

Alberta Nonprofit Data Strategy:

Canadian Survey on Business Conditions, Fourth Quarter 2021



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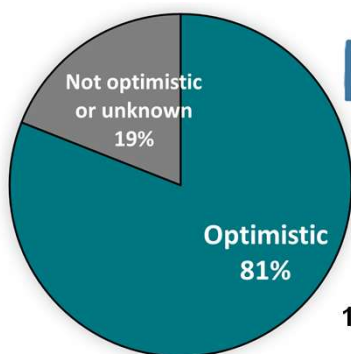


Content

1. **Executive Summary**
2. Canadian Survey on Business Conditions
Q4-2021

1. Executive Summary – Organizational Outlook

Community Nonprofits, Fourth Quarter 2021



Are optimistic about the upcoming days!

for next 12 months

A decrease from 90% last quarter...

- 37% report expected increases in demand
- 35% report expected decreases in cash reserves

Source: Statistics Canada, Canadian Survey on Business Conditions, Fourth Quarter 2021



Statistics Canada

Statistique Canada

www.statcan.gc.ca



Based on 1,403 community nonprofits sampled across Canada October 1 to November 5, 2021. These numbers may *not* reflect the full community nonprofit sector in Canada. Please interpret the findings with caution when discussing the community nonprofit sector.



A return to bias toward increased revenue in Q3 to **decreased** revenue in Q4

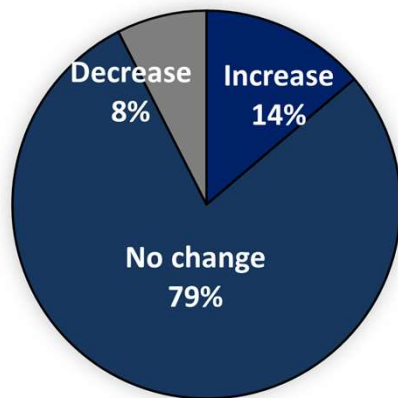
Top obstacles next 3 months?

- 38% recruiting skilled employees
- 32% retaining skilled employees
- 32% shortage of labour force



Executive Summary (cont.) – Employee Outlook

Community Nonprofits, Fourth Quarter 2021



Employee numbers are fairly stable

for next 3 months



Sector aiming for retention

56% increasing wages to existing employees

30% increasing wages to new employees

37% providing paid time for learning programs

Source: Statistics Canada, Canadian Survey on Business Conditions, Fourth Quarter 2021



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Executive Summary (cont.) – COVID-19



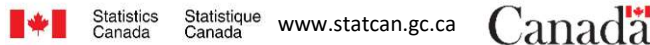
Community Nonprofits, Fourth Quarter 2021

Teleworking

- **47% teleworking**
 - **Mostly hybrid (on-site and at home combination)**



Source: Statistics Canada, Canadian Survey on Business Conditions, Fourth Quarter 2021



Lack of government programs

- **39% impact of lack of programs on survival**

Repayable Government loans

- **37% had loan**
 - **7% major challenge to repay**



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2a. Canadian Survey on Business Conditions Q4-2021: Introduction

Canadian Survey on Business Conditions

1. A Cross-Canada Statistics Canada cross-sectional survey
2. A voluntary, stratified random sample of businesses by geography, industry sector, and size
3. The Fourth Quarter (Q4) 2021 survey was collected between ***October 1 to November 5, 2021***
4. As a comparison point, the Third Quarter (Q3) 2021 survey was collected between ***July 2 to August 6, 2021***

More details at:

<https://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&Id=1323642>

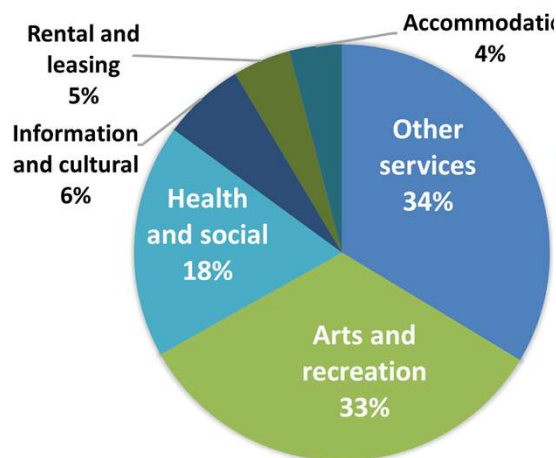
Nonprofits in the Current Analysis

The current analysis focuses on survey responses from *community nonprofits*:

1. Also called 'Nonprofit institutions serving households'
2. Sometimes we compare to private sector businesses
3. The reported data is cross-Canada, but similar to Alberta patterns
4. 1,403 community nonprofits responded across Canada, with 119 from Alberta in the Q4 survey

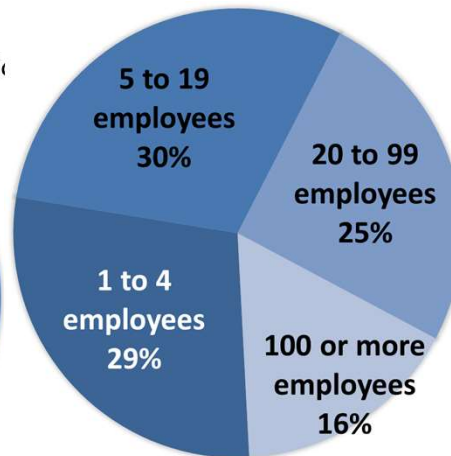
Nonprofits in the Current Analysis: Breakdown

Subsector



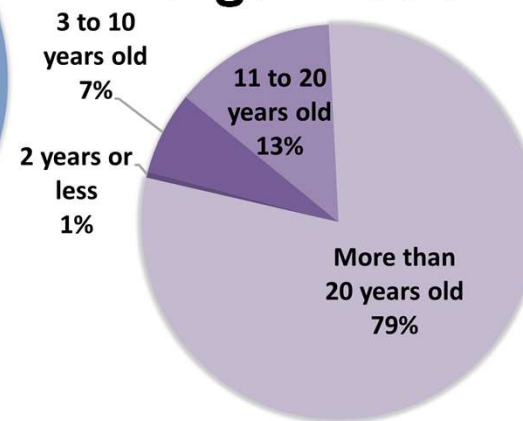
Covers many subsectors

Employees



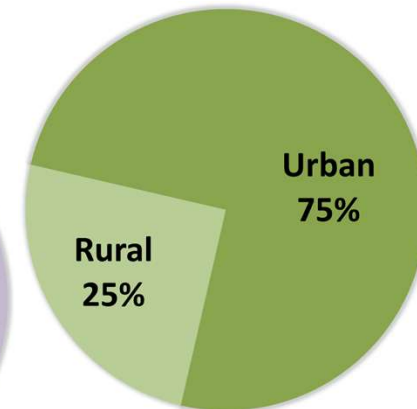
Does not include nonprofits without employees

Age of organization



Most are established organizations

Geographic Region



Both rural and urban organizations

How to Interpret these Results?¹

(Limitations of this Data)

What to do:

1. Interpret the findings with caution as they may miss aspects of the community nonprofit sector. For example, it was estimated that 58% of community nonprofits in Alberta had no employees in 2003², whereas all organizations had an employee in this analysis;
2. Use the data to provide initial evidence for where the community nonprofit sector may be heading and create opportunities for future discussion on change; and
3. Consider how well the findings apply to your organization's context.

