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A REPORT TO ALBERTA CHAMBERS OF COMMERCE

HIRING INTENTIONS

Labour Shortage Survey

January 2023

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ABOUT THE RESEARCH

OBJECTIVES

- This report continues research initiated in March 2020 dealing with labour market issues. Many of the original questions have been repeated in subsequent surveys and others have been added.
- The overall purpose of the research is to understand the experiences and expectations of Alberta businesses regarding their hiring needs over the next year. To this end, questions probed current staffing needs, skills required, difficulties hiring these skills, incentives offered to induce hiring, barriers to hiring, issues related to hiring incentives, extent of hiring or considering hiring outside of Alberta, willingness to consider hiring the long-term unemployed, youth, and the disabled, the range of skills used in the workplace, and the extent of change in skills needs in the next five years.
- In addition, Insight Community members who were anticipating a need to hire in the next six to twelve months were asked questions about their concerns regarding a possible recession and the impact of inflation on their business as well as follow up questions related to hiring outside of Alberta.

METHODOLOGY

- In all, 535 businesses completed the survey which was administered on the Alida platform by the Alberta Chambers of Commerce to members and other affiliated businesses.
- In addition, 330 members of ACC's Insight Community answered a number of follow up questions appended to the end of the survey. These are found at the end of the report.
- Surveying for the current survey was undertaken between December 3rd and 20th, 2022.

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SUMMARY OF FINDINGS

Labour Market Shortages

- While the Alberta labour market at all levels continues to be very tight, it is relatively unchanged over the last six months.
- A majority (61%) – in line with July 2022 (62%) - of Alberta businesses continue to experience staffing shortages of a significant (31%) or moderate (30%) nature. Consequently, two-thirds (67% compared with 71% in July 2022) report this is having a significant (33%) or moderate (34%) impact on production and/or sales opportunities.
- Businesses, though, do see a slight decline in the size of their workforce needs in the next six months and one year out. Compared with 18 months ago, fewer (37% to 45%, respectively) now say their hiring needs will increase in the next six months, while more now say their hiring needs will stay about the same (53% to 37%, respectively). The same overall pattern also applies to their anticipated workforce needs in the next 12 months, although businesses continue to anticipate greater hiring needs 12 months out than they do in the next six months (46% to 37%, respectively).
- Employers continue to report that hiring at all positions requiring a post secondary level education or any job above the entry level is at least somewhat difficult. However, with jobs requiring only a high school education or an entry level position, there has been some easing of reports on the difficulty of hiring. Both types have seen approximately a 10% decline in the reported difficulty of hiring. This should make hiring somewhat easier for these types of positions. This is important as positions with these limited requirements continue to be the ones employers say they have most needed to hire recently.

Response to Shortages

- In order to meet labour shortages, most (73%) businesses - and especially those facing significant shortages - continue to offer a variety of incentives. These include: flexible work arrangements (57%), increased wages/compensation (53%) and skills training (49%). Pressure on wages appears to be continuing as those employers saying they are facing a significant labour shortage are easily the most likely to identify wages/compensation (60%) as an incentive.
- Smaller businesses appear to be in a difficult competitive situation regarding hiring as far fewer (27%) than other organizations (57%) say they have increased wages/compensation. However, they are the most likely to say they will provide more flexible hours and work arrangements (63%).
- As a further response to labour shortages, employers have opted for a number of different strategies. This includes hiring youth (56%) and recruiting from elsewhere in Canada (32%). However, the pool of applicants from the rest of Canada may be declining. When asked about the number of recent job applicants from outside of Alberta, many more employers say there are fewer now than six months to a year ago (33%) compared with those who say there are more now (12%).
- Other strategies cited less frequently include hiring those with disabilities (23%), hiring the long-term unemployed (18%), and recruiting internationally (16%).
- A further strategy cited was employee referrals and this appeared to have some traction with majorities of employers citing some success (including 30% of employers reporting that over half of their hires came from this source).
- Another approach some employers are using is internal software to support recruitment efforts (33%).

Barriers to Recruitment

- Three broad factors continue to represent the major barriers to recruitment: a lack of applicants (39%), the lack of candidates with the right qualifications, such as technical (37%) and interpersonal skills (33%), and a combination of wage related issues, including not being able to afford the going wage rate (28%), budget constraints (18%) and competition from other employers (29%).

Skill Set Needs

- In order to help anticipate future demand for skills, employers were asked to identify the skills they currently use in their business and their anticipated needs over the next five years.
- As might be expected, the range of skills used now and needed in the future is diverse. Accounting, construction/trades related, IT related, and graphic designers are all cited as being used with some frequency. And, a mix of some less used now and some currently being used are cited as being in greater need for businesses over the next five years. This includes a continuing focus on construction/trades related skills and a greater focus on IT related skills. Petroleum and other types of engineers are also cited as being in future demand (at least among those currently using these skills).
- Related to the skills anticipation need issue, most employers say they are at least somewhat confident in their ability to forecast the skills they will need five years from now. This suggests that some confidence can be placed in their projections.

Inflation, Recession, and Interest Rate Expectations

- A majority (84%) of employers continue to believe a recession in the next twelve months is at least somewhat likely and four-in-ten believe the impact would be major.
- While anticipating a recession, employers are currently dealing with the consequences of inflation and report that this is having a significant impact on their cost structure, including wage pressure. Related to this, half of employers report that this is highly problematic since they can't pass costs on the customers/clients or that they can't afford to pay higher wages to retain and attract staff.
- Interest rate increases are also a concern for many businesses, but this issue is dwarfed by the twin concerns of inflation and a recession. In summary, the current inflationary challenges and concerns with a potential recession make for a challenging business climate for many employers in the province.

Regional Variations

- As in previous surveys, no consistent and/or significant regional variations were identified.

