

Annapolis Valley Chamber of Commerce

Membership Survey

2016

Conducted on Behalf Of:



Conducted By:



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AVCC Membership Survey

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Objectives

1. To provide guidance on advocacy issues, communications, events, benefits, and the tourism strategy.
2. To measure the level of value members perceive their membership provides, as well as how well AVCC represents the interests of businesses in the community.

Method

- Questionnaire designed by Nova Insights in consultation with AVCC Executive and Advocacy Committee
- Conducted online from the database of AVCC members November 15 to December 15, 2016
 - Database included 394 member organizations with 601 individual addresses
 - 45 email invitations returned as undeliverable; 3 reported as not members
 - 130 member individuals completed from 119 organizations
 - 30% response from member organizations
- The members responding to this survey have a median of six full-time employees (other than themselves) and one part-time employee.
- A very strong majority (82%) have locations in the eastern end of the territory, and one-quarter (28%) have locations in the western end. (*These add to more than 100% as some have multiple locations spanning the territory.*)

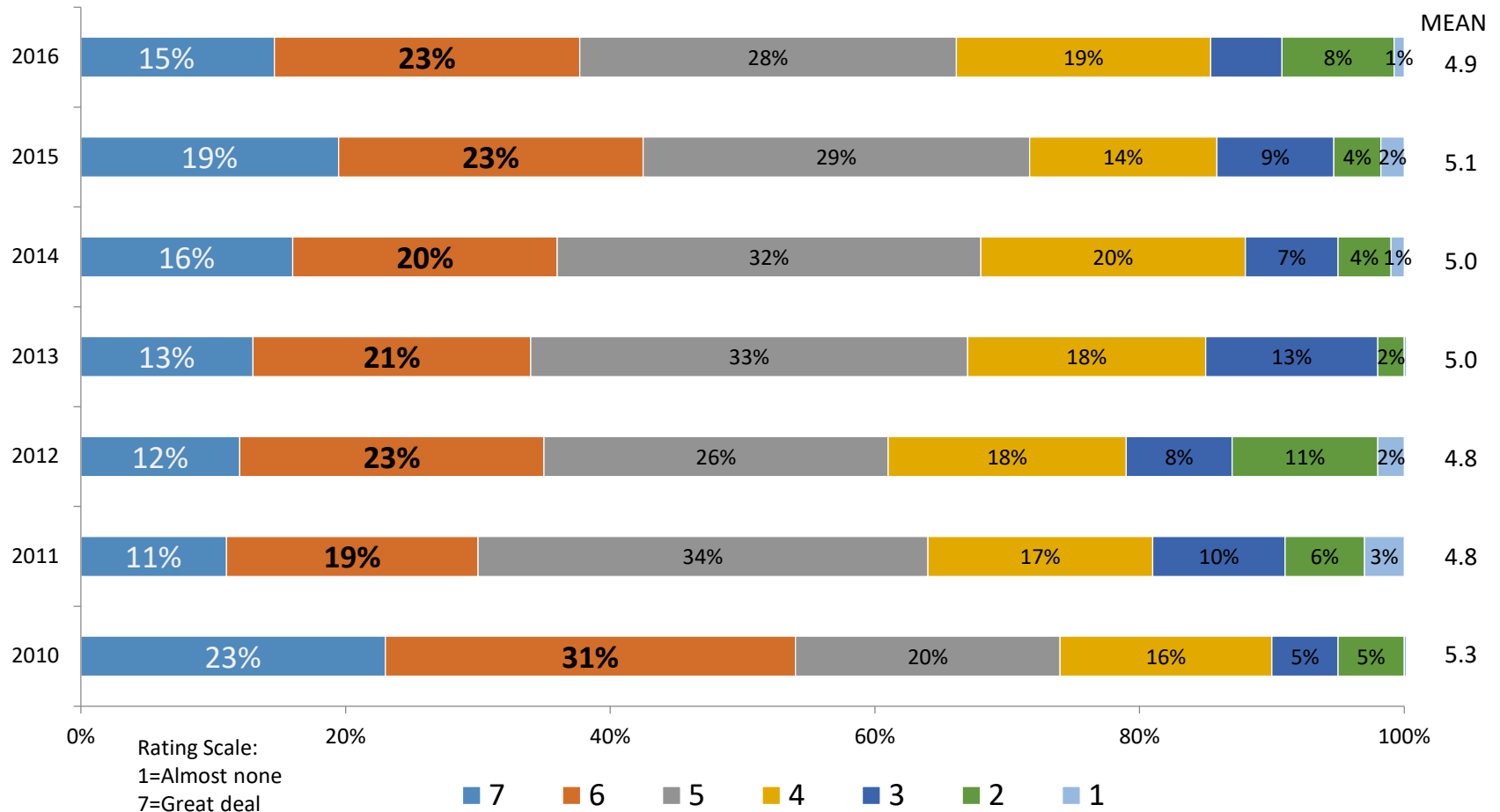
Key findings

1. The value perceived in AVCC membership has decreased slightly overall and within the top rating category.
