




Alberta Nonprofit Data Strategy:
Canadian Survey on Business Conditions, Fourth Quarter 2021

ABNN
Alberta Nonprofit Network

**EDMONTON
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Alberta



Content

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

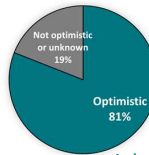
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1. Executive Summary – Organizational Outlook

Community Nonprofits, Fourth Quarter 2021



Are optimistic about the upcoming days!

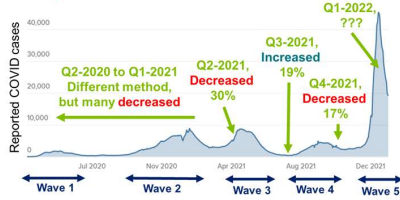
A decrease from 90% last quarter...

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

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



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

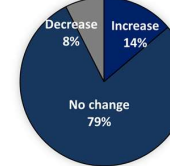
Top obstacles next 3 months?

- 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



*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.

Executive Summary (cont.) – COVID-19



Community Nonprofits, Fourth Quarter 2021

Teleworking

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



Lack of government programs

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

Repayable Government loans

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



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



Canada

*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.

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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 (Q4) 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>



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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



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Based on Alberta nonprofit stakeholder goals to have information on sector recovery from the COVID-19 pandemic, this deliverable was created.

1. The Canadian Survey on Business Conditions is a cross-sectional survey by Statistics Canada, reflecting a sample of businesses in the time period. The results we report are cross-Canada, and not specific to Alberta nonprofits.
2. The survey is voluntary, based on a stratified random sample of businesses, and split by geography, industry sector, and size. This means that the sampling tries sample across the sector, but it will have some bias and might miss some sectors and types of nonprofits. Information is provided on the types of nonprofits covered in the next slides.
3. The main survey presented in these slides is from the Fourth Quarter (Q4) of 2021, collected between October 1 to November 5, 2021.
4. We also refer to results from the Third Quarter (Q3) of 2021, collected between July 2 to August 6, 2021 as a comparison point.

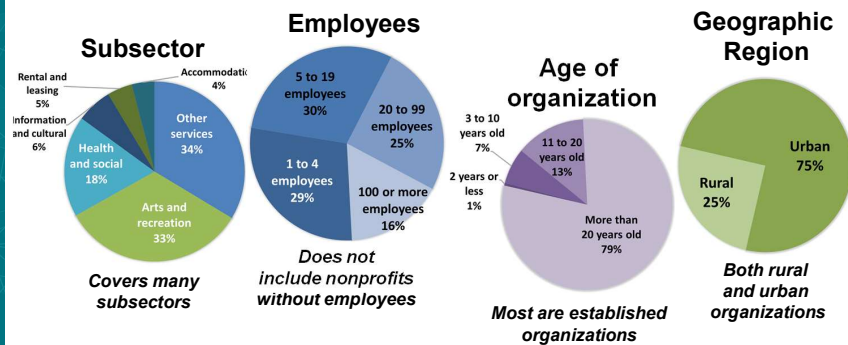
For more details go to the Statistics Canada website:

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

The analysis focuses on the following nonprofit data:

1. It focused on community nonprofits (also called 'non-profit institutions serving households'). For example, these are social services, advocacy, or sports and recreation organizations. This definition of nonprofits most closely follows the Alberta Nonprofit Network (ABNN) view of nonprofits. This definition excludes government nonprofits such as schools and hospitals.
2. As a comparison point, we sometimes compare to businesses that self-identified as private sector to show differences in the two.
3. The sample is cross-Canada. However, similar patterns were generally seen in Alberta. This analysis focuses on the cross-Canada level due to the small sample size in Alberta.
4. The sample includes 1,403 self-identified community nonprofits across Canada, with 119 from Alberta.

