



BUSINESS SURVEY REPORT (2019)

Mr. William Schatten, VP, Research and Analytics | T. 416.960.1310 F. 416.960.9602 | E. wschatten@forumresearch.com



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PURPOSE

The purpose of the Saanich business survey (2019) was to carry out a statistically valid survey among businesses licensed by, and operating in, the District of Saanich.

Topics to be covered included:

- perceptions of service delivery
- service availability
- quality of services
- municipal participation

The survey also gathered data for the District's planning and reporting processes.

EXECUTIVE SUMMARY

Overall, the results and feedback from the 2019 business survey reveal a very positive attitude among business owners within the District of Saanich and suggest it is a good place for businesses to succeed. Key findings include:

- 100% of business owners say quality of life in Saanich is either "good" or "very good";
- 94% rate Saanich as either a "good" or "very good" place to operate a business;
- 89% are pleased with the overall direction the District of Saanich is taking.

When it comes to services in Saanich, a majority of respondents were either very or somewhat satisfied for each service item. Highest satisfaction ratings include: "fire services" (99%), "fire safety inspections for businesses" (98%), and "reliability and quality of drinking water" (97%).

When it comes to the perceptions held by businesses regarding services and taxation, 37% of respondents would most prefer to retain the same level of municipal services with a managed tax increase. Top priorities for budget spending included: roads and traffic control (62%), water distribution system (62%), sanitary sewer system (61%), and environment protection and enhancement (57%).

Half of business owners (53%) said they have had contact with the municipality within the past 12 months. Based on their most recent experience dealing with a municipal employee, an overwhelming majority of respondents were satisfied with all aspects of the service provided by the staff. Respondents agreed that staff treated them fairly (96%), the staff were knowledgeable and competent (94%), and they waited a reasonable amount of time at the service location (93%).

Future satisfaction surveys targeted toward business owners will be very important to inform a business-focused agenda moving forward, identify areas of opportunity, and ensure business owners have the tools they need to continue to flourish.

METHODOLOGY

The Saanich business survey (2019) was conducted among businesses licensed by, and operating in, the District of Saanich.

Respondent businesses were contacted at random by telephone, using Forum’s state of the art Computer Assisted Telephone Interviewing System (CATI).

Fieldwork dates	January 21-February 1
Method	Computer Assisted Telephone Interviewing (CATI/Telephone)
Criteria for participation	Business licensed by, and operating in, the District of Saanich
Sample Size	403
Average length	17 minutes
Margin of error	± 4.88%, 19 times out of 20

*Due to rounding, numbers presented throughout this document may not add up to the totals provided. For example, in some cases, the sum of all question values may add up to 101% instead of 100%. Similar logic applies to TOP2 and BTM2 groupings.

Following the direction and guidance of Council, Saanich included some new questions as well as additional categories within some existing questions to the 2019 business survey. Therefore, we were unable to “trend” or compare the data from the questions with additional categories against the same questions that were used in previous business surveys.

WHAT IS A “TOP BOX,” “BOTTOM BOX,” OR “TOP2” SCORE?

The top box score (also referred to as TOP2) is a generally accepted research practice when using a 4 or 5-point scale. It is simply the net percentage of the highest categories on the rating scale.

For example, if the scale is: “very satisfied”, “somewhat satisfied”, “somewhat dissatisfied”, and “very dissatisfied”, then the combined number of respondents who answered either “very satisfied” or “somewhat satisfied” would be reported as TOP2, or the top box score. Conversely, the bottom box score is the net percentage of respondents of the lowest categories of the rating scale. Using the same example, the combined number of respondents who answered “somewhat dissatisfied” or “very dissatisfied” would be grouped together to represent BTM2, or bottom box score.

WHAT IS N?

A standalone N represents an indication of the number of respondents in a given sample group.

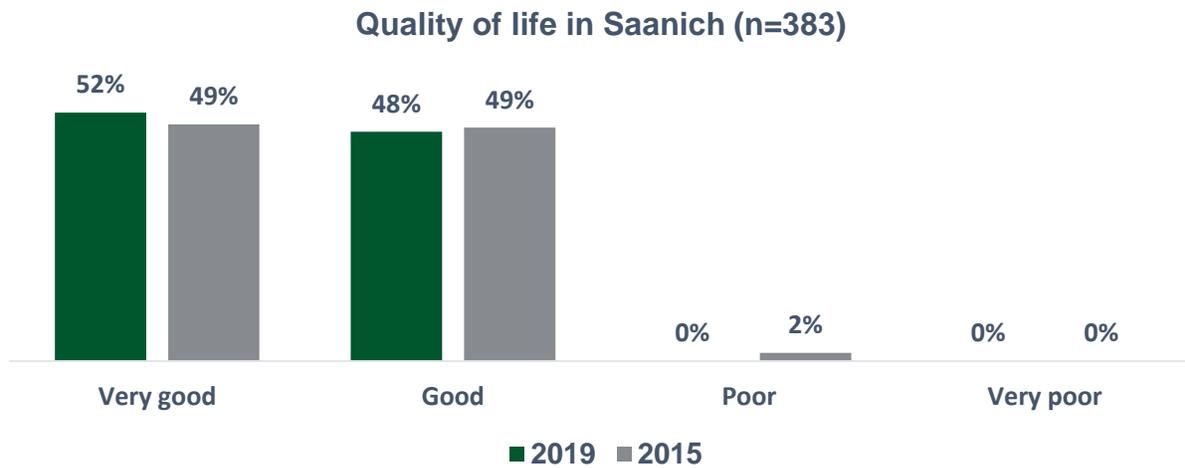
For example, n=1022 means 1022 respondents answered a particular question.

QUALITY OF LIFE IN SAANICH

Q1A. ASSESSMENT OF THE QUALITY OF LIFE IN SAANICH

How do business owners rate quality of life in the District of Saanich?

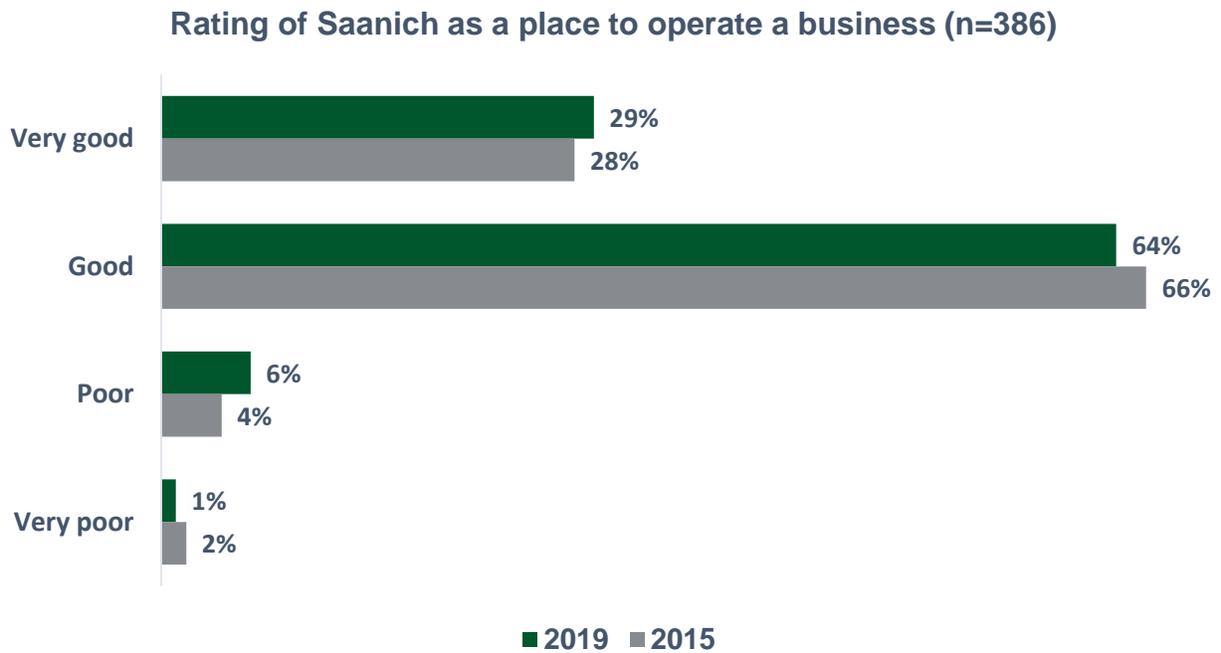
All respondents (100%) say that quality of life in Saanich is either “good” or “very good” (48% and 52% respectively).



Q1A. How would you rate the overall quality of life in Saanich? Would you say...

Q1B. ASSESSMENT OF SAANICH AS A PLACE TO OPERATE A BUSINESS

When looking at the rating of Saanich as a place to operate a business, business owners gave Saanich a rating of 94% (TOP2).