What NOT to do:

1. Do NOT interpret the findings to represent the full community nonprofit sector nationally or in Alberta; and
2. Do NOT use the findings without discussing the context about how the data was collected and how this may affect their application to the broader community nonprofit sector.

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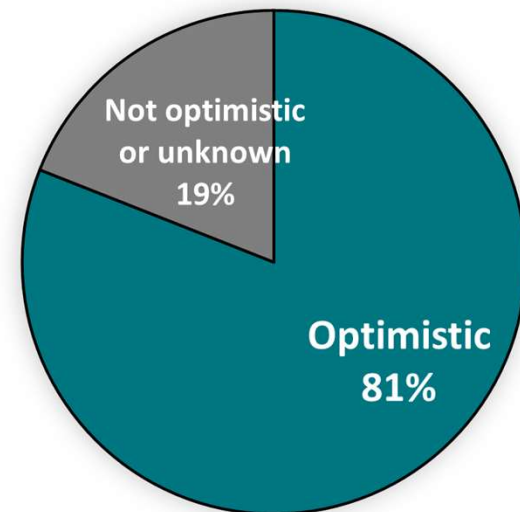
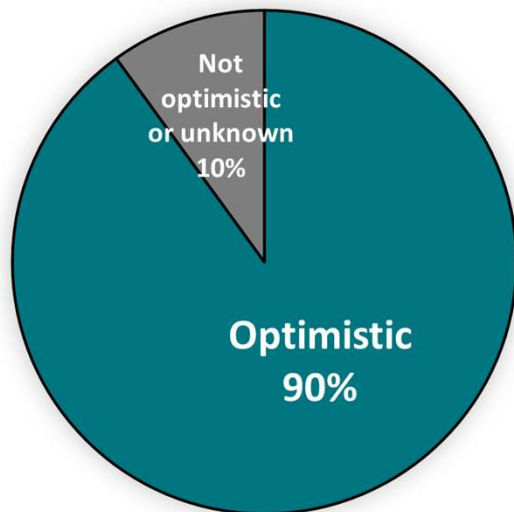
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2b. Organization Outlook: Outlook for the Next 12 Months