2. The perceived effectiveness of AVCC in representing the business community has continued to increase.
3. The various categories of member benefits received very high marks last year, but all have declined below levels even seen two years ago.
4. Direct email is by far the most effective communications tool. The AVCC website and announcements at events round out the top three modes.
5. Half of members have seen or heard about the tourism ads, showing a decline from last year. Those recognizing AVCC as the sponsor has also declined substantially.
6. Awareness that AVCC has sponsored a new health pan since 2013 has continued to increase, as has awareness of the Bens Plus brand, specifically.
7. Establishment of alternative energy businesses remains the top priority for members.
8. Importance of issues on the Advocacy Committee's current agenda continue to resonate with members. All have increased in importance except for a slight decline in industrial land development.
9. A plurality of members feel they need more information to form an opinion on carbon pricing.

Value & effectiveness

The overall perceived value of AVCC membership has declined slightly. The decline has come primarily from those providing the top rating, reversing the trend of a slow increase.

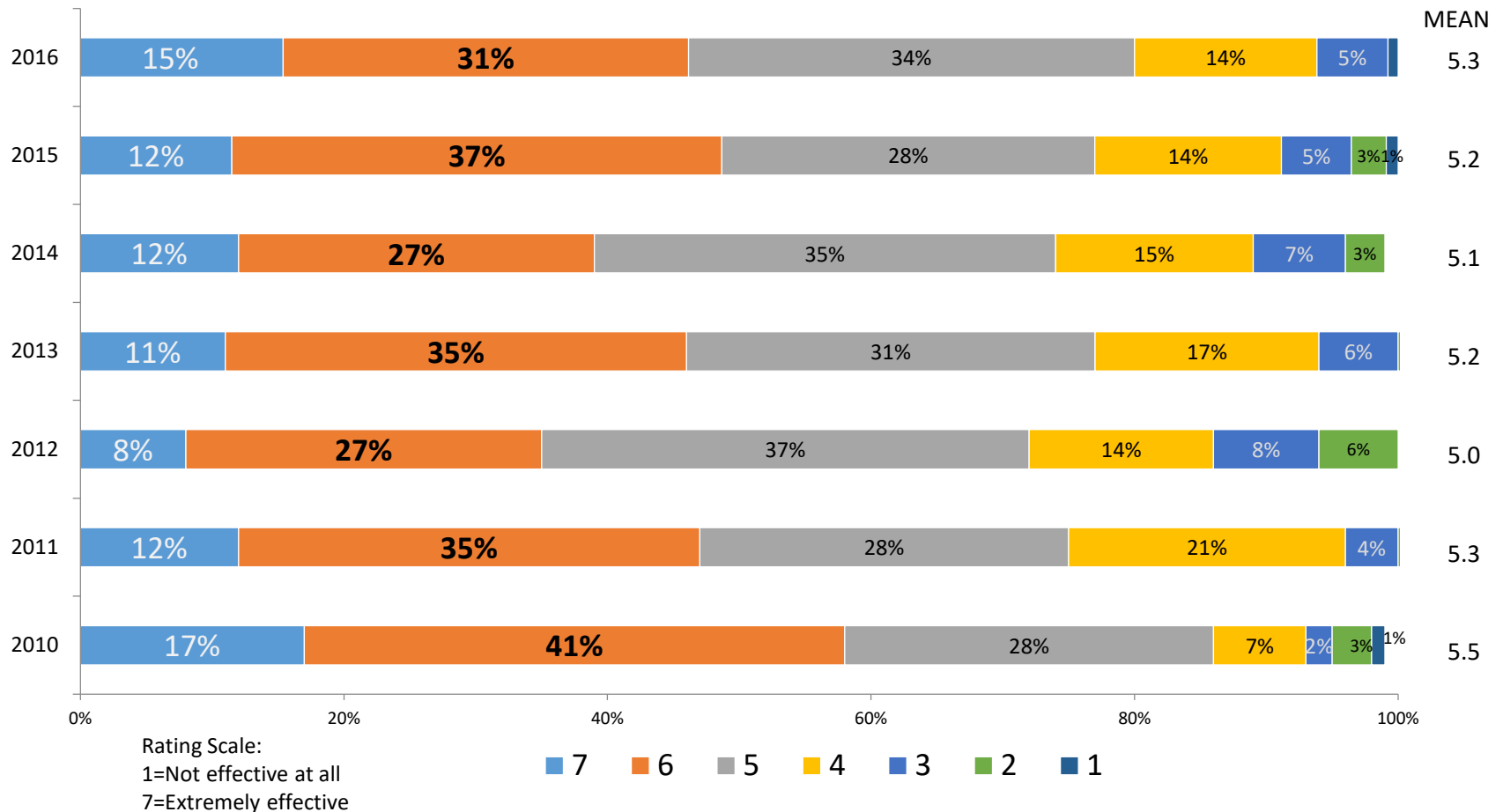
Value of AVCC Membership



Value & effectiveness

The top-three-box rating of how AVCC represents members on issues has increased slightly, as has the proportion providing the highest rating — its highest level since 2010.