Q1b. How would you rate Saanich as a place to operate a business?

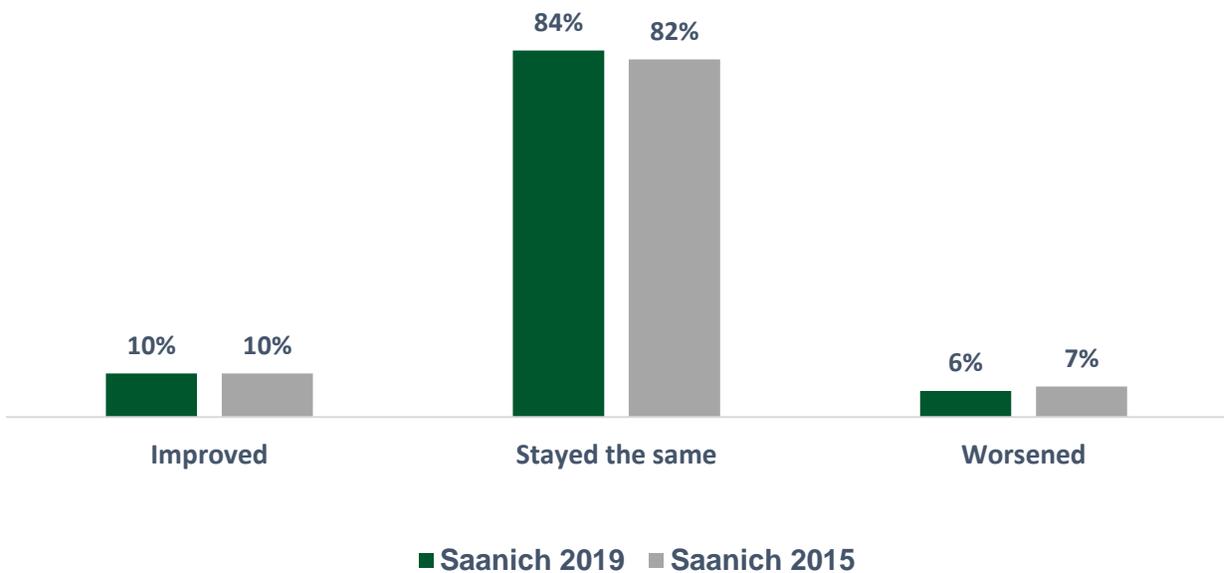
Q2. IMPROVEMENT OF SAANICH AS A PLACE TO OPERATE A BUSINESS

When respondents were asked whether Saanich, as a place to operate a business, has improved, worsened or stayed the same in the past three years, 84% of respondents said it has stayed the same, 10% of respondents said that it has improved, and less than 6% said it has worsened.

Respondents who said it has improved attributed this to the following: “population growth/more people live here” (24%); “more construction/new buildings” (23%); and “growth in economy/business” (17%).

Respondents who said it has worsened attributed it to the following: “government regulation/red tape” (43%); “poor economy/business environment” (32%); “high taxes/fees” (21%); and “high real estate costs” (20%).

**Saanich as a place to operate a business in the past three years
(n=345)**



Q2. Do you feel that Saanich as a place to operate a business in the past three years has improved, worsened, or stayed the same?

(A) Why do you say it has improved?

(B) Why do you say it has worsened?

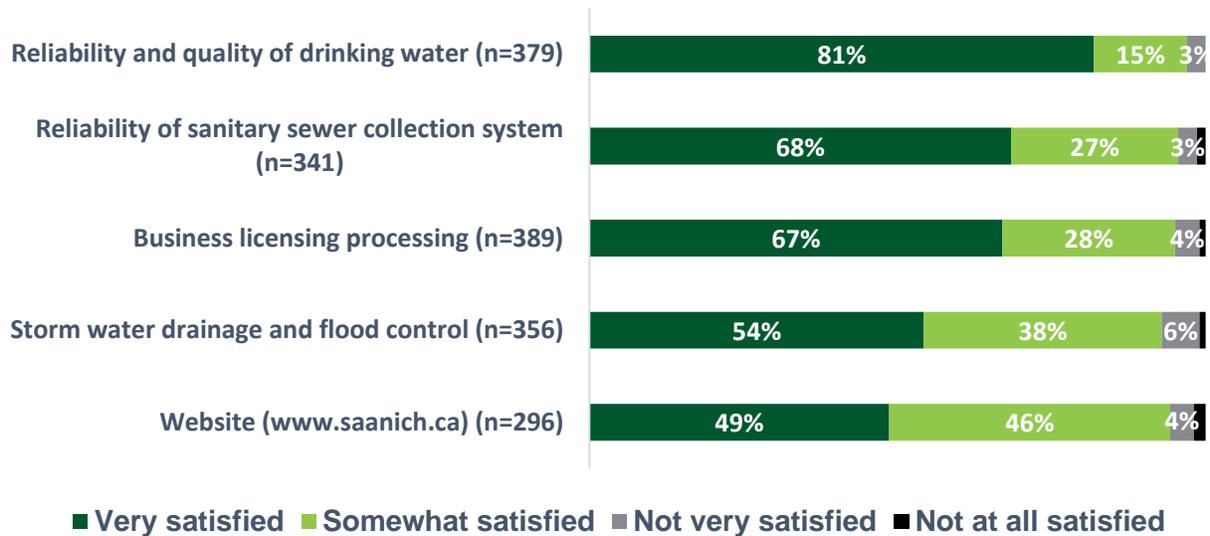
SERVICE SATISFACTION AND IMPORTANCE

Q3A. SATISFACTION WITH SAANICH'S SERVICES

Respondents were asked to rate their level of satisfaction with various services offered by the District of Saanich.

Services with the highest satisfaction rates include: “reliability and quality of drinking water” (97%) and “reliability of sanitary sewer collection system” (96%).

Satisfaction with services provided by the District of Saanich



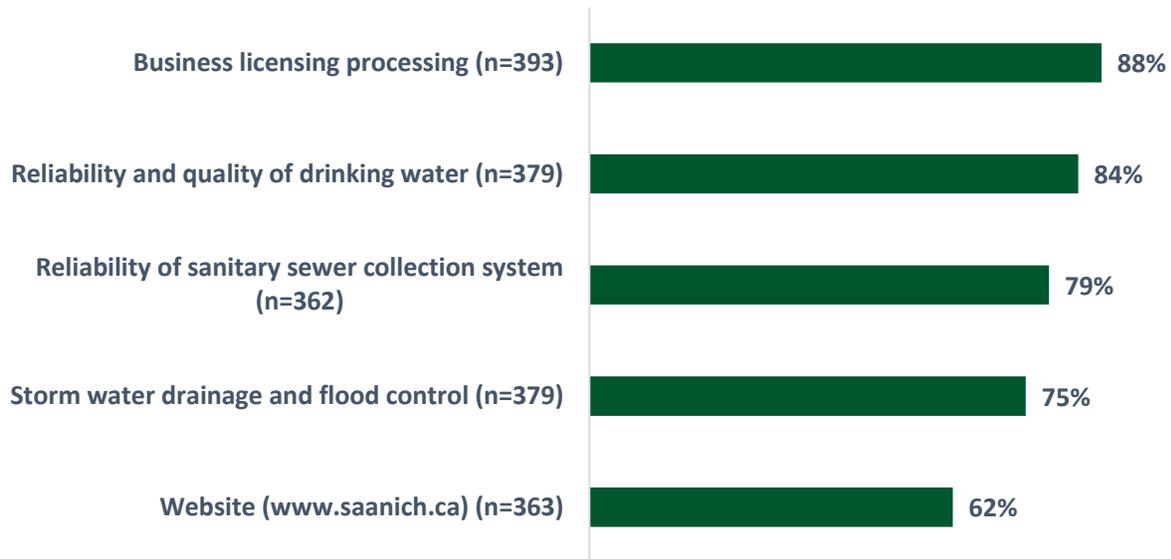
Q3a. I'm going to read out a list of services provided by the District of Saanich. As a business owner in Saanich, please tell me how satisfied you are with each of the following

Q3B. WHICH SERVICE PROVIDED BY SAANICH IS MOST IMPORTANT?

Respondents were asked “how important are these services to your business”.

Top mentions include: “business licensing processing” (88%) and the “reliability and quality of drinking water” (84%). The least important service is the website (62%).

