



Nova Scotia *Come to life*: 2007 Survey Results

Senior Civil Servants – Ottawa

Omnifacts Bristol Research

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Table of Contents

Executive Summary	i
Methodology and Objectives	ii
Findings	ii
Introduction and Background	1
Background	2
Questionnaire	2
Sample	2
Survey Findings	4
Provincial Economies	5
Provinces as a “Place to Do Business”	7
Key Brand Attributes	9
Provincial Governments	11

Executive Summary

Methodology and Objectives

- Telephone survey of a total of 338 senior federal government officials from Ottawa during April 2007. Margin of error is +/-5%, 19 times out of 20
- Follow-up to 2004 Baseline survey
- Objectives
 - To further explore perceptions of Nova Scotia in general and on key brand attributes;
 - To compare findings to the first survey to determine whether perceptions have changed;
 - To obtain current perceptions of the Nova Scotia Government compared to other provincial governments in Atlantic Canada and the rest of the country.

Findings

- Senior Civil Servants' perceptions of Nova Scotia as a "Place to Do Business" have improved from 2004 to 2007. There have been improvements in several areas: best place to conduct business, research and development, dynamic and entrepreneurial business community. There have also been solid gains relative to New Brunswick, but several of these gains have been magnified by worsening perceptions of New Brunswick.
- The proportion of senior civil servants rating Nova Scotia as good or excellent place to do business has grown from 56% in 2004 to 62% in 2007. While not statistically significant, the proportion of respondents rating Nova Scotia as "excellent" has grown from 6% in 2004 to 9% in 2007.
- Ontario has lost ground from 54% of senior civil servants rating it as an excellent place to do business in 2004 to 28% in 2007. During the same period, perceptions of British Columbia have risen and the two provinces are now standing nearly at par in second place right after Alberta.
- Perceptions of Quebec, Manitoba and New Brunswick have all slightly declined, while perceptions of Newfoundland and Labrador, Prince Edward Island and Saskatchewan have improved.

Ratings of Provinces as a "Place to do Business"	2004			2007		
	n	% Excellent	% Excellent or Good	n	% Excellent	% Excellent or Good
Alberta	190	61%	95%	215	53%	91%
Ontario	190	54%	95%	215	28%	88%
British Columbia	145	20%	81%	145	28%	83%
Quebec	145	10%	57%	123	4%	51%
New Brunswick	94	7%	55%	114	7%	52%
Nova Scotia	335	6%	56%	338	9%	62%
Manitoba	145	3%	57%	123	2%	50%
Saskatchewan	190	4%	39%	215	4%	56%
Prince Edward Island	96	3%	30%	134	3%	38%
Newfoundland & Labrador	145	2%	36%	123	2%	43%

- New Brunswick remains Nova Scotia’s “closest competitor” within the Atlantic Region, but Nova Scotia is making gains in perceptions of the business climate.
- Perceptions of Nova Scotia having the most well-established entrepreneurial business community (within the context of the four Atlantic provinces) has increased almost 10% since 2004 and now stands at 46%, but an almost 10% drop in perceptions of New Brunswick means Nova Scotia is now 20% ahead.
- Nova Scotia already enjoyed more positive perceptions than New Brunswick for being the best place to conduct business, having most businesses participating in research and development and being the most dynamic place to do business. Perceptions of Nova Scotia have improved, but declines in New Brunswick’s perceptions have widened gaps between the two provinces.