Nonprofits in the Current Analysis: Breakdown



In terms of where this survey samples from:

1. The total sample consists of 33% arts and recreation, 18% health and social organizations, 6% information and cultural, etc. The survey samples from a couple of the big subsectors in nonprofits (arts and recreations, and health and social organizations). These percentages are based the North American Industry Classification System (NAICS), not on the International Classification of Non-profit Organizations (ICNPO), the standard often used for classifying nonprofit subsectors.
2. The sample includes a pretty equal sample for the different numbers of employees for organizations. This sampling misses the estimated 58% of nonprofits without employees. This sampling misses the estimated 58% of nonprofits without employees, and is weighted more heavily towards larger organizations, which make up a smaller part of the nonprofit sector (Imagine Canada 2006; "The Nonprofit and Voluntary Sector in Alberta").
3. A majority of organizations are well established (11+ years of business, 92%), compared to more recent organizations (10 or less years of business, 8%).
4. The data represents both rural and urban organizations.

Source: Custom request

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.

As with most surveys, the results should be used and interpreted with some caution¹.

1: https://albertanonprofits.ca/resources/Documents/ABNN%20Pulse%20Check%20Report_November%202020.pdf

2: Roach, R. (2006). The Nonprofit and Voluntary Sector in Alberta: Regional Highlights of the National Survey of Nonprofit and Voluntary Organizations. Toronto, ON: Imagine Canada.

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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

Survey Question: “Over the next 12 months, what is the future outlook for this business or organization?”

Analysis Notes: Optimistic consists of ‘very optimistic’ and ‘somewhat optimistic’. Some figures do not add to 100% due to rounding.

Source:

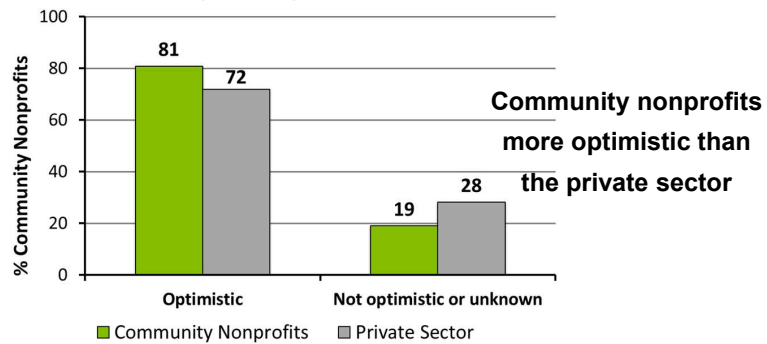
Third Quarter 2021: Statistics Canada. Table 33-10-0393-01. Future outlook over the next 12 months, third quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310039301>

Fourth Quarter 2021: Statistics Canada. Table 33-10-0426-01. Future outlook over the next 12 months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310042601>

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



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Survey Question: “Over the next 12 months, what is the future outlook for this business or organization?”

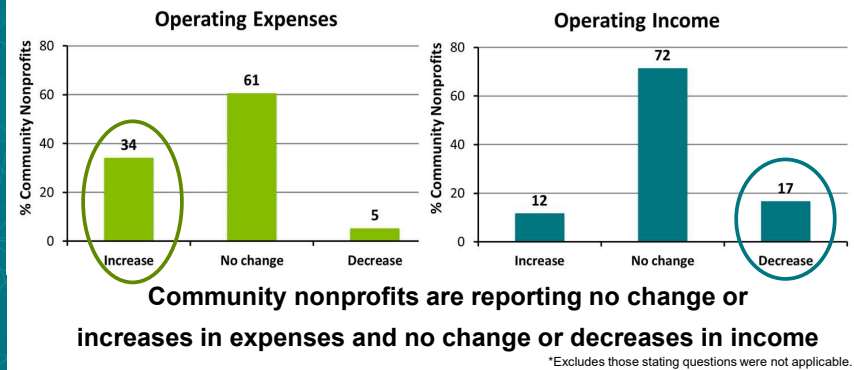
Analysis Notes: Optimistic consists of ‘very optimistic’ and ‘somewhat optimistic’. Some figures do not add to 100% due to rounding. Compared to the private sector.