Importance of services provided by Saanich

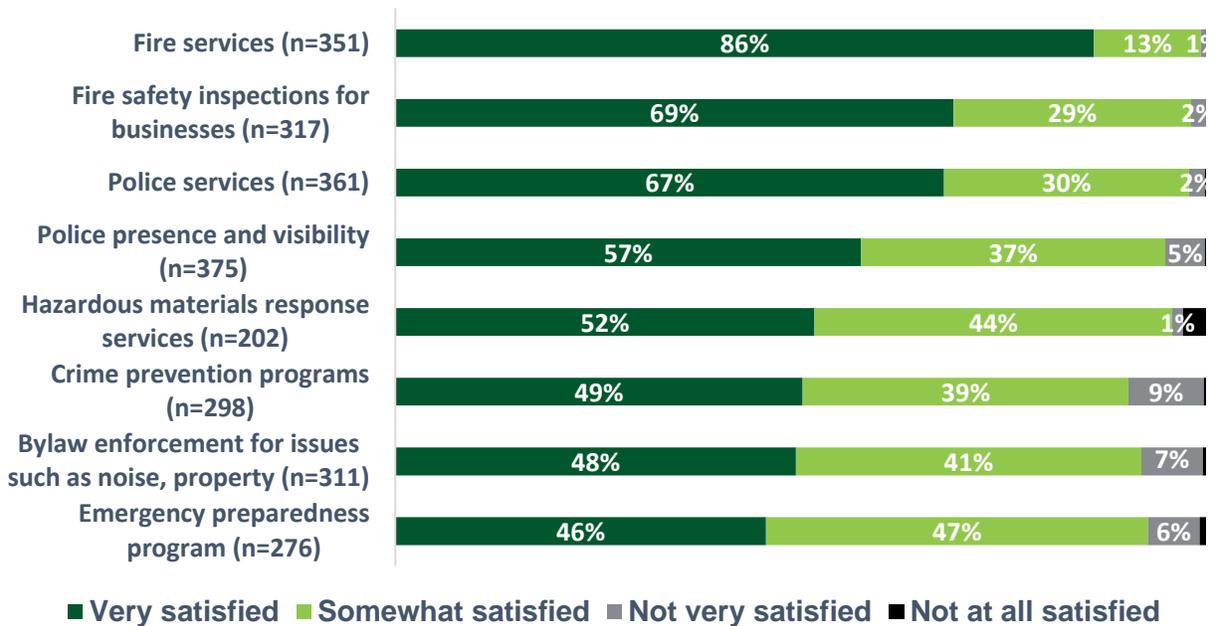


Q3b. Now, how important are each of these services to your business?

Q3A. SATISFACTION WITH PUBLIC SAFETY SERVICES

The survey also asked respondents' satisfaction with public safety services. The highest satisfaction ratings were recorded for “fire services” (99%), “fire safety inspections for businesses” (98%), “police services” (97%), and “hazardous materials response services” (96%).

Satisfaction with public safety services

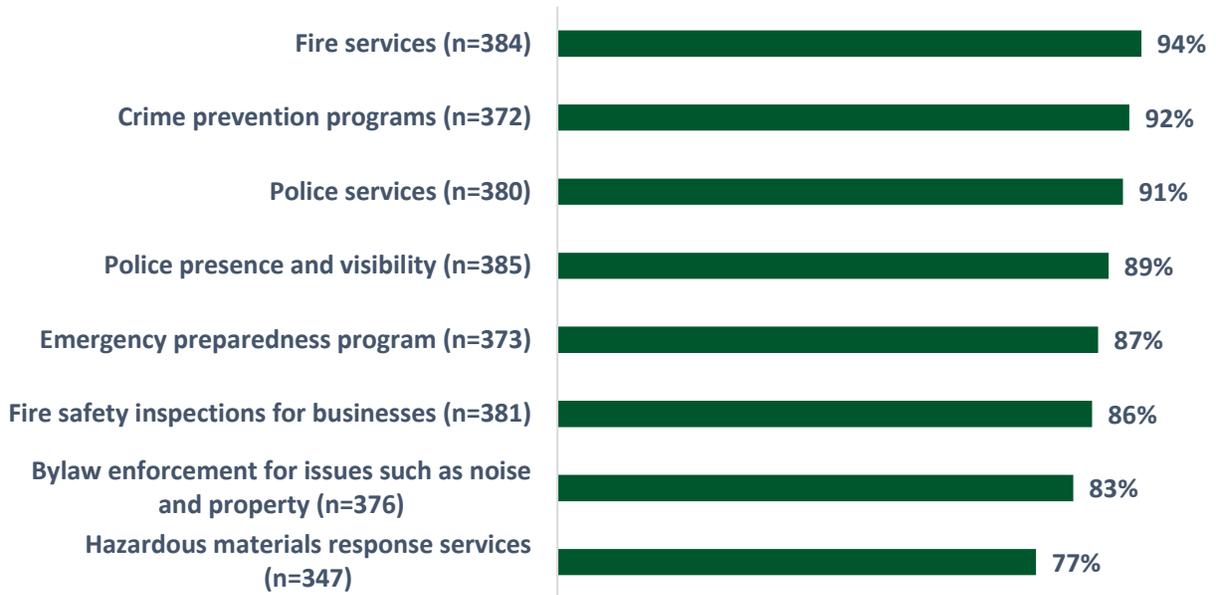


Q3a. I'm going to read out a list of services provided by the District of Saanich. As a business owner in Saanich, please tell me how satisfied you are with each of the following

Q3B. WHICH PUBLIC SERVICE IS MOST IMPORTANT?

The most important public service, “fire services” (94%), also has the highest satisfaction rates.

Importance of public services (TOP2)

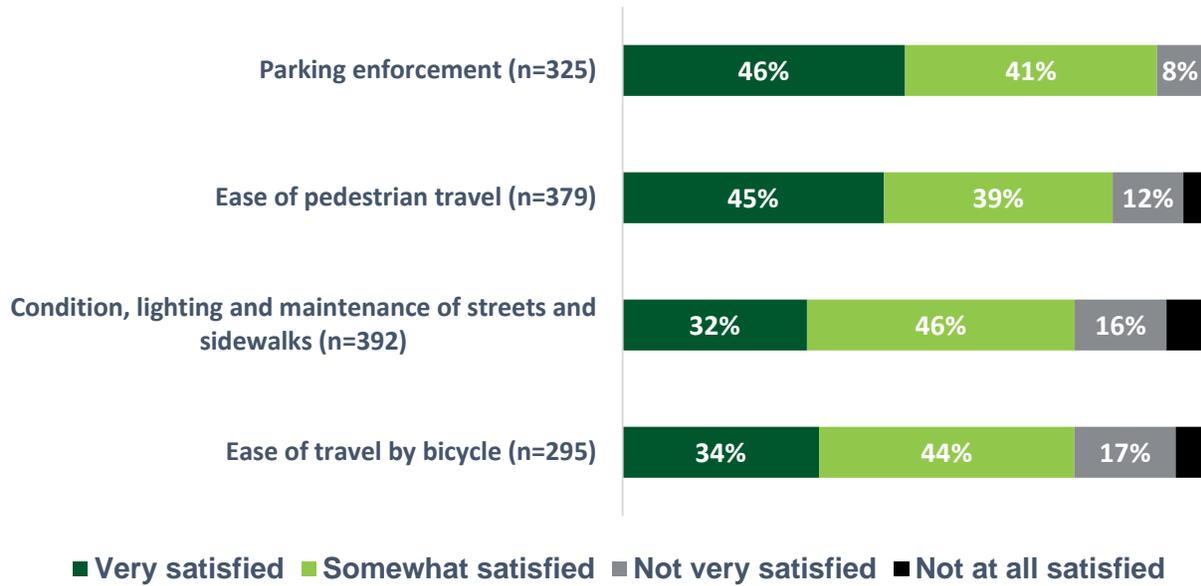


Q3b. Now, how important are each of these services to your business?

