



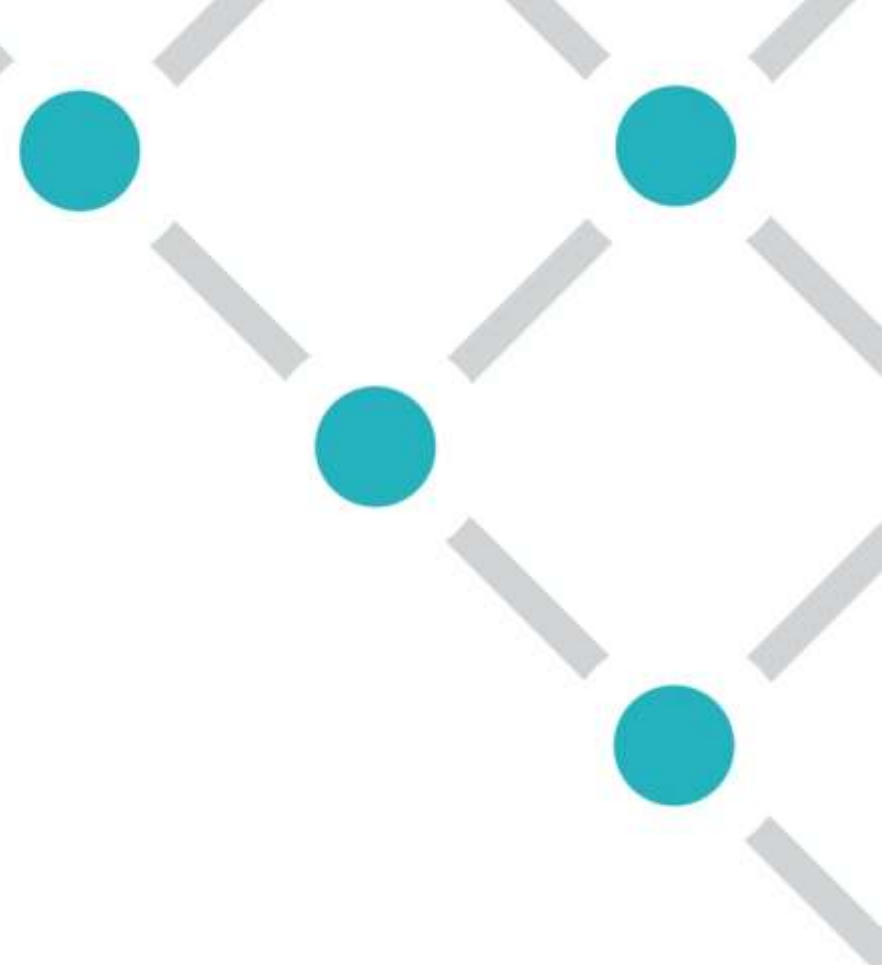
**NARRATIVE**  
RESEARCH

## 2020 ACC Policy Survey

December 2019

Prepared for:

The Atlantic Chamber of Commerce





The Atlantic Chamber of Commerce (ACC) commissioned Narrative Research to undertake an independent **Policy Study** of its Chamber network, to assist in developing a region-wide policy strategy.

The overall objective of this study was to obtain member direction in establishing policy priorities for the Atlantic Chamber. In addition and more specifically, this study sought to:

- *Verify member perceptions of the current Atlantic Chamber policy priorities;*
- *Identify key policy issues at the Federal and Provincial levels;*
- *Identify most preferred outcomes to specific policy changes; and*
- *Generate a brief profile of Chamber Member businesses as the calendar turns to 2020.*

An online survey methodology was employed for this study. The data was collected between November 5 and December 4, 2019. In total, 118 members of the Atlantic Chamber of Commerce were sent invitations to participate in this study. Overall, 41 members completed the survey. The response rate for the study was 35 percent. The average survey completion time was 9 minutes.

Note that due to small sample sizes, differences between subgroups noted are solely directional in nature and not statistically significant. As well, among graphs that contain tracking, in a small number of instances, 2018 data does not sum to 100 percent as some responses selected were not included in the 2019 survey.

Wherever possible, results are compared to those found one year ago in the **2019 Policy Study**. Caution should be taken when interpreting these comparisons due to the small sample sizes as well as, in some cases, slightly differing question wording.



The results of the *2020 Atlantic Chamber of Commerce Policy Study* indicate a mix of opinions across the various chambers in Atlantic Canada. Indeed, when asked what the single most pressing issue or desired outcome is, there is often not a clear ‘winner’ at the overall level. Variations are evident across urban and rural chambers, as well as across provinces. When establishing a region-wide policy strategy, the Atlantic Chamber of Commerce should consider these subgroup differences. This similar observation was made last year following the *2019 Policy Study*.

At the federal level, the most pressing policy issues identified include *access to qualified workers*, and *tax reform*, and *economic development programs*. At the provincial level, the same issues are mentioned.

At the provincial level, a series of policy issues are proposed and chambers provided their most desirable outcome for each issue. Once again, the results commonly indicate a split amongst two or more of the proposed outcomes. That said, one specific provincial policy issue has some degree of consensus. A majority of chambers indicate that the most desirable outcome to supporting increased trade is *reducing inter-provincial barriers*. This result remains consistent with last year.

In regards to the consolidation of municipal services and infrastructure in specific regional population centres, approximately one-half of chambers are in *support* of this proposition, while only 15 percent are in *opposition*. Indeed, there is a high degree of uncertainty as nearly four in ten either require more information to make a decision or are unsure.