Effectiveness in representing members on issues



Benefits

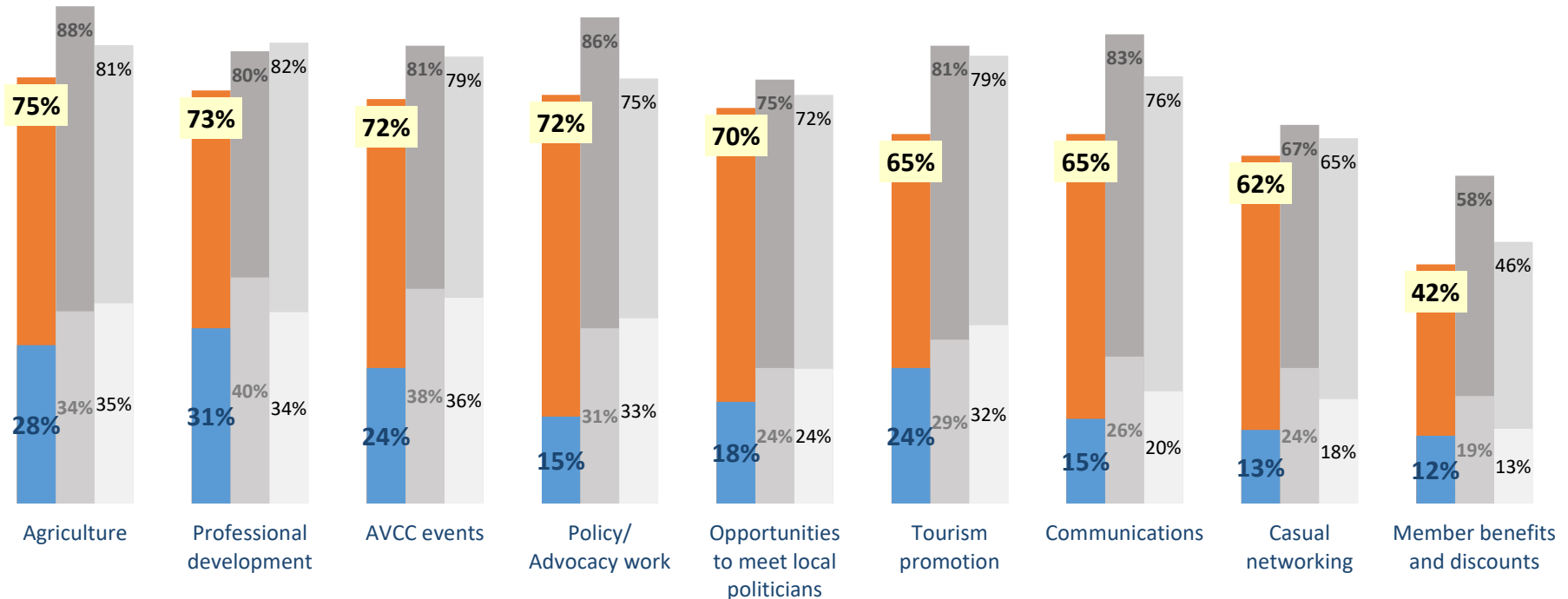
The top-three-box value rating has declined across all benefit categories, as has the proportion providing the highest rating.

Value of specific AVCC offerings

Rating Scale:
1=No value
7=Great value

■ 2016 Top Three Value Rating (5,6,7)
 ■ 2015 Top Three Value Rating (5,6,7)
 ■ 2014 Top Three Value Rating (5,6,7)

■ 2016 Great Value (7)
 ■ 2015 Great Value (7)
 ■ 2014 Great Value (7)