Q3A. SATISFACTION WITH TRANSPORTATION IN SAANICH

Respondents are most satisfied (TOP2) with “parking enforcement” (88%) and the “ease of pedestrian travel” (84%),

Satisfaction with transportation services

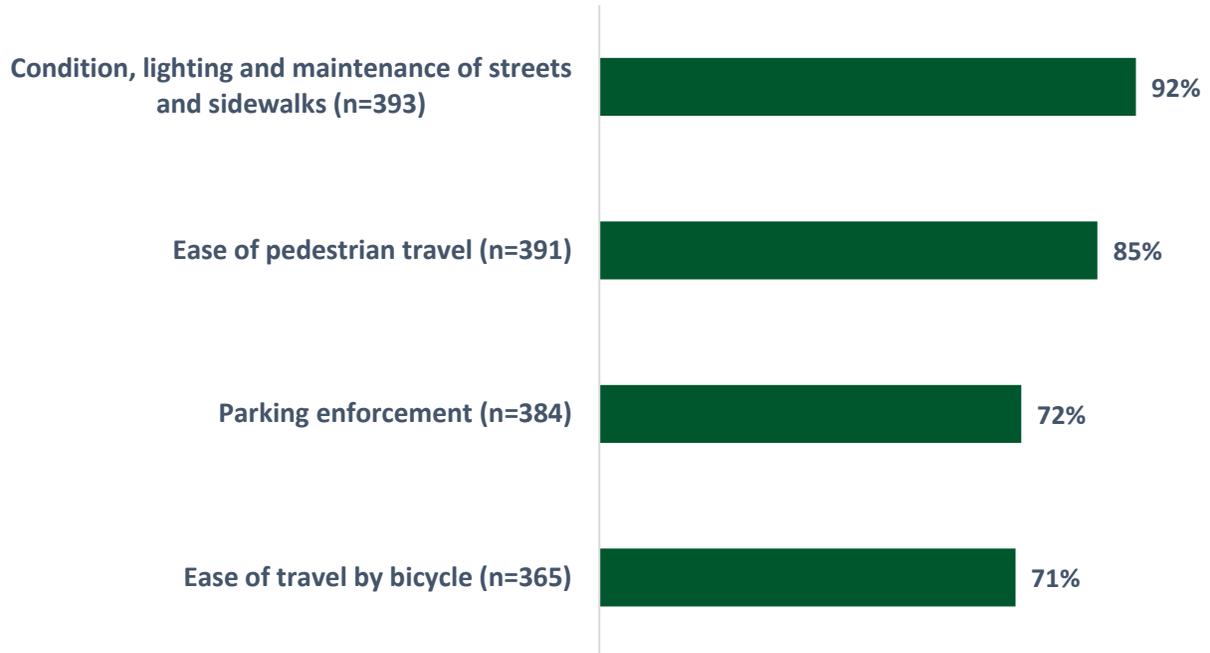


Q3a. I'm going to read out a list of services provided by the District of Saanich. As a business owner in Saanich, please tell me how satisfied you are with each of the following

Q3B. IMPORTANCE OF TRANSPORTATION SERVICES IN SAANICH

The most important service, the “condition, lighting, and maintenance of streets and sidewalks” (92%), is also the service with the lowest satisfaction rates. Respondents think services that benefit pedestrians are more important than other transportation services.

Importance of transportation services



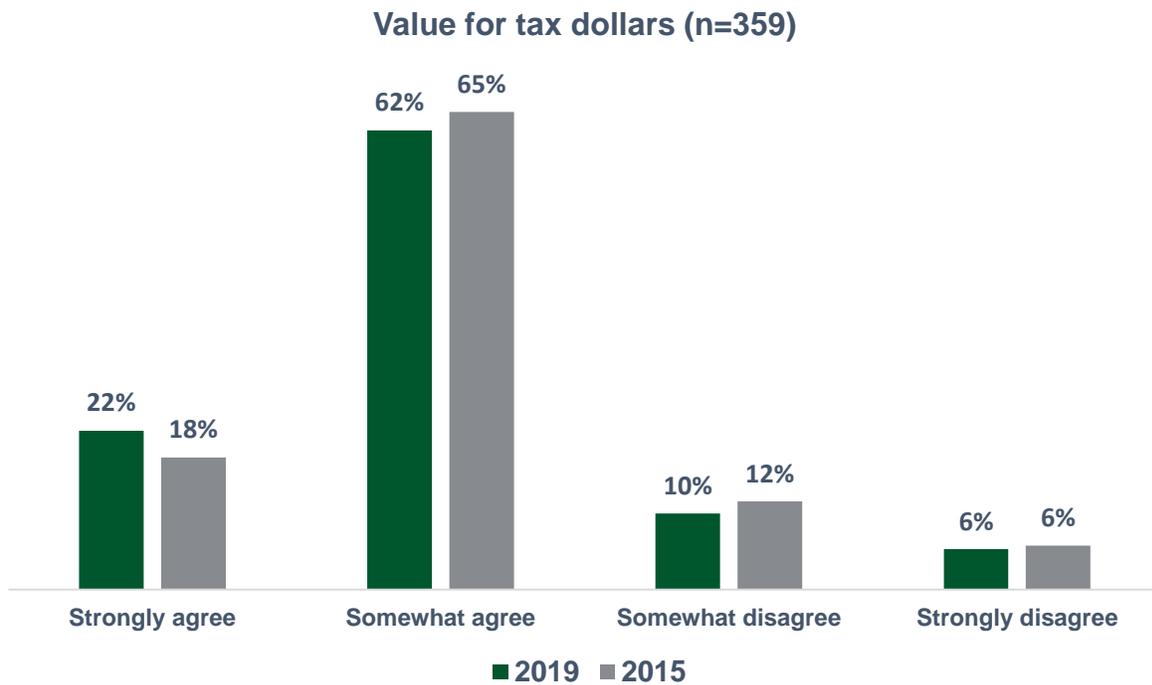
Q3b. Now, how important are each of these services to your business?

FINANCIAL SUSTAINABILITY

Q6A. VALUE FOR TAX DOLLARS

Do business owners feel they receive good value for their tax dollars?

88% either strongly or somewhat agree that they receive good value for their tax dollars (22% and 62% respectively).

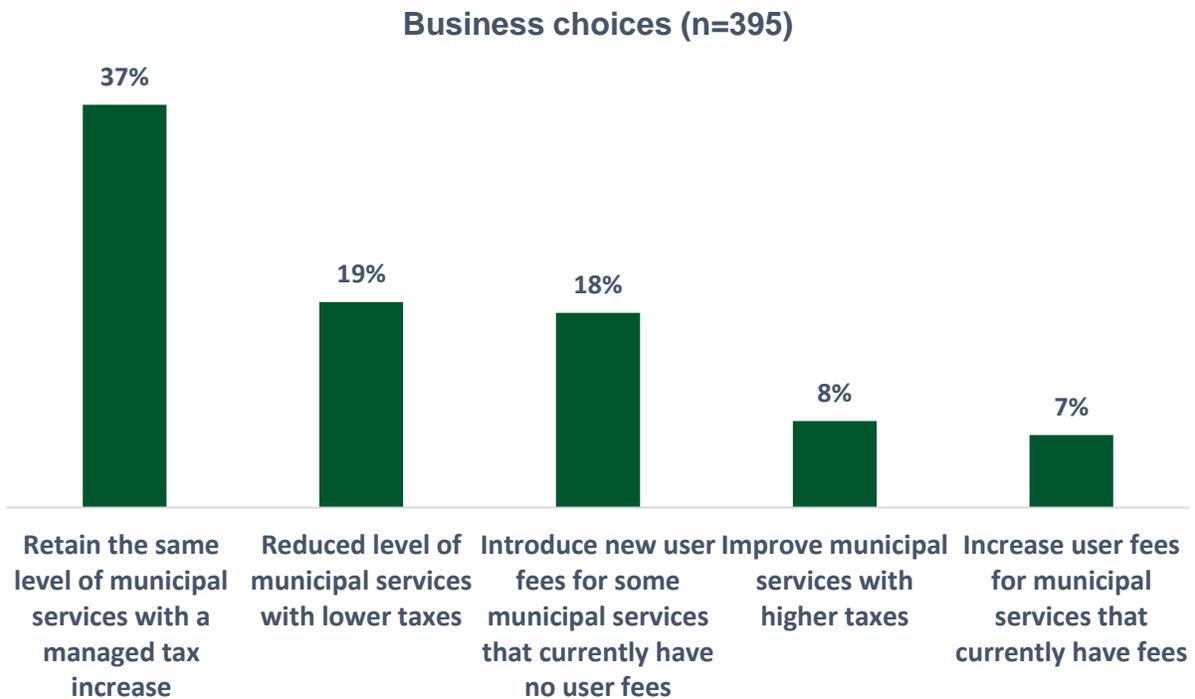


Q6a. For each of the following statements I'd like you to tell me how much you agree or disagree with following statements:
I receive good value for the municipal taxes I pay

Q4. PAYING FOR SERVICES

In order for the District of Saanich to understand perceptions held by businesses when it comes to services and taxation, Council wanted to know which of the following realistic choices were preferred: “retain the same level of municipal services with a managed tax increase”, “reduced level of municipal services with lower taxes”, “introduce new user fees for some municipal services that currently have no user fees”, “improve municipal services with higher taxes”, or “increase user fees for municipal services that currently have fees”.

If faced with the choice, 37% of respondents would most prefer to “retain the same level of municipal services with a managed tax increase”.