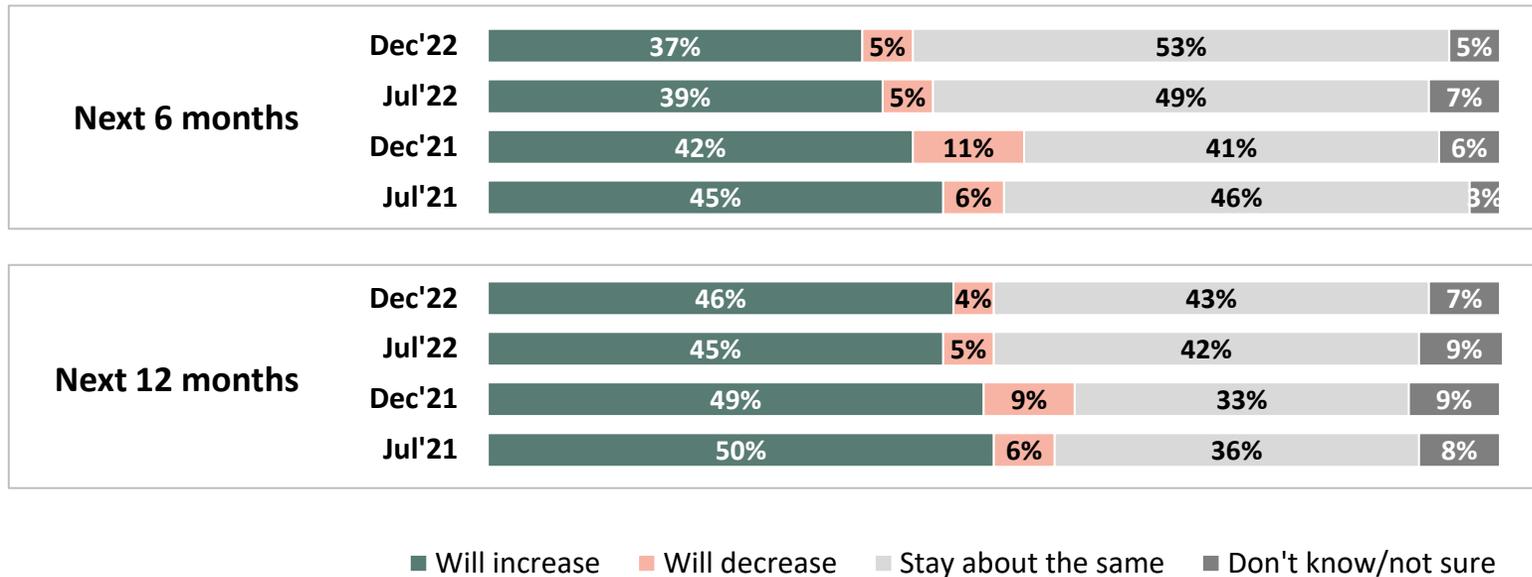
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DETAILED FINDINGS

Expectations of labour force needs in the coming six and twelve months have declined somewhat over the last 18 months. More employers now believe their labour force needs will stay about the same in the next six months than say they will increase (53% to 37%, respectively).

- However, employers continue to have significant apprehension regarding a year from now and almost half (46%) believe their needs will increase.

Perceptions of Change in Size of Work Force in Next 6 and 12 months



Private sector businesses continue to be much more likely than public sector/NGOs to believe their staffing needs will increase in the next six months (41% to 30%, respectively) and in the next year (51% to 36%, respectively).

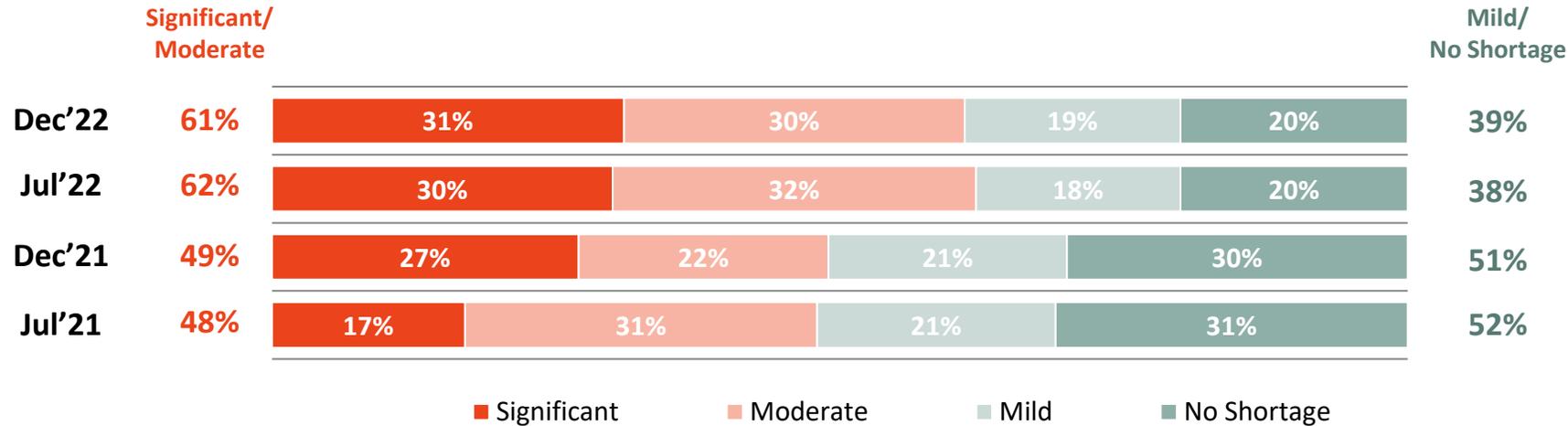
The smallest businesses (4 or fewer staff) continue to be the least likely to believe their staffing needs will increase over the next six months (22%) and the next year (31%) compared with those with 5 or more staff (41% and 50%, respectively).

Q1. Aside from any seasonal fluctuations, do you anticipate any change in the size of your workforce relative to the following time periods: (previous phrasing) Aside from any seasonal fluctuations, do you anticipate any change in the size of your workforce in the next 6/12 months (relative to the previous 6/12 months)?

Base: Total sample Jul'21 n=487, Dec'21 n=410, Jul'22 n=560, Dec'22 n=535

The proportion of businesses saying they are experiencing significant to moderate staff shortages is unchanged over the last six months, but this remains high with six-in-ten (61%) reporting significant (31%) or moderate (30%) shortages.