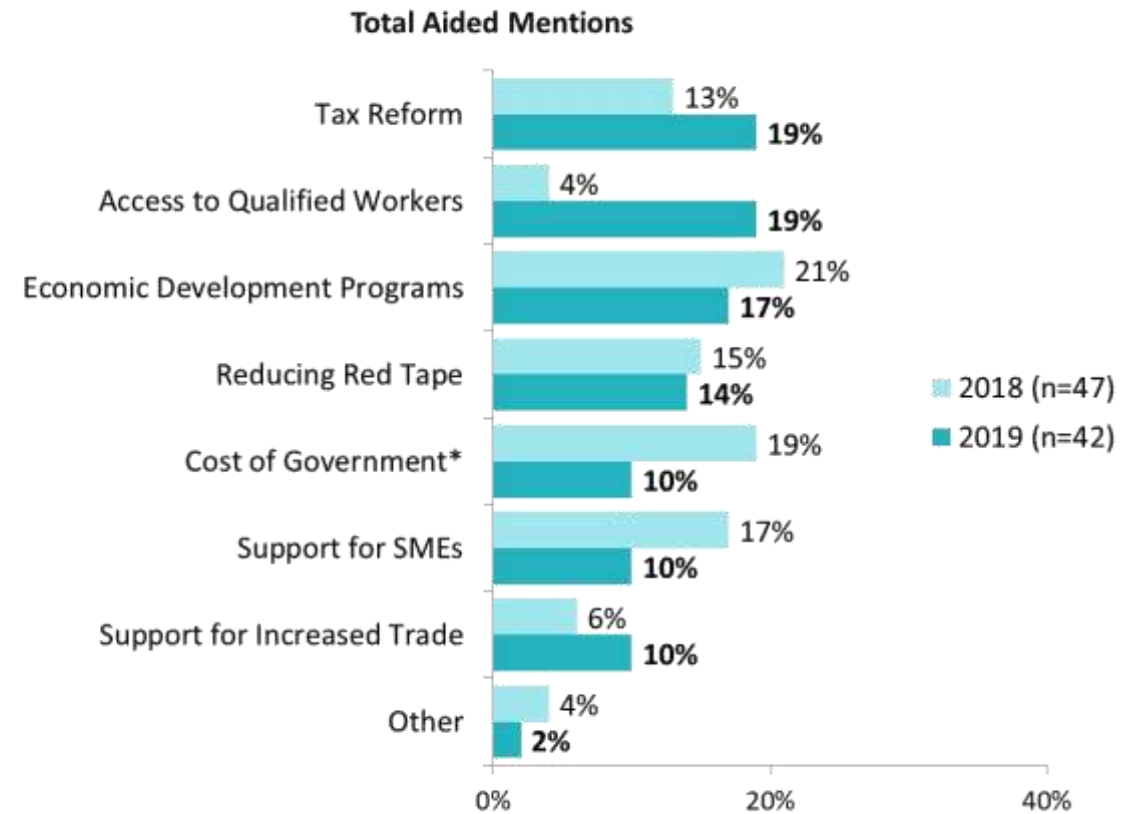
# Most Pressing Issue at Federal Level

*There is no clear single most pressing federal policy issue that is identified by a majority of chambers, that said, the most commonly identified issues include access to qualified workers, tax reform, and economic development programs.*

Rural chambers and those in New Brunswick and Nova Scotia are the most likely to mention access to qualified workers as the single most pressing issue. Chambers in Nova Scotia are also most likely to mention reducing red tape. Meanwhile, there are three key mentions among Newfoundland and Labrador Chambers, those being tax reform, economic development programs, and support for SMEs.

Compared with last year, access to qualified workers has increased from four percent. (Table 1)

## Single Most Pressing Policy Issue at Federal Level



Q.1: In your opinion, what is the single most pressing policy issue at the federal level?  
*Note: Slight wording changes from 2019 Policy Survey. \*Previously fiscal responsibility.*





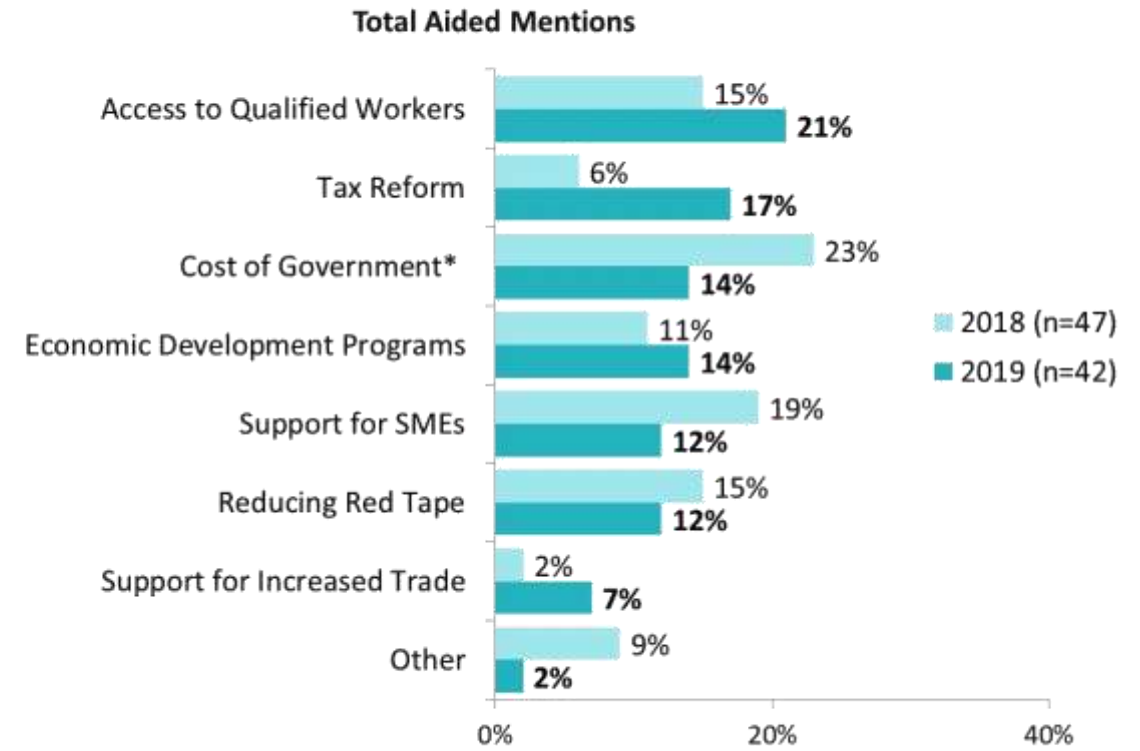
# Most Pressing Issue at Provincial Level