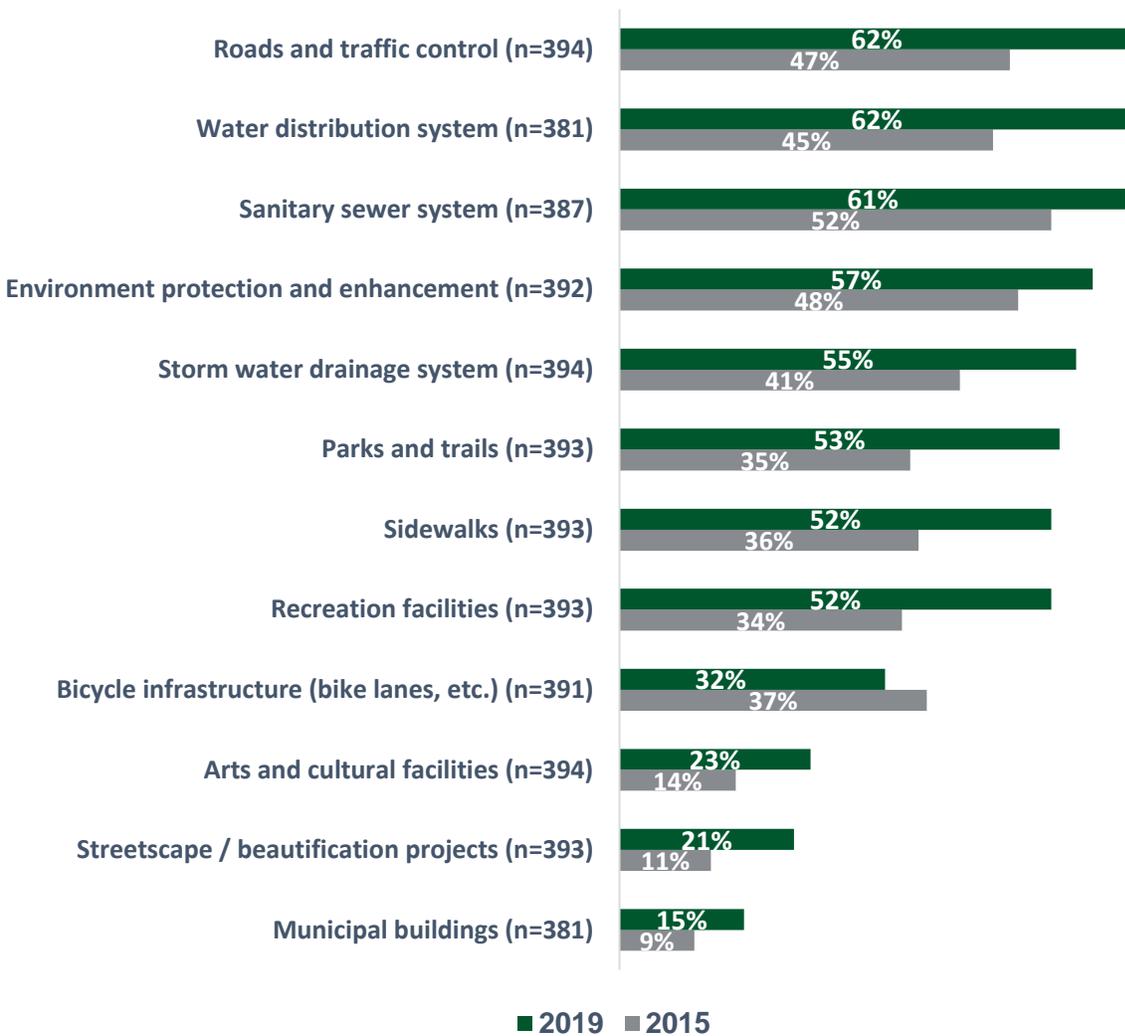


Q4. If faced with the following realistic choices, what would you advise Council to do?

Q5. PRIORITY FOR FUTURE SPENDING

Saanich spends a portion of its yearly budget on large projects, known as capital budgets. Given a list of possible projects, respondents were asked to prioritize each project for future spending on 10-point scale (where 1 is the lowest priority and 10 is the highest priority). Top priority items for budget spending, where respondents gave a rating of 8, 9 or 10 included “roads and traffic control” (62%), “water distribution system” (62%), “sanitary sewer system” (61%), and “environment protection and enhancement” (57%). Projects that were not a top priority for spending amongst respondents included “arts and cultural facilities” (23%), “streetscape / beautification projects” (21%) and “municipal buildings” (15%). A notable change from 2015 is a decrease in the priority of “bicycle infrastructure”; all other capital budgets have increased their ratings from 2015.

Top priority items (rating 8, 9, 10)



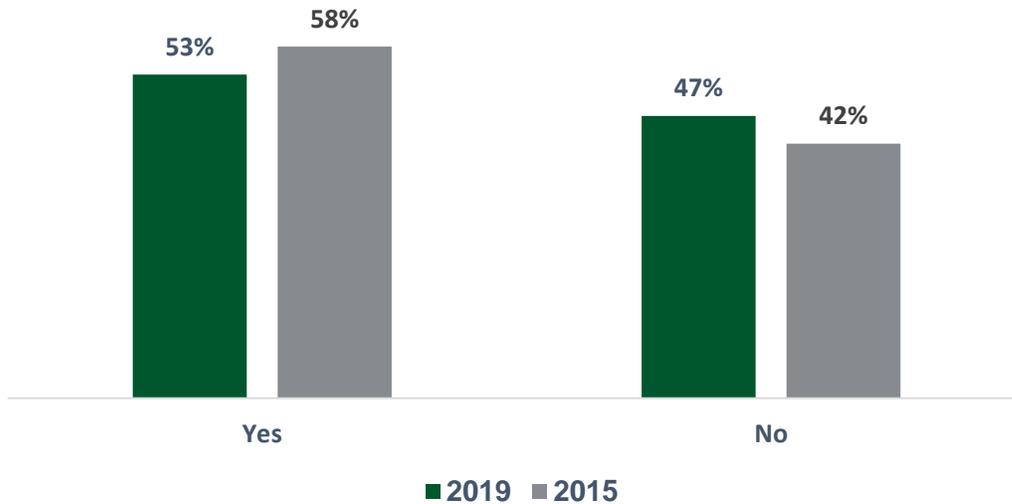
Q5. On a scale of 1 to 10 where 1 is the lowest priority and 10 is a very high priority, please indicate how much of priority each project would be to you.

COMMUNICATION AND PUBLIC ENGAGEMENT

Q7. CONTACT WITHIN 12 MONTHS

When respondents were asked whether or not they have had any personal contact (in-person, by phone, email or fax) with a Saanich employee over the last 12 months, 53% said they have had contact.

Personal contact with a Saanich employee (n=395)



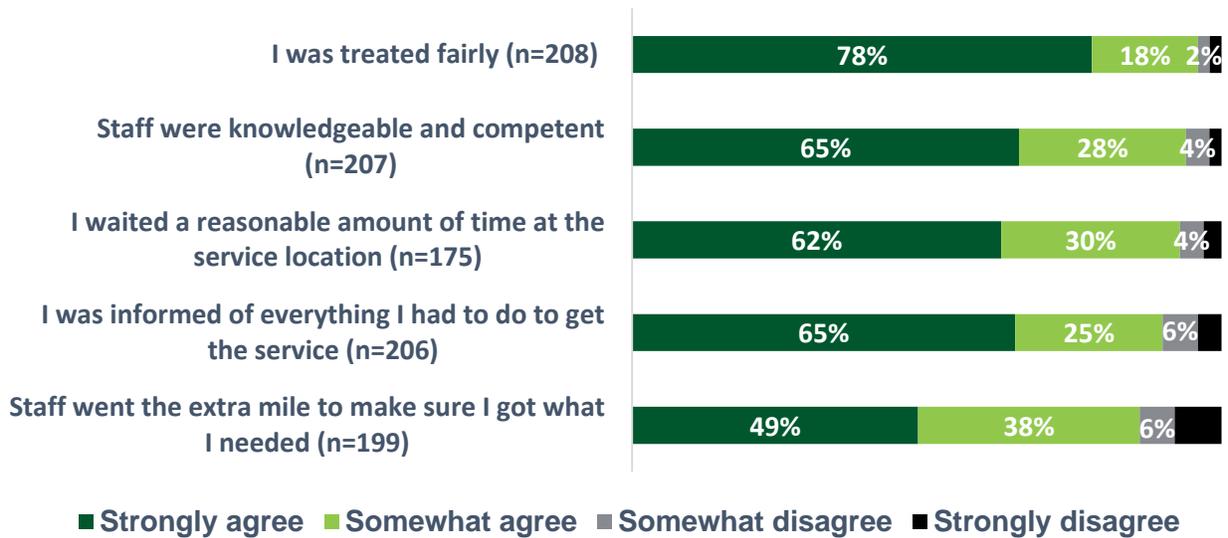
Q7. Have you had any personal contact (in-person, by phone, email or fax) with a Saanich employee over the last 12 months?

Q8. SATISFACTION WITH SERVICE DELIVERY

Based on their most recent experience with a Saanich employee, respondents were asked to provide feedback regarding various aspects of the service delivery.

An overwhelming majority of respondents were satisfied with all aspects of service delivery provided by staff. As well, the largest proportion of residents to “strongly agree” was for the statement: “I was treated fairly” (78%).

