria is a good place to operate a business;
- Businesses that expect to expand; and,
- Operators who believe that they receive good value for their municipal tax dollars.

Financing

Value for Taxes

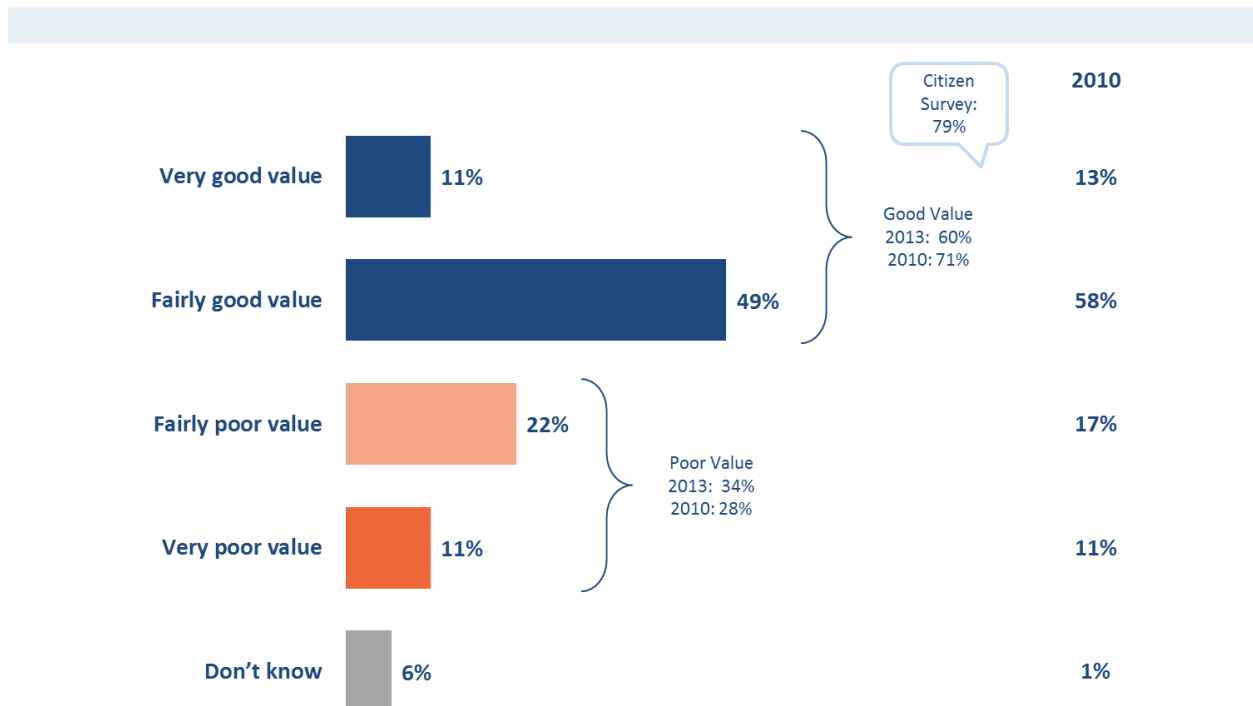
The majority of businesses believe they receive good value for their municipal tax dollars.

Overall, 60% of businesses say they receive good value for the taxes they pay to the City of Victoria. Of this, 11% say “very good value” and 49% say “fairly good value”. Around one-third (34%) of businesses feel otherwise, including 11% saying “very poor value” and 22% saying “fairly poor value”.

Comparisons to the Citizen Survey show that citizens are more likely than businesses to say they receive good value for the municipal taxes they pay (79% of citizens vs. 60% of business operators).

Ground has been lost on this measure since 2010, when 58% of business operators said that they received good value for their taxes as compared to the current level of 49%.

Value for Taxes



Q16. Thinking about all the programs and services you receive from the City of Victoria, would you say that overall you get good value or poor value for your tax dollars?
 Base: All Respondents (n=300); 2010 (n=300)



Businesses that are *more* likely to say they receive good value (combined “**very/fairly good value**” responses) for the municipal taxes they pay include:

- Those that say Victoria is a good place to operate a business (69%, compared to 21% of those that rate Victoria’s overall business climate poorly);
- Those that plan to expand their business (65% of those that plan to expand and 62% who foresee no change as compared to 44% who plan to downsize or close);
- Those that are satisfied with the City’s overall services (71%, compared to 21% of dissatisfied business operators);
- Those that have been in operation for less than 15 years (69%, compared to 54% of those who have been operating for 15 years or more); and,
- Female business operators (68% of female business operators as compared to 55% of males).

Tax Increases vs. Service Cuts

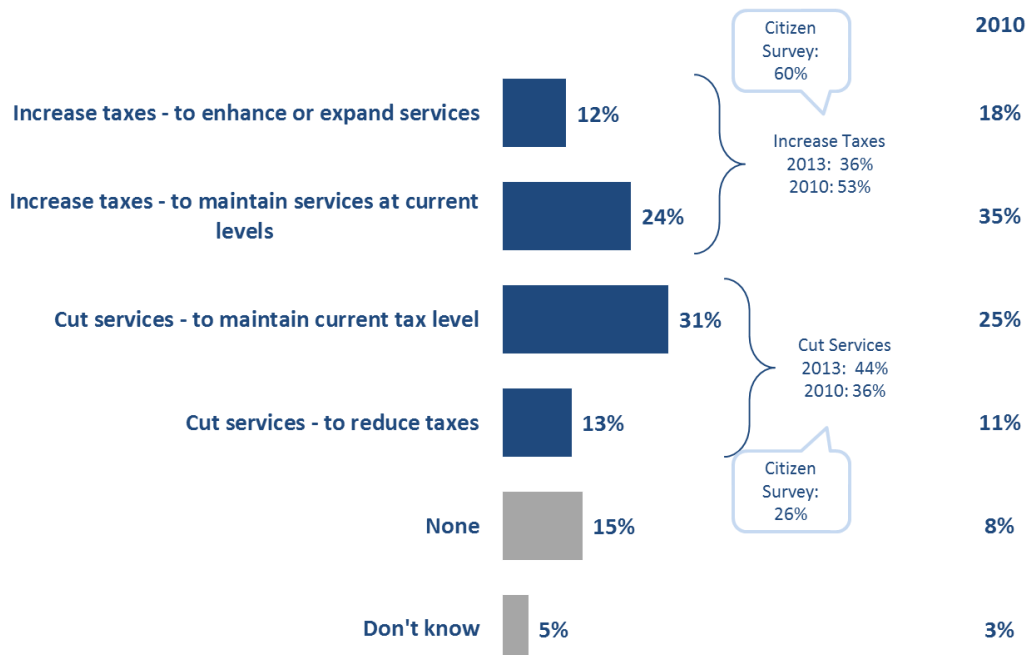
Attitudes have changed since 2010: businesses operators now prefer service cuts over tax increases.