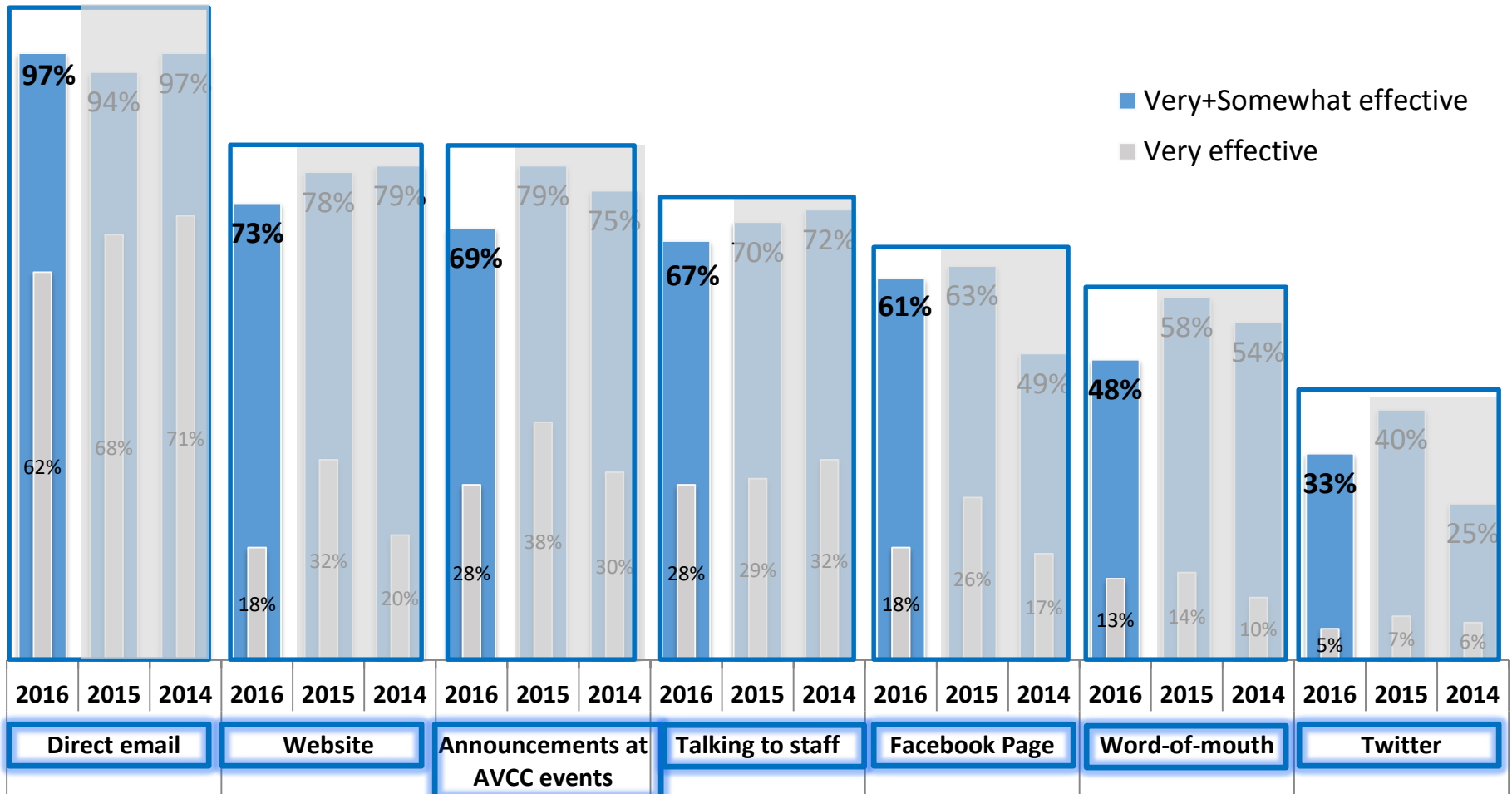


Communication

eNews remains the most effective communications tool, by far. It is seen as at least somewhat effective by almost everyone.

Note: This survey was distributed by email, so respondents providing opinions are, by nature, more likely to open emails from AVCC.