Extent of Business Experiencing Staffing Shortage



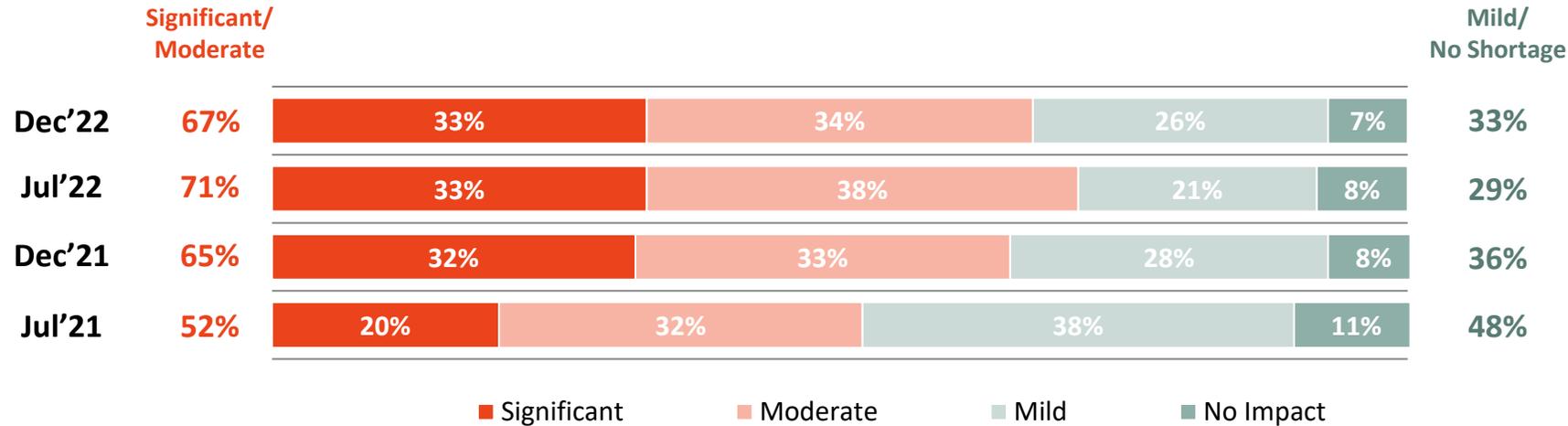
Businesses of 10 or more staff are more likely to cite the impact of these shortages as significant or moderate and this is especially the case for those with 50 or more staff (72%) and those in the tourism sector (75%).

Q2. To what extent is your business currently experiencing a staffing shortage, that is you have insufficient qualified candidates to meet your business needs?

Base: Total sample Jul'21 n=487, Dec'21 n=410, Jul'22 n=525, Dec'22 n=520

Two-thirds (67%) of those reporting shortages continue to say this is having a significant or moderate impact on production or sales opportunities. Not surprisingly, the biggest impact is among employers who say their staffing shortage is significant, with 66% reporting the impact on sales or production is significant.

Impact of Staffing Shortage on Production and Sales Opportunities



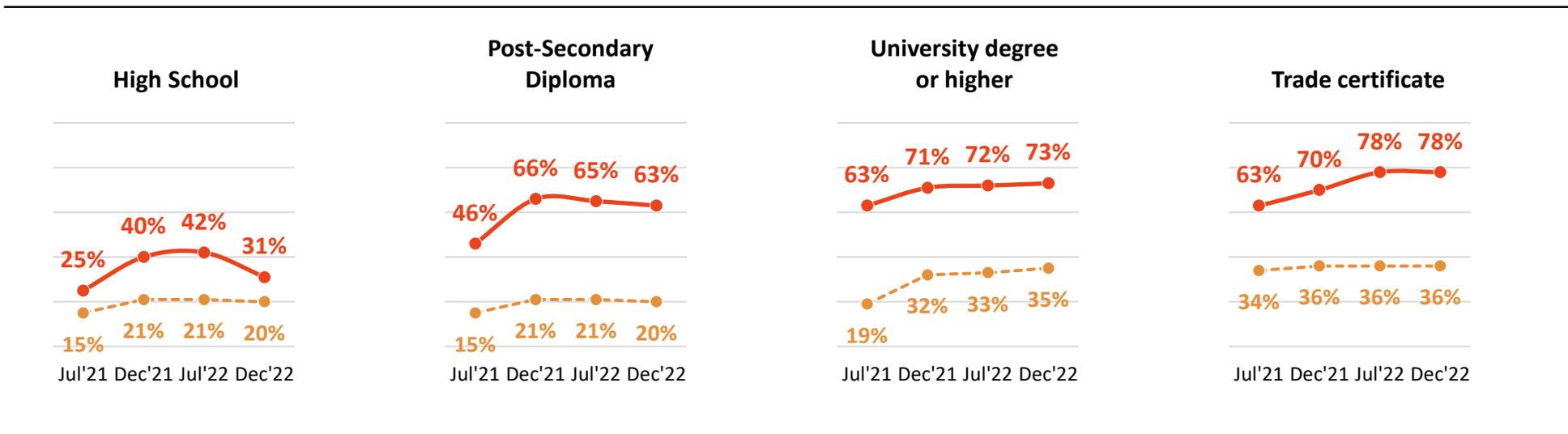
Those in the tourism sector are among the most likely to say staffing shortages are affecting sales/production significantly or moderately (71%). Regionally and by size of enterprise, there are no major differences suggesting staffing shortages are causing issues across the province.

Q3. How much of an impact, if any, is your staffing shortage causing in loss of production or sales opportunities?
 Base: Answered "Significant, Moderate or Mild Shortage" at Q4 Jul'21 n=336, Dec'21 n=287, Jul'22 n=390, Dec'22 n=414

DIFFICULTY OF HIRING DIVERSE EDUCATION BACKGROUNDS

Among those reporting staffing shortages, majorities continue to say it is very or somewhat difficult to hire all but the high school educated (and there has been a decline in reported hiring difficulties for the high school educated). In other words, it continues to be difficult to hire anyone with a post-secondary education and related skills.

- As in earlier surveys, employers continue to have more need to hire those with a high school or college education than those with a university degree or a trade certificate.