If given a choice between tax increases or service cuts, at present more businesses in Victoria would prefer cuts in service (44%) than would prefer increased taxes (36%). This is a departure from attitudes in 2010, when 53% chose increased taxes while 36% opted for cuts in services.

When it comes to cutting services, businesses are more likely to prefer to cut services to maintain the current tax level (31%) rather than cutting services to reduce taxes (13%). When it comes to increasing taxes, 24% would prefer the City to increase taxes to maintain services at current levels, while only 12% prefer increasing taxes to enhance or expand services.

In contrast, citizens express a preference for tax increases over service cuts with a 60% majority saying they would prefer to see increased taxes (as compared to 36% of business operators), while 26% of citizens would prefer service cuts (vs. 44% of businesses).

Tax Increases vs. Service Cuts



Q17. Municipal property taxes are the primary way to pay for services provided by the City of Victoria. Due to the increased cost of maintaining current service levels and infrastructure, the City of Victoria must balance taxation and service delivery levels. To deal with this situation, which one of the following four options would you most like the City of Victoria to pursue?
Base: All Respondents (n=300); 2010 (n=300)



The types of businesses that are *more* likely to say the City should **cut services** include:

- Male business operators (49% of males vs. 37% of female business operators);
- Companies with 11 or more employees (59% of those with eleven or more employees as compared to 40% of those with 10 or fewer);
- Those that say Victoria is a poor place to operate a business (62%, compared to 40% of those that rate Victoria's overall business climate favourably);
- Those who expect to downsize or close their businesses are the most likely to support cuts in services (66%, as compared to 46% of those with no plans for change and 33% of those that expect to expand);
- Those that are dissatisfied with the City's services (60%, compared to 40% of satisfied respondents); and,
- Those that believe they receive poor value for their municipal tax dollars (60%, compared to 35% of those rating their value for taxes positively).

Communication

Level of City Information

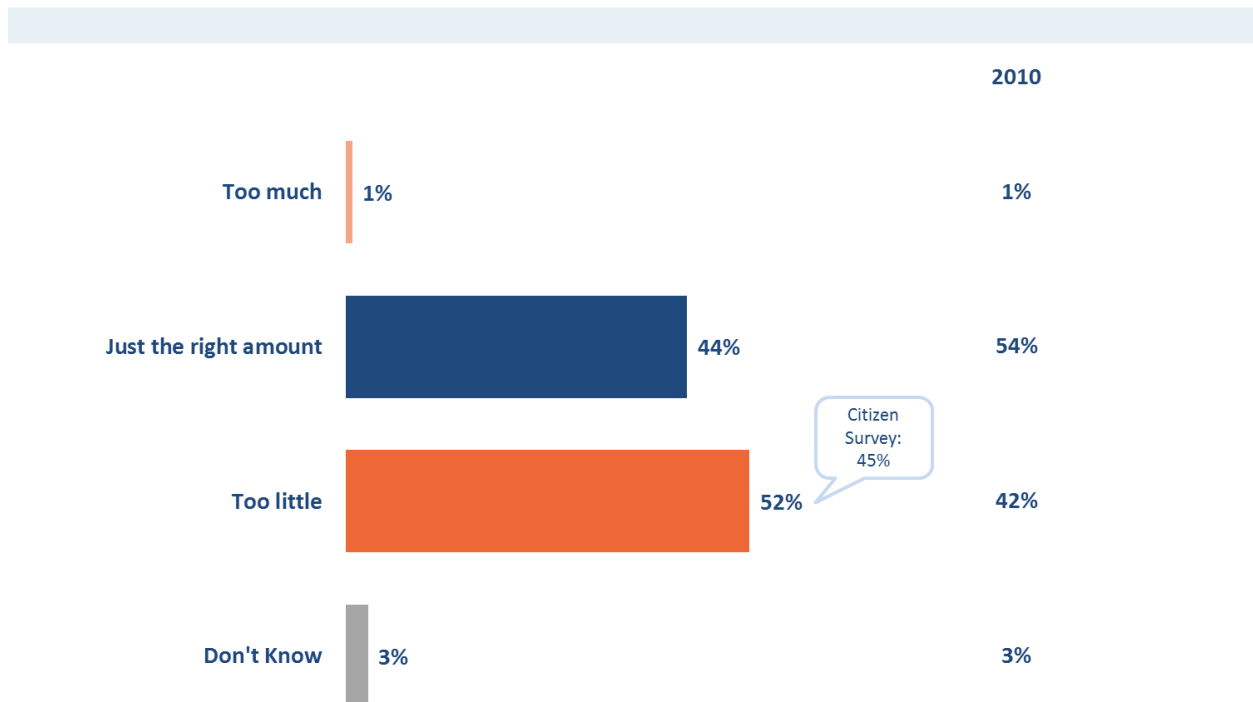
There is room to increase the amount of information disseminated to businesses.

Just under half (44%) of businesses say they receive “just the right amount” of information from the City, 52% believe that they receive “too little” information from the City. Only 1% of businesses say they receive “too much” information from the City. Overall, these findings indicate that many businesses would like to receive more information from the City of Victoria.

Compared to citizens, businesses are more likely to say that they receive “too little” information (45% of citizens as compared to 52% of businesses).