*Similar to federal policy issues, no single provincial policy issue is identified by a majority, however, the most pressing issue identified is, once again, access to qualified workers.*

The number of mentions for each policy issue is relatively similar across provinces and urban and rural chambers.

Last year, the cost of government and increased support for SMEs were at the top of the list for most pressing provincial policy issues. (Table 2)

## Single Most Important Provincial Policy Issue That Would Improve Business Environment at Provincial Level



Q.2: In your opinion, what is the single most important provincial policy issue that if addressed would improve the business environment at a provincial level? *Note: Slight wording changes from 2019 Policy Survey. \*Previously fiscal responsibility.*

*The two most desirable outcomes for a comprehensive tax reform would be a comprehensive review of taxes for individuals, small businesses and corporations, and reduced corporate tax rates to stimulate business investment.*

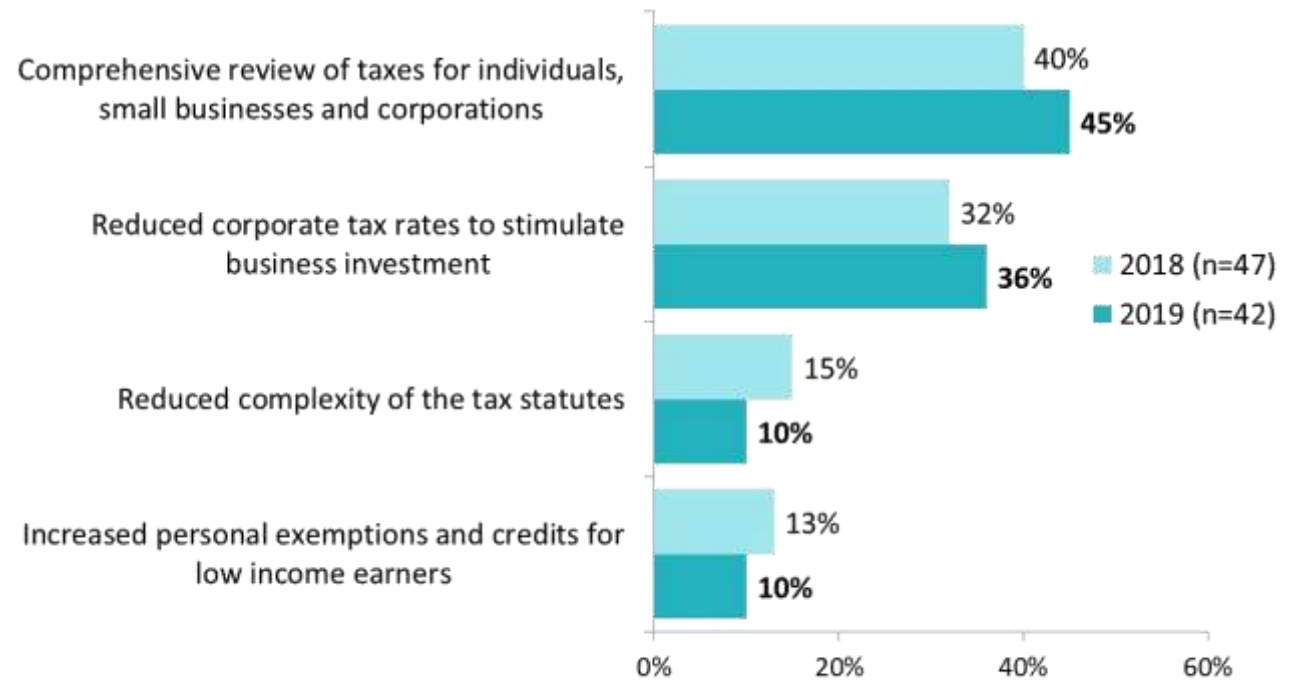
In comparison, increased personal exemptions and credits for low income earners, and reduced complexity of the tax statutes, are far less desirable.

Opinions are generally consistent across provinces and urban and rural chambers, although opinions among PEI chambers are evenly split between a reduction in corporate tax rates, and increased personal exemptions and credits for low income earners.

Opinions remain consistent with those gleaned last year. (Table 4\_1)

## Most Desirable Outcome for Tax Reform

Total Aided Mentions



Q.4\_1: For each of the following provincial policy issues, please indicate the single most desirable outcome to you. Tax Reform. Note: Slight wording changes from 2019 Policy Survey.