Respondent satisfaction with Saanich employees



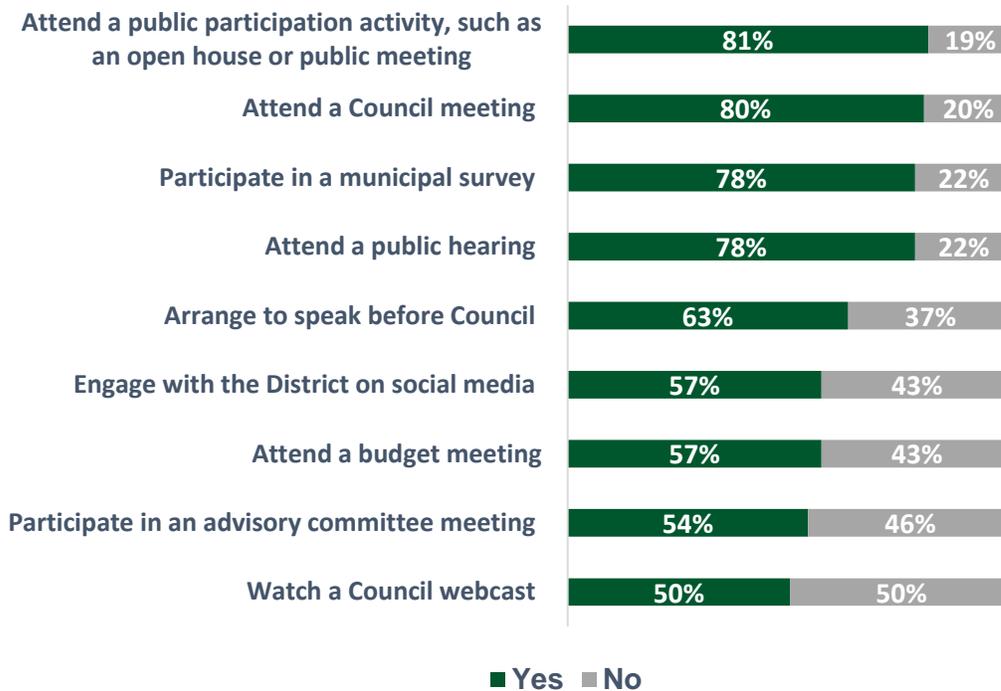
Q8. What was your impression of the service provided by the Saanich employee with your most recent contact?

Q10. COMMUNICATION

Do Saanich business owners have information about how to get involved and engaged in municipal activities?

A large majority of respondents say they feel they can find the information they need to “attend a public participation activity” (81%), “attend a Council meeting” (80%), a “public hearing” (78%), and “participate in a municipal survey” (78%).

Knowledge in finding information to participate in various activities in Saanich (n=395)



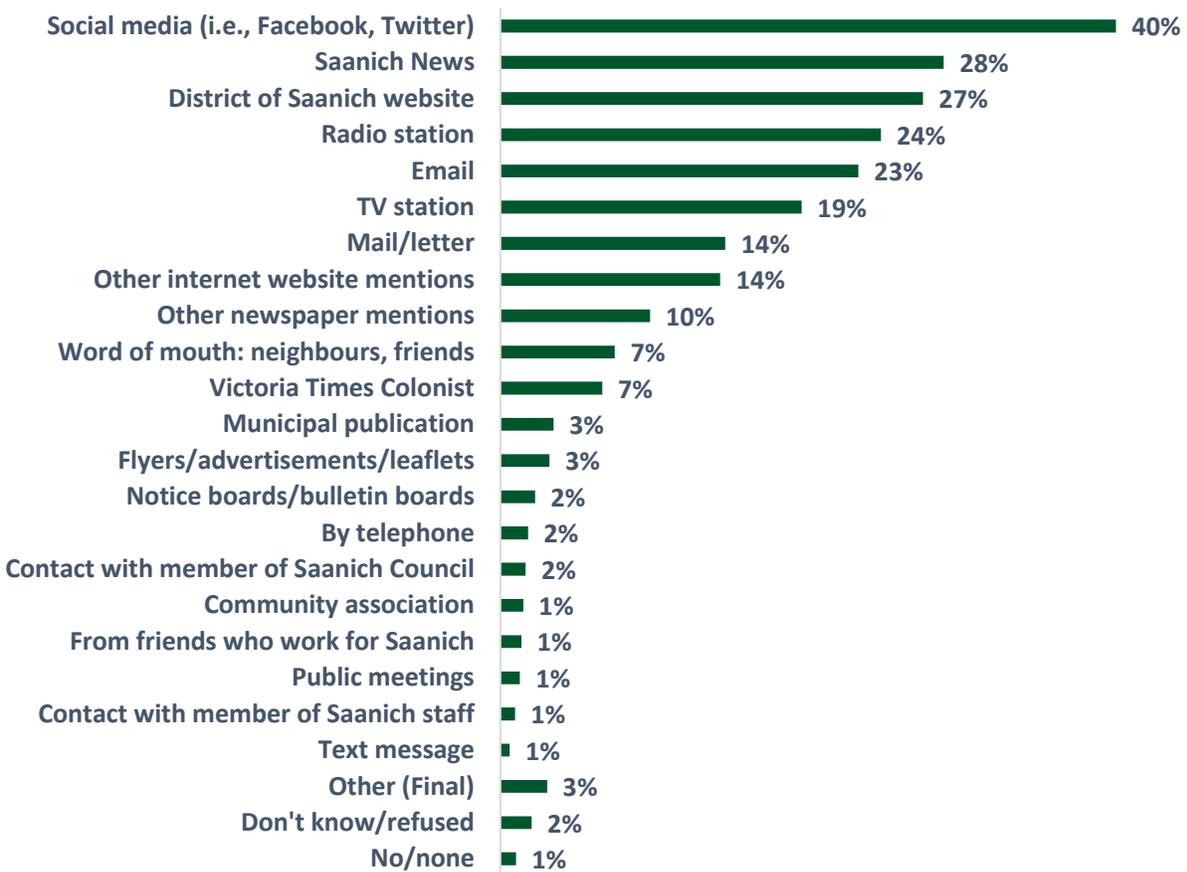
Q10. Do you feel you can find information about how to participate in the following activities?

Q11. PREFERRED METHODS OF COMMUNICATION

How do business owners of Saanich prefer to learn about local government issues?

The most preferred platforms of communication from which businesses would like to learn about local issues include social media (40%), Saanich News (28%), and the District of Saanich website (27%).

Preferred ways to learn about local government issues (n=395)



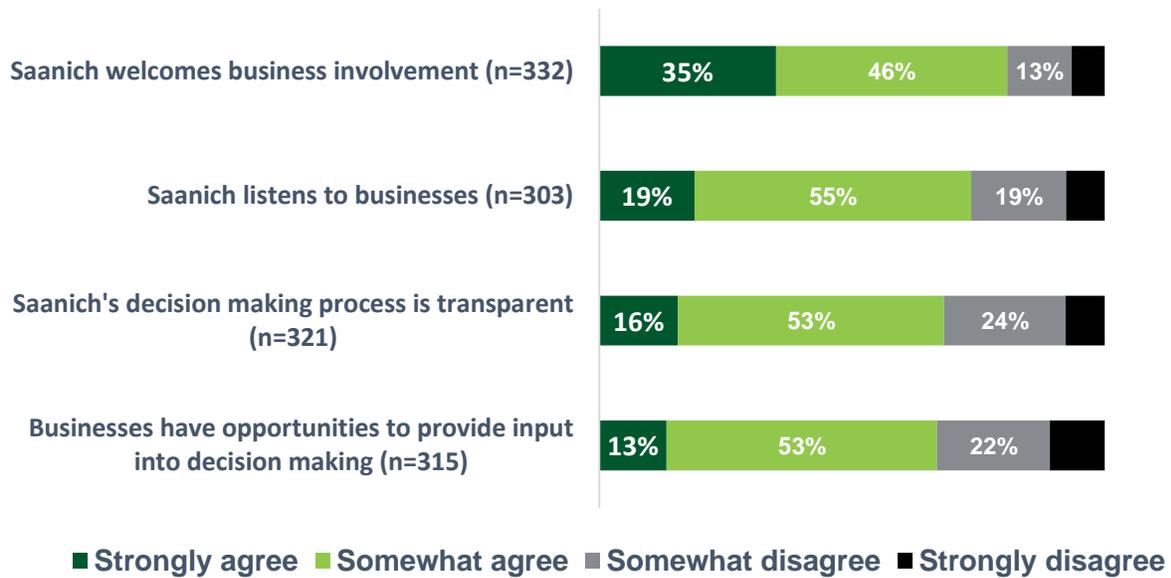
Q11. Please identify up to three of the ways you prefer to learn about local government issues?

