POLICY UPDATE

Membership Value Increasing: 2001 Member Survey

December 10, 2001

In the fall, the Chamber launched its annual membership survey as KLJ Field Services conducted phone interviews with 351 randomly-selected members who were representative of overall membership by geography and company size. The 2001 edition continues a series of annual surveys covering a wide range of topics, from overall satisfaction to policy areas of priority. These surveys provide the Chamber with key information required to focus on its future direction, while assessing its performance compared to previous years.

The 2001 results, analysed by Corporate Research Associates, show that members continue to be largely satisfied with the Chamber, and support the direction and priorities advocated by the organization.

Overall Satisfaction Remains High

Overall member satisfaction has remained high, with 94% of respondents expressing satisfaction with the Chamber. This is consistent with the positive growth found in 2000 (94%), 1998 (89%) and 1995 (81%). The high satisfaction rating is reflected in the members' perceived value of Chamber membership compared to its cost. Specifically, the perceived value of membership has increased slightly from 2000, as 80% felt they receive excellent or good value for their membership relative to its cost.

Services and Activities

It is very clear the Chamber's role as a networking facilitator continues to provide paramount value to its members. Four in ten members, in unaided response, indicated the opportunity to network was their primary reason for joining the organization.

Members placed the greatest value on networking events (74%), business communications, (such as *Business Voice*, web site and policy updates — 76%), public policy issues (69%), and member benefits and discounts (62%) following as valuable Chamber offerings.

Policy Direction

Members were asked about the level of priority the Chamber should place on various issues. The results continue to place the highest priority on government taxation (75%) and government spending (71%). Changing how the nation views Metro Halifax (60%), transportation issues (53%), health care (52%) and energy development (51%) were named as top priorities by at least half of all respondents.

For the first time, members were asked to rate the priority of the long-term goals as drafted in the Chamber's new strategic plan. Members rated supporting an effective and efficient government (65% named as top priority), collaborating with the industry and education sector stakeholders to develop a human resources development strategy to support a strong business environment (60%) and continually working to improve the value of membership in the Chamber to sustain and attract members (60%) were named as the top strategic goals. These priorities were followed closely by the desire to see the Chamber demonstrate leadership in planning a "city by design" (54%), and promoting a healthy workplace (54%).

Overall, the results of the 2001 membership survey confirm the Chamber's value among its members. The Chamber continues receive credit for acting as an effective voice for the business community, for speaking out on business and public policy issues, and for continuing to be a strong networking facilitator. The results also indicate that the Chamber is moving forward in areas with initiatives that are viewed as important to the Chamber community.

Editor's note: Visit the Policy Update section on our website for quantitative results and a slide presentation of highlights, or contact the Chamber office with specific questions on the survey.

METROPOLITAN HALIFAX CHAMBER *OF* COMMERCE

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Halifax Chamber of Commerce 2001 Member Survey

Prepared for:

Metropolitan Halifax Chamber of Commerce

September 2001

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Introduction

This report presents the 2001 findings of the **Metropolitan Halifax Chamber of Commerce Member Satisfaction Survey** developed by Corporate Research Associates Inc. and conducted by KLJ Field Services Inc., on behalf of Halifax Chamber of Commerce.

The Metropolitan Halifax Chamber of Commerce Member Satisfaction Survey has been commissioned to provide Halifax Chamber of Commerce with a measurement of member satisfaction. The study allows Halifax Chamber of Commerce to track member satisfaction, gain insight to members' requests for change and assess member familiarity with activities and services.

The primary objective of this study is to provide ongoing measurement of member satisfaction. More specifically, the study sought to:

- **Understand duration, reason for and overall satisfaction of membership;**
- **Assess familiarity with, satisfaction of and frequency of members' use of Chamber's services and activities;**
- **Understand value placed on services, activities and benefits of Chamber by members; and**
- **Determine members' understanding of Chamber's role, future and present priorities to both its members and policy issues.**

A total of 351 personal interviews were conducted with Halifax Chamber of Commerce members. The interviews were conducted between September 6 and September 14, 2001. The results of the study are accurate to +/- 5.2%, 19 times out of 20. More detail can be found in the Methodology section of this report.

It should be noted that the tabulated results are presented in percentages and have been rounded to the nearest whole number. Consequently, the totals may not always add up exactly to 100 percent. The word **Sample** found on each table indicates the number of persons who responded to the question asked.

Executive Summary

The results of the **2001 Metro Halifax Chamber of Commerce** survey suggests members are largely satisfied with the Halifax Chamber of Commerce. The overall level of satisfaction has remained relatively consistent with last year. Nearly eight in ten Chamber members believe they receive at least good value for their membership when compared to cost. The vast majority of respondents are completely or mostly satisfied with the way in which the Chamber keeps them informed about policy initiatives, events and member services.

Longevity of membership has increased with about one third of respondents having maintained spanning three to five years, on third sustaining membership for six years or more and the last third, less than two years. The level of activity of members has remained consistent with last year; nevertheless there is much room for improvement in member's activity within the Chamber.

For the most part, members place the greatest value on the Chamber's services and activities with which they are most familiar. Networking events and Communication Publications held the greatest familiarity and value. Respondents were more likely to read Business Voice, take advantage of benefit and discounts as well as respond to policy surveys as compared to last year. The benefits members are most familiar with this year are insurance discounts as well credit card and car rental discounts. However, there remains tremendous room for improvement in this area, as three in ten members are still not aware of various benefits and discounts offered to Chamber members.

With regard to the Chamber's direction on current and future policies, most members felt government taxation and spending were of top priority. The National image of Halifax has also remained at the top of the list as well. Regarding the long-term strategic plan of the Chamber, at least six in ten respondents felt that supporting an effective and efficient government, collaborating with industry and education sector stakeholders to develop a human resources development strategy to support a strong business environment and continually improving the value of membership in the Chamber to sustain and attract members were of main concern.

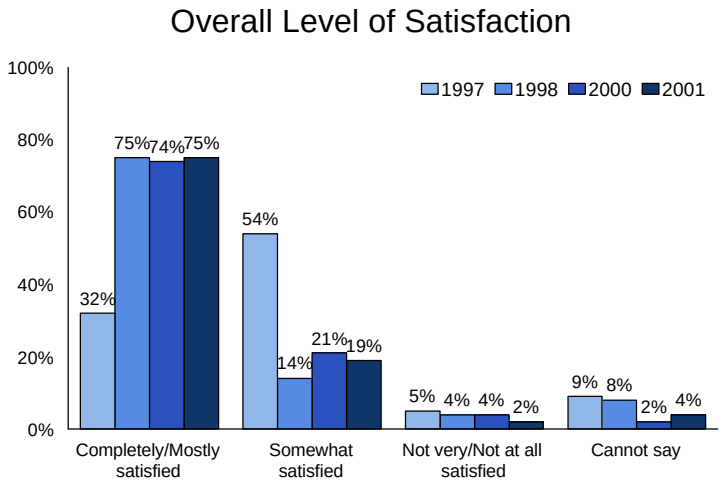
Lastly, over four in ten respondents felt the Chamber's role was a business voice in the community or to develop and promote the Halifax Regional Municipality business and describe the Chamber as active, doing a good job and progressive.

Detailed Analysis

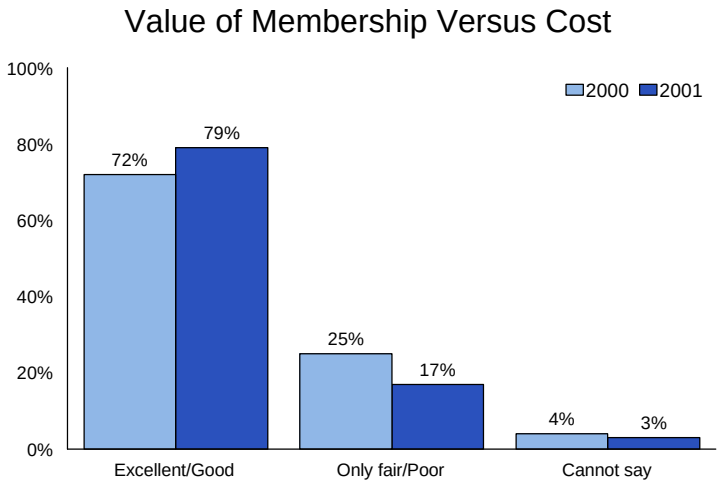
Satisfaction With Metro Chamber of Commerce

Overall Opinion Of Chamber of Commerce

The overall satisfaction level of Halifax Chamber of Commerce members has increased slightly in the past year. Three in four members are completely or mostly satisfied with the Chamber of Commerce. More specifically, there has been an increase of members who are completely satisfied (31%) with the Chamber compared to last year (26%). Two in ten are only somewhat satisfied with their membership, yet the percentage of respondents who are not very satisfied is the lowest in four years (1%). As expected, respondents who consider themselves very active are more likely to be completely satisfied than any other group (Table 6).