Source:

Fourth Quarter 2021: Statistics Canada. Table 33-10-0426-01. Future outlook over the next 12 months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310042601>

Expenses and Income Q4-2021, Next 3 months



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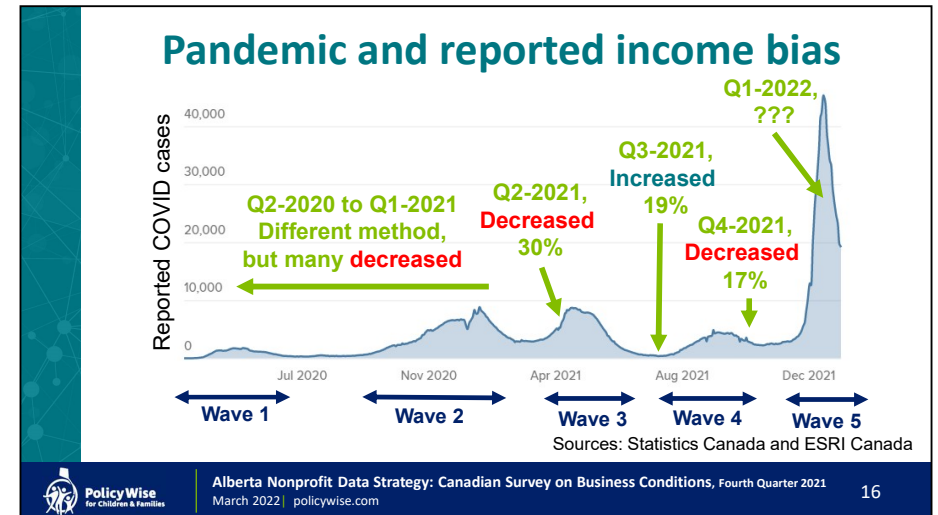
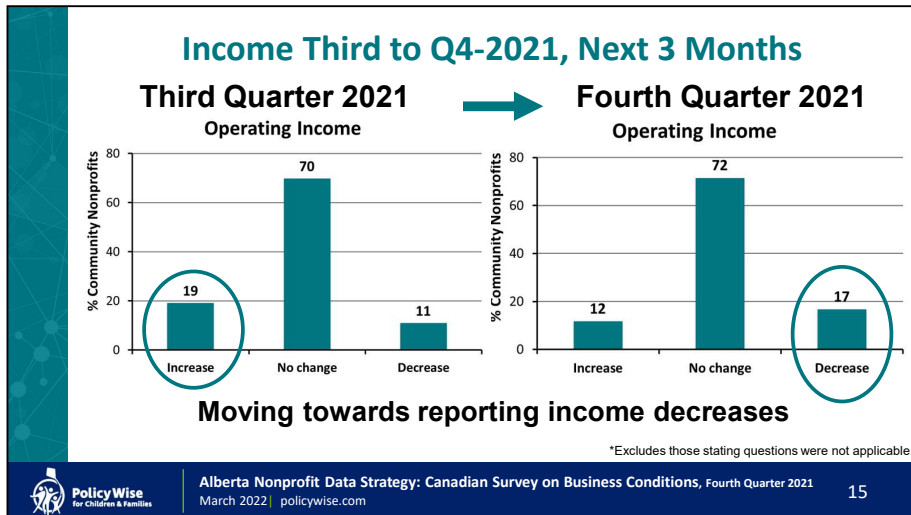
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Survey Question: “Over the next three months, how are each of the following expected to change for this business or organization?” Subcategories were “Operating expenses” and “Operating income”.

Analysis Notes: The percentages exclude those answering ‘not applicable’. Some figures do not add to 100% due to rounding.

Source: Statistics Canada. Table 33-10-0399-01. Business or organization expectations over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310039901>



Survey Question: “Over the next three months, how are each of the following expected to change for this business or organization?” The subcategory was “Operating income”.

Analysis Notes: The percentages exclude those answering ‘not applicable’. The third quarter 2021 value is from the previous iteration of the survey. Some figures do not add to 100% due to rounding.