At 52%, businesses are more likely to rate the amount of information as “too little” today than they were in 2010, when 42% rated the amount of information as “too little”.

Level of City Information



Q21. In your opinion, does your business currently receive information from the City?
Base: All Respondents (n=300); 2010 (n=300)

Businesses that are *more* likely to say they receive **too little** information from the City include:



- Smaller companies with 10 or fewer employees (56%, compared to 39% of those with eleven or more employees);
- Business operators that consider Victoria to be a poor place to do business (66%, compared to 49% of those with a positive outlook on Victoria as a place to operate a business);
- Those that are dissatisfied with the City's overall services (70%, compared to 47% of satisfied businesses); and,
- Those that say they receive poor value for their municipal tax dollars (72%, compared to 41% of those rating their value for taxes favourably).

Information Needs

Businesses are interested in receiving a wide range of information from the City.

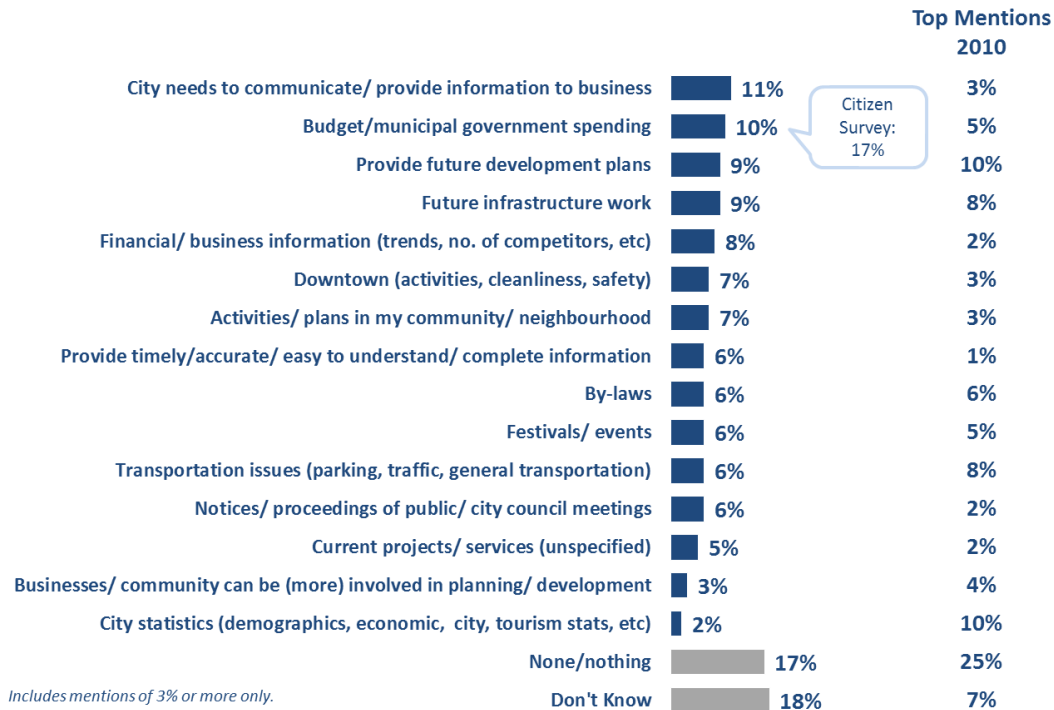
When asked which types of information they would like to receive from the City, many simply reiterate that the “City needs to communicate/provide information to business” without providing constructive ideas. More specific suggestions include:

- “Budget/municipal government spending” (10%);
- “Future development plans” (9%);
- “Future infrastructure work” (9%); and,
- “Financial/business information (trends, number of competitors etc.)” (8%).

“Budget/municipal government spending” is a top interest for both citizens and businesses, but more so for citizens (17% of citizens vs. 10% of businesses).

Compared to 2010, the one notable change is that businesses this year are slightly more interested in information on “budget/municipal government spending” (10% vs. 5% in 2010).

Information Needs



Q23. Thinking about your business information needs, what kinds of information do you want the City to provide you with?
Base: All Respondents (n=300); 2010 (n=300)



Business subgroups that are *more* interested in information on the municipal budget and spending include:

- Male business operators (13%, as compared to 4% of females);
- Business operators who perceive Victoria to be a poor place to do business (21%, as compared to 7% of those with a positive outlook on Victoria as a place to operate a business);
- Businesses that plan to downsize or close (25% vs. 7% of those who plan to expand and 9% of those that plan no change);
- Those that are dissatisfied with the City's overall services (19%, compared to 8% of satisfied businesses); and,
- Those that say they receive poor value for their municipal tax dollars (20%, compared to 5% of those who are positive in their assessment of value for taxes).



City Consultation

Preferred methods of consulting with businesses include online surveys, email and feedback forms. Businesses are less interested in providing input through online discussion forums and telephone surveys.

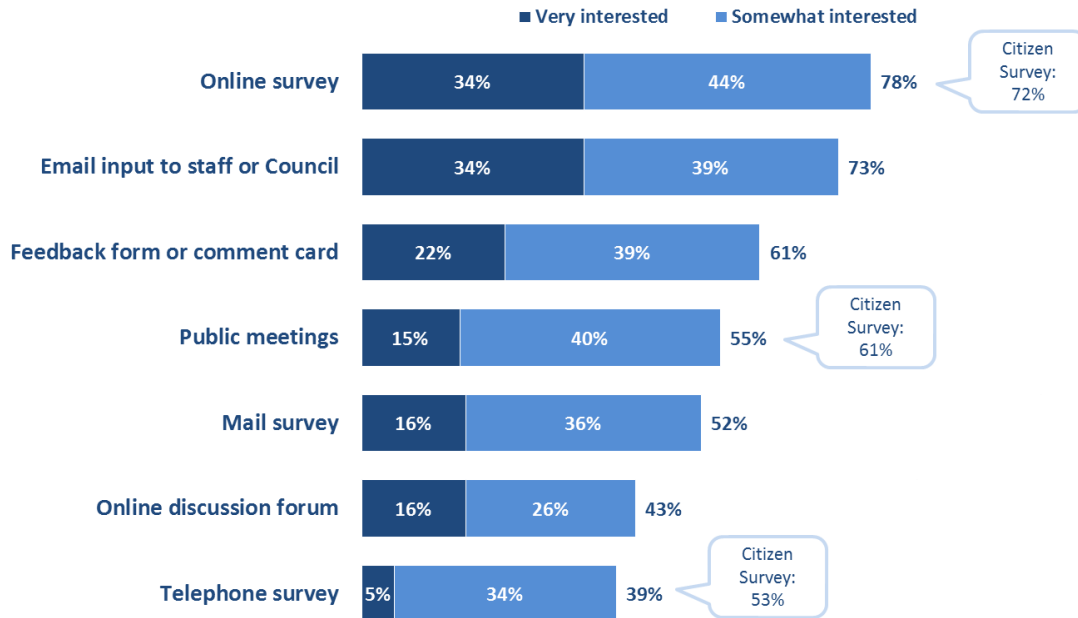
The majority of businesses are interested in providing their input to Council on important local issues through the following methods of consultation:

- “Online surveys” (78% interested, 34% very interested);
- “Email input to staff or Council” (73% interested, 34% very interested);
- “Feedback forms or comment cards” (61% interested, 22% very interested);
- “Public meetings” (55% interested, 15% very interested); and,
- “Mail surveys” (52% interested, 16% very interested).

There is less of an appetite for providing information through an “online discussion forum” (43% interested, 16% very interested) and even less interest in a “telephone survey” (39% interested, 5% very interested).

Citizens and businesses are generally aligned when it comes to how they would like to provide input to Council on important local issues. Businesses are more interested than citizens in online surveys (78% of businesses vs. 72% of citizens). Citizens are more interested than business operators in public meetings (61% of citizens vs. 55% of businesses) and telephone surveys (53% of citizens as compared to 39% of businesses).

City Consultation



Q24. There are a number of different ways the City can consult with businesses on important local issues. Please tell me how interested you would be in providing your input to the City through each of the following methods, using a scale of very interested, somewhat interested, not very interested, not at all interested.
Base: All Respondents (n=300)

Interest in the various forms of providing input to the City are fairly consistent across the key subgroups of business operators. The only method of communication where there are some subgroup differences pertains to the least popular method of communication – telephone surveys. The following groups tend to be *more* interested in telephone surveys:

- Business operators who perceive Victoria to be a poor place to do business (53%, as compared to 37% of those who consider that Victoria is a good place to operate a business);
- Those that are dissatisfied with the City's overall services (56%, compared to 35% of satisfied businesses); and,
- Those who have had contact with the City in the past 12 months (47%, as compared to 28% among businesses who have not had contact).

Providing Feedback to the City of Victoria

Just under half of businesses are aware of opportunities available to provide input to the City of Victoria, and 54% have done so.

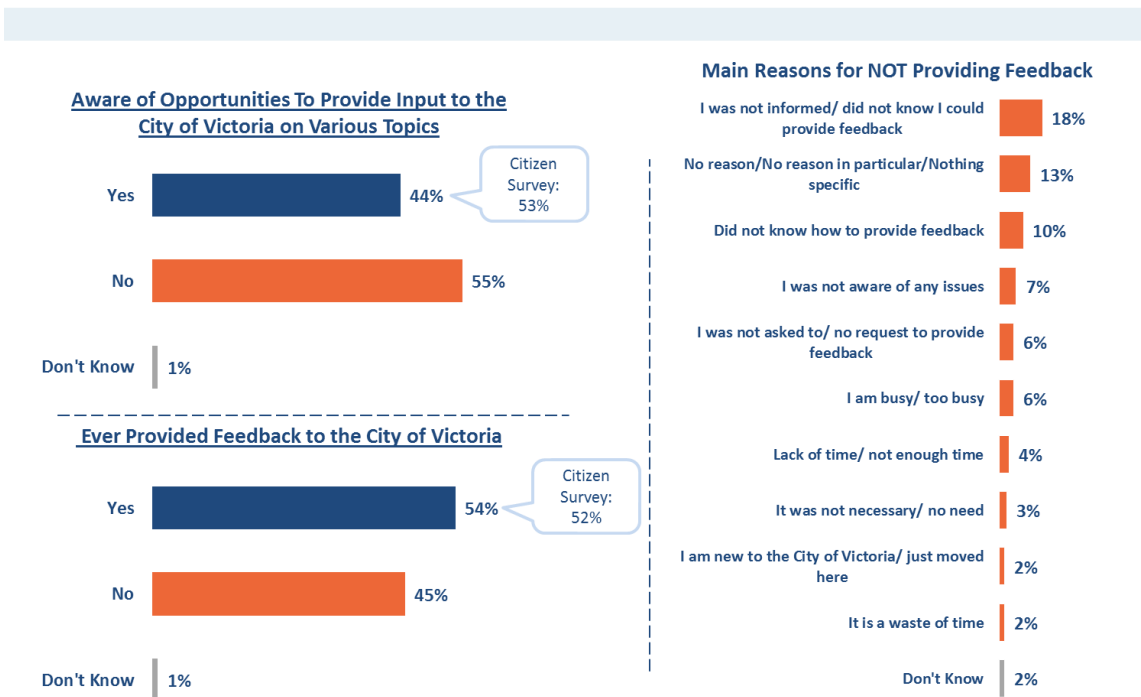
When asked, 44% of business operators state that they were aware of opportunities to provide input to the City of Victoria prior to this survey. And, 54% of business operators state that they have provided feedback to the City in the past.

The main reasons that businesses have not provided feedback in the past include

- Lack of knowledge that they could provide feedback (18%), or not knowing how to do so (10%);
- Having had no particular reason to do so (13%), not being aware of any issues (7%) or having no need to do so (3%); and,
- Others explain that they are too busy (6%), don't have enough time (4%).

Citizens are more likely to state that they were aware of the opportunity to provide input (53% of citizens vs. 44% of businesses). The two groups are about as likely to have recently provided input to the City (52% of citizens as compared to 54% of businesses).