Q12. PUBLIC ENGAGEMENT

Respondents were asked to rate the level to which they agree that Saanich welcomes citizen involvement, listens to business, allows business to have input into decision making and how transparent they feel the government of Saanich is when it comes to the decision-making process.

All statements received high agreement levels with the largest proportion (81%) (TOP2) agreeing somewhat or strongly that Saanich welcomes business involvement.

Public engagement for business owners



Q12. I'm going to read out several statements and would like to know how much you agree or disagree with each.

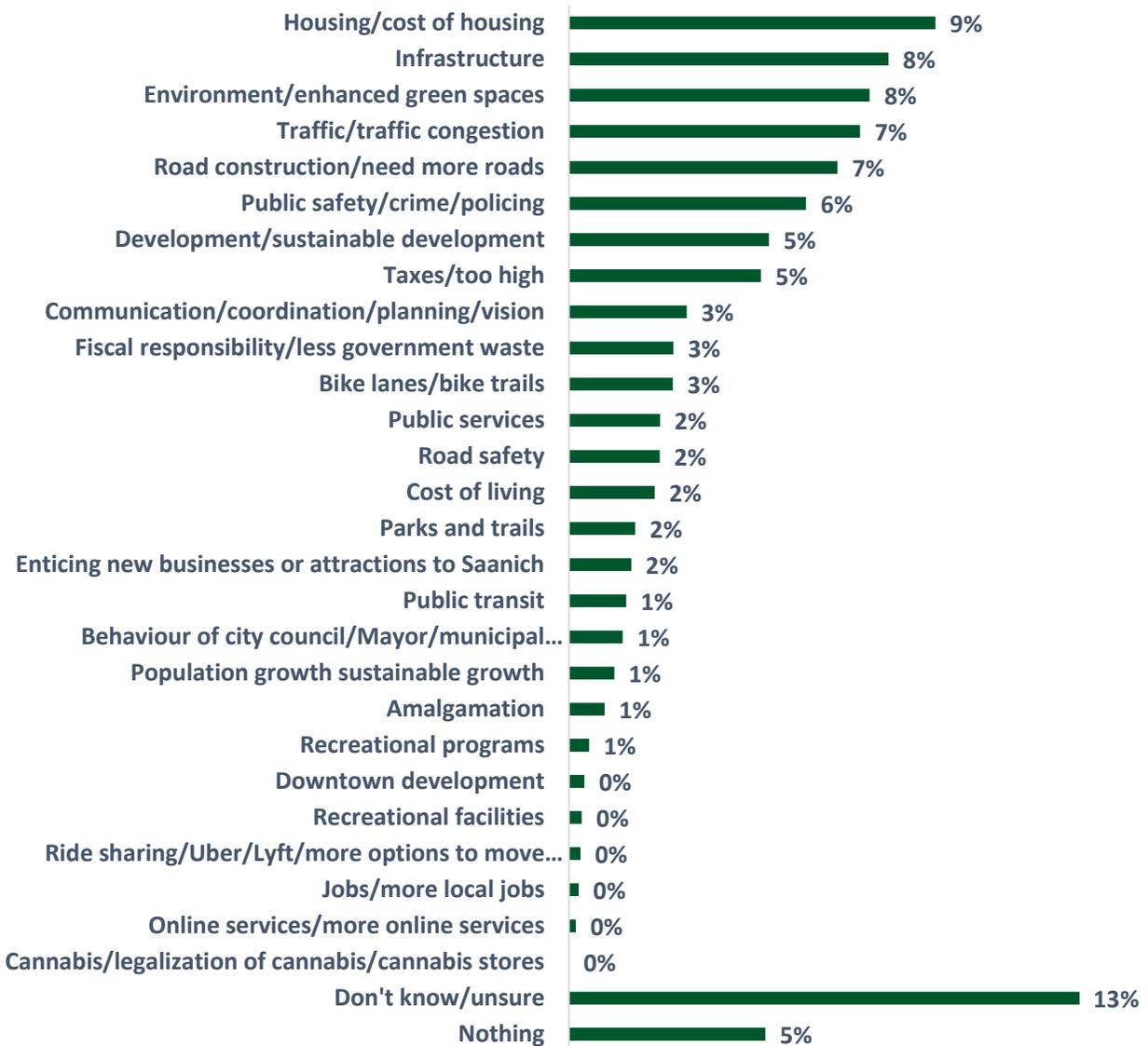
FUTURE DIRECTIONS AND PERFORMANCE

Q9. MOST IMPORTANT ISSUES

What is the most important issue facing the District of Saanich?

The most important issues are housing (9%), infrastructure (8%), and the environment (8%).

Most important issues (n=395)

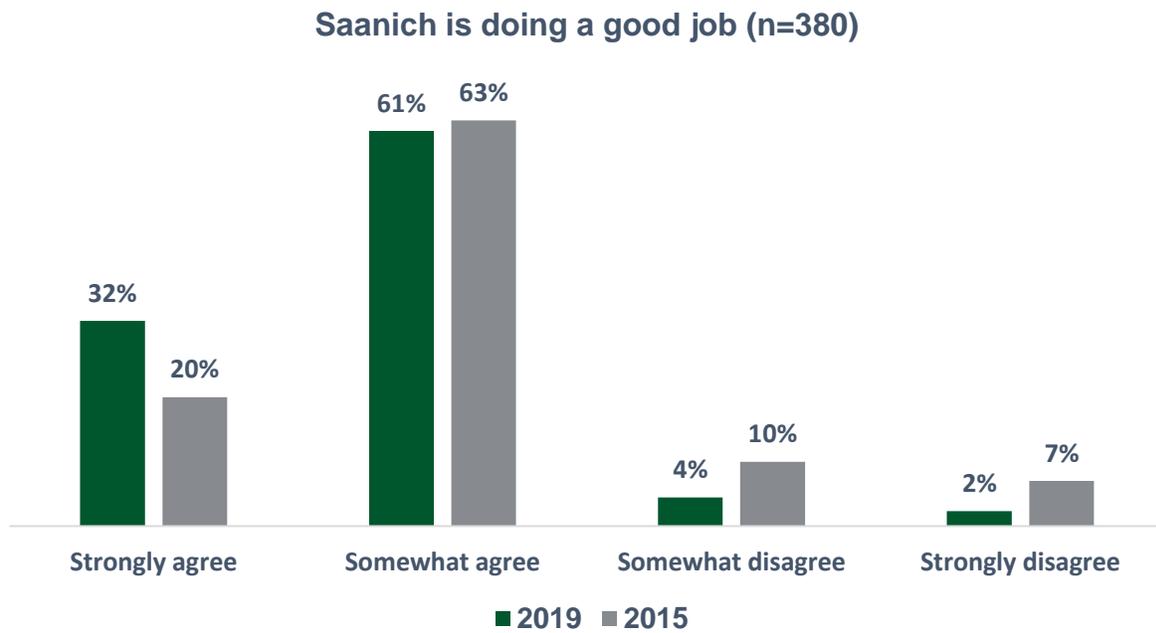


Q9. What is the single most important issue facing the District of Saanich? That is, the one issue you feel should receive the greatest attention?

Q6C. SAANICH SEEN AS DOING A GOOD JOB

Do business owners feel the District of Saanich is doing a good job in general?

Overall, 93% either strongly or somewhat agree that Saanich is doing a good job (32% and 61% respectively).

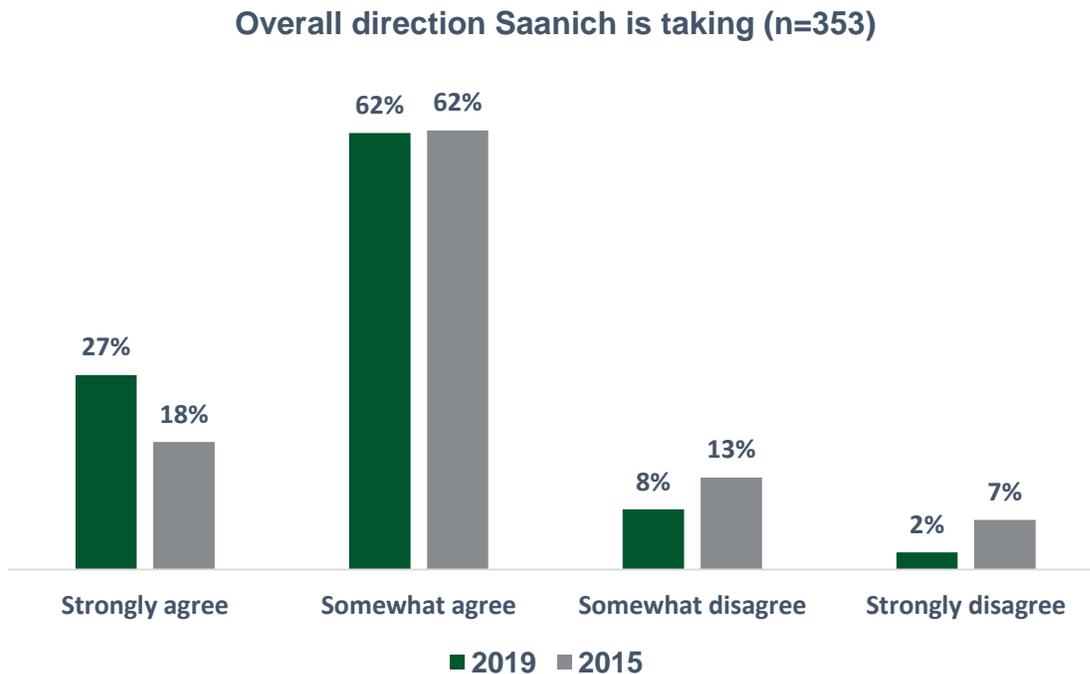


Q6c. For each of the following statements I'd like you to tell me how much agree you agree or disagree with following statements:
 In general, I believe the District of Saanich is doing a good job

Q6B. FUTURE DIRECTIONS

Are business owners pleased with the overall direction Saanich is taking?