Source:

Third Quarter 2021: Statistics Canada. Table 33-10-0363-01. Business or organization expectations over the next three months, third quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310036301>

Fourth Quarter 2021: Statistics Canada. Table 33-10-0399-01. Business or organization expectations over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310039901>

Survey Question: Q2-2021 to Q4-2021: “Over the next three months, how are each of the following expected to change for this business or organization?” The subcategory was “Operating income”. Similar question in Q2-2020 to Q1-2021, but with more breakdowns, such that it is not directly comparable.

Analysis Notes: The percentages exclude those answering ‘not applicable’ and focus on bias towards reporting decrease or increase. The other quarter values is from the previous iteration of the survey.

Sources:

Second Quarter 2020: Statistics Canada. Table 33-10-0253-01. Business revenue from April 2020 compared with April 2019, by business characteristics"

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310025301>

Third Quarter 2020: Statistics Canada. Table 33-10-0281-01. Business or organization revenue from August 2020 compared with August 2019, by business characteristics"

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310028101>

Fourth Quarter 2020: Statistics Canada. Table 33-10-0317-01. Business or organization revenue from 2020 compared with 2019, by business characteristics"

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310031701>

Second Quarter 2021: Statistics Canada. Table 33-10-0337-01. Business or organization expectations over the next three months, by business characteristics, second quarter of 2021. <https://doi.org/10.25318/3310033701-eng>

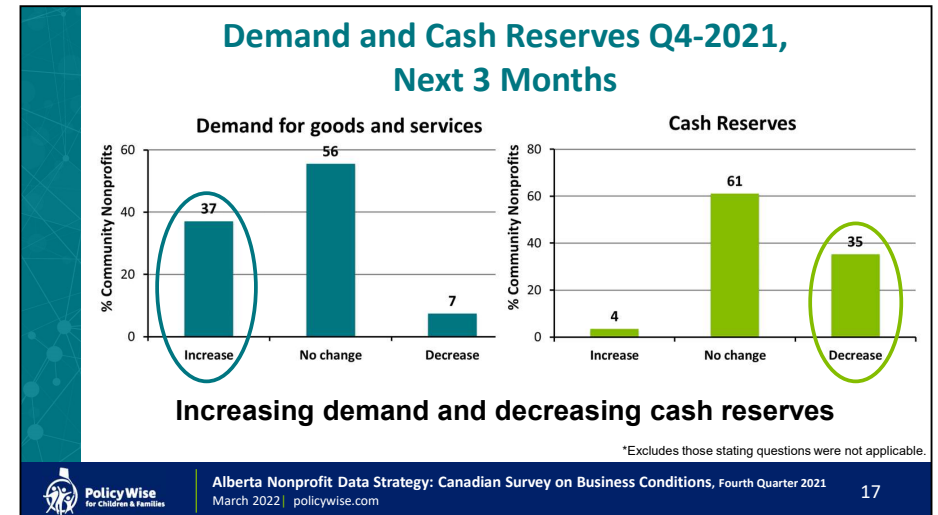
Third Quarter 2021: Statistics Canada. Table 33-10-0363-01. Business or organization expectations over the next three months, third quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310036301>

Fourth Quarter 2021: Statistics Canada. Table 33-10-0399-01. Business or organization expectations over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310039901>

Esri Canada: through <https://globalnews.ca/news/8148223/covid-4th-wave-data-canada/>