Effectiveness of communication modes

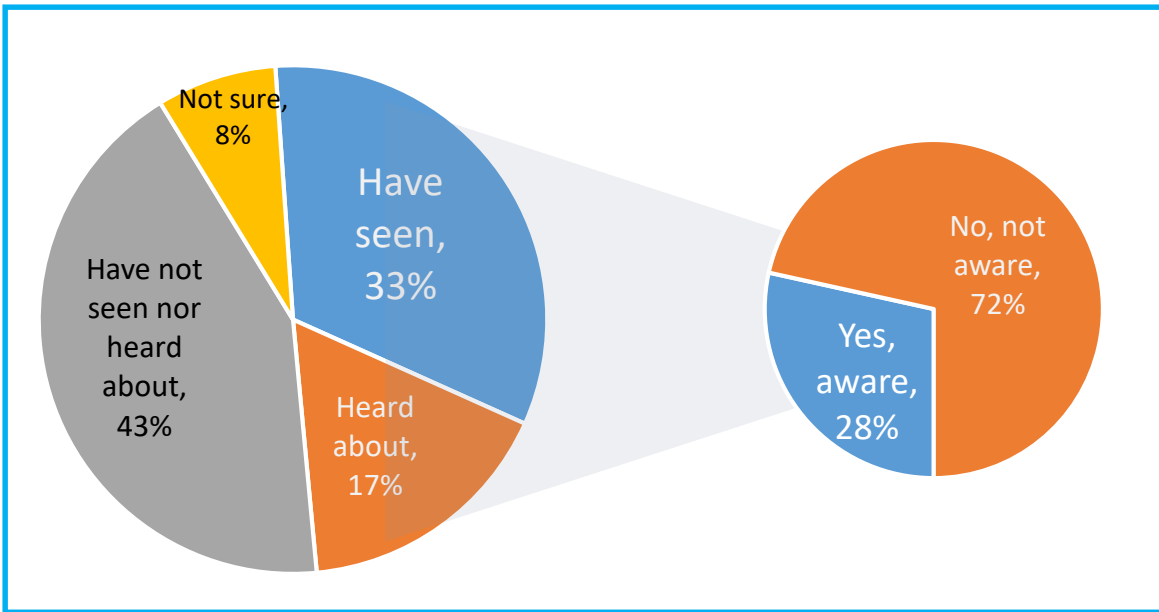


Tourism

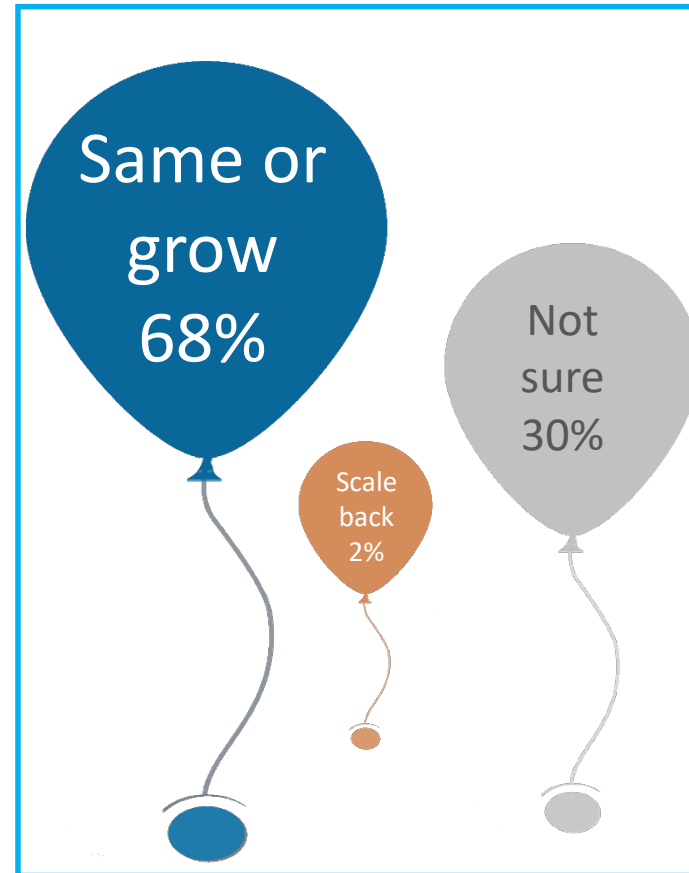
Half say they have seen or heard about the *Simply Extraordinary* television ads (down 12-points since last year), and only one-in-four are aware these were planned and designed primarily by AVCC volunteers (down 31-points).

Two-thirds of the membership feel this initiative should continue at the same or higher level.

Awareness of tourism campaign



In the future ...



Q8a. Have you seen or heard about the television advertisements for Annapolis Valley Tourism, entitled *Simply Extraordinary* that aired over the summer and recently ended?

Q8b. Before today, were you aware the Tourism advertisements entitled *Simply Extraordinary* on television and Annapolis Valley Minute on Halifax radio stations were planned and designed primarily by volunteers through the Annapolis Valley Chamber of Commerce with financial support from various levels of government?