Providing Feedback to the City of Victoria



q19anew. Prior to this survey, have you been aware of opportunities to provide input to the City of Victoria on various topics? Base: All Respondents (n=300)
 q19bnw. Have you ever provided your feedback to the City of Victoria? Base: All Respondents (n=300)
 q19cnw. What is the main reason why you have not provided your feedback to the City of Victoria? Base: All not provided feedback (n=135)



Business subgroups that are *more* likely to state that they have provided input to the City of Victoria include:

- Male business operators (62%, as compared to 42% of females);
- Business operators who perceive Victoria to be a poor place to do business (70%, as compared to 50% of those with a positive outlook on Victoria as a place to operate a business);
- Those that are dissatisfied with the City's overall services (77%, compared to 49% of business operators who say that they are satisfied);
- Those that say they receive poor value for their municipal tax dollars (63%, compared to 51% of those who are positive in their assessment of value for taxes); and,
- Business operators who have had contact with a City employee within the past 12 months (63%, vs. 40% of those who have not had contact).



Customer Service

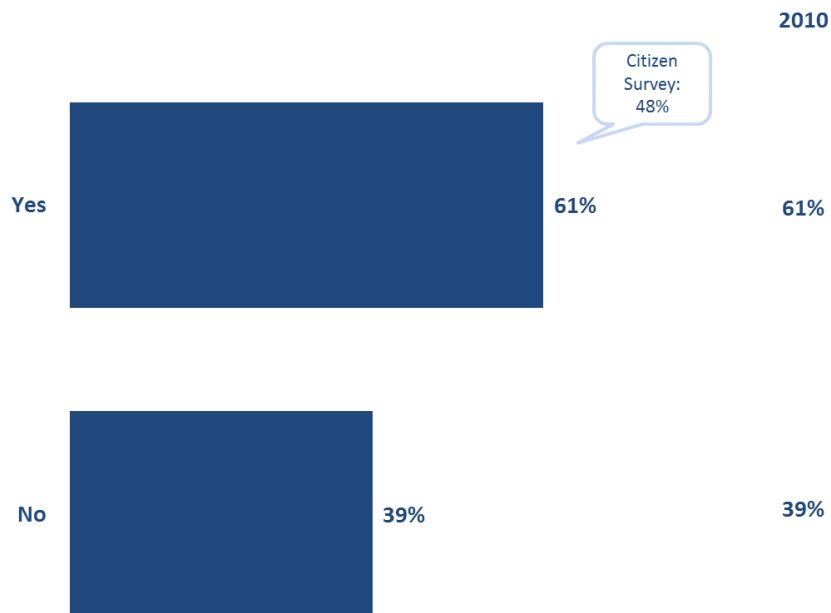
Contact with City

The majority of businesses have contacted or dealt with a City employee in the past 12 months.

As was the case in 2010, six-in-ten (61%) business operators say they personally contacted or dealt with a City employee in the last 12 months.

Businesses are more likely than citizens to have contacted the City in this timeframe (61% of businesses vs. 48% of citizens).

Contact with City



Q25. In the last twelve months, have you personally contacted or dealt with a City employee?
Base: All Respondents (n=300); 2010 (n=300)

Businesses that are *more* likely to have had contact with the City in the last 12 months include:

- Male business operators (68% vs. 50% of females);
- Non-retail businesses (66%, compared to 49% of retail businesses);
- Those that think Victoria is a poor place to operate a business (77%, compared to 57% of those demonstrating a positive perception of Victoria's overall business climate);
- Those that expect to expand their business (71%, as compared to 56% of those with no plans for change); and,
- Those that are dissatisfied with the City's overall level and quality of services (77%, compared to 58% of satisfied respondents).

Satisfaction with Contact Experiences

Contact experiences are predominately satisfactory; however, business operators are much less satisfied than they were in 2010. Satisfaction with both staff helpfulness and speed of service has declined significantly.

Among those who contacted or dealt with a City employee in the last 12 months, 67% are satisfied with the overall service they received, including 39% saying "very satisfied". This represents a significant decline since 2010, when 82% were satisfied, including 54% that said "very satisfied".

The contact experience attributes which have declined significantly since 2010 include:

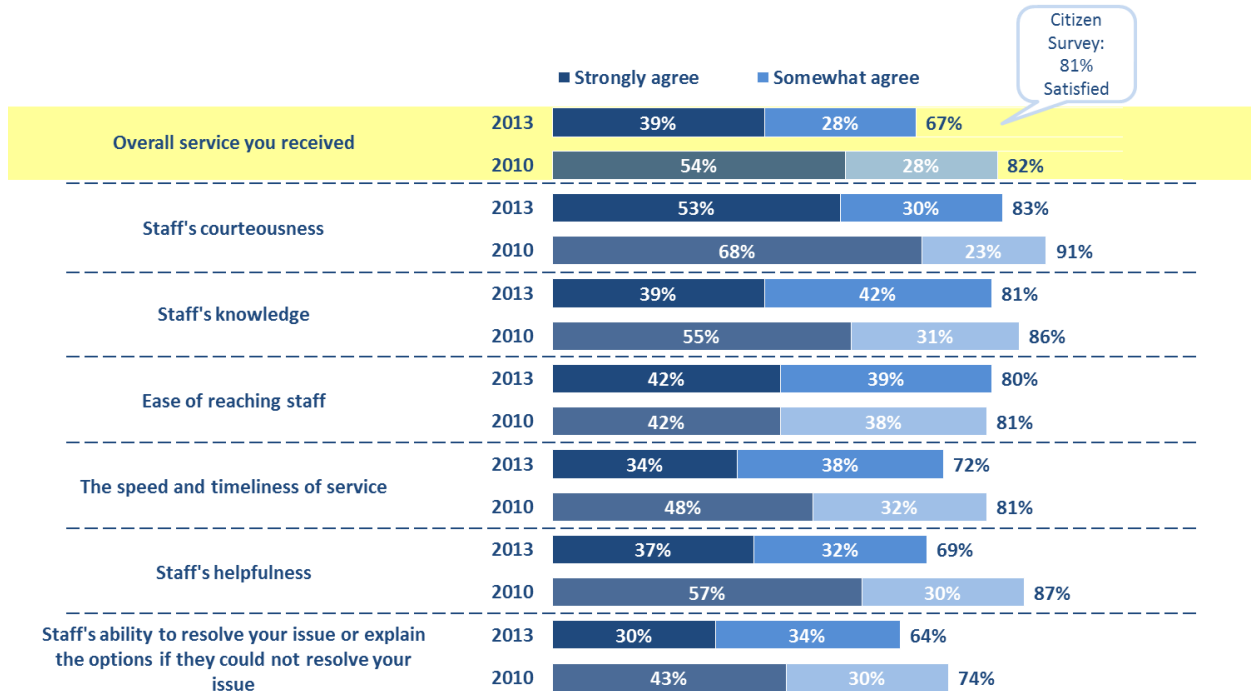
- 69% are satisfied with "staff's helpfulness" (as compared to 87% in 2010);
- 64% are satisfied with "staff's ability to resolve your issue or explain the options if they could not resolve your issue" as compared to 74% satisfied with "staff's ability to resolve your issue" in 2010). (Note: a slight wording change was made to the attribute);
- 72% are satisfied with "the speed and timeliness of service" (as compared to 81% in 2010);
- 83% are satisfied with "staff's courteousness" (as compared to 91% in 2010);