Strengths and Wins	Which province in Atlantic Canada...	2004			2007		
		NS	NB	Gap NS-NB	NS	NB	Gap NS-NB
Business Climate	is the best place to conduct business	47%	33%	+14%	50%	28%	+22%
	has the most businesses participating in research and development activities	42%	20%	+22%	45%	22%	+23%
	is the most dynamic place to do business	44%	35%	+9%	52%	23%	+19%
	has the most well-established entrepreneurial business community	37%	34%	+3%	46%	26%	+20%

- New Brunswick is stronger than Nova Scotia in terms of perceptions of the transportation infrastructure and taxation.
- Nova Scotia had a strong lead over New Brunswick in terms of transportation infrastructure in 2004, but a drop in Nova Scotia combined with an increase in New Brunswick has to the two provinces almost equal with just below 40% giving a good or excellent.
- It is with transportation and telecommunications that New Brunswick is most dramatically ahead of Nova Scotia even though there have been some declines in New Brunswick.
- In 2004, perceptions of corporate tax rates were more positive in New Brunswick as compared to Nova Scotia. These perceptions are still more positive in New Brunswick’s favour, but the gap between the two provinces has narrowed.

(See table on the following page for a summary of “losses and weaknesses”

Losses and Weaknesses	Which province in Atlantic Canada...	2004			2007		
		NS	NB	Gap NS-NB	NS	NB	Gap NS - NB
Infrastructure – Transportation	has the best developed transportation infrastructure	60%	23%	+37%	39%	37%	+2%
Infrastructure – Telecommunications	has the best telecommunications infrastructure that ensures communities in the province are accessible to the world	26%	51%	-25%	26%	44%	-18%
Connection to Markets	has the best transportation to US markets*	n/z	n/z	n/z	37%	53%	-16%
	has the best transportation connections to Canadian markets*	n/z.	n/z.	n/z	36%	54%	-18%
	has the most competitive corporate tax rate	8%	24%	-16%	10%	17%	-7%

* Statement was added in 2007

Introduction and Background

Background

As part of the on-going Nova Scotia *Come to life* initiative, a series of research projects with key target groups have and will be conducted to provide direction and feedback for the development and refinement of communication activities and strategies. In April of 2007 a survey was conducted of Senior Civil Servants at the Director-General, Director and Manager levels within the Canadian Federal Government. This survey represents the third survey conducted with this target group; the first baseline survey having been conducted during November 2004, and a second interim survey completed in May 2006. This report presents a comparative analysis of perceptions over time with emphasis on comparisons between 2004 and 2007.

Questionnaire

Key findings from this survey are presented in this report. It should be noted that the questionnaire was administered in French and English, based on the respondent's preference.

Sample

From 2004 to 2007, the proportion of senior civil servants who have lived in Atlantic Canada decreased from 27% to 19%.

Have you ever lived in Atlantic Canada?

	Year	
	2004	2007
Total (N)	335	338
Yes	27%	19%
No	73%	81%

New Brunswick, Prince Edward Island and Newfoundland and Labrador have all registered an increase in the proportion of senior civil servants who had lived in their province, with New Brunswick having the largest increase. During the same period, the proportion of senior civil servants who had lived in Nova Scotia significantly decreased from 76% to 56%. All of these figures are based on relatively small sample sizes.

Among those who had attended college or university in Atlantic Canada, the proportion of those who had done so in Nova Scotia declined from 71% in 2004 to 59% in 2007. While not statistically significant, observationally, the proportion of senior civil servants who had attended college or university in Atlantic Canada has slightly declined from 13% in 2004 to 10% in 2007.

The proportion of senior civil servants who had visited Atlantic Canada for a business trip has steadily declined since 2004. The proportion of those who have never traveled for business to Atlantic Canada has doubled from 8% in 2004 to 16% in 2007.

Have you ever visited Atlantic Canada for a business trip?