—●— % saying "Very/Somewhat Difficult to hire (re-proportioned to exclude "Have not needed to hire recently" responses)
 - - -● - - - % saying "Have not needed to hire recently"

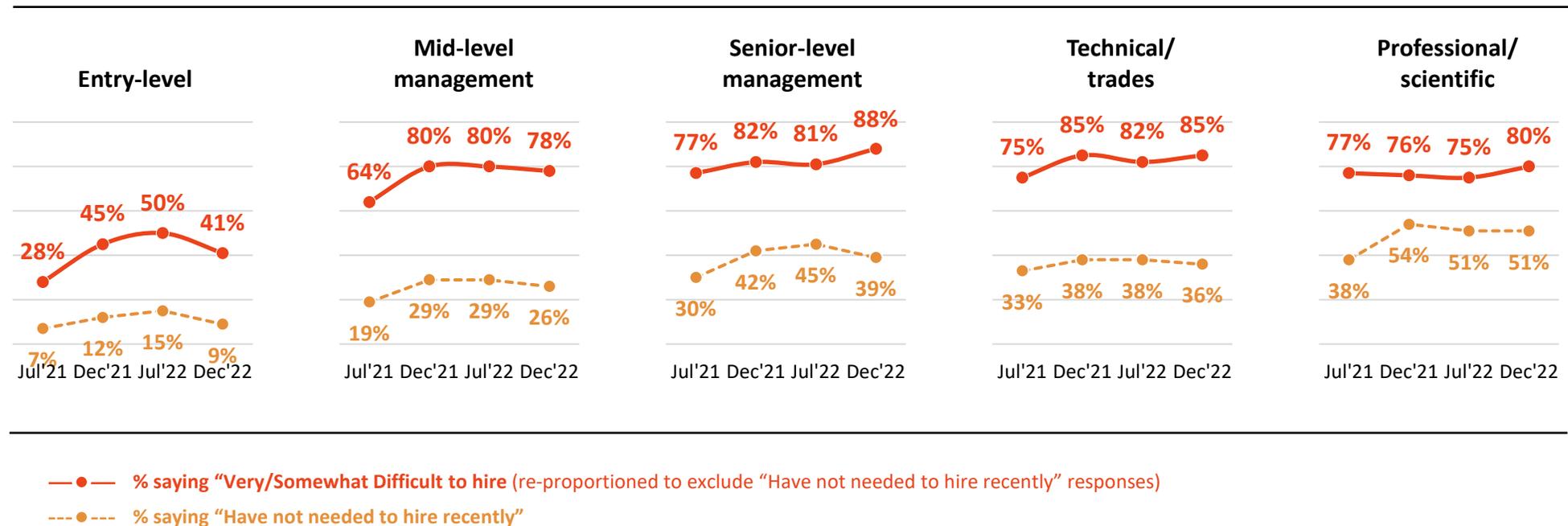
The tourism sector, in particular, continues to need to hire the high school educated and to be the most likely to report difficulties in hiring this group (40%) compared with non-tourism operations (29%).

Q4. How easy or difficult is it to hire people with the following education levels to manage your business?
 Base: Jul'21 n=336, Dec'21 n=287, Jul'22 n=Bases vary (Excludes those reporting No shortage at Q4), Dec'22 n=414

DIFFICULTY OF HIRING DIVERSE SKILL SETS

The greatest need for all businesses continues to be entry level positions, although reported difficulty in hiring this group has declined in the last six months. However, for all other levels, three-quarters or more of employers continue to report difficulty in hiring.

- Larger employers (200+) appear to have somewhat less difficulty than others in hiring those with mid-level (69%) and technical/trade skills (76%).



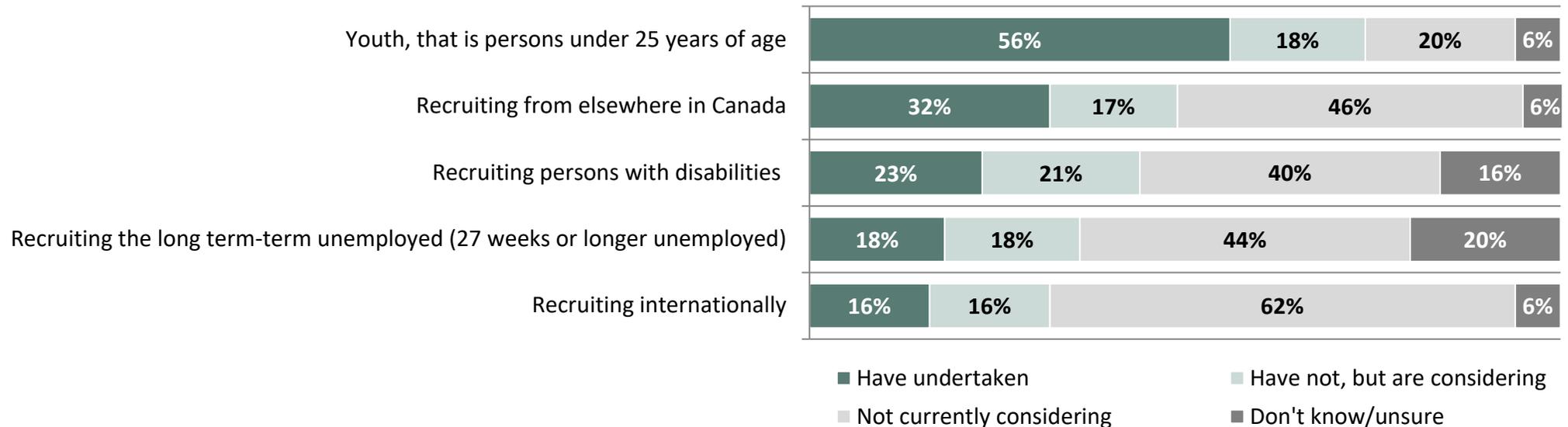
Q5. How easy or difficult is it to hire people with the following skills to manage your business?
 Base: Answered "Significant, Moderate or Mild Shortage" at Q4 Jul'21 n=336, Dec'21 n=287, Jul'22 n=Bases vary, Dec'22 n=414

Employers activities undertaken to address skills shortages vary greatly. A majority (56%) have hired youth while few (16%) have tried recruiting internationally.

- Organizations reporting a significant staffing shortage are far more likely than others to have recruited elsewhere in Canada (57%) and internationally (30%). They are also less likely than those reporting a moderate shortage to be considering these activities - presumably because they have already taken these actions.
- Larger enterprises are generally more likely to have undertaken all activities, with the exception of hiring youth (for example, 58% of organizations with 50 – 199 staff report recruiting elsewhere in Canada).
- Public sector/NGO organizations are far more likely to report hiring the disabled (35%) than the private sector (17%).