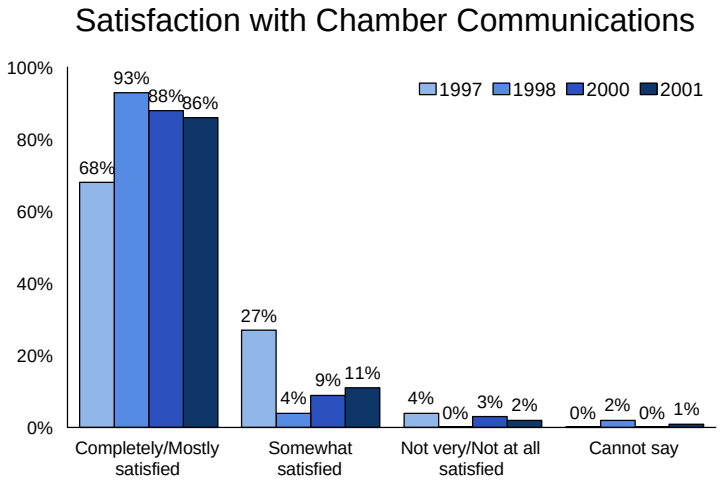


Three in four Chamber members feel they receive at least good value for their membership when compared with cost. This year saw an increase in the amount of respondents who feel their membership is of good (54%, up 7%) value for cost. Members who feel they are very active are more likely to think their membership is of excellent value, while a mere two percent feel their membership is of poor value. Respondents who feel their membership is of poor value most likely to consider themselves not at all active (Table 10).



Satisfaction with the Chamber's Communication

Over eight in ten respondents (86%, down 2%) are completely or mostly satisfied with the way in which the Chamber keeps members informed about its policy issues, events and member services. The number of surveyed members who are completely or mostly satisfied with the Chamber's communication has decreased in the past four years however, the more active the respondent, the more likely they are completely satisfied with the way in which the chamber keeps them informed. Only two percent of respondents are not very or not at all satisfied. Of this small percentage of respondents and those who are only somewhat satisfied, "utilize email more" was the most common verbal suggestion for improvement (24%) [Note- these results should be considered with caution, due to the small sample size (n=46).] (Tables 12, 13).



* In 1997, a different collection methodology (mail-out) was used

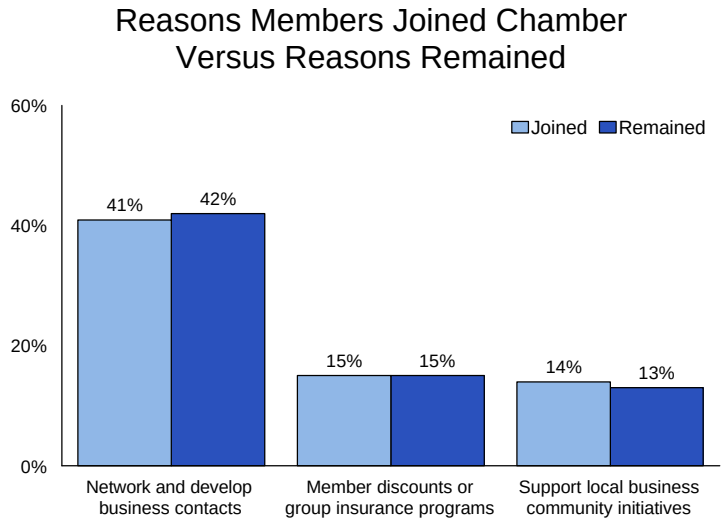
Membership Profile

Reasons for Membership Initiation and Maintenance

Continuing with last year's survey, four in ten respondents said the primary reason they became a member of the Metropolitan Halifax Chamber of Commerce was to network and develop business contacts (41%, down 2 points). While this year saw an increase of respondents who claimed Member discounts or group insurance programs (15%, up 5 points) was the main reason they joined the Chamber and "Supporting local business" community initiatives (14%, up 1 point) ranked third on the scale.

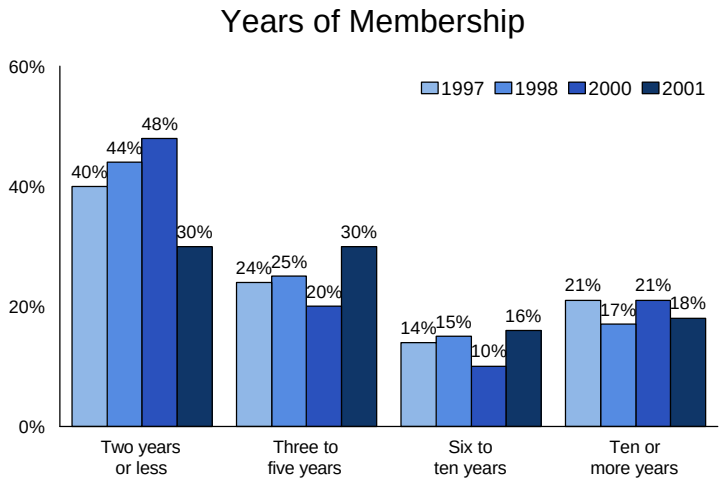
Of note, there were no substantial changes in respondents' motives for joining the Chamber of Commerce compared to last year. Establishing a business profile in the community (4%, down 5 points) lost importance in 2001, while having a Voice in the local community became more important to respondents. Enhancing the prestige/reputation/credibility of one's organization (2%) was a response added to the tables this year, however very few respondents joined the Chamber for this reason (Table 4).

Respondents were asked why they remain members of the Halifax Chamber of Commerce. The majority replied that their underlying reason was Networking and developing business contacts (42%) with Members' discounts or group insurance (15%) and Supporting local business community initiatives (13%) following in the distance. Respondents who have been members of the Chamber of Commerce for six years or longer are more likely to remain a member to Support local community business initiatives. Respondents who consider themselves to be less active, are more likely to have joined and remain members of the Chamber for the discounts or group insurance programs. As this is the first year respondents were asked this question, and there is no basis for comparison (Table 5).



Tenure of Membership

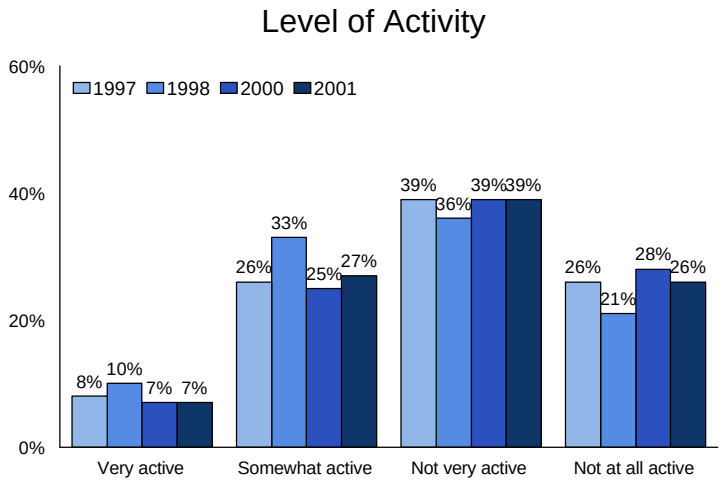
The sizes of the years of membership subgroups have evened out since last year. A substantial decrease is noted in the amount of respondents who have been members for less than one year (8%, down 14 percent) as compared to last year. Three in ten of those interviewed have been Chamber members for three to five years, while over three in ten (34%) have been members for six years or more. In contrast with last year's findings, there has been a noticeable increase in the amount of respondents who have been members for six to ten years. Respondents who have been members for more than one year but less than six are more likely to classify themselves as not very or not at all active. The vast majority of those interviewed (90%) are responsible for determining whether they renew their Chamber membership (Table 1, 11).