Third Quarter 2021

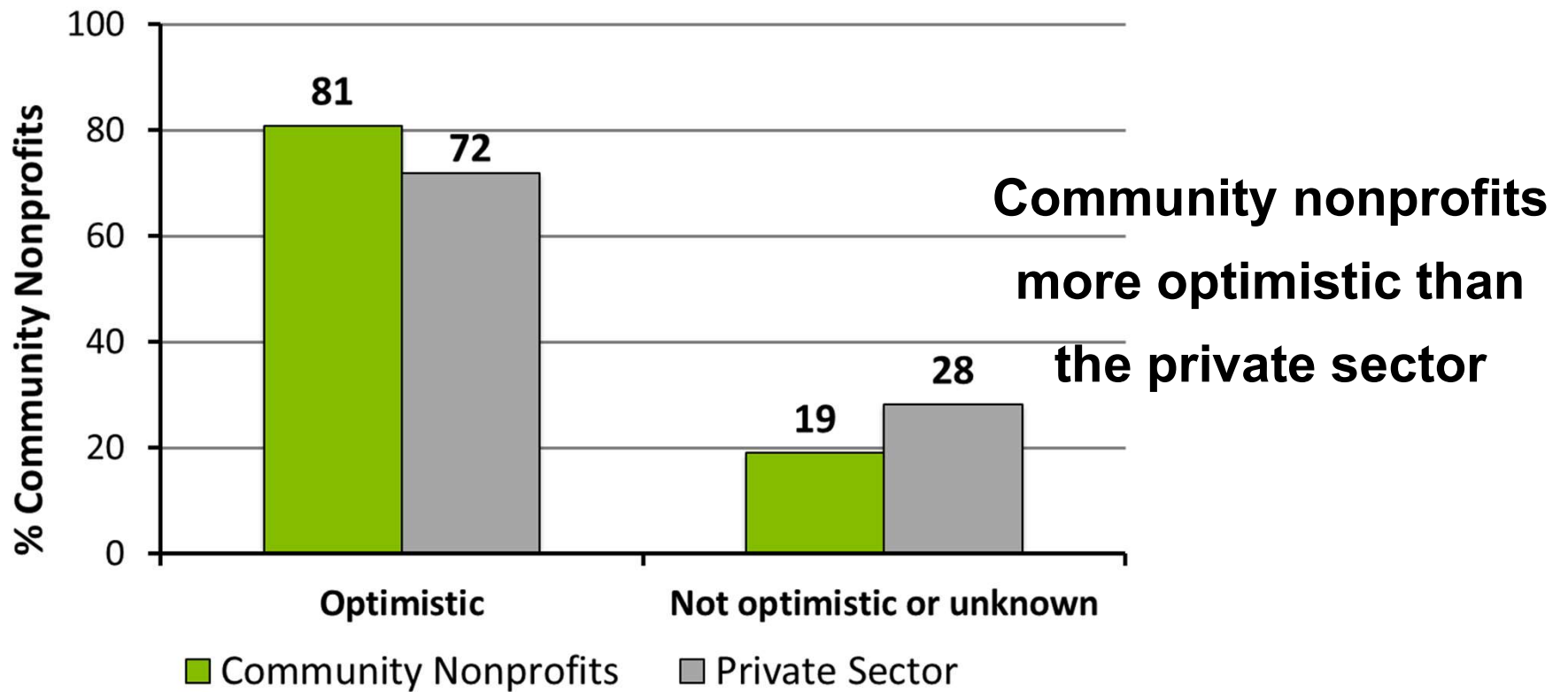


Fourth Quarter 2021

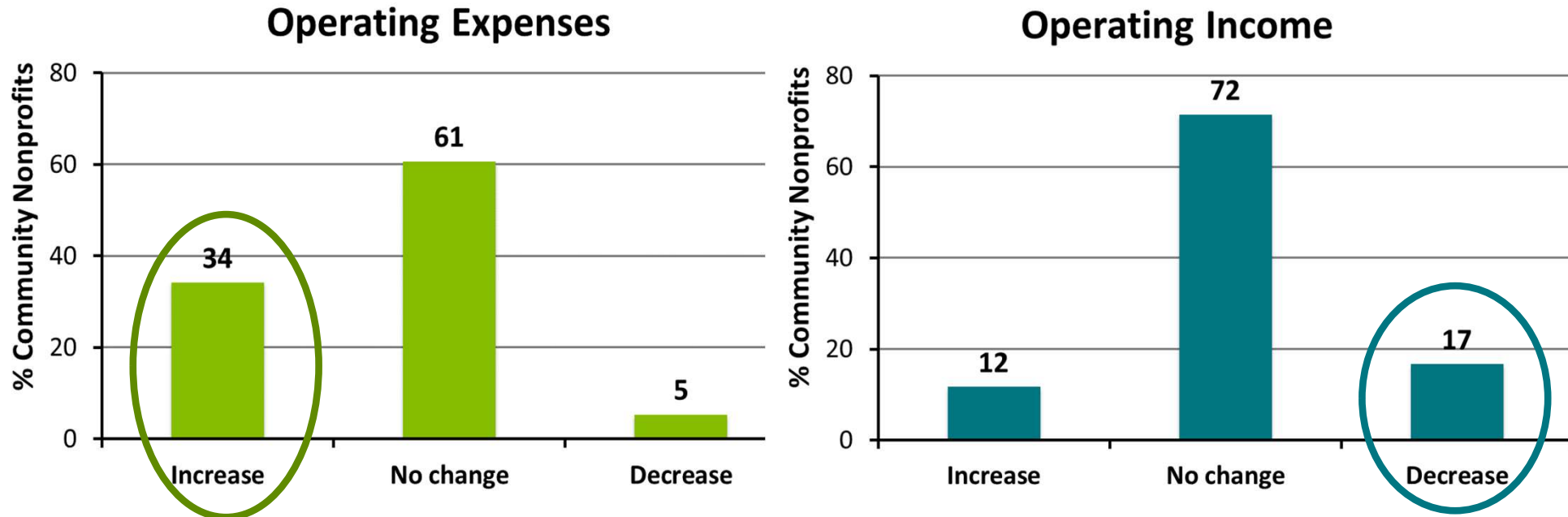


Community nonprofits are showing slight drop in optimism about the upcoming days

Outlook for the Next 12 Months, Q4-2021: Community Nonprofits vs. Private Sector



Expenses and Income Q4-2021, Next 3 months



Community nonprofits are reporting no change or increases in expenses and no change or decreases in income

*Excludes those stating questions were not applicable.

Income Third to Q4-2021, Next 3 Months

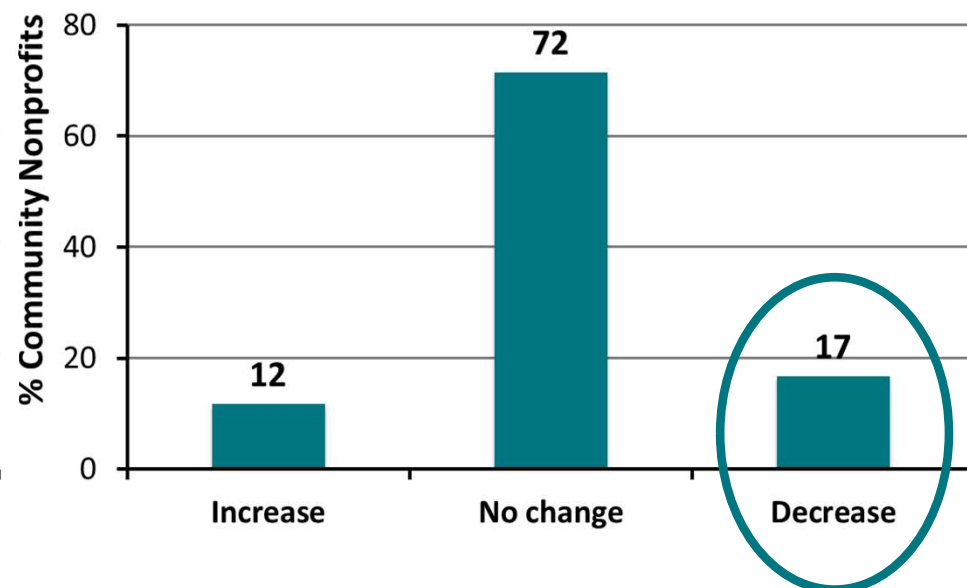
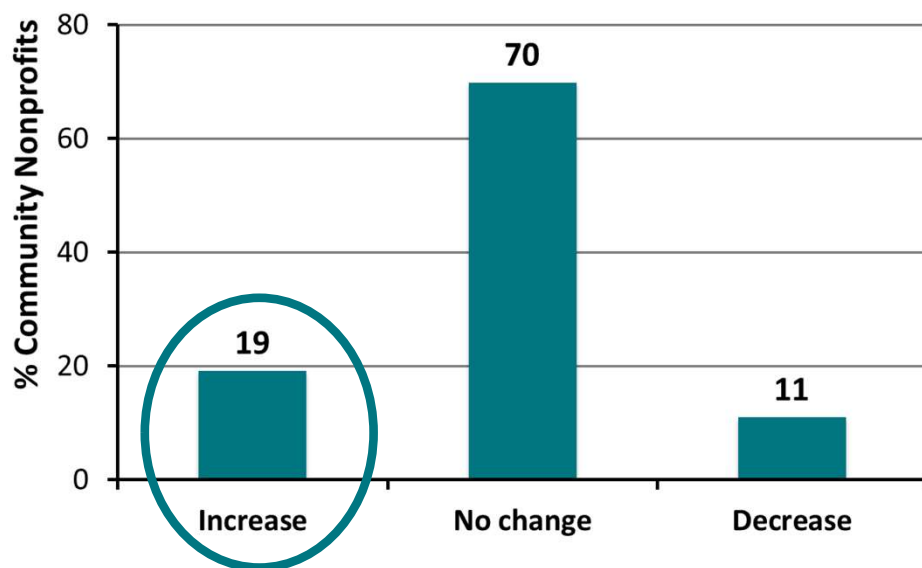
Third Quarter 2021



Fourth Quarter 2021

Operating Income

Operating Income



Moving towards reporting income decreases

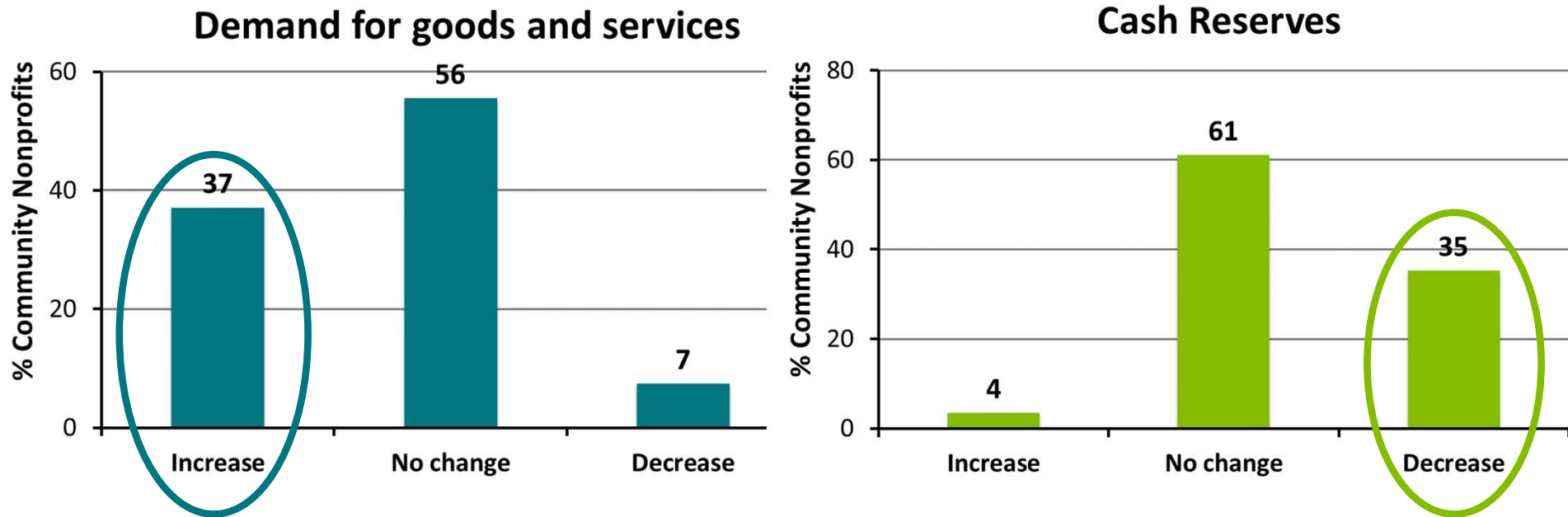
*Excludes those stating questions were not applicable.