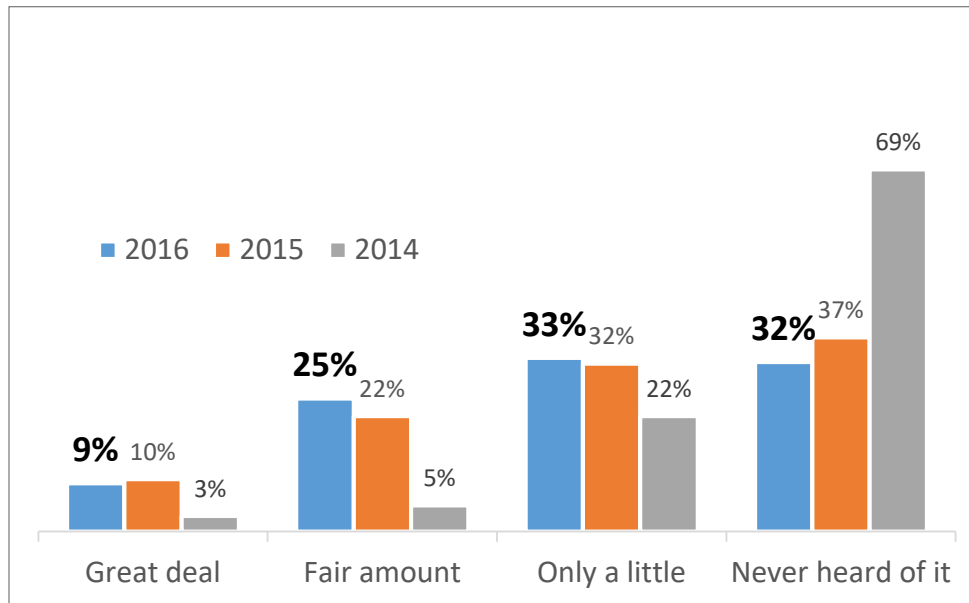
Q8c. Is this kind of tourism strategy something the Annapolis Valley Chamber of Commerce should ...

Bens Plus

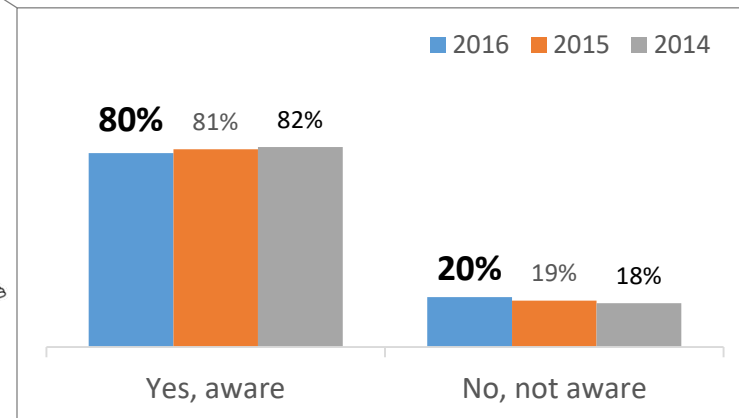
Overall awareness that AVCC has sponsored a new health plan since 2013 has continued to increase with small increases in the awareness of the Bens Plus brand.



Awareness of Bens Plus



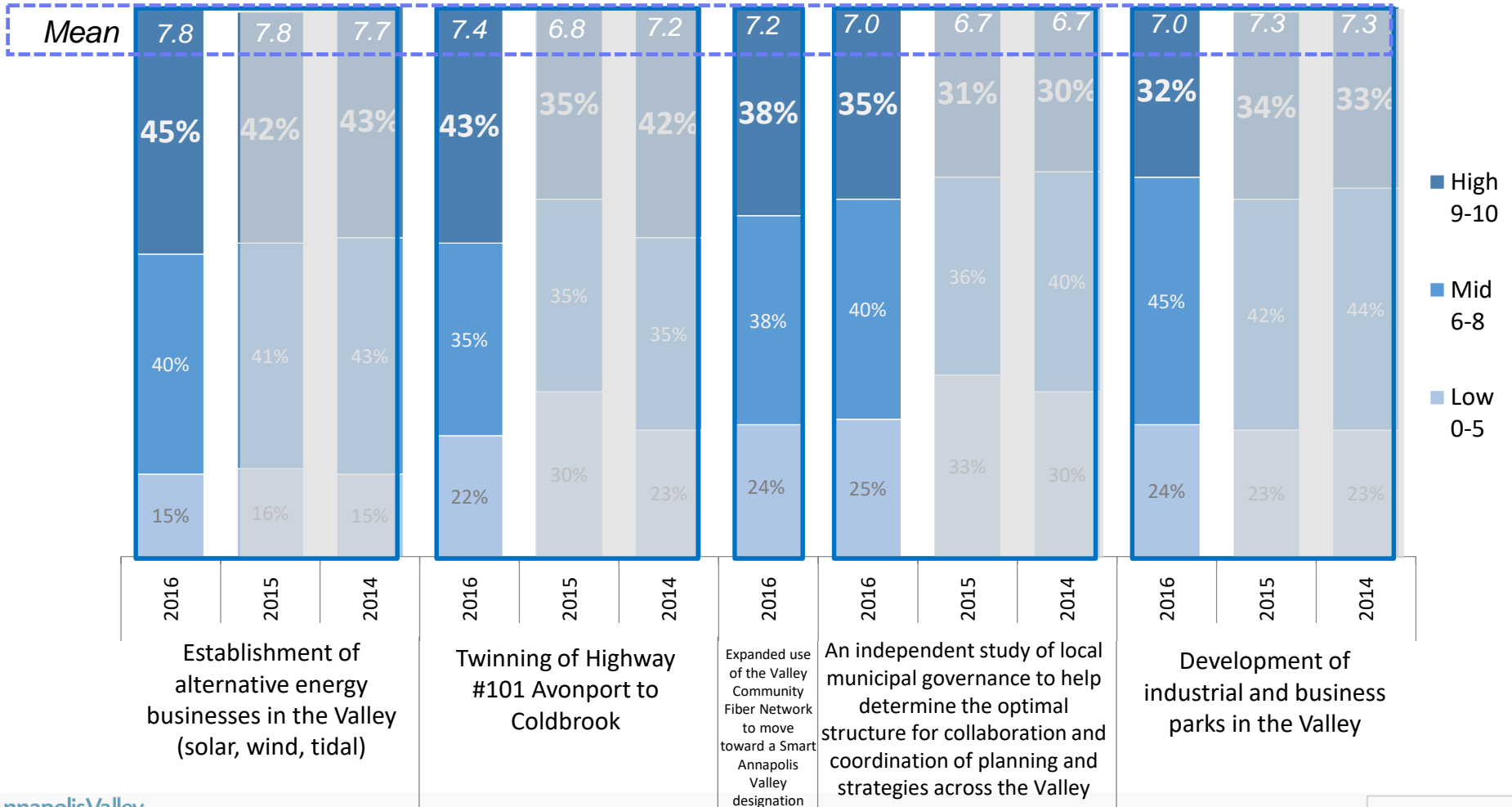
Awareness of Bens Plus as AVCC sponsored (among those have heard of)