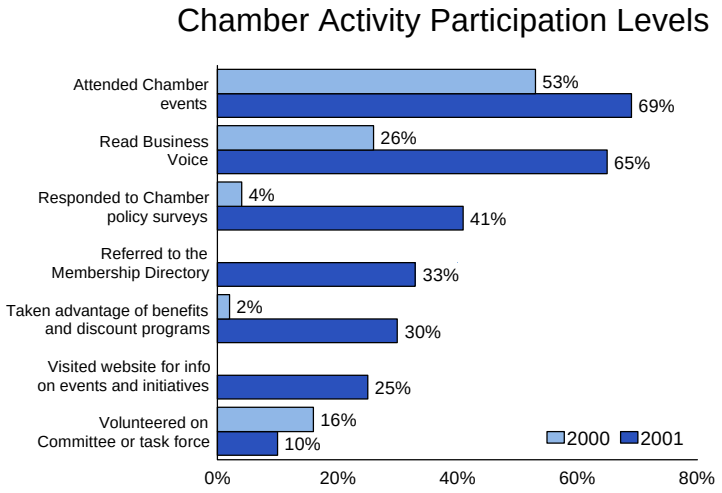
Activity and Service Levels and Importance

Activity Level

The activity level of Halifax Chamber members is fairly consistent with results from last year. About three in ten classifying themselves as very (7%, down 1%) or somewhat active (27%, up 2%). The highest participation levels occurred in 1998 with one in ten respondents considering themselves very active and three in ten somewhat active. Understandably, respondents who have been members for longer are more likely to consider themselves more active (Table 2).



Chamber activities with the greatest participation levels are: attending Chamber events and reading Business Voice. Respondents who have been members for six years or longer are more likely to have participated in both of these activities than respondents who have not been members as long. Compared to last year, there has been an increase in the percentage of members who attended participated in Chamber activities with nearly seven in ten respondents (69%) having attended Chamber events and more than six in ten (65%) having read Business Voice. The amount of surveyed members who have responded to Chamber policy surveys (40%), referred to the Membership directory (33%) or taken advantage of member benefits (30%) has also increased considerably in the past year. Referring to Chamber Membership Directory and visiting the Chamber website are additions to the tables this year thus there is no basis for comparison of earlier years (Table 3).



Activities and Services

Overall it appears members are familiar with most of the Chamber's activities. Specifically three in four members are very or somewhat familiar with the Chamber's activities and services, with the exception of the Metro Halifax Business Awards. Not surprising, members place the greatest value on the Chambers Activities and Services they are most familiar with. Over eight in ten respondents are very or somewhat familiar with Networking Events (86%) and Publication Communications (82%) and the highest values placed on these exact services as well. Reflecting the value members place on Networking Events, it is understandable that this is the type of activity isattended most by surveyed members. The more active the respondents are, the more likely they are very familiar with Chamber activities and services (Table 8a-g, 9a-g).

Activity/Service	Familiarity *	Value**	Gap***
Public Policy	76%	69%	+7
Publications	82%	76%	+6
Network Events	86%	74%	+12
Dinners	73%	56%	+17
Business Award	67%	48%	+19
Benefits	72%	62%	+10
Speakers	77%	61%	+16

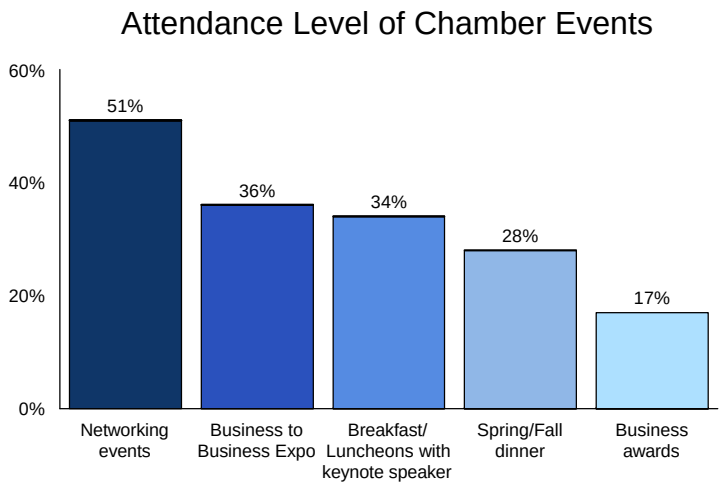
* % Very/Somewhat familiar

** % Significant/Moderate value

*** Difference between Familiarity and Satisfaction Score (Gap= Familiarity-Value). In general, a positive gap indicates Halifax Chamber of Commerce members are more familiar with specific activities and service than the value they place on the feature. A negative score would indicate members feel less informed about a service or activity than the value they have for it.

Respondents were asked which Chamber events they attended in the past year, and as the scale has been revised since 2000, direct comparisons are not recommended. Half of surveyed members

attended networking events, while more than seven in twenty attending the Business to Business Expo (36%) or Breakfast and Luncheons with keynote speakers (34%). Evidently, there is much room for improvement on behalf the Chamber to increase the attendance levels with all events, specifically Metro Halifax Business Awards (17%), although it is a relatively new function. The Annual Spring/Fall Dinners (28%) also have a larger percentage gap in attendance. Understandably, respondents who define themselves as very active are more likely to attend Chamber events than respondents who feel they are not as active (Table 16a-e).



The overall level of satisfaction of events in the past year has decreased slightly. Down from last year, six in ten respondents were completely (27%, up 2%) or mostly satisfied (34%, down 6%) with the Chamber events they attended in the past year. When asked what would increase the respondents' level of satisfaction with the Chamber events, the most common recorded response was tailoring events to the respondents' business, followed by more focus on networking [Note- these results should be considered directional only, due to the small sample size (n=35).] (Table 16, 17).

Benefits and Discounts

Of the benefits and discounts the Chamber offers to its members, there appears to be varied awareness of the discounts and benefits. Seven in ten members are aware of Small Business Group Insurance benefits (79%) as well as Group Home and Auto Insurance (70%), with somewhat smaller percentages aware of Car rentals (68%) and Credit card discounts (68%).

The majority of members are not aware of the discount they may receive on Certificate of Origin Service (28%), Payroll administration program (46%) and Fuel discounts (60%). Knowledge of 'How to Network' Seminars (67%) and Business Voice advertising discounts (66%) familiarity levels could be improved as well. As the comparison scale of last year's survey is different from this year, analysis between the two years is not recommended. When asked what benefits the Chamber should consider offering to its members, the most common responses provided were discounts/rewards with travel and hotels in addition to discounts between fellow members (Table 19a-l, 20).

Business Directory

Respondents were asked how many times they have used the Chamber of Commerce Business directory to support fellow members. Little more than one in ten (13%) claim to have used the directory one to three times, while one quarter of respondents (25%) have used the directory four to ten times. Nearly two in ten (17%) have used the directory more than ten times. Almost half of all respondents (45%) have never used the Chamber's Business Directory, however this number has decreased since last year (45%, down 9%) (Table 14).

Nearly one half (46%) of surveyed members do not recall seeing or hearing advisements about business development or support for business that was sponsored by the Chamber in the past three months. Over two in ten recall seeing or hearing some form of Chamber advertising on television (27%) or in a magazine (26%). Fewer respondents recall advertising in a newspaper (21%), on the radio (12%) or a billboard advertisement (5%). Predictably, active members are more likely to have seen some form of advertising than any other activity level, as well as respondents who have been members for longer periods of time (Table 15).