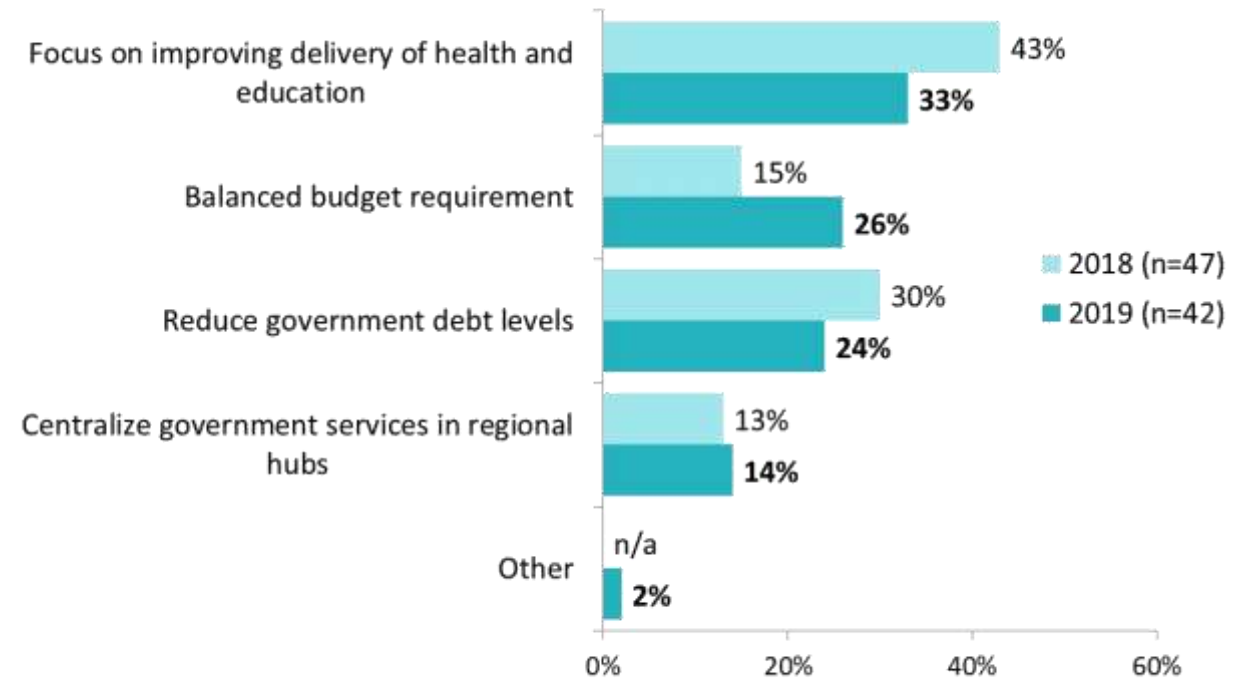
*In regards to improving the cost of government, a focus on improving delivery of health and education is identified as the most desirable outcome, closely followed by a balanced budget requirement and reduction in debt levels.*

Centralizing government services to regional hubs is comparatively less desirable. Rural chambers, and those in Nova Scotia, are considerably more likely to cite that a focus on improving delivery of health and education is most desirable to them. Meanwhile, urban chambers, and those in NL/PEI, most commonly indicate a reduction in government debt levels. Both of these findings are consistent with last year.

Also similar to last year, opinions across New Brunswick chambers are mixed and no single proposed outcome is a clear ‘winner.’ (Table 4\_2)

## Most Desirable Outcome for Cost of Government

Total Aided Mentions



Q.4\_2: For each of the following provincial policy issues, please indicate the single most desirable outcome to you. *Cost of Government*\*. \*Previously *fiscal responsibility*.



# Improve Access to Qualified Workers

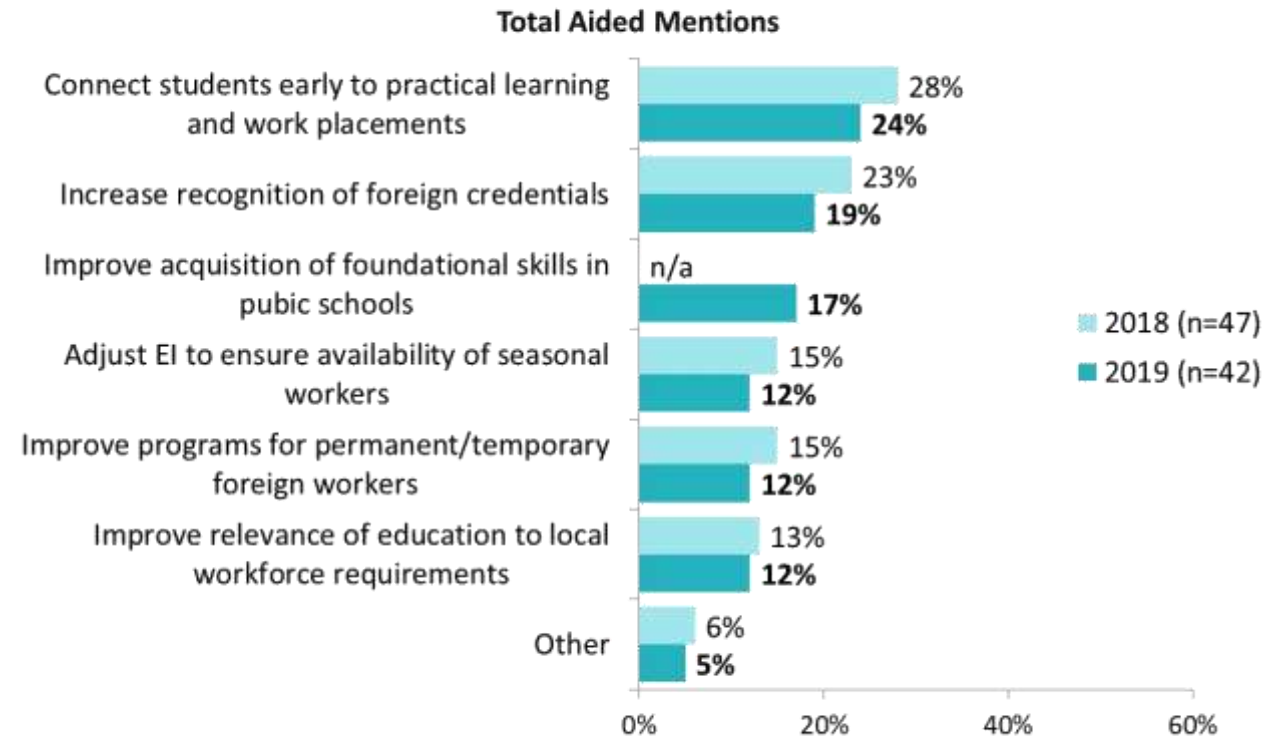
*Connecting students to placements early is the most desired outcomes in regards to improving access to qualified workers, albeit only by a small margin.*

Mentions of connecting students early to practical learning and work placements is higher among rural chambers and chambers in PEI, while mentions of increasing recognition of foreign credentials is elevated among urban chambers.