Advocacy

Importance of issues on the Advocacy Committee's agenda continue to resonate with members. All have increased in importance except for a slight decline in industrial land development.

Existing advocacy issues



Q6a. First we'd like to understand the degree to which these broad issues are important to you. Please read the issues below and rate how important each is to you.

Components may not add to aggregates due to rounding.

Advocacy

Before Nova Scotia agreed to a federal carbon pricing system, AVCC introduced the topic to members to determine their position. A strong plurality felt they needed more information.

There has been a great deal of talk among federal and provincial leaders about imposing a carbon pricing system across the country, possibly with varied models by province.

One carbon pricing system is a Carbon Tax that puts a monetary price on the direct and indirect costs imposed on the economy, our communities, and our planet by greenhouse gas emissions and global warming.

Another system is referred to as Cap and Trade —The “cap” sets a limit on emissions, which is lowered over time to reduce the amount of pollutants. The “trade” creates a market for carbon allowances, so those below the limit can sell credits to those above the limit, providing an incentive for companies to innovate toward meeting their allocated limit.

By households and businesses shifting to cleaner technologies, demand for energy-efficient products increases and helps encourage innovation and investment in green solutions.

Proponents of adopting a carbon pricing model in Nova Scotia believe that a stronger price on emissions will lead to more investment in cleaner energy sources such as solar and wind power. And although a carbon fee or tax makes polluting activities more expensive, it makes green technologies more affordable as the price signal increases over time.

Opponents of adopting a carbon pricing model in Nova Scotia believe Nova Scotia has effectively used other strategies to reduce greenhouse gas emissions. This has primarily been through increased use of renewable energy for power generation, which has also resulted in among the highest power rates in the country. Therefore, Nova Scotia should be exempt from a new carbon pricing system.

32%

Nova Scotia should agree to a new carbon pricing system to encourage innovation in green technologies that will further reduce greenhouse gas emissions

18%

Nova Scotia should not agree to a new carbon pricing system because current strategies already cost businesses and consumers, so we should avoid further costs

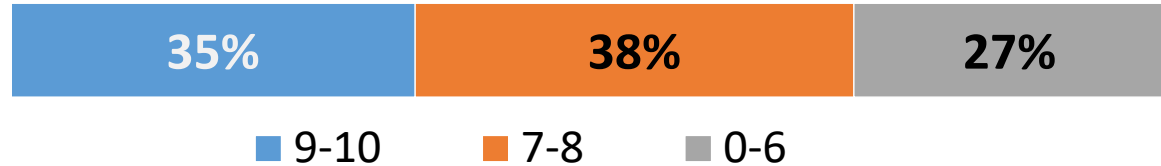
49%

I need more information

Q7a. Which comes closer to how you feel?

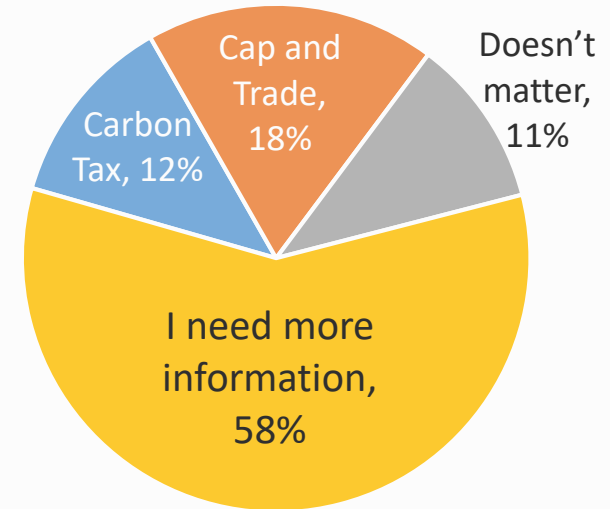
Among those who expressed an opinion on whether Nova Scotia should agree to a carbon pricing system, most do not feel strongly.