Pandemic and reported income bias



Sources: Statistics Canada and ESRI Canada

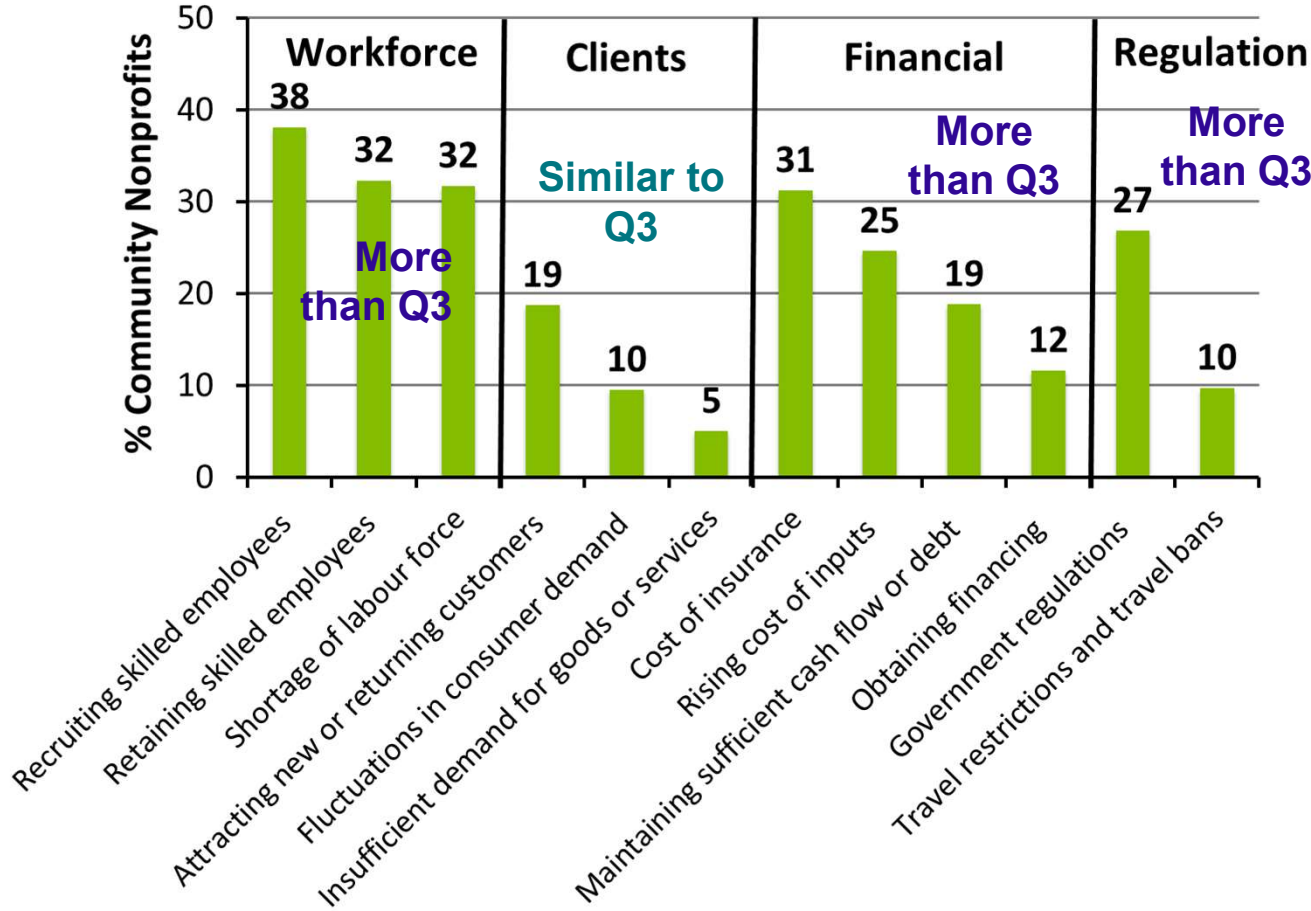
Demand and Cash Reserves Q4-2021, Next 3 Months



Increasing demand and decreasing cash reserves

*Excludes those stating questions were not applicable.

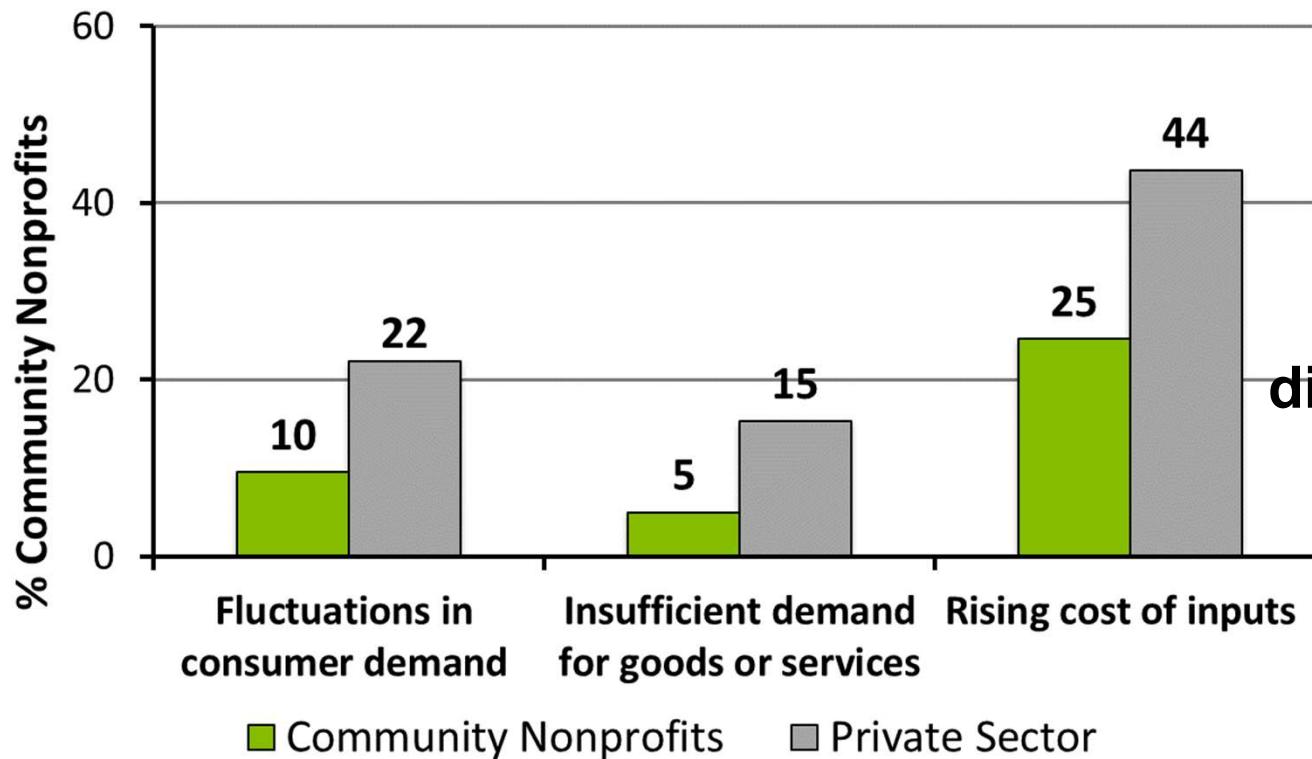
Obstacles Q4-2021, Next 3 months



Workforce, financial, and regulation obstacles were larger than in the third quarter of 2021.