Notably, mentions of improving relevance of education to local workforce requirements is mentioned most often by Nova Scotian chambers, while it was mentioned once by a chamber in New Brunswick, and not at all mentioned in PEI or Newfoundland and Labrador.

These results are generally consistent with last year. (Table 4\_3)

## Most Desirable Outcome to Improve Access to Qualified Workers



Q.4\_3: For each of the following provincial policy issues, please indicate the single most desirable outcome to you. *Improve Access to Qualified Workers.* Note: Slight wording changes from 2019 Policy Survey.





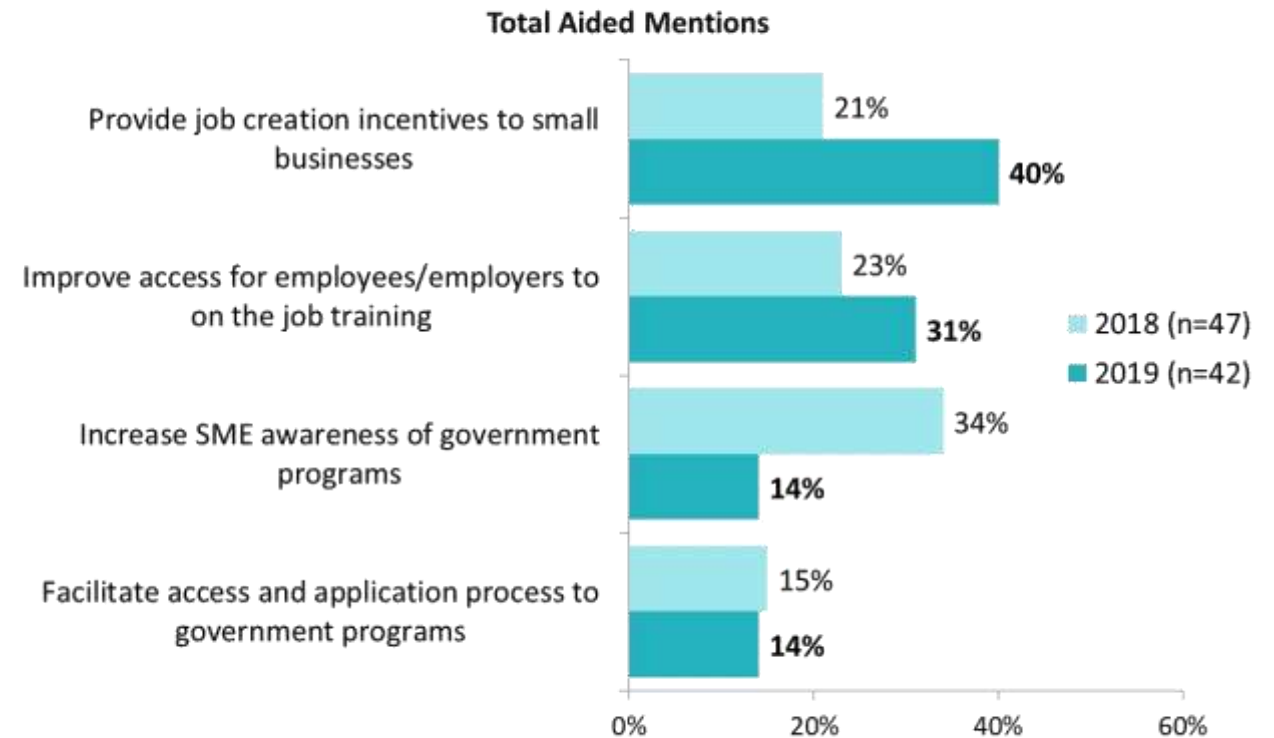
# Increase Provincial Support to SMEs

*Providing job creation incentives to small business, followed by improving access for employees and employers to on the job training, are the most identified preferred outcomes for increasing support to SMEs.*

Mentions of providing job creation incentives to small businesses are highest among chambers in Nova Scotia as well as Newfoundland and Labrador, while mentions of improving access for employees and employers to on the job training are highest among chambers in New Brunswick and PEI.

Last year, increased SME awareness of government programs was the most desirable outcome. (Table 4\_4)

## Most Desirable Outcome to Increase Support to SMEs



Q.4\_4: For each of the following provincial policy issues, please indicate the single most desirable outcome to you. Increase Support to SMEs. Note: Slight wording changes from 2019 Policy Survey.