Actions Undertaken to Meet any Shortages of Needed Skills

Dec'22



Q8. In order to meet any shortages of the skills you need for each of the following what, if any, have you done or are considering undertaking?

Base: Total sample n=520

Among those saying they have a labour shortage, only 23% report they are doing nothing new to deal with the situation. The most frequently cited incentives continue to be offering flexible work conditions, raising wages and compensation (up by 20% since July 2021), and offering skills training.

- Small business (1- 4) are the least likely to say they will raise wages or compensation (27%), but are the most likely to say they will provide more flexible hours and work arrangements (63%).
- The private sector, compared to the public sector/NGOs, are much more likely to say they have raised wages/compensation (59% and 40%, respectively) while public sector/NGOs are more likely to say they have provided flexible hours than are the private sector (63% and 54%, respectively).

Types of Incentives Offered to Attract Talent

	Jul'21	Dec'21	Jul'22	Dec'22
Provide flexible hours or work arrangements	65%	60%	54%	57%
Raise wages or compensation	33%	46%	45%	53%
Offer skills training	44%	42%	50%	49%
Expand benefits	24%	27%	30%	32%
Allow staff to work from home, all or partly	-	-	23%	27%
Make jobs full time rather than contract or part time	-	-	22%	23%
Nothing new, beyond or normal offering to potential employees	-	-	20%	23%
Covering relocation costs	-	-	13%	13%
None	18%	13%	-	-
Other, please specify	6%	9%	7%	4%
Don't know	-	-	4%	4%

Those companies that say they already face significant staffing shortages are the most likely to say they will raise wages and compensation (60%).

Q11. (Previously Q10) What incentives, if any, is your company offering or planning to offer to attract talent? (Please check all that apply) (previously) What incentives, if any, is your company planning to offer to attract talent? (Please check all that apply)

Base: Jul'21 n=187, Dec'21 n=151, Jul'22 n=371, Dec'22 n=414

TOP THREE RECRUITMENT BARRIERS

Despite restricting respondents to only their top three recruiting barriers, (and this largely accounts for the December declines) the same pattern of lack of applicants - including those with a lack of technical and people skills - emerge as the major issues. In addition, competition from other employers (including not being able to afford going rates) continues to be a major barrier.

Top Barriers for Recruiting Skills Your Business Needs

	Mar'20	Mar'21	Jul'21	Dec'21	Jul'22	Dec'22		Mar'20	Mar'21	Jul'21	Dec'21	Jul'22	Dec'22
Among those reporting a significant staff shortage, 48% say lack of applicants is the top barrier, followed by lack of technical skills (39%), competition from other employers (36%) and people skills (31%).	Lack of applicants	28%	42%	54%	59%	48%	39%						
	Lack of technical skills or qualifications	35%	44%	45%	47%	43%	37%						
	Lack of people skills or qualifications	40%	44%	48%	51%	50%	33%						
	Competition for skills from other employers	23%	28%	48%	43%	38%	29%						
	Can't afford the going rates for the staff we would like to hire	36%	37%	35%	38%	36%	28%						
	Business budget constraints	36%	29%	27%	33%	24%	18%						
	High cost of training someone without some basic skills we need	-	-	-	-	28%	14%						
	Lack of management and/or leadership skills	19%	17%	31%	29%	21%	11%						
	Candidates unwilling to relocate	18%	23%	20%	19%	18%	9%						
	Government regulation for hiring workers from outside Canada	6%	8%	13%	19%	13%	7%						
Applicants do not have accessible housing to relocate	8%	8%	8%	8%	9%	7%							
							<i>Cont'd</i>						
							Candidates unwilling to forgo government income support programs	-	-	24%	25%	18%	5%
							Applicants don't have adequate transportation	9%	10%	9%	13%	16%	5%
							Applicants cannot access adequate childcare	9%	11%	14%	15%	12%	4%
							Lack necessary language skills (require recruits to be bilingual or multilingual)	3%	3%	5%	3%	12%	4%
							Candidates cannot pass screening (drug, criminal record check, etc.)	10%	11%	12%	11%	11%	4%
							Foreign credentials recognition	2%	2%	8%	6%	8%	3%
							Interprovincial credential recognition	3%	3%	7%	3%	5%	1%
							Language barriers (English as a second language)	9%	6%	9%	9%	-	-
							There are no significant barriers	-	4%	3%	2%	4%	8%
							Other	7%	7%	11%	10%	10%	5%
							Don't know/not sure	3%	1%	1%	2%	2%	4%

Q9. What are the three top barriers for recruiting the skills your business needs? (Please select all that apply) Previous phrasing (Q8) What are the top barriers for recruiting the skills your business needs? (Please select all that apply)

Base: Total sample Mar'20 n=317, Mar'21 n=356, Jul'21 n=336, Dec'21 n=287, Excluding Jul'21 n=151, Dec'21 n=123 who at Q3 said no shortage), Jul'22 n= 482, Dec'22 n=520

TOP THREE BARRIERS BY ENTERPRISE SIZE

The recruitment barriers identified vary somewhat by the size of enterprise. Among smaller employers (9 and under), not being able to afford the going rate or budget constraints are significant barriers, while competition from other employers is a major issue among larger businesses.

- Among smaller employers, lack of people skills vies with lack of technical skills as barriers.

Number of Employees and Barriers to Recruitment

	Dec'22			
	1 -4	5 - 9	10 - 49	50+
Lack of applicants	26%	38%	45%	41%
Lack of technical skills or qualifications	40%	35%	41%	31%
Lack of people skills or qualifications	31%	38%	33%	29%
Competition for skills from other employers	11%	17%	33%	46%
Can't afford the going rates for the staff we would like to hire	35%	31%	21%	28%
Business budget constraints	33%	23%	12%	11%