This represents a return of obstacles decreasing in Q3-2021.

Biggest Differences in Obstacles, Q4-2021: Community Nonprofits vs. Private Sector

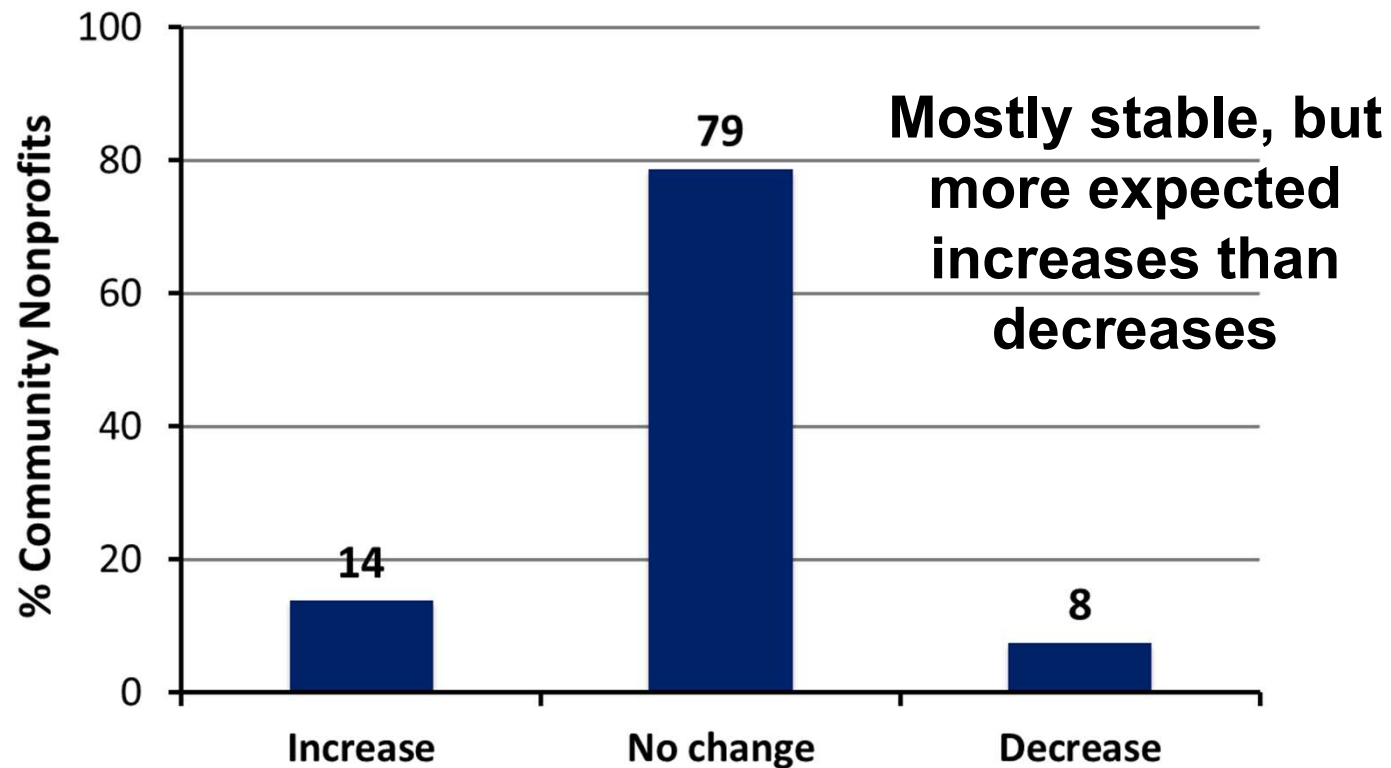


Most similar (not shown), biggest differences in demand and costs

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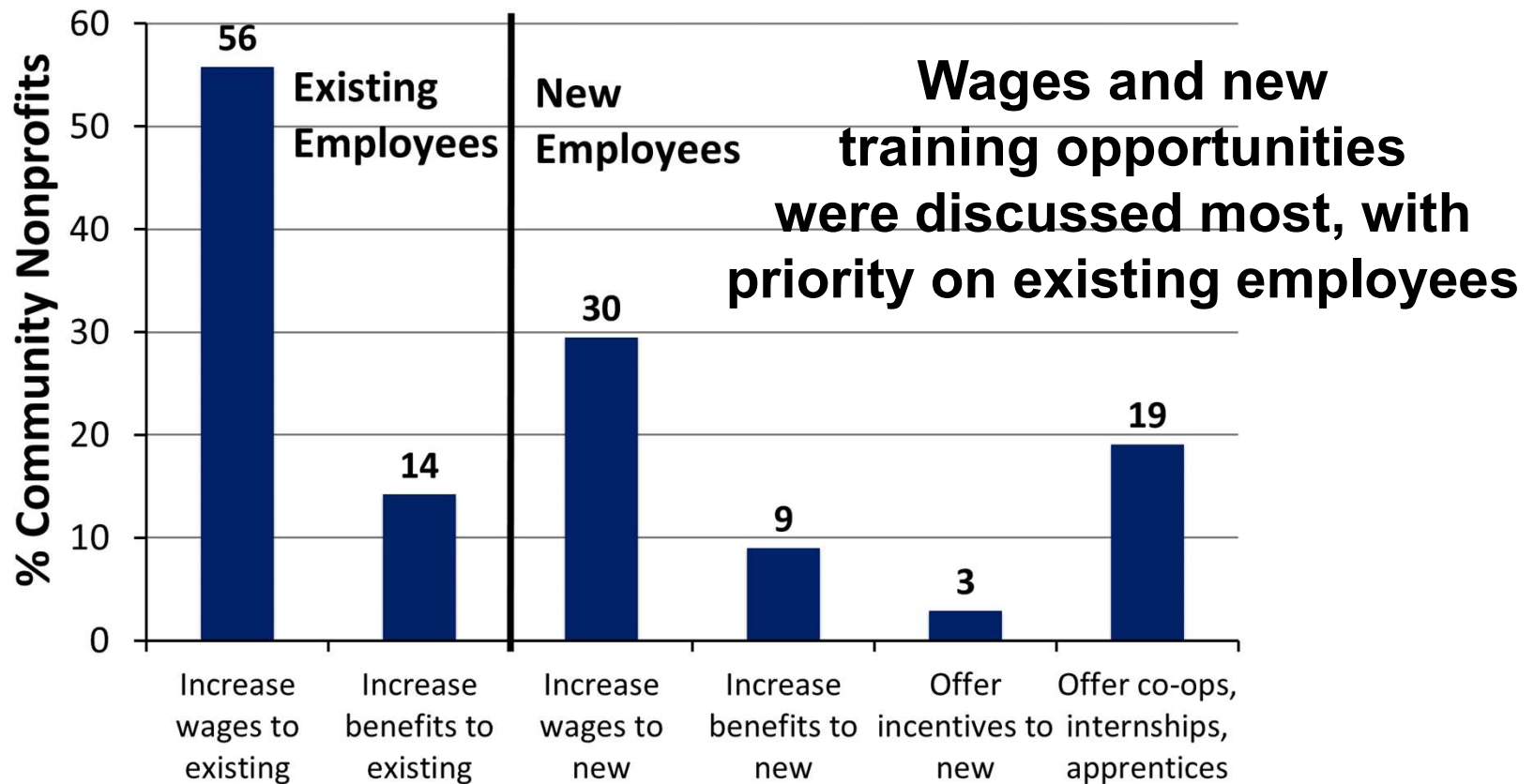
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2c. Employee Outlook: Number of Employees Q4-2021, Next 3 months