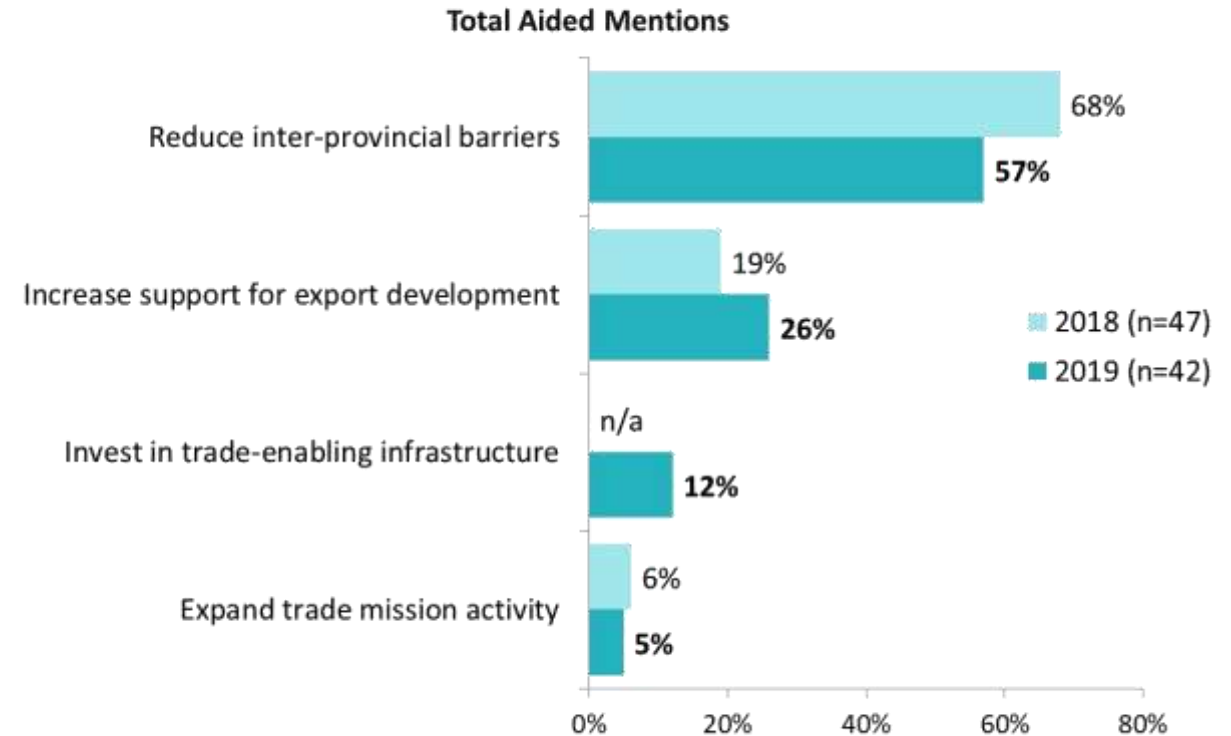


# Provide Provincial Support to Increase Trade

*Reducing inter-provincial barriers is the dominant preference in regards to providing more support designed to increase trade, consistent with last year's result.*

Results in this regard are generally consistent between chamber subgroups. That said, mentions of increasing support for export development are elevated outside of Nova Scotia. This finding was also observed last year. (Table 4\_5)

## Most Desirable Outcome to Provide Support to Increase Trade



Q.4\_5: For each of the following provincial policy issues, please indicate the single most desirable outcome to you. Provide Support to Increase Trade. Note: Slight wording changes from 2019 Policy Survey.

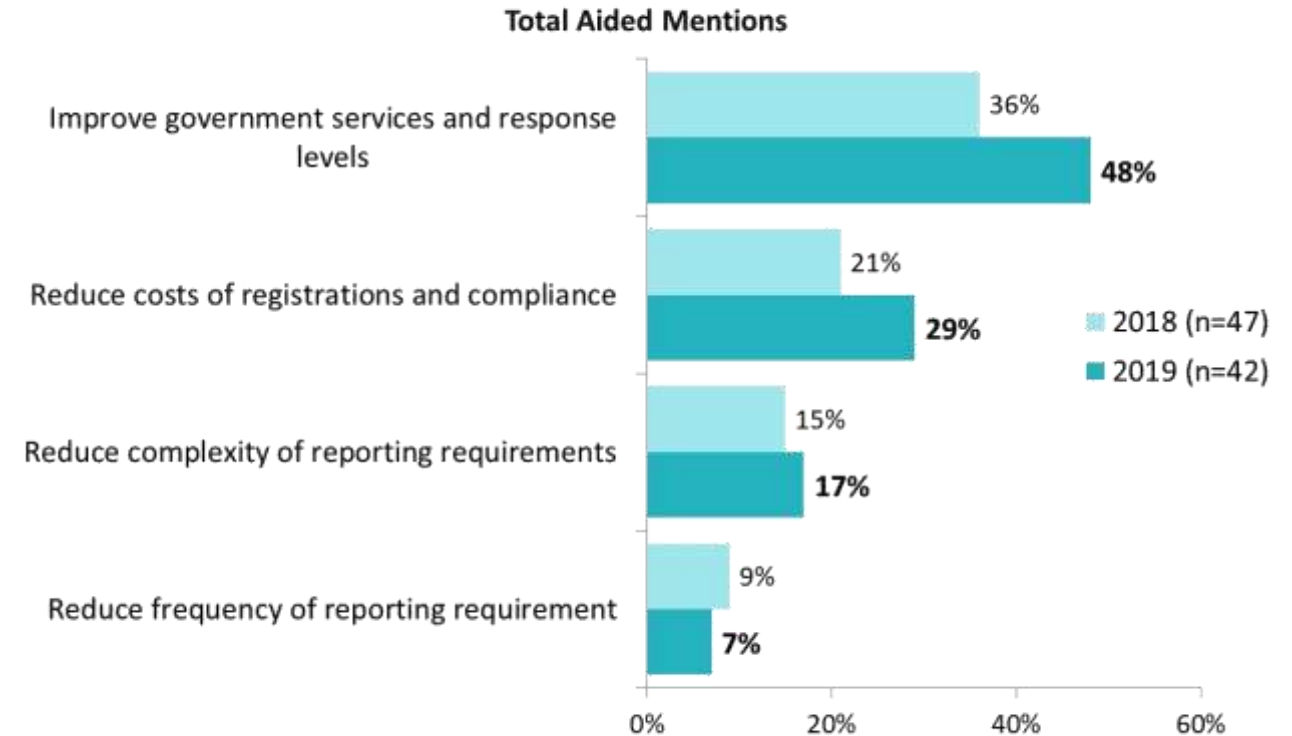


# Reduce the Provincial Regulatory Burden on Business

*Improving government services and response levels is most commonly cited as the most desirable outcome vis-à-vis reducing regulatory burden on business.*