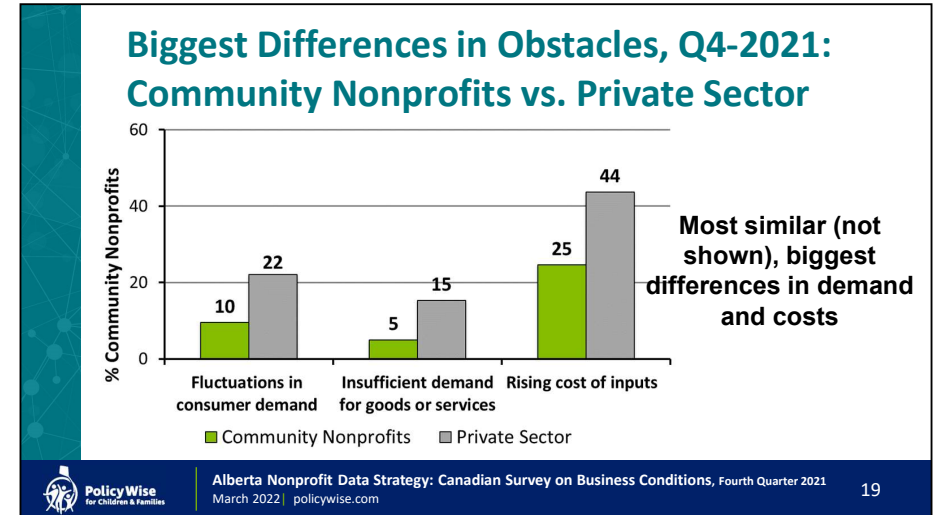
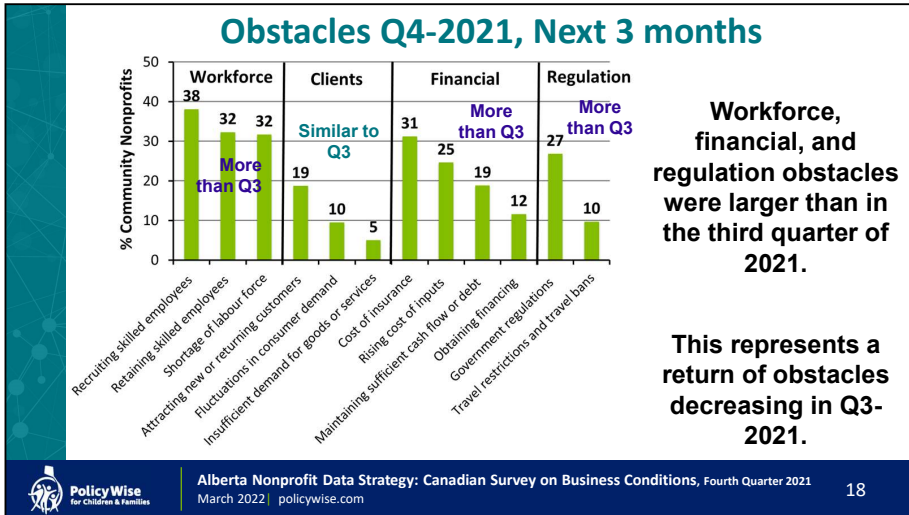


Survey Question: “Over the next three months, how are each of the following expected to change for this business or organization?” The subcategories were “demand for goods and services offered by the business or organization” and “cash reserves”.

Analysis Notes: The percentages exclude those answering ‘not applicable’. Some figures do not add to 100% due to rounding.

Source: Statistics Canada. Table 33-10-0399-01. Business or organization expectations over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310039901>



Survey Question: “Over the next three months, which of the following are expected to be obstacles for this business or organization? Select all that apply.”

Analysis Notes: Categories were created through a qualitative grouping of the topics by PolicyWise and are presented to show a comparison from Q3 to Q4. Comparisons were made to third quarter 2021 obstacles, purple (more than Q3) reflects an increase in the obstacle from Q3 to Q4 and green (less than Q3) reflects a decrease or similarity in the obstacle from Q3 to Q4. Some figures do not add to 100% due to rounding.

Source: Statistics Canada. Table 33-10-0400-01. Business or organization obstacles over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310040001>

Survey Question: “Over the next three months, which of the following are expected to be obstacles for this business or organization? Select all that apply.”

Analysis Notes: Categories were created through a qualitative grouping of the topics by PolicyWise and are presented to show a comparison from Q3 to Q4. Comparisons were made with the private sector. While most were similar, the comparison of the top 3 differences is shown.