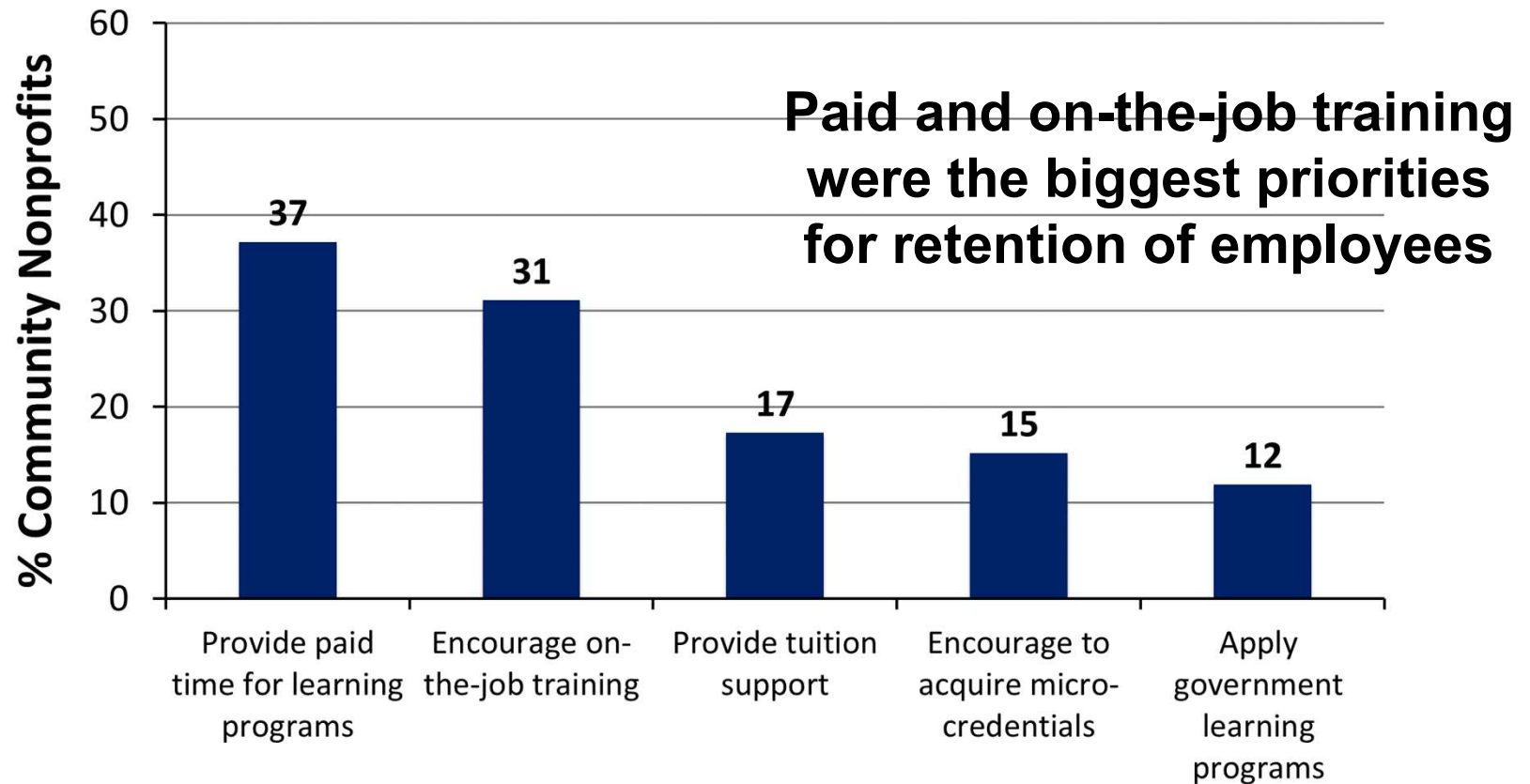


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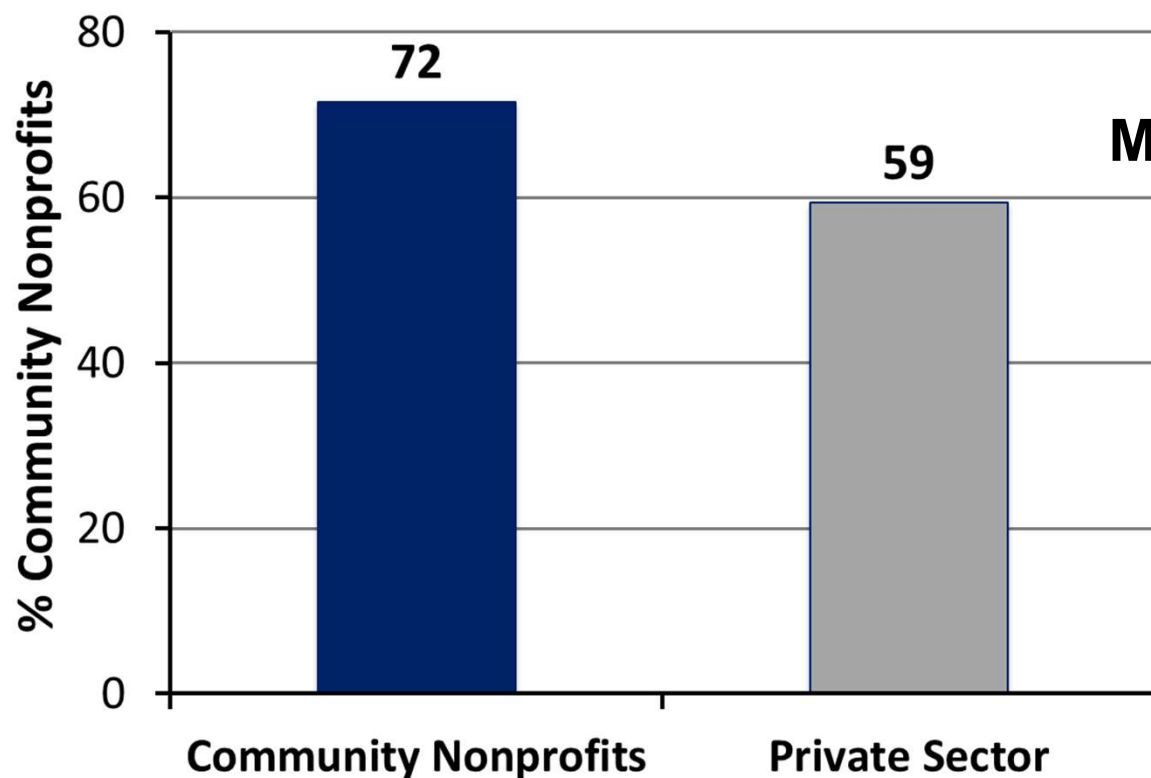
Plans for retention and recruitment of employees, Q4-2021