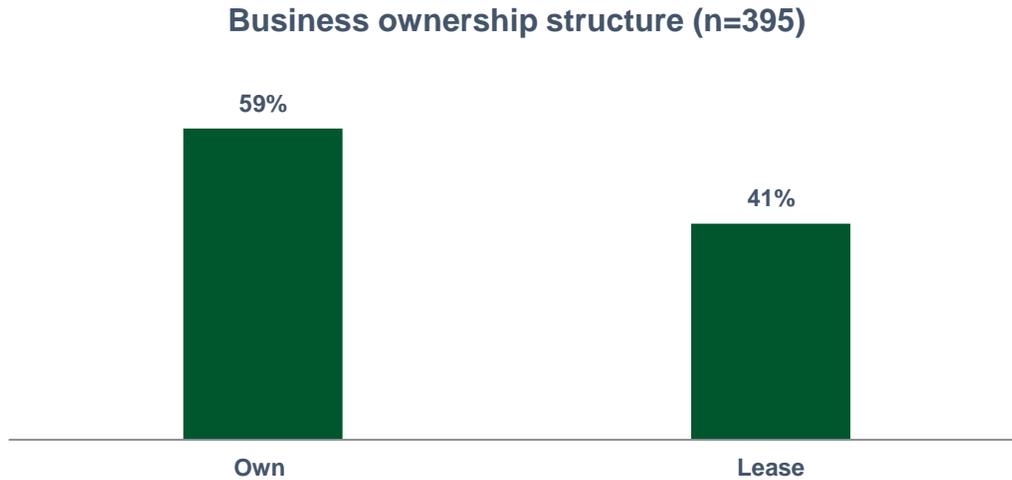
A majority of residents (89%) either strongly or somewhat agree that they are pleased with the overall direction Saanich is taking (27% and 62% respectively).



Q6b. For each of the following statements I'd like you to tell me how much you agree or disagree with following statements:
I am pleased with the overall direction that the District of Saanich is taking.

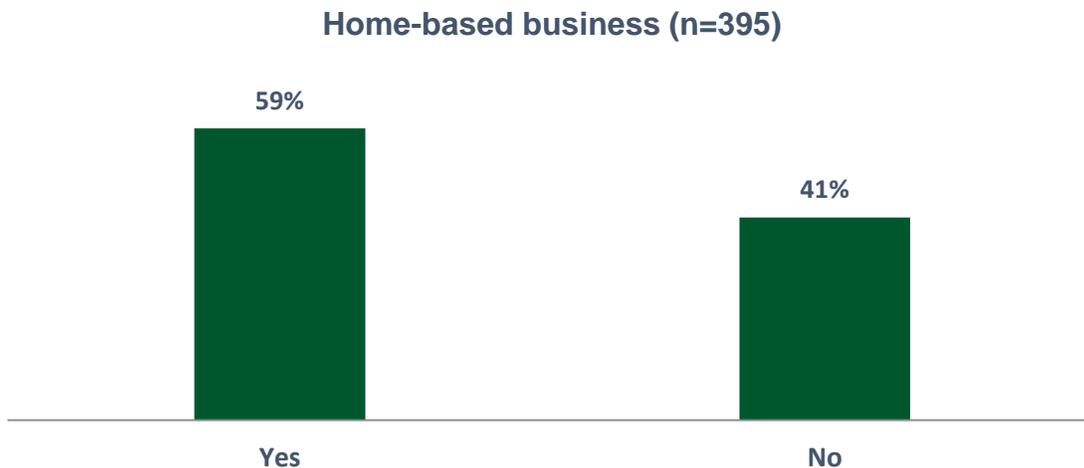
RESPONDENT PROFILE

Q13. DO YOU OWN OR LEASE YOUR OWN SPACE?



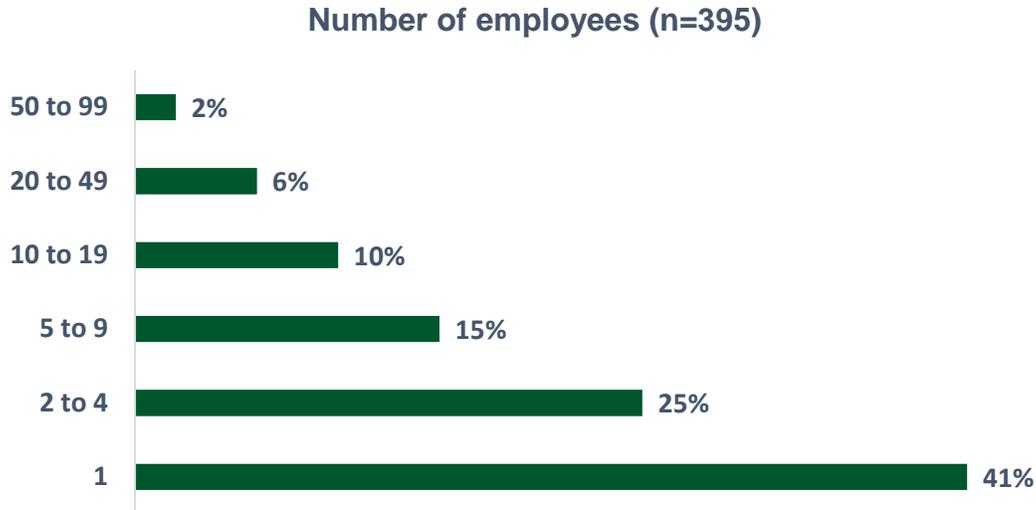
Q13. Do you own or lease your business space?

Q14. DO YOU OPERATE A HOME-BASED BUSINESS?



Q14. Do you operate a home-based business?

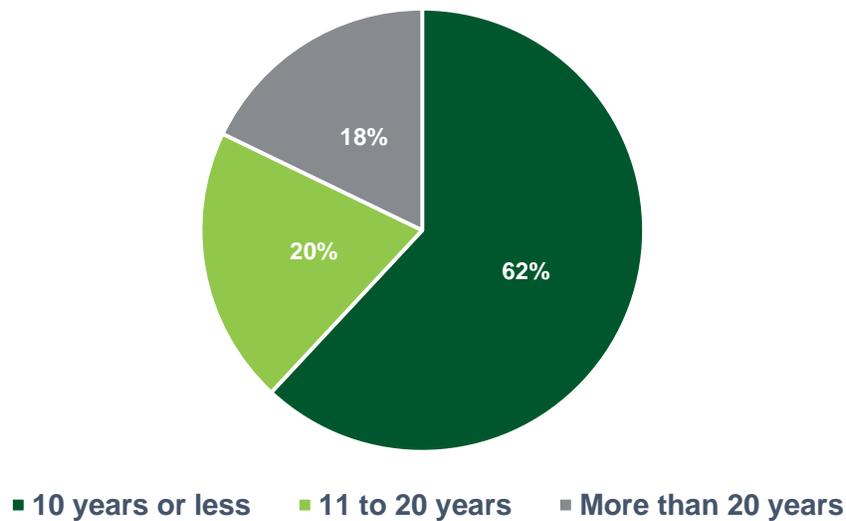
Q15. HOW MANY EMPLOYEES DOES YOUR BUSINESS HAVE?



Q15. How many employees does your business have (please include yourself)?

Q16. HOW MANY YEARS HAVE YOU OPERATED A BUSINESS IN SAANICH?

Number of years in the business (n=395)



Q16. How many years have you operated a business in Saanich?

Q17. WHICH BEST DESCRIBES YOUR TYPE OF BUSINESS?

Type of business (n=395)



Q17. Which of the following best describes your type of business?