Rating Scale:
0=Not important at all
10=Very important

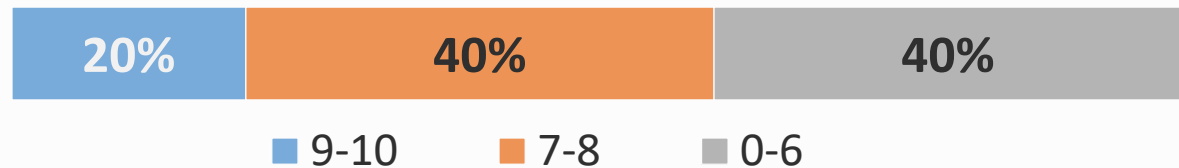


And if Nova Scotia were required to adopt a carbon pricing system, a majority would need more information to have an opinion on which type of system.

Among those with an opinion, there is a slight preference for cap and trade. And even among those, only one-in-five feel strongly about their preference.



Rating Scale:
0=Not important at all
10=Very important



Q7b. How important is it to you that Nova Scotia should [PIPE: agree/not agree] to a new carbon pricing system?
Q7c. If Nova Scotia must adopt a carbon pricing model because of federal regulation, which would you prefer?
Q7d. How important is it to you that [PIPE: Cap and Trade / Carbon Tax] be chosen as the carbon pricing model?

Conclusion

AVCC's membership continues to have confidence they are effectively represented on issues, but perception of direct value has declined. This may indicate a need to more closely align AVCC's offerings with members' day-to-day needs, or to find ways to more effectively communicate the offerings as they are available, and the value being provided.

About Nova Insights

Nova Insights is a full service **market research and evidence-based consulting** firm providing services to organizations in Canada and the United States.

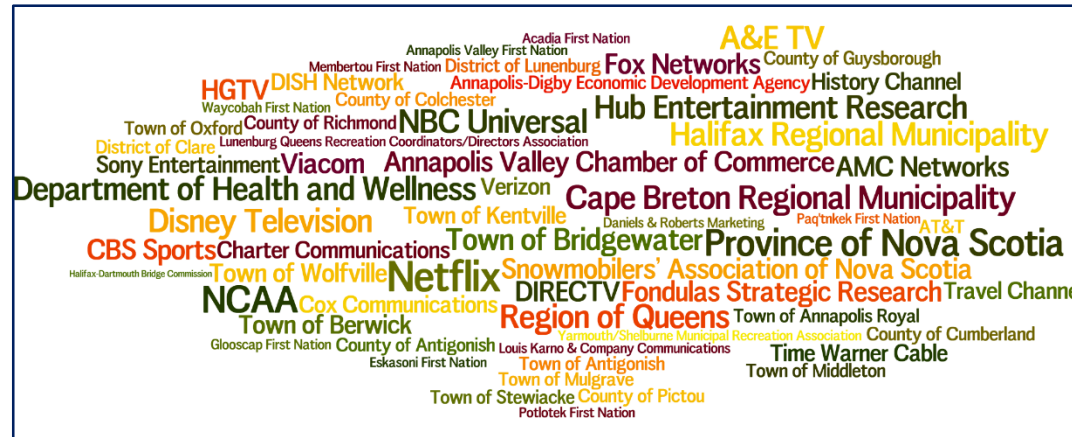
The founder and President of Nova Insights, Paul DesBarres, brings over 20 years of experience in the market research industry to clients. He built his experience working in the U.S. for a diverse client list including major universities, associations, international music companies, major newspapers, entertainment companies, and professional and amateur sports organizations. In Nova Scotia, he has worked for various municipalities, government departments, social marketing organizations, and associations.

Paul spent a decade in New England where he specialized in consumer research in the sports, media, and entertainment industries. It was during this time that Paul received **specialized training as a qualitative moderator** from the RIVA Institute in Bethesda, Maryland. Paul managed research and provided analytic and methodological services to clients such as:



In 2005, Paul returned to Nova Scotia. Since then, Nova Insights has conducted research for:

Nova Insights is a currently part of the Nova Scotia Standing Offer Lists for Management Services, and Nova Scotia Business Inc.



Nova Insights recognizes and supports Nova Scotia's commitment to sustainability. Our sustainability policy can be found at <http://novainsights.ca/sustainability/>.