Satisfaction scores are similar to those attained in 2010 for:

- 81% are satisfied with "staff's knowledge" (vs. 86% in 2010); and
- 80% are satisfied with the "ease of reaching staff" (vs. 81% in 2010).

Satisfaction with the overall contact experience with City employees is lower among businesses than for citizens. Eighty-one percent of citizens are satisfied with the overall experience, as compared to 67% of businesses.

Satisfaction with Contact Experiences



Q26. And, thinking of the last time you contacted a City employee, how satisfied were you with the ...? Would you say you were ...? And how satisfied were you with ...? (Note: Wording change, in 2010 question was "Staff's ability to resolve your issue".)
Base: Have personally contacted or dealt with a City employee (n=183); 2010 (n=182)

- Satisfaction (combined "very/somewhat satisfied" responses) with the City's overall customer service is generally *higher* among businesses that think Victoria is a good place to operate a business, those that are satisfied with the City's services and those that perceive that they receive good value for their taxes.

Emergency Preparedness Kits

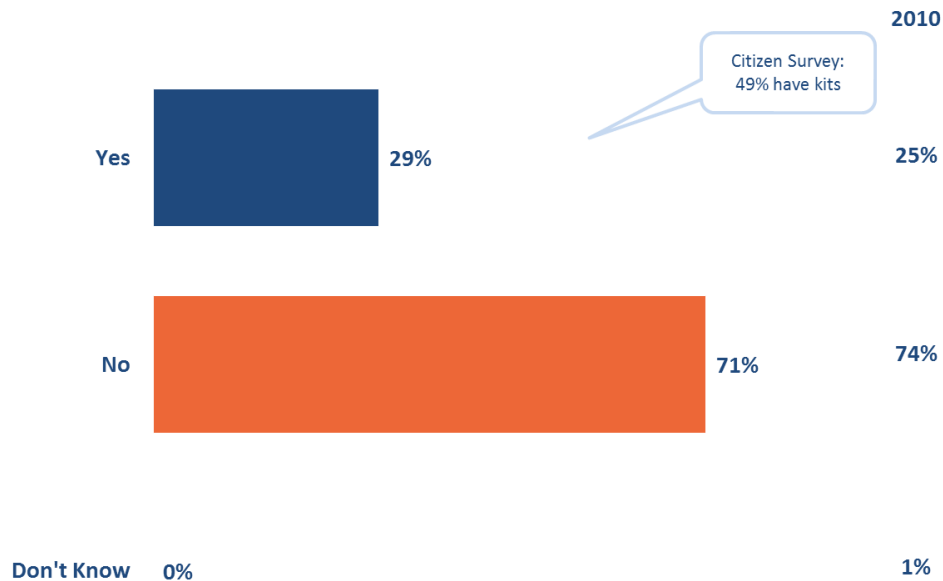
Most businesses still do not have an emergency preparedness kit.

Twenty-nine percent of businesses have an emergency preparedness kit that includes enough food, water, and other supplies for them and their staff for a minimum of three days. The majority (71%) of businesses are without such a kit.

Businesses are much less likely than citizens to have an emergency preparedness kit (29% of businesses vs. 49% of citizens).

On a positive note, the proportion of businesses with kits has edged up slightly since 2010 (from 25% in 2010 to 29% today).

Emergency Preparedness Kits



Q28. Does your business have an emergency preparedness kit that includes enough food, water, and other supplies for you and your staff for a minimum of three days?
Base: All Respondents (n=300); 2010 (n=300)



Businesses that are *more* likely to **have an emergency preparedness kit** include:

- Non-retail businesses (33%, compared to 20% of retail businesses); and,
- Business operators who have had contact with a City employee in the past 12 months (34%, compared to 22% of those who have not had contact).

Appendix A: Sample Characteristics

The table below illustrates the breakdown of the sample into key demographic and business categories.