These results are generally consistent across provinces and urban and rural chambers. (Table 4\_6)

## Most Desirable Outcome to Reduce the Regulatory Burden on Business (Red Tape)



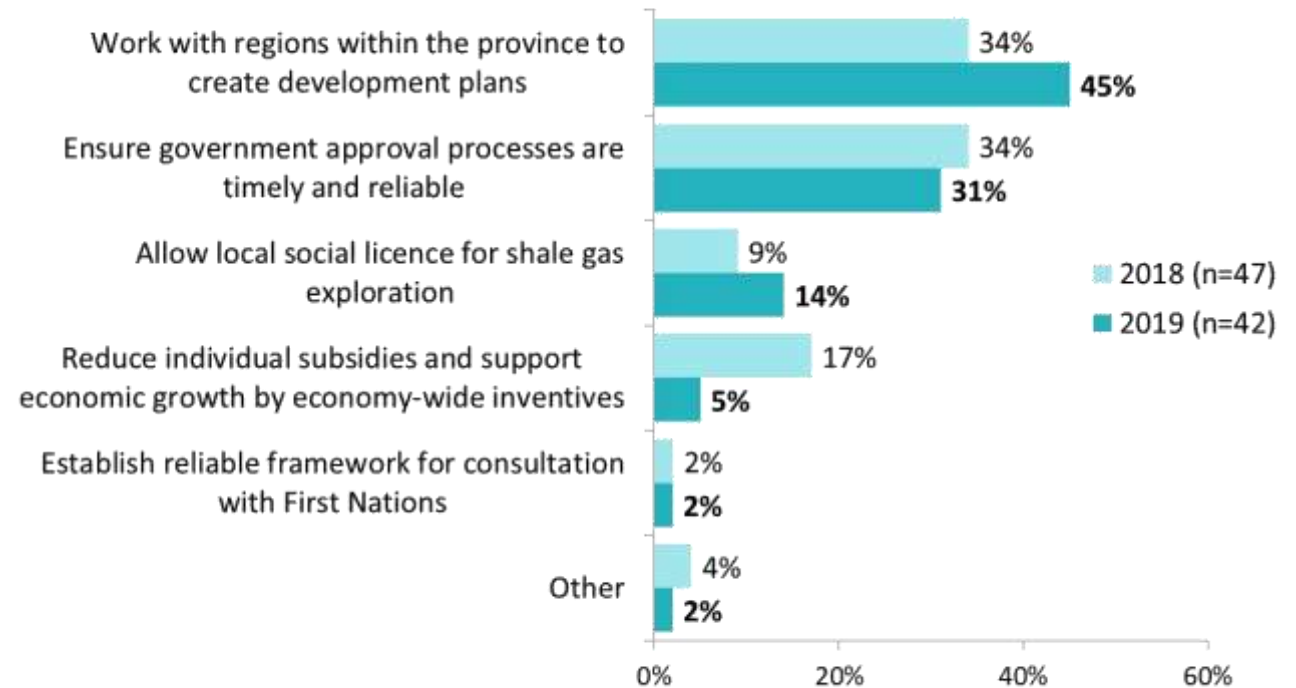
Q.4\_6: For each of the following provincial policy issues, please indicate the single most desirable outcome to you. Reduce the Regulatory Burden on Business (Red Tape). *Note: Slight wording changes from 2019 Policy Survey.*

*Working with regions within the province to create development plans, followed by ensuring government approval processes are timely and reliable, are the two most desirable outcomes for programs to support economic development.*

Mentions of working with regions within the province to create development plans are elevated among rural chambers, while mentions of ensuring that government approval processes are timely and reliable are highest among urban chambers. (Table 4\_7)