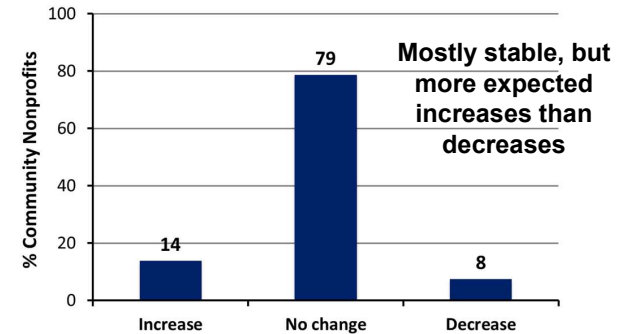
Source: Statistics Canada. Table 33-10-0400-01. Business or organization obstacles over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310040001>

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



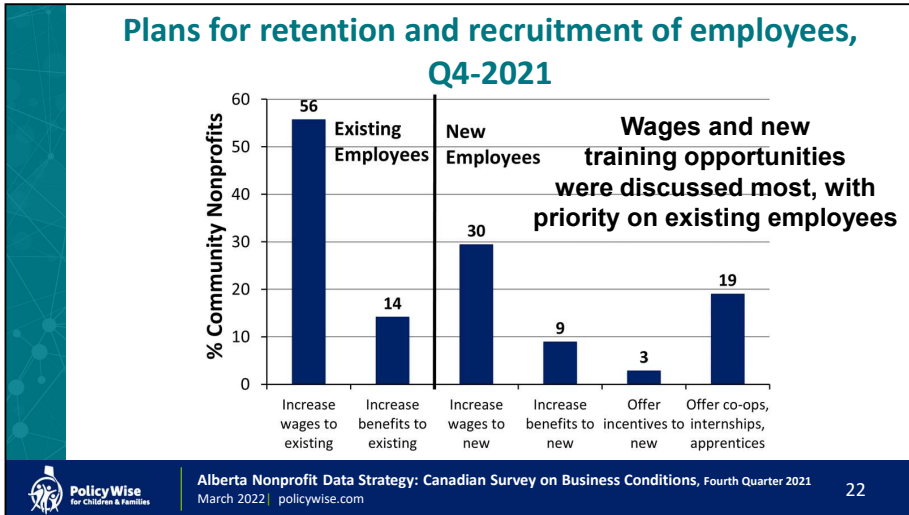
*Excludes those stating this question was not applicable.

Survey Question: “Over the next three months, how are each of the following expected to change for this business or organization? Number of employees.”

Analysis Notes: The percentages exclude those answering ‘not applicable’. Some figures do not add to 100% due to rounding.

Source: Statistics Canada. Table 33-10-0399-01. Business or organization expectations over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310039901>



Survey Question: “Over the next 12 months, does this business or organization plan to do any of the following? Select all that apply.”

Analysis Notes: In the order of the chart, the selections were “1) Increase wages offered to existing employees, 2) increase benefits offered to existing employees, 3) increase wages offered to new employees, 4) increase benefits offered to new employees, 5) offer signing bonuses or incentives to new employees, and 6) work with education and training institutions to offer work-integrated learning programs such as co-ops, internships, and apprenticeships.” Some figures do not add to 100% due to rounding.

Source:

Statistics Canada. Table 33-10-0416-01. Business or organization plans regarding recruitment, retention and training, fourth quarter of 2021.
<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310041601>

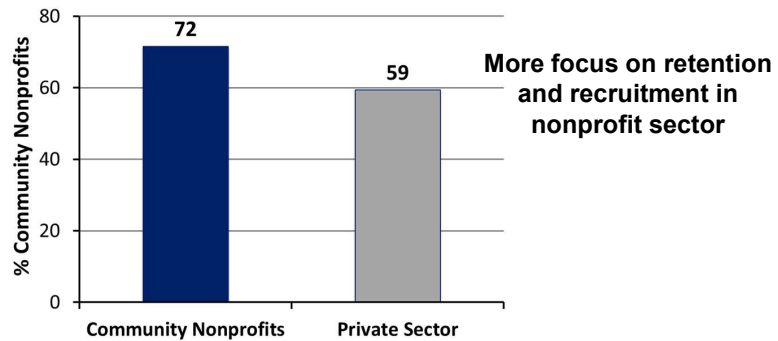
Survey Question: “Over the next 12 months, does this business or organization plan to do any of the following? Select all that apply.”