Chamber of Commerce Directions and Issues

Current Policy Work

Once again the Chamber asked its members for guidance in determining the focus of its policy work. Members were provided nine issues and asked to rate them regarding priority. Government Taxation and Government Spending rated highest on the list followed by the National Image of Metro Halifax and then Transport (road, air, port). There were no significant changes in the members' opinions of the Chamber's priority of policy issues as compared to last year. Nine in ten respondents felt the newly added topics; Transport and Energy Development were of top or moderate priority while Sunday shopping was not rated as highly (Table 21a-j). It may be that Sunday Shopping is considered under the umbrella of a larger issue (Table 21).

Priority	Gov't spending		Trans-port	Gov't taxation		Workers Comp.		Energy dev't	Inter'l trade		Health care		Nat'l image		Sunday shop.
	00 %	**01 %**	**01 %**	00 %	**01 %**	00 %	**01 %**	**01 %**	00 %	**01 %**	00 %	**01 %**	00 %	**01 %**	**01 %**
Top	79	**71**	**53**	80	**75**	29	**30**	**51**	42	**41**	51	**52**	55	**60**	**34**
Moderate	17	**23**	**42**	17	**22**	55	**54**	**41**	50	**50**	36	**38**	40	**35**	**35**
Low	3	**4**	**4**	2	**2**	12	**12**	**6**	6	**8**	11	**9**	4	**4**	**29**
Cannot say	1	**1**	**1**	1	**1**	5	**3**	**2**	2	**2**	3	**1**	2	**1**	**2**

Less than two in ten respondents (17%) suggested the Chamber of Commerce would be more effective by taking a stronger position on more issues, while seven in ten respondents (71%) felt the Chamber of Commerce has the right balance with regard to its' priorities on various issues. Only one in ten respondents suggested fewer issues (11%) would make the Chamber more effective. The longer a respondent has been a member of the Chamber, the more likely they agreed the Chamber has the right balance of issues (Table 22).

Future Chamber Directions and Policies

Members were also asked to respond to the Chamber's long-term strategic plan and rate the priority of various issues. Of note, supporting an effective and efficient government received the greatest backing from respondents and as the length of membership increases, so does support for the government. Collaborate with industry and education sector stakeholders to develop a human resources development strategy to support a strong business environment as well as continually improve the value of membership in the Chamber to sustain and attract members follow in the distance as top priorities (Table 23a-g).

Long term Priorities	Support effect. and effic. gov't	Leadership in city by design	HR dev't to support business	Celebrate HRM confidence	Chamber's progressive voice	Improve members hip value	Promote healthy workforce
Top	65%	57%	60%	39%	34%	60%	54%
Moderate	29%	36%	34%	53%	56%	37%	38%
Low	4%	5%	5%	7%	8%	3%	7%
Cannot say	2%	3%	1%	1%	3%	0%	1%

Chamber's Role

Respondents were asked to define the main role of the Chamber based on their knowledge. The most frequent response was 'a business voice for the community' (26%), followed by 'develop and promote the Halifax Regional Municipality business' (20%). Two in ten respondents felt the Chamber's primary role was to either 'support and foster local business' (11%) or 'network business together' (11%). Of note, no other role is offered by more than 7 percent of respondents (Table 24).

When asked what word or phrase would describe the Chamber, the most prevalent responses were active (12%), followed by a good business voice (10%), doing a good job (5%) and progressive (5%). Nearly nine in ten respondents did not have any further comments to add about the survey, the largest category, a mere four percent of respondents, replied 'overall good job' (Table 25, 26).

Study Methodology

Questionnaire Design

The survey questionnaire used for this study was designed by CRA, conducted by KLJ Field Services Inc., in consultation with Metro Halifax Chamber of Commerce representatives.

Sample Design and Selection

This telephone study was designed to capture satisfaction and value information from Metropolitan Halifax Chamber of Commerce members. All telephone interviews were conducted by fully trained and supervised interviewers.

Sample Tolerances and Statistical Reliability

A sample of 351 provides a 95% confidence level with a +/- 5.2% margin of error. The margin of error for individual results varies with both the size of the sample and the strength of the response as the following table demonstrates.

Size of Sample	20 or 80%	30 or 70%	40 or 60%	50%
400 Interviews	3.9	4.5	4.8	4.9
200 Interviews	5.4	6.2	6.8	7.0
100 Interviews	7.5	8.8	9.5	9.9
50 Interviews	11.0	13.0	13.7	14.2

Survey Administration

The survey was administered to members between September 6 and September 14, 2001. Fully trained and supervised interviewers conducted all interviewing. The average length of time required to complete an interview was 12 minutes. Among all eligible respondents contacted, the rate of interview completion was 30 percent.