## Most Desirable Outcome for Economic Development

Total Aided Mentions

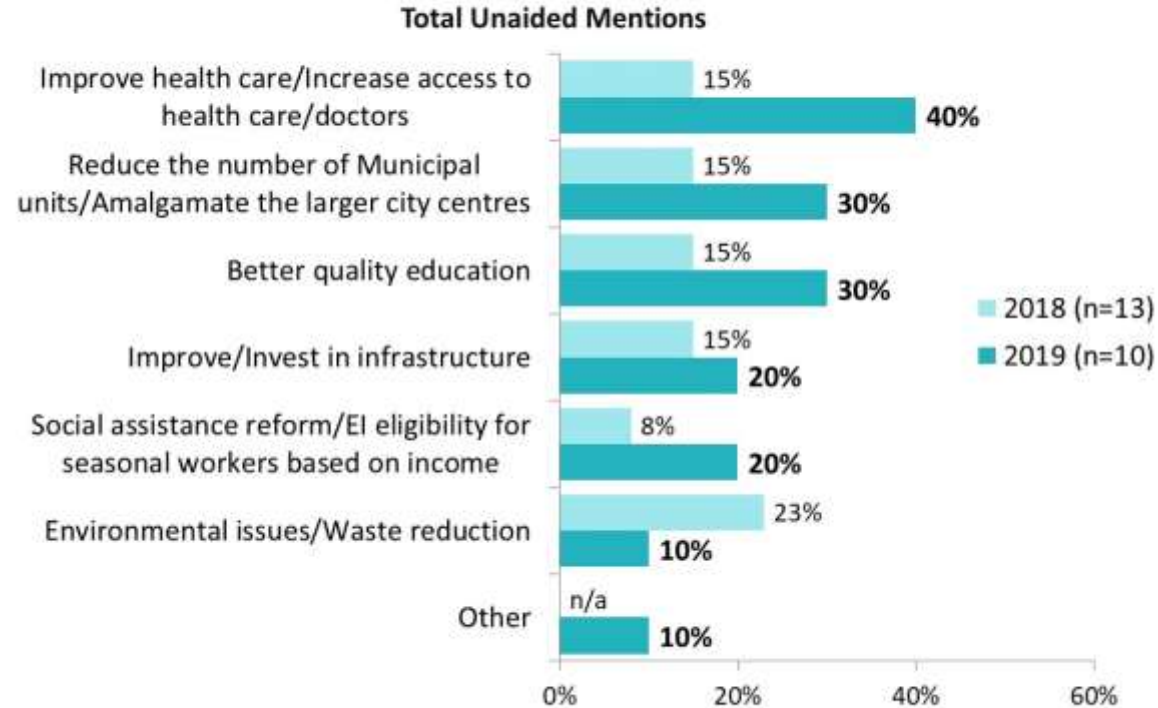


Q.4\_7: For each of the following provincial policy issues, please indicate the single most desirable outcome to you. Economic Development. *Note: Slight wording changes from 2019 Policy Survey.*



A small number of chambers identified other provincial policy issues not noted in the previous questions. The most common issues cited include improving health care and increasing access to health providers, amalgamating the larger city centres, and providing better quality education. Caution should be taken when comparing with 2018 results given small sample sizes. (Table 4\_8a)

## Most Desirable Outcome for Other Provincial Policy Issue/Outcome



Q.4\_8a: For each of the following provincial policy issues, please indicate the single most desirable outcome to you.  
Other Provincial Policy Issue/Outcome. *Note: This question was optional.*

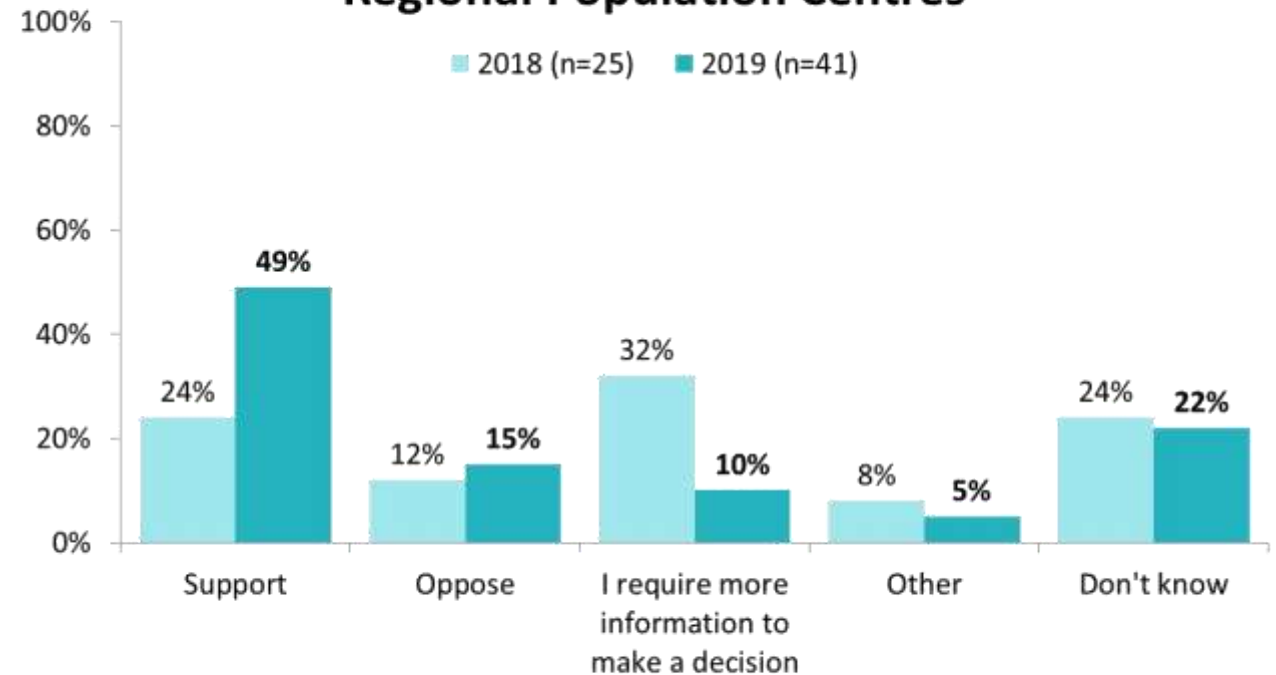


# Consolidation of Services and Infrastructure

*Opinions lean towards supporting the consolidation of services and infrastructure in a limited number of regional population centres, although results indicate that a significant proportion of chambers are unsure.*

Support is elevated among chambers in New Brunswick, although there is a consistent minority of chambers in each province that indicate they are either unsure or require more information before making a decision. Notably, support has doubled from one year ago. Among the small number that require more information, three of the four mention requiring more information on which regions and locations will be affected, while the other chamber was unable to comment as the respondent was unsure of the views of his/her chamber overall. (Table 5)

## Chamber's Opinion of Consolidating Services and Infrastructure in a Limited Number of Regional Population Centres



Q.5: Does your Chamber support or oppose the consolidation of services and infrastructure in a limited number of regional population centres



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Every insight tells a story.