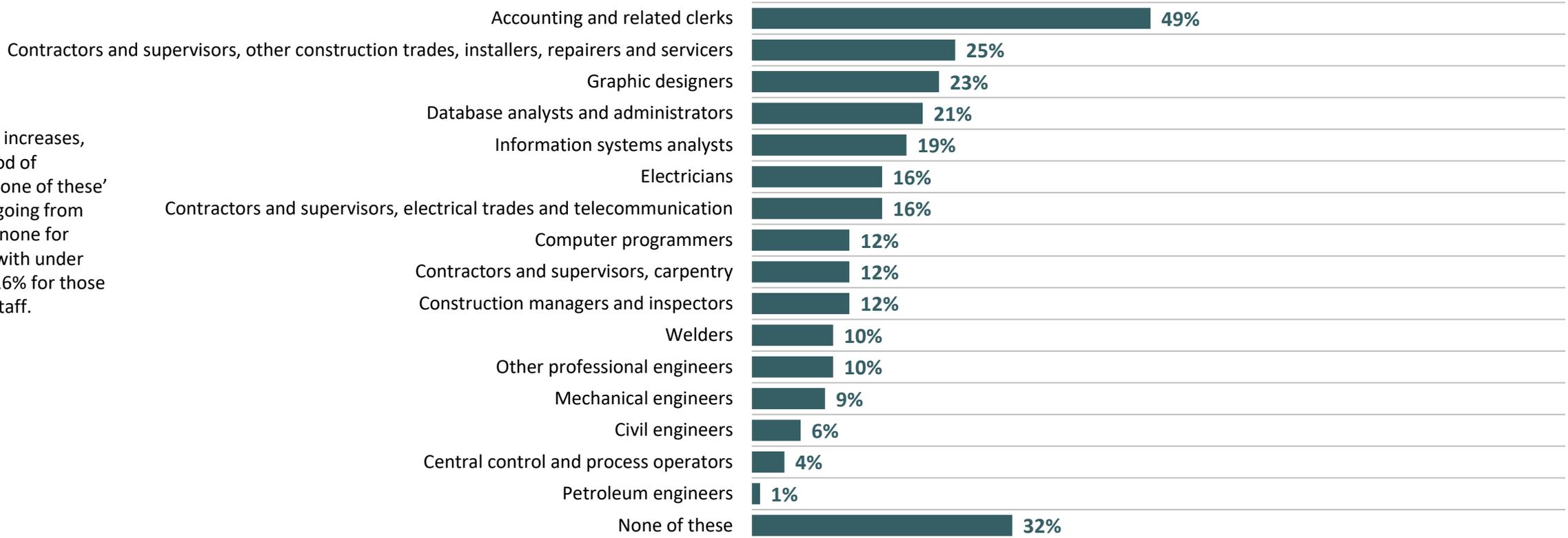
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CURRENT SKILL SETS USED

As might be expected, there is considerable variation in the skills used by employers, with accounting and related clerks being the skill set most frequently cited. However, one-third of employers also reported not using any of the skill sets explored (and this varied greatly by size of business).

Skill Sets that are Currently used in Business

Dec'22



As staff size increases, the likelihood of reporting 'none of these' decreases, going from 40% saying none for employers with under 10 staff to 16% for those with 200+ staff.

Q6. Which of the following skill sets (whether through having staff or contracting out) does your organization currently make use? (Please select all that apply)

Base: Total sample n=520

HOW SKILLS ARE OBTAINED

There is considerable variation in whether skills are in-house, contracted out, or both options are used. The most frequent skills brought in-house are accounting, data base and information system analysts, and control and process operators.

Employed or Contracted by Organization

Dec'22

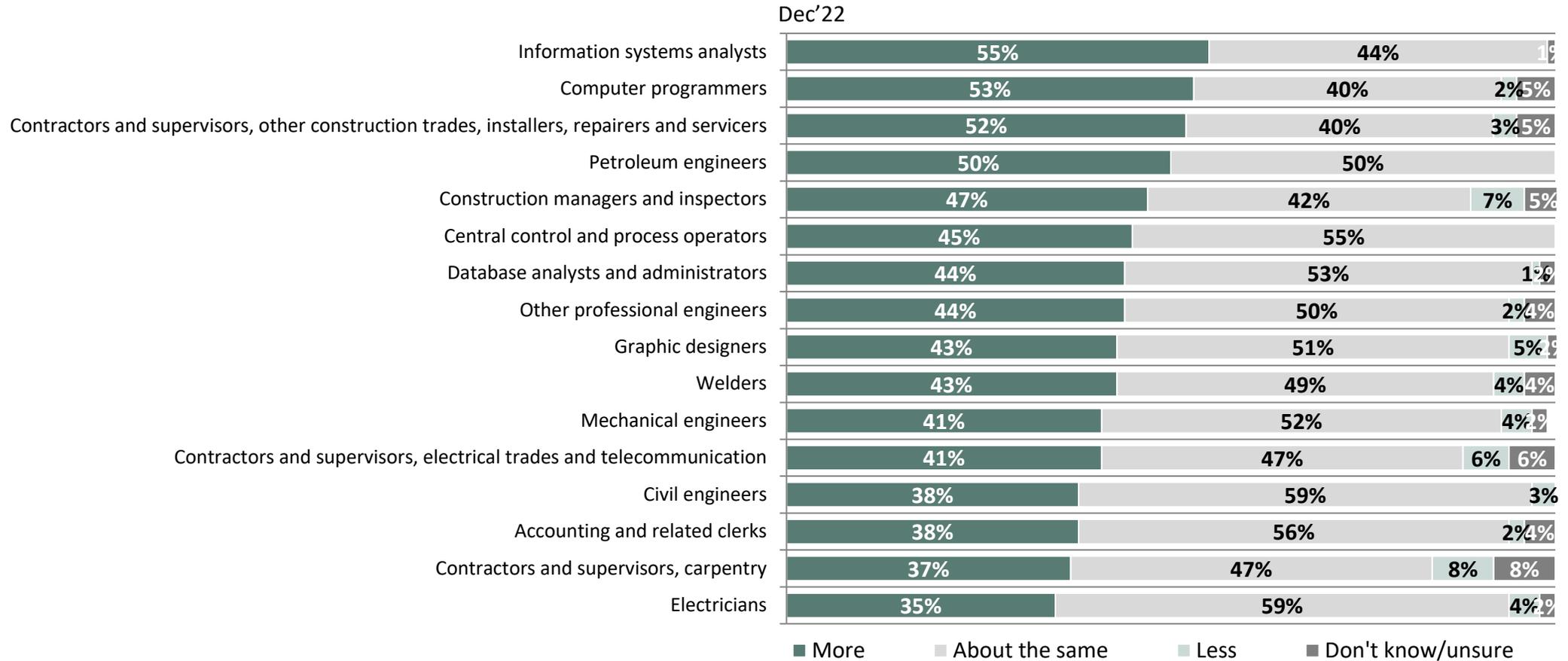
	EMPLOYED	CONTRACTED	BOTH	DON'T KNOW/UNSURE
Accounting and related clerks	64%	19%	15%	2%
Database analysts and administrators	63%	18%	14%	6%
Central control and process operators	60%	10%	25%	5%
Information systems analysts	59%	27%	12%	2%
Mechanical engineers	43%	37%	17%	2%
Construction managers and inspectors	42%	22%	35%	2%
Civil engineers	41%	44%	16%	-
Computer programmers	40%	37%	18%	5%
Welders	39%	33%	24%	4%
Other professional engineers	38%	36%	26%	-
Contractors and supervisors, other construction trades, installers, repairers and servicers	38%	34%	25%	3%
Graphic designers	37%	39%	22%	3%
Petroleum engineers	33%	33%	33%	-
Contractors and supervisors, electrical trades and telecommunication	30%	48%	20%	1%
Contractors and supervisors, carpentry	27%	39%	32%	2%
Electricians	26%	53%	20%	1%