Metropolitan Halifax Chamber of Commerce Membership Study 2001

Presented to:
Metropolitan Halifax Chamber of Commerce

October 2001

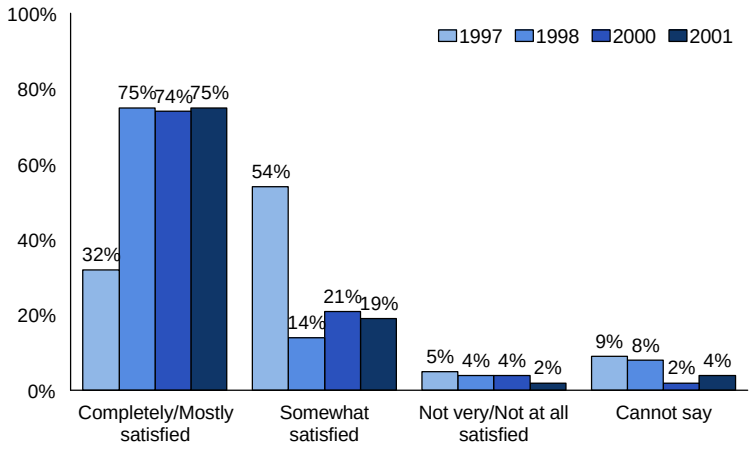
CORPORATE RESEARCH ASSOCIATES INC

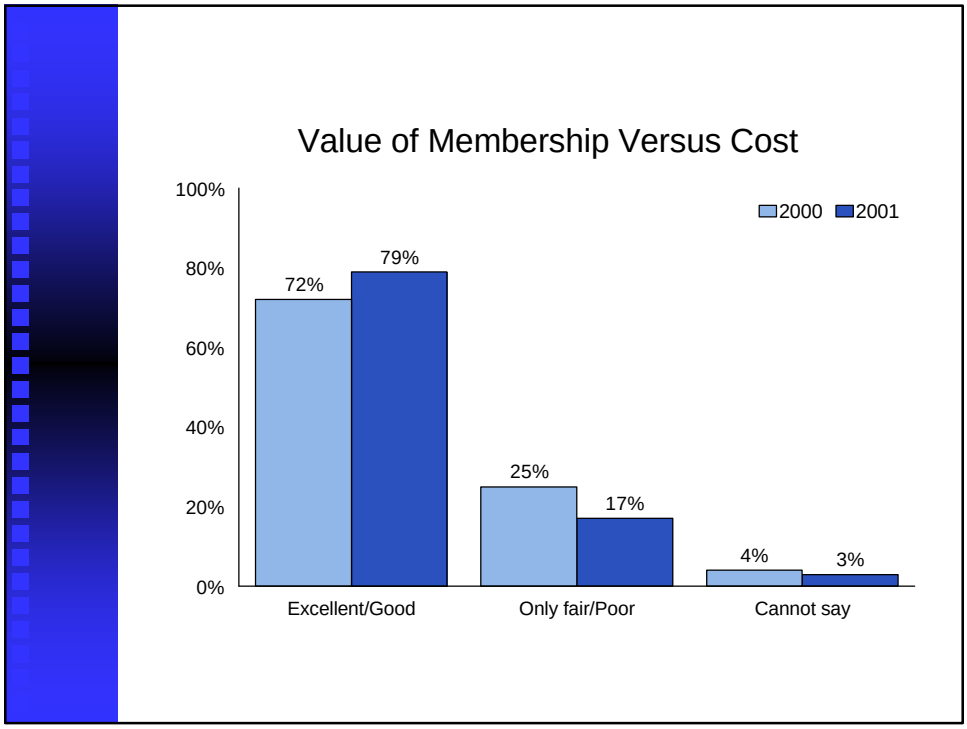
Study Objectives

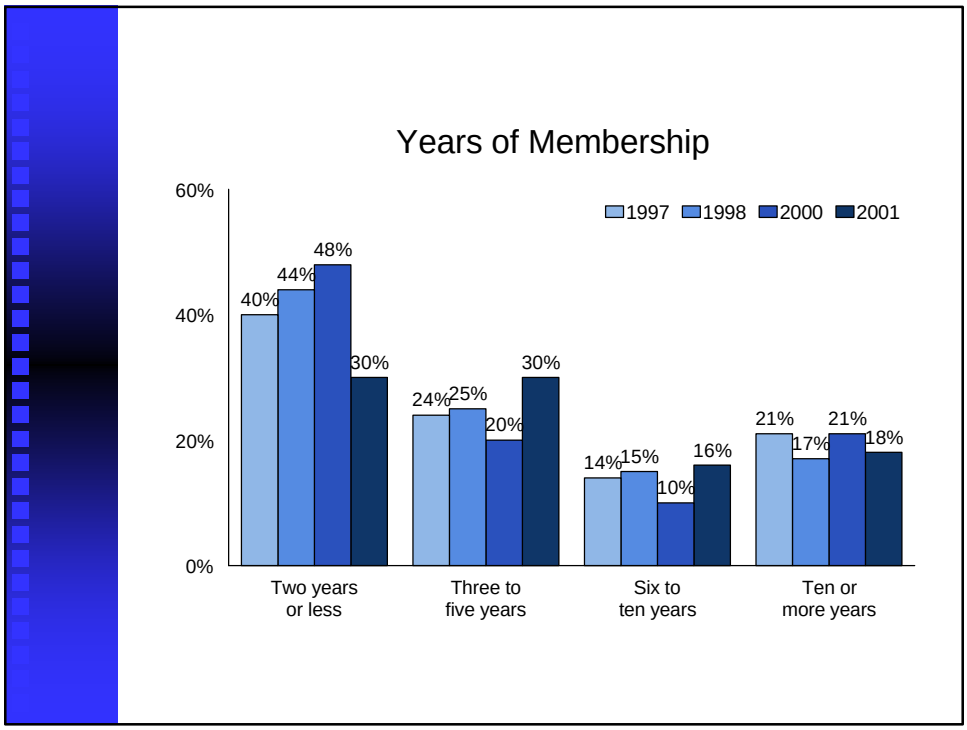
- Determine members' overall satisfaction with the Chamber of Commerce
- Asses Chamber members' level of participation in a variety of activities
- Determine members perception regarding value of membership and value derived from various events, activities and services
- Determine member's understanding of the Chamber's future and present priorities to both its members and policy issues

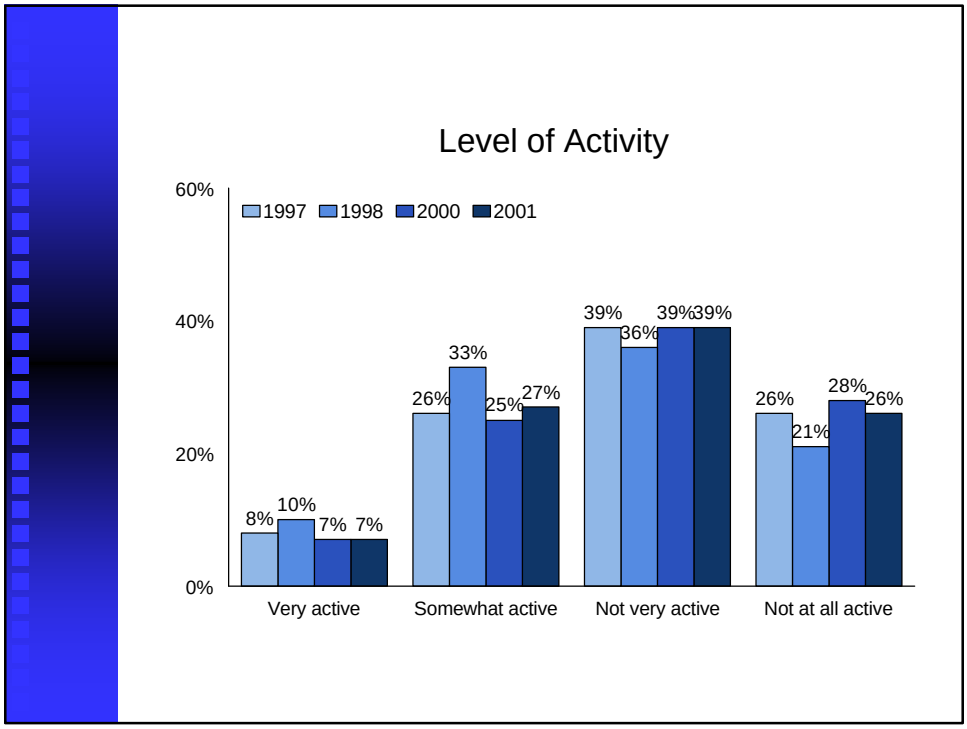
Study Methodology

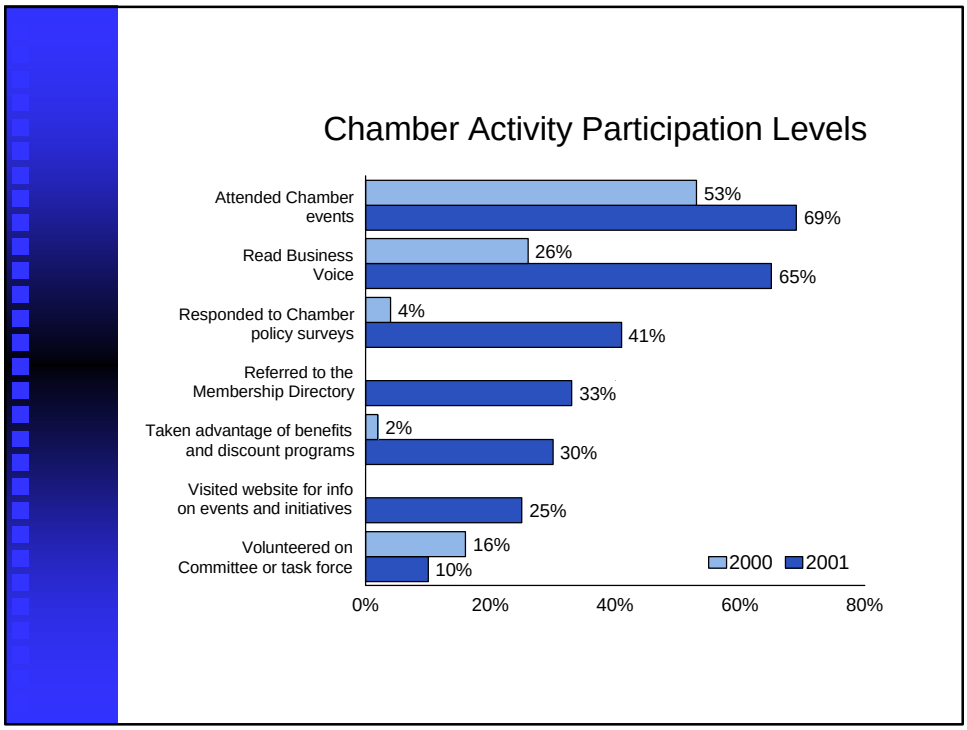
- Telephone interviews
- (Total sample size 351)
- Respondents randomly selected from Chamber membership list (representative by geography & company size)
- Field work completed September 6-14, 2001