Analysis Notes: In the order of the chart, the selections were “1) Provide employees with paid time to engage in learning and development programs, 2) encourage employees to participate in on-the-job training, 3) provide tuition support to employees to take courses or programs, 4) encourage employees to acquire micro-credentials which help individuals develop job-related competencies, and 5) apply for learning and development programs provided by governments in order to upskill or reskill current employees.” Some figures do not add to 100% due to rounding.

Source:

Statistics Canada. Table 33-10-0416-01. Business or organization plans regarding recruitment, retention and training, fourth quarter of 2021.
<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310041601>

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



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Survey Question: “Over the next 12 months, does this business or organization plan to do any of the following? Select all that apply.”

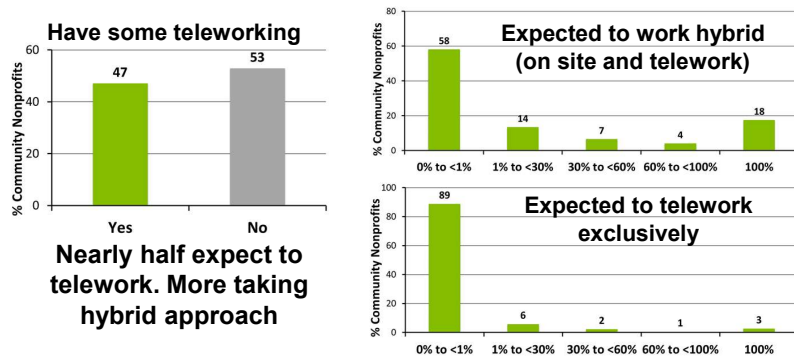
Analysis Notes: This reflects organizations that answered that they had no plans. Some figures do not add to 100% due to rounding. Compared to the private sector.

Source:

Statistics Canada. Table 33-10-0416-01. Business or organization plans regarding recruitment, retention and training, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310041601>

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



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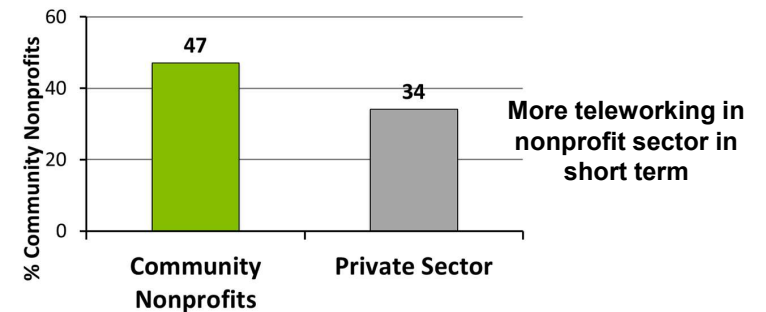
Survey Question: “Over the next three months, what percentage of the employees of this business or organization is anticipated to do each of the following? Exclude staff that are primarily engaged in providing driving or delivery services or staff that primarily work at client premises. Provide your best estimate rounded to the nearest percentage. If the percentages are unknown, leave the question blank.”

Analysis Notes: Responses were: “workforce anticipated to work exclusively on-site, workforce anticipated to telework exclusively, and workforce anticipated to have a hybrid telework and on-site work arrangement.” The “have some teleworking” option reflect organizations that did not report 100% of “workforce anticipated to work exclusively on-site”. Some figures do not add to 100% due to rounding.