Demographics

Gender			Own/Lease Business Space			Type of Business		
	2010	2013		2010	2013		2010	2013
Male	55%	61%	Own	-	29%	Retail	28%	30%
Female	45%	39%	Lease	-	70%	Health services	10%	9%
			Don't know	-	1%	Commercial/office	9%	9%
Neighbourhood			Operate Home Business			Restaurant food services	6%	9%
	2010	2013		2010	2013	Manufacturing	5%	6%
Burnside	26%	26%	Yes	22%	7%	Educational services	5%	5%
Downtown	23%	29%	No	78%	93%	Financial services	4%	5%
Fairfield- Gonzales	12%	9%	Number of Years Operating Business			Automotive Repair Shop	2%	5%
Fernwood	5%	4%		2010	2013	Other	30%	22%
Harris Green	6%	7%	5 or less	26%	12%	Number of Full-Time Employees		
Hillside Quadra	4%	3%	6-10	17%	18%		2010	2013
James Bay	7%	2%	11-15	14%	15%	1	22%	11%
North Jubilee	2%	2%	16-20	14%	12%	2-5	41%	42%
North Park	2%	5%	21-25	8%	9%	6-10	17%	22%
Oaklands	6%	3%	26-30	8%	14%	11+	18%	22%
Rockland	2%	4%	Over 30	12%	20%	Don't Know	1%	2%
South Jubilee	1%	2%	Mean	16.6	21.2	Mean	9.1	12.6
Victoria West	5%	4%						



Appendix B: The Questionnaire

INITIAL INTRODUCTION

Hello, this is _____ from Ipsos Reid, a professional public opinion research firm calling on behalf of the City of Victoria. We are not selling anything.

May I please speak with the person who is responsible for the overall management and direction of your company at this location? This person typically has a title such as owner, president, senior manager, etc.

Yes, speaking [READ RESPONDENT INTRO]

Transfer [READ RESPONDENT INTRO ONCE CONNECTED OR AS A MESSAGE]

No, not available [ARRANGE FOR AN APPOINTMENT & CALL BACK]

RESPONDENT INTRODUCTION

Hello, this is _____ calling from Ipsos Reid. We're a professional public opinion research company calling on behalf of the City of Victoria. We are not selling anything. The City is looking for businesses' input about the programs and services it provides and the issues you think the City should prioritize.

Is now a good time?

Yes [CONTINUE]

No [ARRANGE FOR AN APPOINTMENT & CALL BACK]

(IF NECESSARY: Please be assured that this survey is completely confidential.)

(IF NECESSARY: This survey will take around 15 minutes to complete.)

Does your business operate at one or more locations in the City of Victoria?

Yes

No

[IF 'YES' IN QA, CONTINUE. OTHERWISE, THANK & TERMINATE.]

B. (DO NOT ASK) RECORD GENDER

Male

Female

(READ TO ALL) Thank you. Please answer all questions from the perspective of your business at this location.



ISSUE AGENDA

Q1. As a business operating in the City of Victoria, 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? [ACCEPT 1 MENTION] Are there any other important local issues? [ACCEPT 1 MENTION] [IF 'NONE/DK/REF' AT ANY TIME, SKIP TO Q2]

None/nothing

Other [specify]

[RECORD 1ST MENTION]

[RECORD 2ND MENTION]

OVERALL BUSINESS CLIMATE

Q2. Overall, how would you rate the City of Victoria as a place to operate a business? Would you say (READ LIST)?

Very good

Good

Poor

Very poor

Q3. What do you like best about operating a business in the City of Victoria? [ACCEPT 1 MENTION]

None/nothing

Other [specify]

Q4. And, what do you like least about operating a business in the City of Victoria? [ACCEPT 1 MENTION]

None/nothing

Other [specify]

Q5. Please tell me if you agree or disagree with each of the following statements. The first one is [INSERT ITEM]. (Is that strongly or somewhat agree/disagree?) How about [INSERT ITEM]? (REPEAT LIST IF NECESSARY)

[RANDOMIZE]

The City's regulatory environment is fair to businesses

The City's rules and regulations for businesses are readily accessible

The City's rules and regulations for businesses are easy to understand

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree



Q6. Does your business have plans to (READ LIST) in the next five years? [ACCEPT 1 MENTION]

[DO NOT RANDOMIZE]

Expand

Downsize

Close or shut down

[ALWAYS LAST] (DO NOT READ) None of the above

Q7. Do you plan on moving or relocating your business to another location in the next five years?

Yes

No

[IF 'YES' IN Q7, ASK Q8. OTHERWISE, SKIP TO Q11.]

Q8. Do you plan on relocating (READ LIST)?

[ROTATE 1-2, 2-1]

Within the City of Victoria

Outside of the City of Victoria

BUSINESS LOCATION

[ASK ALL]

Changing topics slightly...

Q11. I'm now going to read some statements about the area where your business is located and would like you to tell me if you agree or disagree with each one. The first one is [INSERT ITEM]. (Would that be strongly or somewhat agree/disagree)? How about [INSERT ITEM]? (REPEAT LIST IF NECESSARY)

[RANDOMIZE]

It is easy to find parking in the area where my business is located

Staff and customers feel safe and secure in the area where my business is located

The appearance of buildings and storefronts in the area where my business is located is satisfactory

The appearance and condition of public amenities and spaces in the area where my business is located is satisfactory

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree



DOWNTOWN VICTORIA

The next few questions are about the City of Victoria's downtown core.

Q12. Please tell me if you agree or disagree with each of the following statements about the city's downtown core. The first one is [INSERT ITEM]. (Is that strongly or somewhat agree/disagree?) How about [INSERT ITEM]? (REPEAT LIST IF NECESSARY)

[RANDOMIZE]

[ALWAYS READ ITEMS 1 AND 2 AS A SET] The downtown core is vibrant and exciting during the day

The downtown core is vibrant and exciting during the evening

The downtown core is clean and well-maintained

The downtown core has a good range of shops, entertainment, and services that meet the community's needs

Parking in the downtown core is accessible and convenient

[ALWAYS READ ITEMS 6 AND 7 AS A SET] The downtown core is safe during the day

The downtown core is safe at night

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree

CITY SERVICES

Changing topics slightly...

Q13 How satisfied are you with the overall level and quality of services provided by the City of Victoria? Would you say (READ LIST)?

Very satisfied

Somewhat satisfied

Not very satisfied

Not at all satisfied

I'd now like to get your feedback on a number of specific services provided to you by the City of Victoria.