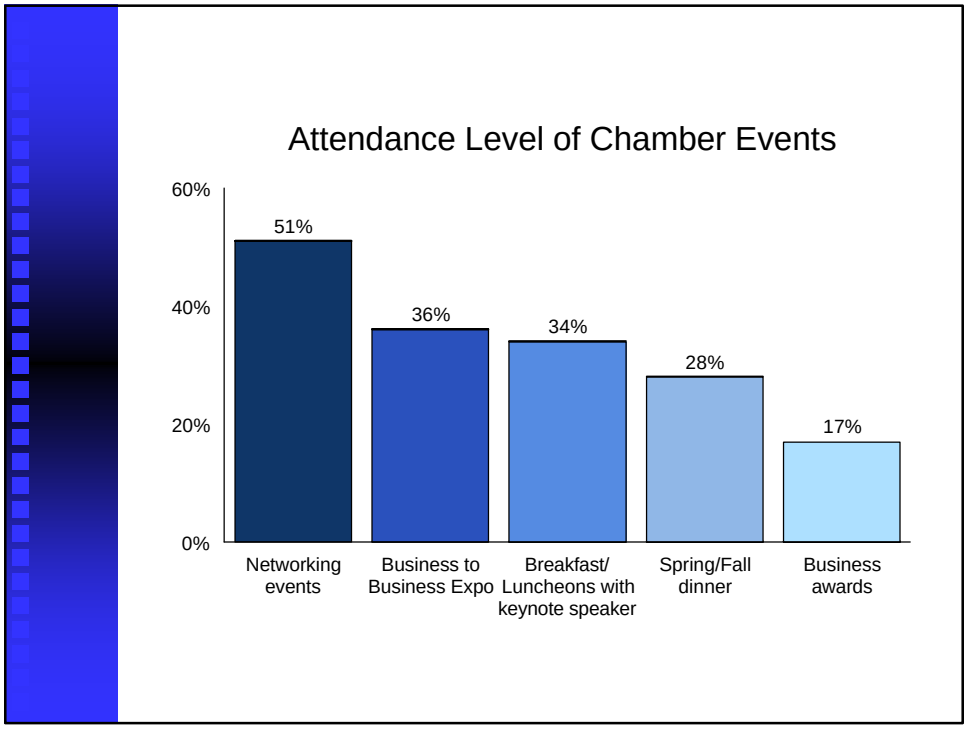


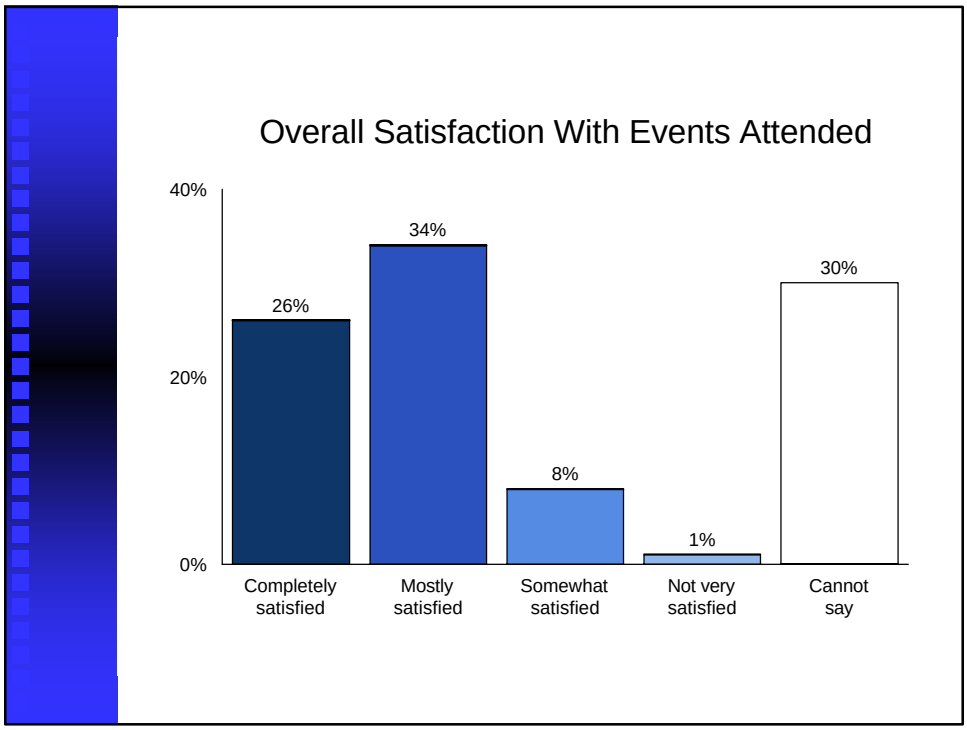

Value of Membership Versus Cost
100%
80%
60%
40%
20%
0%
2000
2001
72%
79%
25%
17%
4%
3%
Excellent/Good
Only fair/Poor
Cannot say

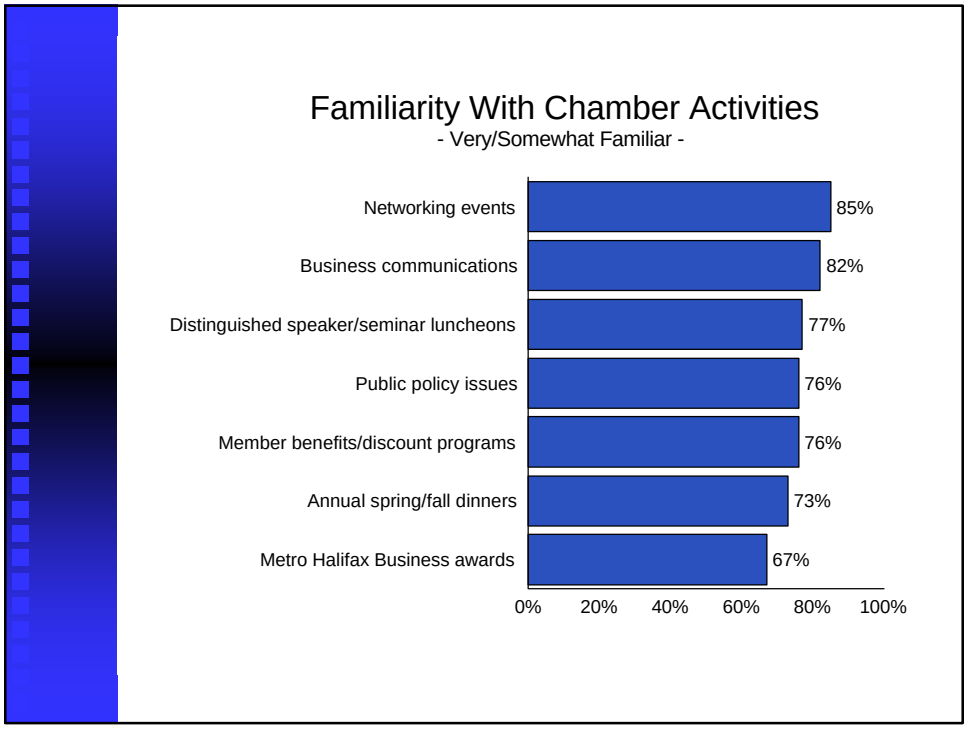

Years of Membership
60%
40%
20%
0%
1997
1998
2000
2001
40%
44%
48%
30%
24%
25%
20%
30%
14%
15%
10%
16%
21%
17%
21%
18%
Two years or less
Three to five years
Six to ten years
Ten or more years