Source: Statistics Canada. Table 33-10-0421-01. Percentage of workforce anticipated to work on-site or telework over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310042101>

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



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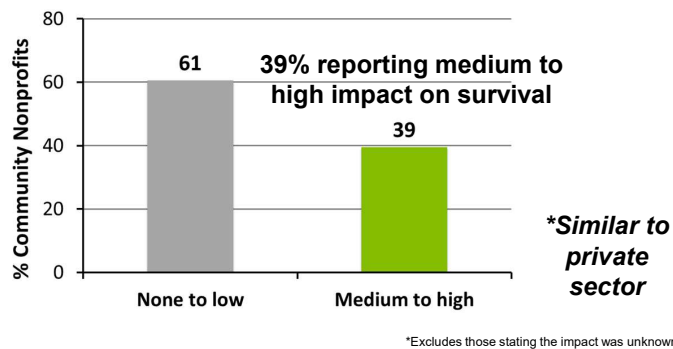
Survey Question: “Over the next three months, what percentage of the employees of this business or organization is anticipated to do each of the following? Exclude staff that are primarily engaged in providing driving or delivery services or staff that primarily work at client premises. Provide your best estimate rounded to the nearest percentage. If the percentages are unknown, leave the question blank.”

Analysis Notes: Reflect those for the “have some teleworking” option that did not report 100% of “workforce anticipated to work exclusively on-site”. Some figures do not add to 100% due to rounding. Compared to the private sector.

Source: Statistics Canada. Table 33-10-0421-01. Percentage of workforce anticipated to work on-site or telework over the next three months, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310042101>

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



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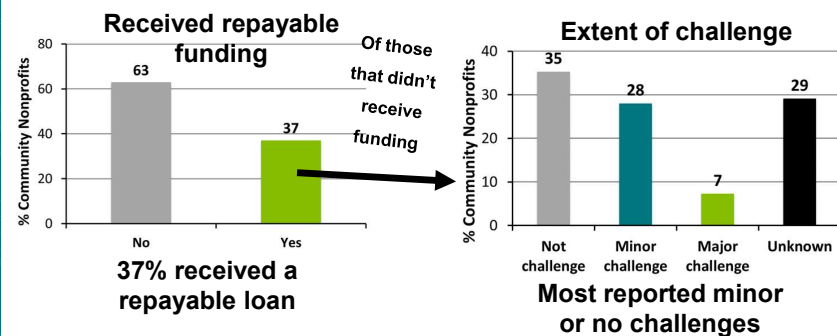
Survey Question: “Over the next 12 months, how would the absence of government support programs impact the survival of this business or organization? Examples of government support programs include the Canada Emergency Business Account (CEBA), the Canada Emergency Wage Subsidy (CEWS), and the Canada Emergency Rent Subsidy (CERS).”

Analysis Notes: Responses were: “No impact, low impact, medium impact, high impact, and don’t know.” The percentages exclude those answering ‘don’t know’. Some figures do not add to 100% due to rounding. Compared to the private sector.

Source: Statistics Canada. Table 33-10-0417-01. Expected impact of the absence of government support programs on the survival of business or organization, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310041701>

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



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Survey Question: “Over the next 12 months, to what extent does this business or organization foresee challenges in repaying funding received from repayable government support programs put in place because of the COVID-19 pandemic? Examples of repayable government support programs include the Canada Emergency Business Account (CEBA) or the Indigenous Business Initiative (sometimes referred to as the Emergency Loan Program (ELP), issued through an Aboriginal Financial Institutions (AFI) or Métis Capital Corporations (MCCs)).”

Analysis Notes: Responses were: “Not a challenge, a minor challenge, a major challenge, don’t know, and this business or organization did not receive any repayable funding from government support programs related to the COVID-19 pandemic.” “No” to received repayable funding reflects a response of “this business or organization did not receive any repayable funding from government support programs related to the COVID-19 pandemic.” Some figures do not add to 100% due to rounding.

Source:

Statistics Canada. Table 33-10-0418-01. Expected level of challenge business or organization has in repaying funding received from repayable government support programs put in place because of the COVID-19 pandemic, fourth quarter of 2021.

<https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3310041801>

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PRIMARY CONTRIBUTORS

Matthew Russell and Kiran Gurm

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CONTACT

Matthew Russell, PhD
Senior Research and Policy Associate
PolicyWise for Children & Families
data@policywise.com