Q7A. For each of those you selected are they employed by your organization or do you contract out this skill set?

Base: Those selected at Q6 n=Bases vary

In many cases, where employers are using a specific skill, there is an expectation that more of this skill will be required.

Business Needs by Occupations Over the Next Five Years



Q7. For each of those you selected, do you see your business needing to make more, about the same or less use of people in those occupations over the next five years?

Base: Those selected at Q6 n=Bases vary

SKILLS INDEX

The index is created by multiplying the percent that ‘use now’ with the percent saying more will be needed in 5 years. The resulting score is then divided by 100. This is a relative and not an absolute index and should be used only to estimate skill set needs based on existing and future demand.

- For example, the index for future demand for accounting is very high because the current use is high despite anticipated future use being moderate. In the case of petroleum engineers, because current use is so low, despite increased future demand, future demand will continue to be low.

Skills Index for Future Demand

	USE NOW	MORE IN 5 YEARS	INDEX SCORE
Accounting and related clerks	49%	38%	18.62
Contractors and supervisors, other construction trades, installers, repairers and servicers	25%	52%	13.00
Information systems analysts	19%	55%	10.45
Graphic designers	23%	43%	9.89
Database analysts and administrators	21%	44%	9.24
Computer programmers	12%	53%	6.36
Contractors and supervisors, electrical trades and telecommunication	16%	41%	6.50
Construction managers and inspectors	12%	47%	5.64
Electricians	16%	35%	5.60
Contractors and supervisors, carpentry	12%	37%	4.44
Other professional engineers	10%	44%	4.40
Welders	10%	43%	4.30
Mechanical engineers	9%	41%	3.69
Civil engineers	6%	38%	2.28
Central control and process operators	4%	45%	1.80
Petroleum engineers	1%	50%	0.50

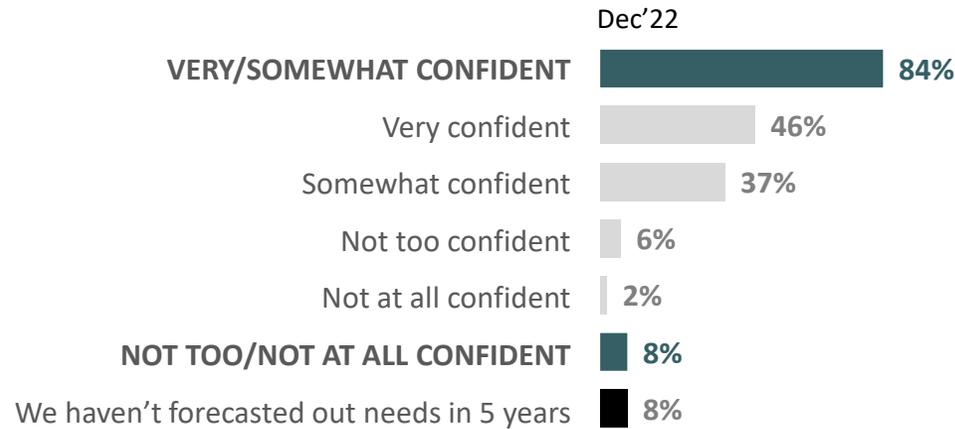
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INSIGHT COMMUNITY MEMBERS WHO ANTICIPATE
HIRING WITHIN THE NEXT SIX OR TWELVE MONTHS

Most of those answering the additional questions appear at least somewhat confident (84%) in their ability to forecast their skills need five years from now. Of interest, few (8%) say they have not made a forecast of future skills' needs.

- Even among small businesses (1 -4 staff) only 16% say they have not made a forecast.

Confidence Level in Business Forecast Needing More Skills or Less Skills Five Years from Now



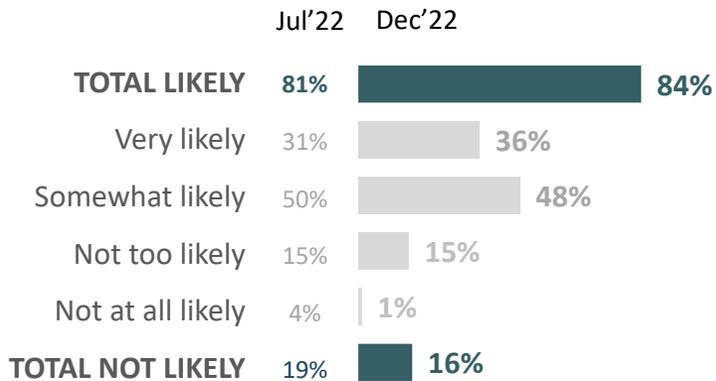
QF1. How confident are you in your forecast of your business needing more or less of these skills 5 years from now?