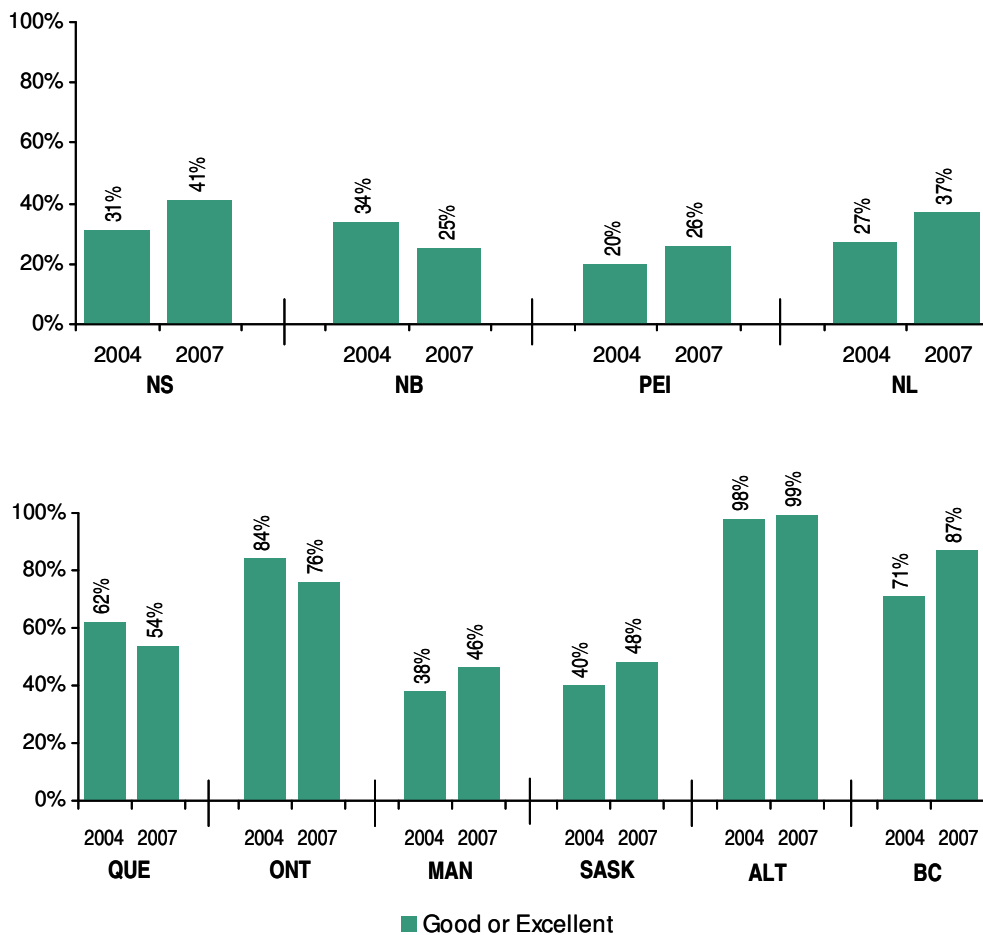
	Year	
	2004	2007
Total (N)	335	338
Yes	92%	84%
No	8%	16%

Survey Findings

Provincial Economies

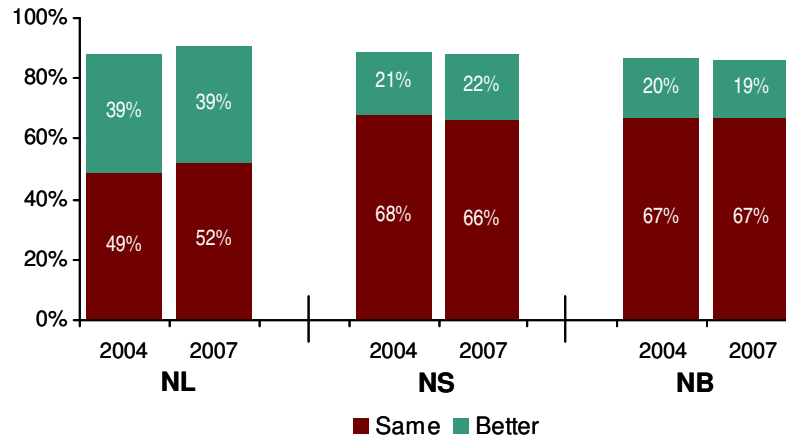
The economic performance of Nova Scotia is perceived as the strongest in Atlantic Canada, although weaker than those of other Canadian provinces. Nova Scotia has also seen an increase of 10 percentage points from 2004 to 2007. Newfoundland and British Columbia have also seen substantial lifts in the proportion of senior civil servants who believe those provinces' economic performance is either "good" or "excellent". Alberta, Ontario and British Columbia continue to be the leaders in economic performance, although Ontario's ratings have slipped slightly since 2004. The prairie provinces of Manitoba and Saskatchewan have seen improvements in the same timeframe.