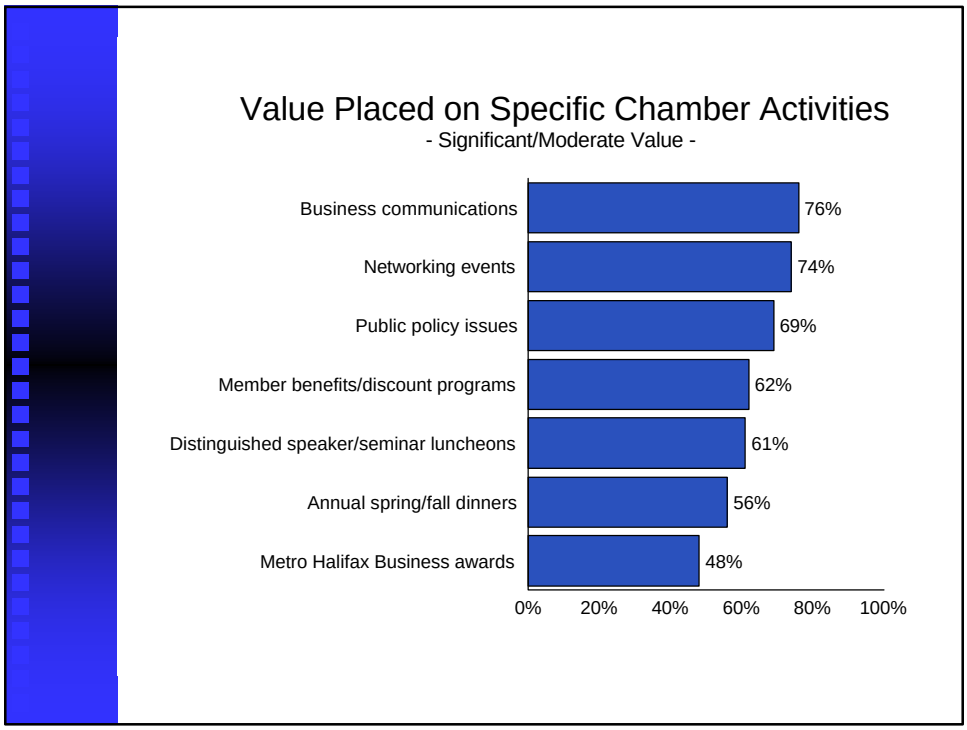

Level of Activity
60%
40%
20%
0%
1997
1998
2000
2001
8%
10%
7%
7%
26%
33%
25%
27%
39%
36%
39%
39%
26%
21%
28%
26%
Very active
Somewhat active
Not very active
Not at all active

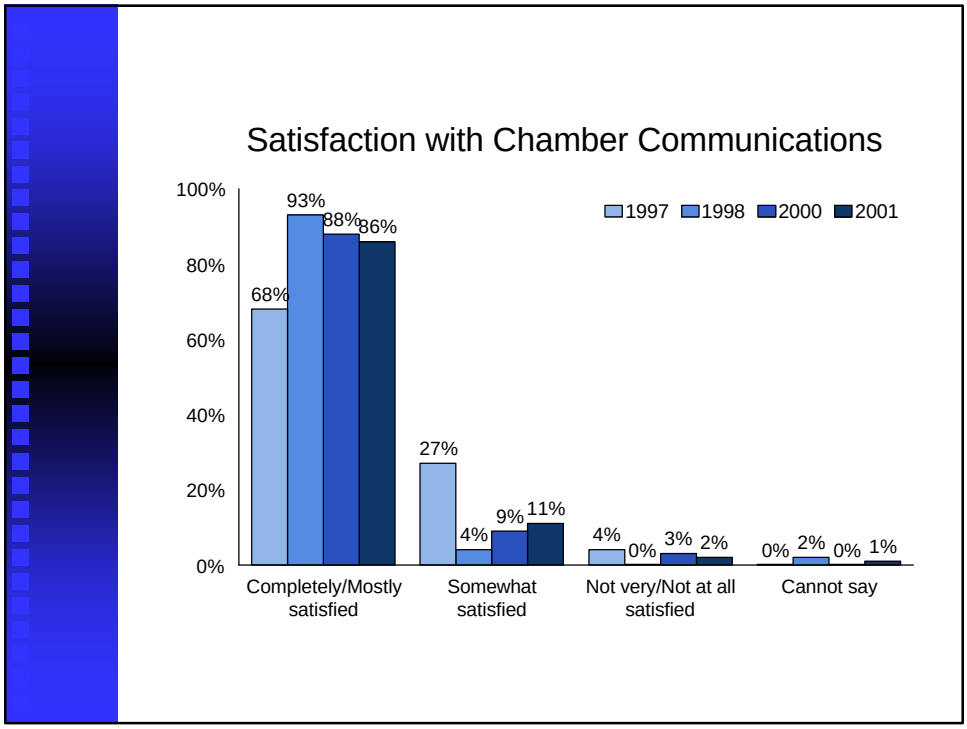

Chamber Activity Participation Levels
Attended Chamber events
53%
69%
Read Business Voice
26%
65%
Responded to Chamber policy surveys
4%
41%
Referred to the Membership Directory
33%
Taken advantage of benefits and discount programs
2%
30%
Visited website for info on events and initiatives
25%
Volunteered on Committee or task force
16%
10%
2000
2001
0%
20%
40%
60%
80%

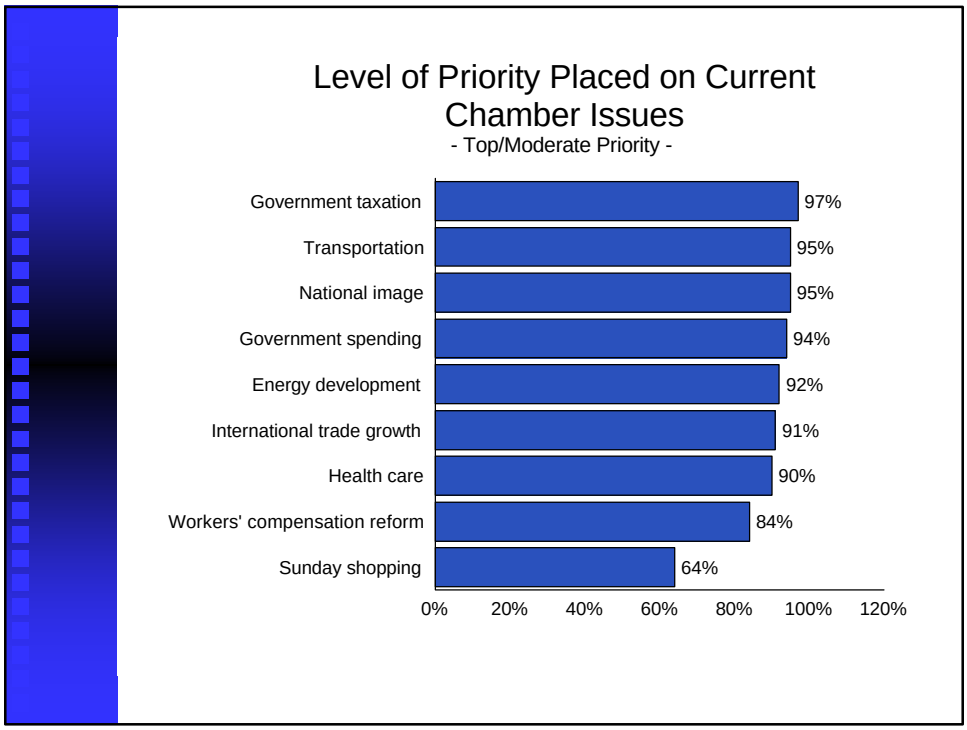

Attendance Level of Chamber Events
60%
40%
20%
0%
51%
36%
34%
28%
17%
Networking events
Business to Business Expo
Breakfast/ Luncheons with keynote speaker
Spring/Fall dinner
Business awards

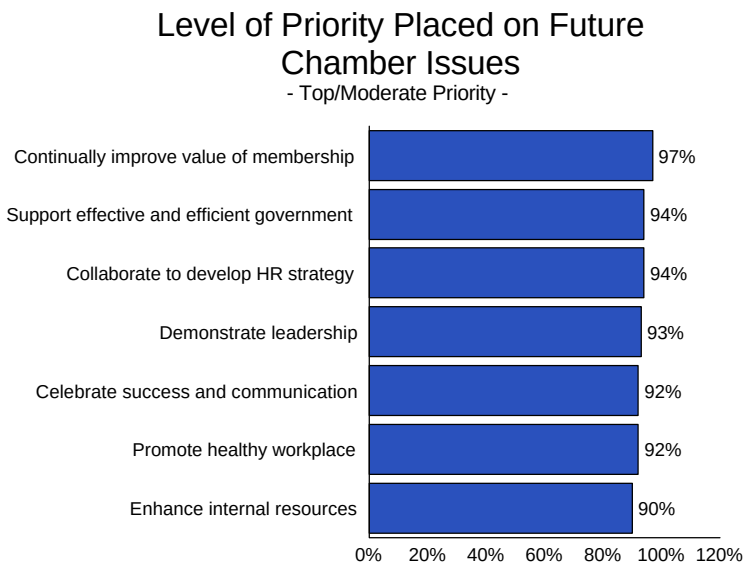

Overall Satisfaction With Events Attended
40%
20%
0%
26%
34%
8%
1%
30%
Completely satisfied
Mostly satisfied
Somewhat satisfied
Not very satisfied
Cannot say