Plans for training for retention of employees, Q4-2021



Have plans for retention and recruitment, Q4-2021: Community Nonprofits vs. Private Sector

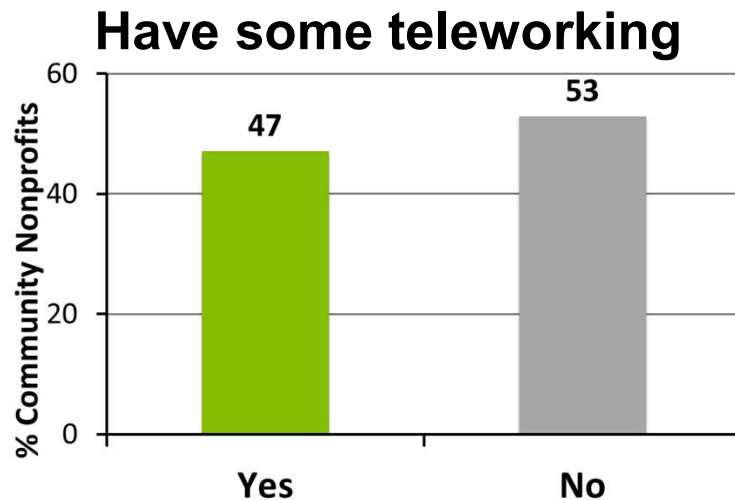


More focus on retention and recruitment in nonprofit sector

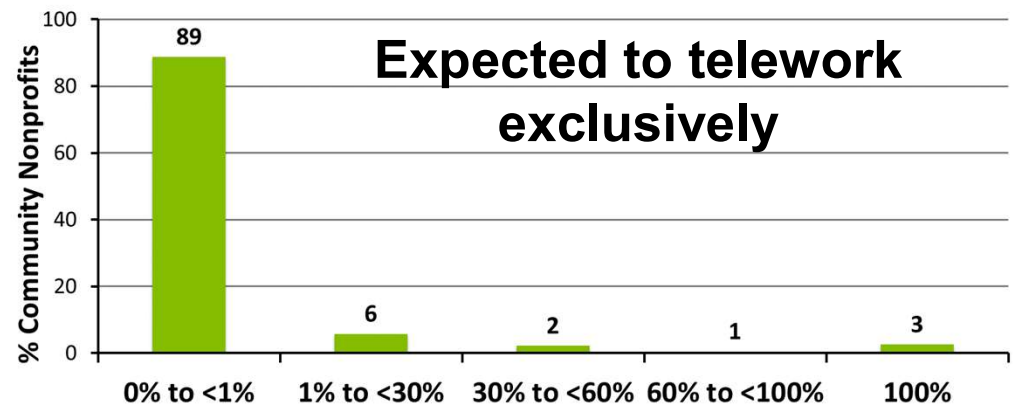
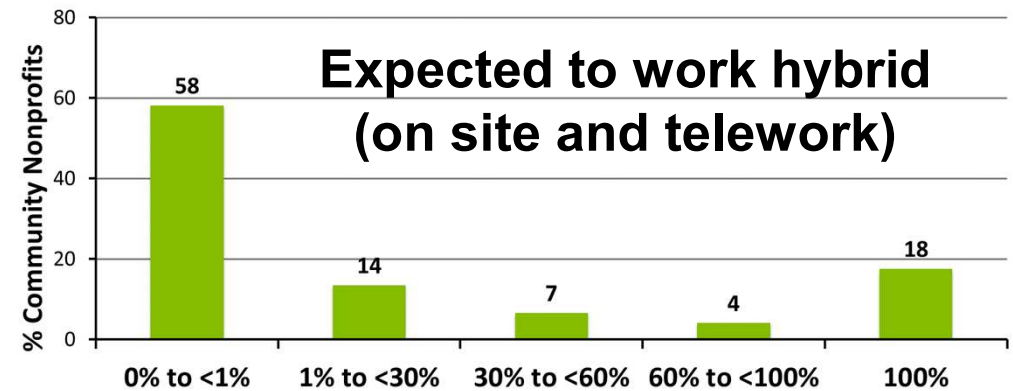
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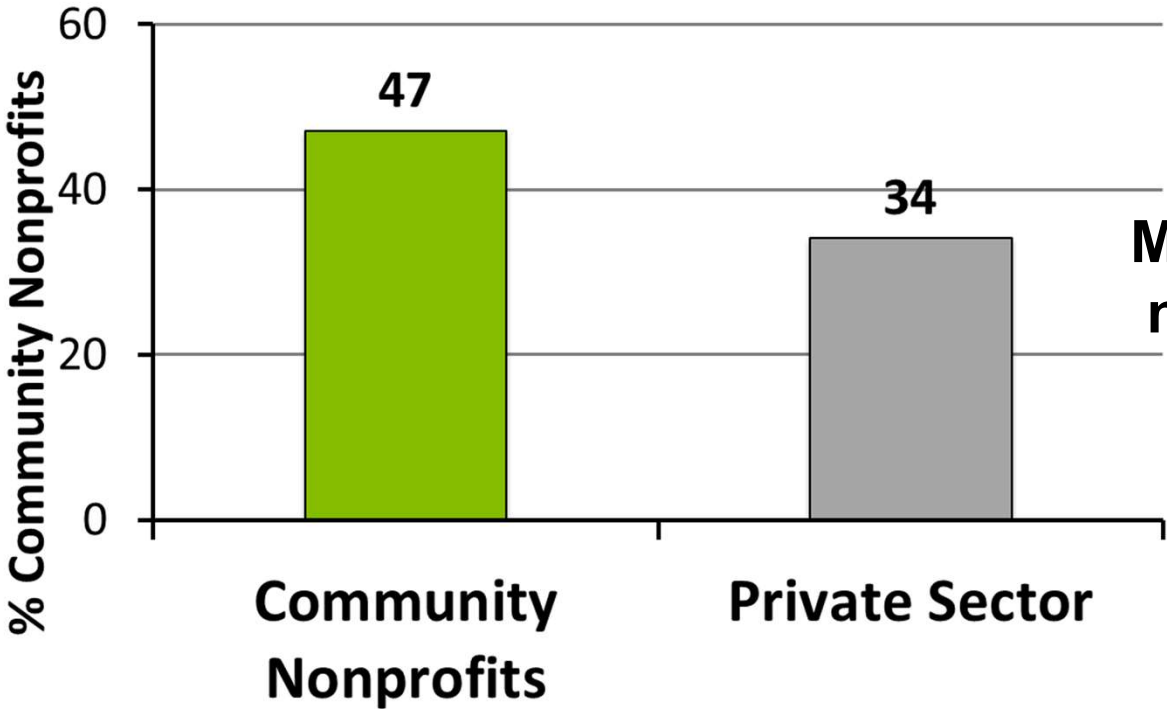
2d. COVID-19 Pandemic Past and Future: Percent teleworking, Q4-2021, next 3 months