Perceptions of Provincial Economic Performance



Expectations for the Nova Scotia economy have remained very stable from 2004 to 2007, with two-thirds of senior civil servants expecting it to remain the same over the next 12 months. Expectations for the economy of New Brunswick and Newfoundland and Labrador have also been very stable during the same period.

Expectations of Economic Performance in "a year from now"

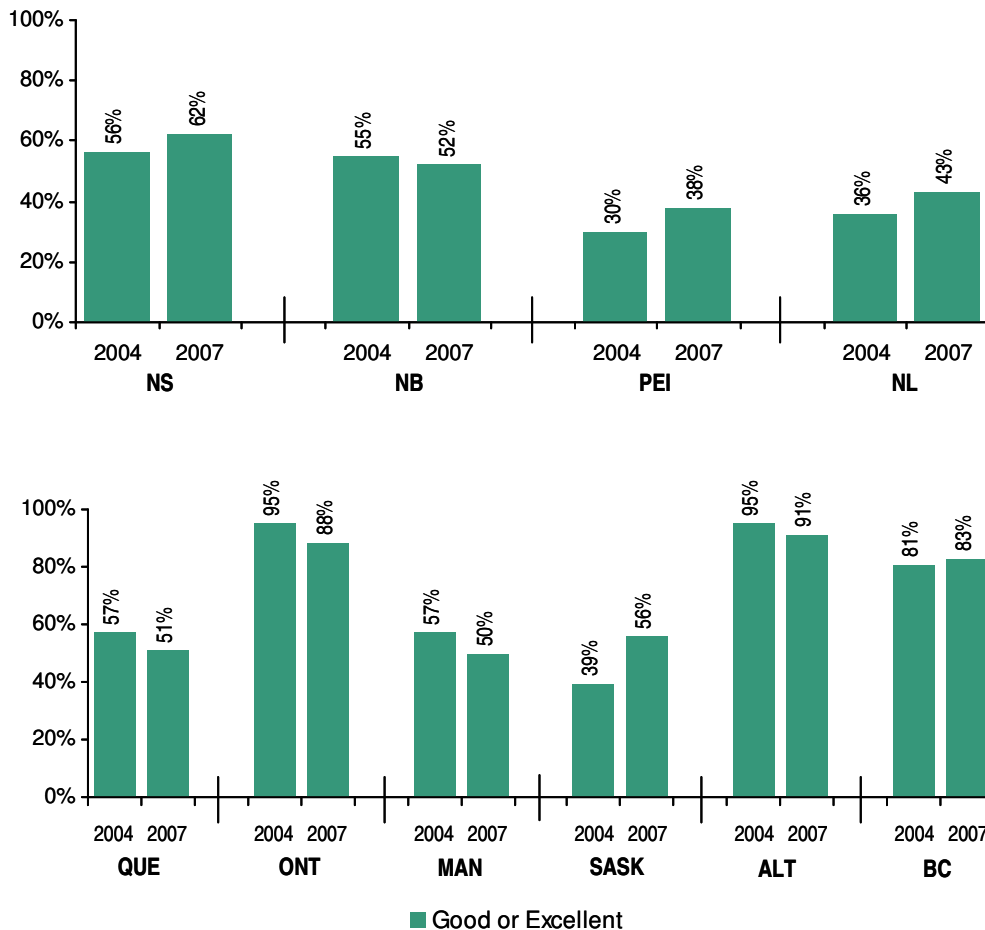


Provinces as a “Place to Do Business”

Nova Scotia is perceived as the best place to do business in the Atlantic, and is also ahead of Quebec, Saskatchewan and Manitoba. Nova Scotia is ranked fourth in Canada on this aspect in terms of combined good and excellent ratings. There have been improvements in perceptions of their business potential in three of the four Atlantic Provinces since 2004; New Brunswick was the only one to note a decrease over the past 3 years.