Q14. Please rate how satisfied you are with each of the following services on a scale of (READ LIST). If you are unfamiliar with or have no experience with a particular service, simply say 'not applicable' and I'll move on to the next item. The first one is [INSERT ITEM]. How about [INSERT ITEM]? (REPEAT LIST IF NECESSARY)

[RANDOMIZE]

Lighting, condition, and maintenance of streets and sidewalks

Enforcement of bylaws for issues such as property and noise

Design of streets, public spaces, and boulevards (IF NECESSARY: Design refers to both the functionality and aesthetics)

City beautification such as signage, landscaping, public art, and street banners

Fire Department services

Building permits and inspections

Business Licensing

City website

Very satisfied

Somewhat satisfied

Not very satisfied

Not at all satisfied

(DO NOT READ) Not applicable

ENGAGEMENT WITH BUSINESSES

Changing topics slightly, I'd now like to ask you a few questions about the City of Victoria's public engagement practices.

Q15. Please tell me if you agree or disagree with each of the following statements. The first one is [INSERT ITEM]. (Is that strongly or somewhat agree/disagree?) How about [INSERT ITEM]? (REPEAT LIST IF NECESSARY)

[RANDOMIZE]

The City listens to businesses

I am pleased with the overall direction that the City is taking

The City keeps me informed

Strongly agree

Somewhat agree

Somewhat disagree

Strongly disagree

13a. What is the most important action the City can take to attract and retain business in the City in general? (ALLOW UP TO 2 RESPONSES, BUT DO NOT PROBE)

[RECORD OPEN END]



FINANCING

Changing topics slightly...

Q16. Thinking about all the programs and services you receive from the City of Victoria, would you say that overall you get good value or poor value for your tax dollars? (Is that very or fairly good/poor value?) (IF NECESSARY: If you lease your current place of business and don't pay taxes directly to the City, please keep in mind that these taxes are still reflected in the rent that you pay to your property owner.)

Very good value
Fairly good value
Fairly poor value
Very poor value

Q17. Municipal property taxes are the primary way to pay for services provided by the City of Victoria. Due to the increased cost of maintaining current service levels and infrastructure, the City of Victoria must balance taxation and service delivery levels. To deal with this situation, which one of the following four options would you most like the City of Victoria to pursue? (READ LIST) [ACCEPT 1 MENTION ONLY]

[ROTATE 1-4, 4-1]

Increase taxes - to enhance or expand services
Increase taxes - to maintain services at current levels
Cut services - to maintain current tax level
Cut services - to reduce taxes
[ALWAYS LAST] (DO NOT READ) None

COMMUNICATION

Changing topics slightly...

Q21. In your opinion, does your business currently receive (READ LIST) information from the City?

[ROTATE 13, 3-1]

Too much
Just the right amount
Too little

Q23. Thinking about your business information needs, what kinds of information do you want the City to provide you with? Any others? [ACCEPT 2 MENTIONS]

None/nothing
Other [specify]



Q24. There are a number of different ways the City can consult with businesses on important local issues. Please tell me how interested you would be in providing your input to the City through each of the following methods, using a scale of (READ LIST). The first one is [INSERT ITEM]. How about [INSERT ITEM]? (REPEAT LIST IF NECESSARY)

[RANDOMIZE]

Public meetings

Telephone survey

Online survey

Mail survey

Online discussion forum

Feedback form or comment card

Email input to staff or Council

Very interested

Somewhat interested

Not very interested

Not at all interested

Q19aNEW. Prior to this survey, have you been aware of opportunities to provide input to the City of Victoria on various topics?

Yes

No

Don't know (DO NOT READ)

Q19bNEW. Have you ever provided your feedback to the City of Victoria?

Yes

No

Don't know (DO NOT READ)

[IF NO, CONTINUE OTHERWISE SKIP TO Q25]

Q19cNEW. What is the main reason why you have not provided your feedback to the City of Victoria?

[RECORD OPEN END] (DO NOT PROBE)

No reason/No reason in particular/Nothing specific (DO NOT READ)

Don't know (DO NOT READ)

CUSTOMER SERVICE

Q25. In the last twelve months, have you personally contacted or dealt with a City employee?

Yes

No



[IF 'YES' IN Q25, ASK Q26. OTHERWISE, SKIP TO Q28.]

Q26. And, thinking of the last time you contacted a City employee, how satisfied were you with the [INSERT ITEM]? Would you say you were (READ LIST)? And how satisfied were you with [INSERT ITEM]? (REPEAT LIST IF NECESSARY)

[RANDOMIZE]

[ALWAYS FIRST] Overall service you received

Staff's knowledge

Staff's helpfulness

Staff's ability to resolve your issue or explain the options if they could not resolve your issue

Staff's courteousness

The speed and timeliness of service

Ease of reaching staff

Very satisfied

Somewhat satisfied

Not very satisfied

Not at all satisfied

EMERGENCY PREPAREDNESS

[ASK ALL]

Changing topics slightly...

Q28. Does your business have an emergency preparedness kit that includes enough food, water, and other supplies for you and your staff for a minimum of three days?

Yes

No

DEMOGRAPHICS

Finally, I just want to ask you some questions for statistical purposes.

Q24. Do you own or lease the space where your business is located?

Own

Lease



Q29. Which of the following best describes your type of business? Please stop me when I reach your category. (READ LIST) [ACCEPT 1 MENTION]

[RANDOMIZE]

Retail

Commercial/office

Entertainment

Hotel

Restaurant food services

Financial services

Manufacturing

Health services

Educational services

Other [specify]



Q30. Do you operate a home-based business?

Yes

No

Q31. How many full-time equivalent workers are employed at your company at this location? If you are unsure, please give me your best estimate. (Note: Full-time equivalent is every full-time worker (35+ hours/week) plus any combination of part-time workers that adds up to a full-time equivalent) (RECORD NUMBER)

[RANGE 1-9999]

Q32. How many years have you operated a business in the City of Victoria? (IF LESS THAN 1 YEAR, ENTER 0)

[RANGE 0 TO 100]

Q33. Can you please provide me with your postal code? (IF NECESSARY, ADD: I assure you that this information will remain completely confidential. We only use it for classification purposes.)

(INTERVIEWER NOTE: Try to get the full 6-digit postal code. If necessary, we will accept only the first 3 digits.)

On behalf of Ipsos Reid and the City of Victoria, thank-you for helping us to complete this survey!