Nearly half expect to telework. More taking hybrid approach

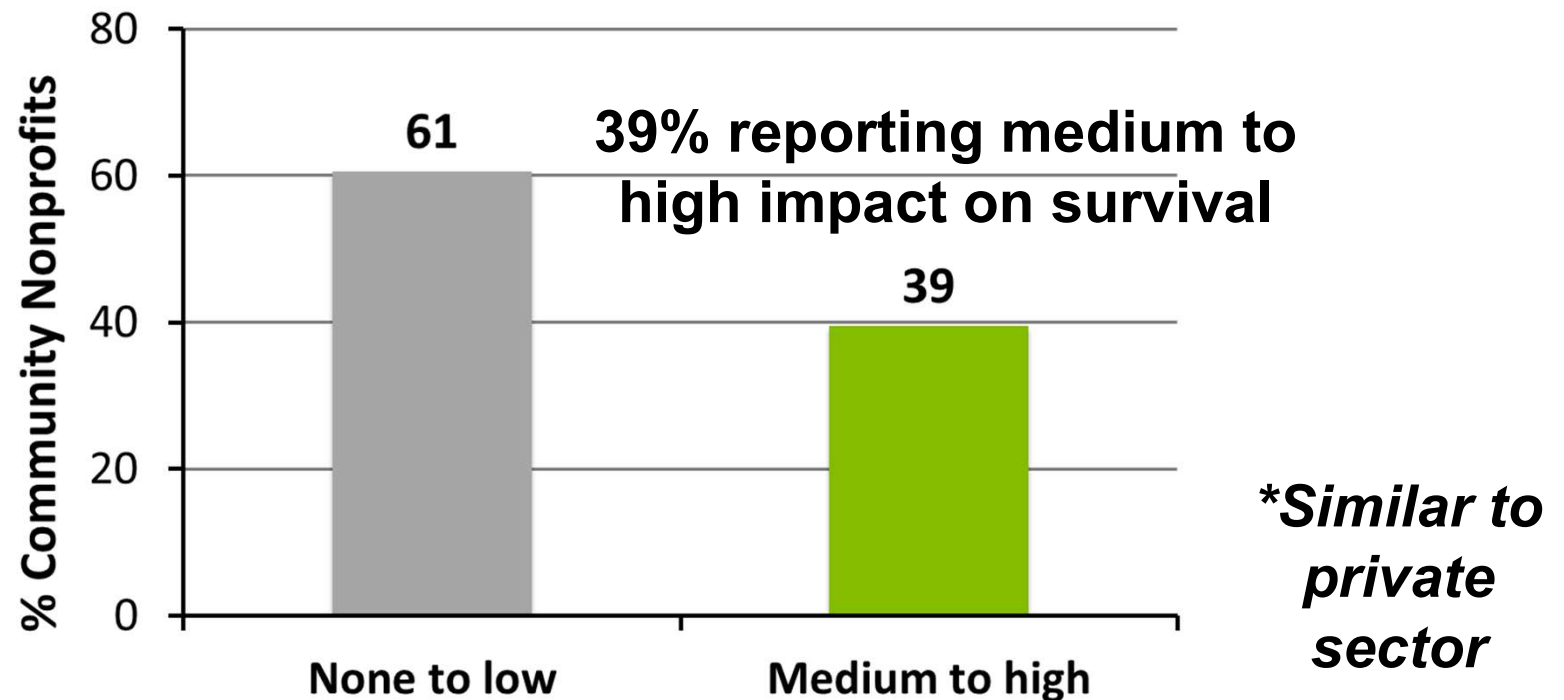


Percent teleworking, Q4-2021, next 3 months : Community Nonprofits vs. Private Sector



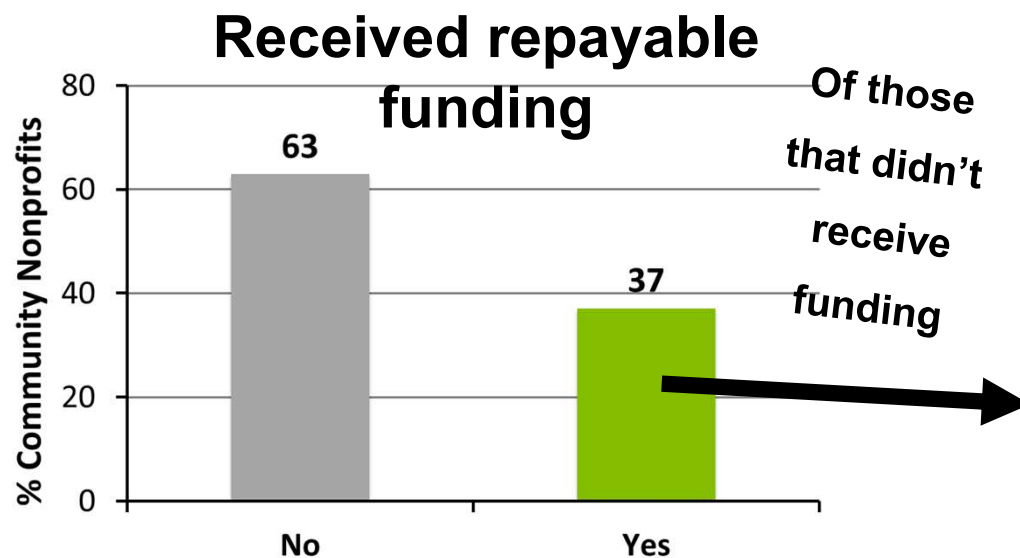
More teleworking in nonprofit sector in short term

Expected impact of the absence of government support programs on the survival of business, Q4-2021

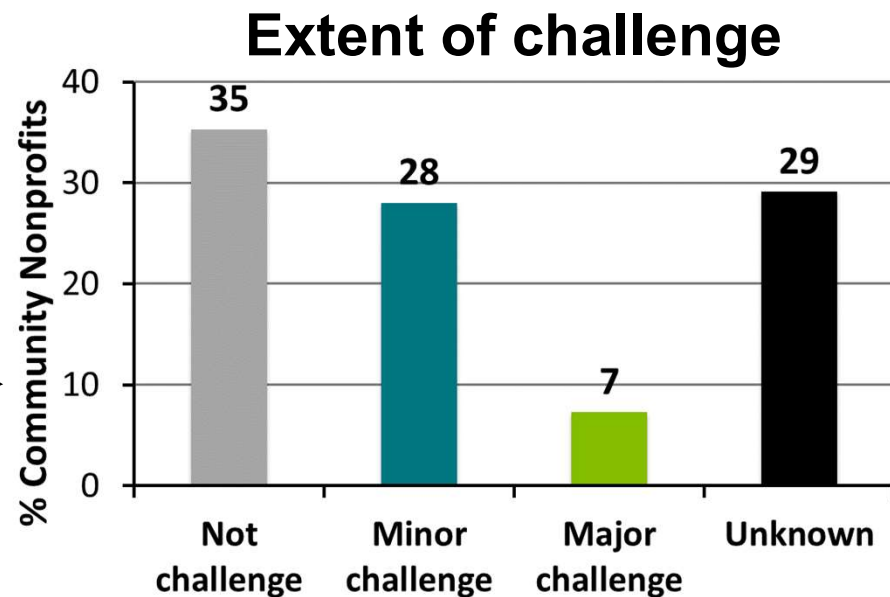


*Excludes those stating the impact was unknown.

Expected challenge repaying government funding for COVID-19, Q4-2021



37% received a repayable loan



Most reported minor or no challenges

Acknowledgements

PRIMARY CONTRIBUTORS

Matthew Russell and Kiran Gurm

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