Ontario and Alberta continue to have the highest ratings of all provinces, but both have seen decreases since 2004. British Columbia also continues to rate highly as being a place to do business. Other provinces in which perceptions of that province of being a “good” or “excellent” place to do business have decreased (although sometimes quite a marginal decrease) include Quebec and Manitoba. Saskatchewan incurred the most notable increase in perceptions since 2004.

Perceptions of Provinces as a “Place to Do Business”



While not statistically significant, observationally, the proportion of senior civil servants who rate Nova Scotia as an *excellent* place to do business has moved up to 9% from 6% from 2004 to 2007. During the same period, the proportion of senior civil servants who rated Nova Scotia as a *fair* place to do business has dropped from 30% to 21%.

How would you rate Nova Scotia as a place to do business?

	Year	
	2004	2007
Total (N)	335	338
Poor	3%	3%
Fair	30%	21%
Good	50%	53%
Excellent	6%	9%
Refused (VOL)	0%	0%
Don't Know/Not Sure (VOL)	10%	14%

Perceptions of Ontario as an excellent place to do business are significantly lower in 2007 as compared to 2004 (down to 28% from 54% in 2004). Perceptions of Alberta although still very positive, have declined from 61% rating it as an excellent place to do business in 2004 to 53% in 2007. Combining good and excellent ratings for both of these provinces still shows them with very strong perceptions.

Perceptions of Newfoundland and Labrador are more positive in 2007 than in 2004, while perceptions of New Brunswick have remained stable.

Key Brand Attributes

Overall findings

Perceptions on key Nova Scotia brand attributes have evolved in different directions since 2004:

- Nova Scotia was already perceived as the most dynamic place to do business in Atlantic Canada in 2004, and has reinforced this position in 2007 (from 44% to 52%.)
- In 2004, Nova Scotia was perceived as having the best transportation infrastructure in Atlantic Canada by 60% of senior civil servants, well ahead of New Brunswick, but since then the position of Nova Scotia has eroded (down to 39%), while New Brunswick has gained grounds (from 23% to 37%) and now the two provinces are nearly on-par .
- The image of Nova Scotia's telecommunications infrastructure and tax rates remain poor in comparison to perceptions regarding New Brunswick.

Two new questions were introduced in the 2007 regarding transportation connections to U.S. markets and to Canadian markets. In both cases, New Brunswick was named by the majority of respondents as the best of all Atlantic Provinces, well ahead of Nova Scotia.

Those who had chosen Nova Scotia as the best place to do business in Atlantic Canada tended to be more likely to do so because of a general perception of the economy being *better there* and because they were *more familiar* with Nova Scotia. New Brunswick's government is seen as being more committed to doing business; New Brunswick is seen to have better telecommunications and having more bilingual people.

Why do you say ... is the best place to conduct business? (Top Mentions)

	NB	NS
Total (N)	95	170
Provincial Government is more Committed to Doing Business	24%	16%
More Familiar with that Province than the Others	20%	28%
Better Location than the Others / Access to Many Markets	19%	12%
Economy is Better There	17%	26%
They have a Better Transportation Infrastructure (Airports, Seaports, Highways, etc)	17%	17%
More Bilingual than the Others	17%	-
Better Telecommunications Infrastructure / More High Tech Service industries	17%	2%

Comparison of Key Attributes by Year

The table on the next page compares the perception of Nova Scotia and New Brunswick on key brand attributes. In three instances (best place to conduct business, access to labour, telecommunications and corporate tax rates), the gap between the two provinces has increased in Nova Scotia's favor in part because of a decline in perceptions of New Brunswick