Familiarity With Chamber Activities
- Very/Somewhat Familiar -
Networking events
85%
Business communications
82%
Distinguished speaker/seminar luncheons
77%
Public policy issues
76%
Member benefits/discount programs
76%
Annual spring/fall dinners
73%
Metro Halifax Business awards
67%
0%
20%
40%
60%
80%
100%


Value Placed on Specific Chamber Activities
- Significant/Moderate Value -
Business communications
76%
Networking events
74%
Public policy issues
69%
Member benefits/discount programs
62%
Distinguished speaker/seminar luncheons
61%
Annual spring/fall dinners
56%
Metro Halifax Business awards
48%
0%
20%
40%
60%
80%
100%

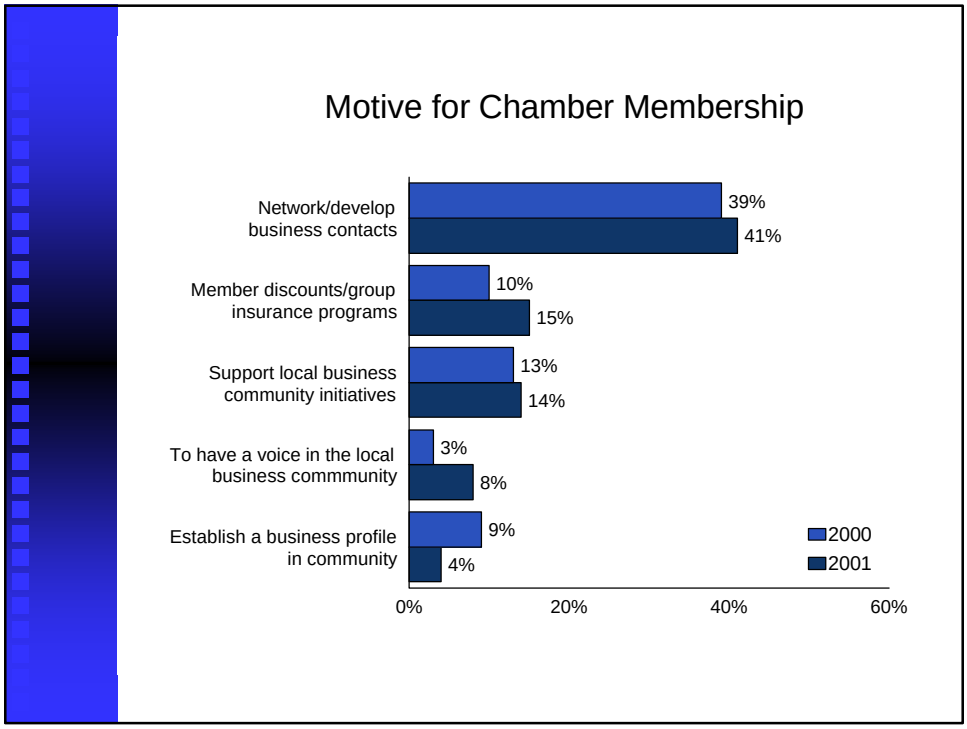

Satisfaction with Chamber Communications
100%
80%
60%
40%
20%
0%
1997
1998
2000
2001
68%
93%
88%
86%
27%
4%
9%
11%
4%
0%
3%
2%
0%
2%
0%
1%
Completely/Mostly satisfied
Somewhat satisfied
Not very/Not at all satisfied
Cannot say

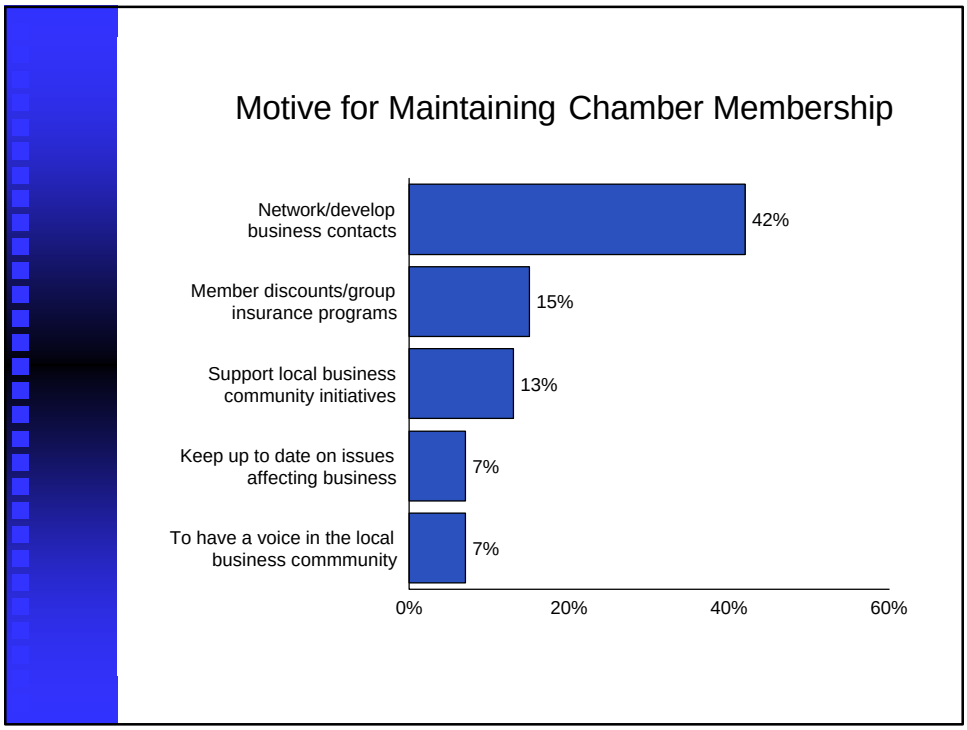

Level of Priority Placed on Current Chamber Issues
- Top/Moderate Priority -
Government taxation
97%
Transportation
95%
National image
95%
Government spending
94%
Energy development
92%
International trade growth
91%
Health care
90%
Workers' compensation reform
84%
Sunday shopping
64%
0%
20%
40%
60%
80%
100%
120%



Effectiveness of Current Stance on Issues

- Right Balance 71%
- More Issues 17%
- Less Issues 11%


Motive for Chamber Membership
Network/develop business contacts
39%
41%
Member discounts/group insurance programs
10%
15%
Support local business community initiatives
13%
14%
To have a voice in the local business commmunity
3%
8%
Establish a business profile in community
9%
4%
2000
2001
0%
20%
40%
60%


Motive for Maintaining Chamber Membership
Network/develop business contacts
42%
Member discounts/group insurance programs
15%
Support local business community initiatives
13%
Keep up to date on issues affecting business
7%
To have a voice in the local business commmunity
7%
0%
20%
40%
60%

Chamber Advertising Viewed in Past Three Months

- Television Advertising 27%
- Magazine Advertising 26%
- Newspaper Advertising 21%
- Radio Advertising 12%
- Billboard Advertising 5%
- **None 46%**

Members' View of Chamber's Role

- A business voice for the community
- Development and promotion of HRM business
- To network business together
- To support and foster local business

Phrase Best Describes Chamber

- Active 12%
- A business voice 10%
- Doing a good job 5%
- Progressive 5%

Key Findings

- Overall level of satisfaction has remained relatively consistent with the past years.
- Assessment of Chamber value has improved in the past year.
- Membership tenure has increased.
- Primary reasons members joined Chamber and remain are to network and develop business contacts.
- Chamber event attendance varies.
- Widespread satisfaction with the way Chamber keeps members informed about policy initiatives, events and services.
- Government taxation and spending continue to be the highest priorities to Chamber members as well as supporting an effective and efficient government.