A Comparison of Key Brand Attributes: Nova Scotia versus New Brunswick

Strengths and Wins	The province in Atlantic Canada that has/is...	2004			2007		
		NS	NB	Gap NS-NB	NS	NB	Gap NS-NB
Business Climate	...the best place to conduct business	47%	33%	+14%	50%	28%	+22%
	... the most businesses participating in research and development activities	42%	20%	+22%	45%	22%	+23%
	...the most dynamic place to do business	44%	35%	+9%	52%	23%	+19%
	...the most well-established entrepreneurial business community	37%	34%	+3%	46%	26%	+20%

Gain		2004			2007		
		NS	NB	Gap NS-NB	NS	NB	Gap NS-NB
Business Climate	...the most qualified labour that is accessible to employers at competitive rates	38%	40%	-2%	41%	33%	+8%

Weaknesses and Losses		2004			2007		
		NS	NB	Gap NS-NB	NS	NB	Gap NS-NB
Infrastructure – Transportation	...the best developed transportation infrastructure	60%	23%	+37%	39%	37%	+2%
Infrastructure – Telecommunications	...the best telecommunications infrastructure that ensures communities in the province are accessible to the world	26%	51%	-25%	26%	44%	-18%
Connection to Markets	...the best transportation to US markets*	n/a	n/a	n/a	37%	53%	-16%
	...the best transportation connections to Canadian markets*	n/a.	n/a	n/a	36%	54%	-18%
	...the most competitive corporate tax rate	8%	24%	-16%	10%	17%	-7%

* Question re-worded in 2007

Provincial Governments

A series of eight questions were asked to assess senior civil servants' perceptions of provincial governments, focusing on aspects of performance or various characteristics. For analysis purposes, rankings of provinces were converted to scores. If a province was ranked first, a score of 2-points was assigned. All second place rankings were given a score of 1 and if a province was not ranked in either first or second place, a score of 0 was assigned. Given that respondents were asked a total of eight questions, the maximum possible score was 16.

As seen below, Alberta and Ontario have a strong lead. These two provinces were most frequently ranked in the Top 2 provincial governments in the country. Quebec and British Columbia were selected with about the same degree of frequency. New Brunswick followed next. Nova Scotia, Newfoundland, Saskatchewan and Manitoba rarely made the Top-2 selections.

(Note that a comparison of 2007 to 2004 is not available for this measure.)

**Mean Scores
Values Range From 0-16**

	2006	2007
Alberta	6.4	5.8
Ontario	3.9	4.6
British Columbia	1.9	2.1
Quebec	1.8	1.9
New Brunswick	1.4	1.0
Newfoundland and Labrador	1.0	1.1
Saskatchewan	0.8	1.1
Manitoba	0.7	0.8
Nova Scotia	0.6	0.7
Prince Edward Island	0.3	0.5

- New Brunswick was chosen as one of the Top 2 governments more often than Nova Scotia, especially in the area of its economic strategy, however, its mean score has declined during the past year.
- Alberta gets the highest mean score again in 2007, albeit with a slightly lower score than in 2006.
- Ontario is the province whose mean score increased most from 2006 to 2007.

% of Senior Civil Servants Ranking <province> as First or Second

Which provincial government...	Province			
	NS	NB	PEI	NL
Most clearly communicates it's provincial priorities	3%	7%	2%	20%
Provides the strongest overall leadership	4%	6%	-	13%
Has the best economic development strategy	7%	12%	1%	5%
Does the best job executing it's economic strategy	5%	9%	-	6%
Is the most cooperative when dealing with federal Government	17%	20%	11%	6%
Has the most promising future economic potential	5%	3%	-	17%
Has the most efficient bureaucracy	7%	13%	8%	5%
Is the most trustworthy	15%	14%	13%	13%

Nova Scotia gets the best ranking in Atlantic in the area of trustworthiness and cooperation. Newfoundland and Labrador get the highest score for communicating priorities clearly, providing leadership, and having the most promising future.