Base: Total sample n=330

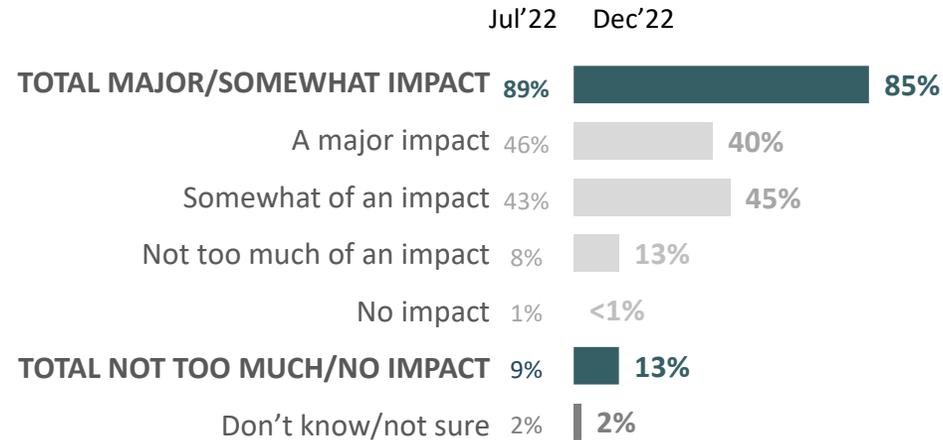
Most (84%) Insight Community members continue to believe it is at least somewhat likely the province will experience a recession in the next year, although somewhat fewer (40%) than six months ago (46%) believe this will have a major impact.

- Concerns that revenues (81%) and customers/sales (74%) will decline, as well as having to lay off staff (50%), continue to be the major imagined impacts.

Likelihood of Alberta Experiencing a Recession in the Next Twelve Months



Impact of Recession on Business



Ways a Recession would Impact Business

	Jul'22	Dec'22
Revenue/cash flow will decline	81%	81%
Decline in customers/client/sales	78%	74%
Have to let staff go/layoff staff	51%	50%
Might not be able to pay down business loans/ line of credit	28%	34%
Might not be able to keep up with bill payments/invoices to creditors	32%	30%
Other	3%	9%
Don't know/not sure	1%	1%

Q1. How likely is it that Alberta will experience a recession in the next twelve months?

Base: Total sample Jul'22 n=80, Dec'22 n=330

Q2. How much of an impact would a recession have on your business?

Base: Total sample Jul'22 n=80, Dec'22 n=330

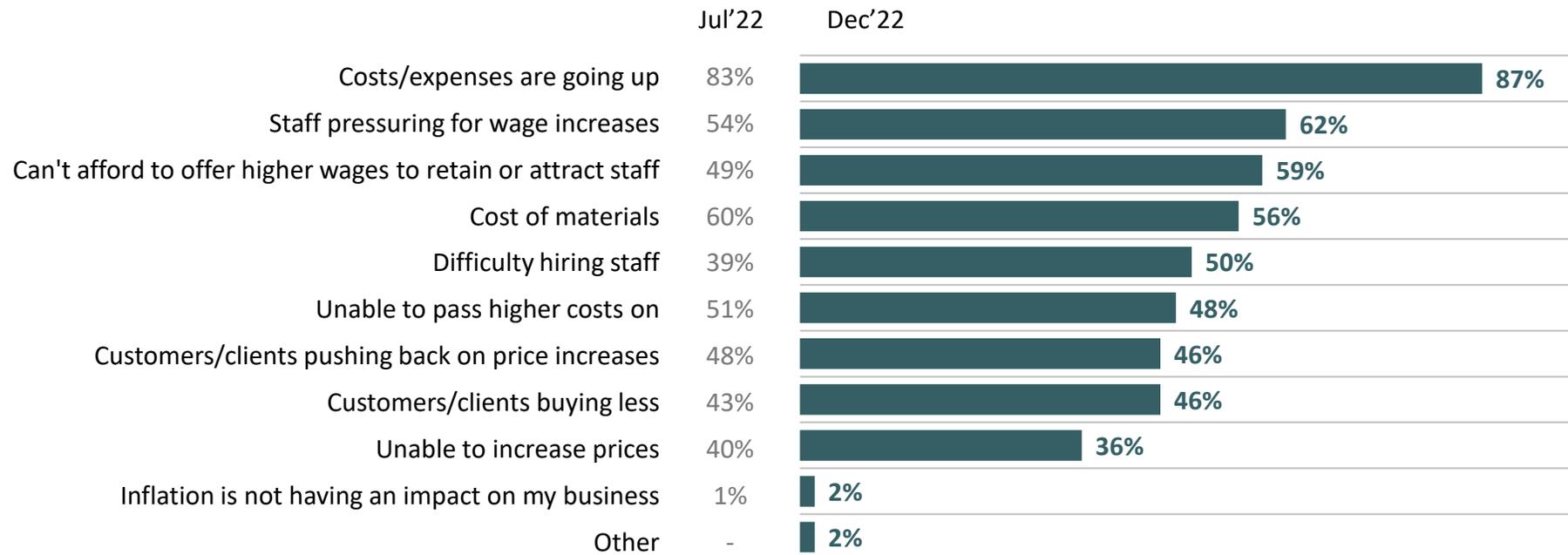
Q2a. In what way would a recession impact your business? (check all that apply)

Base: Total sample Jul'22 n=80, Dec'22 n=276

INFLATION

Insight Community members are being impacted by inflation in many challenging ways. While an increase in costs/expenses (87%) are cited most frequently, many feel pressure on wages (62%). However, at the same time, almost half (48%) feel they cannot pass costs on or that customers/clients are pushing back on price increases (46%).

Impact of inflation on business

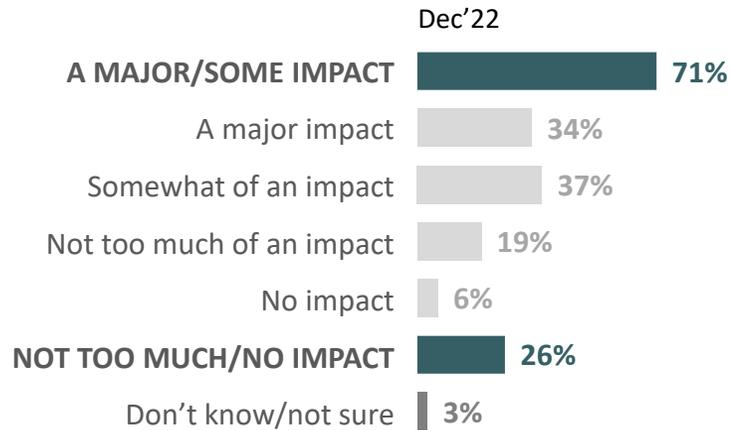


In the last 6 months, the greatest change has been around staffing issues: difficulty hiring staff (+11%), can't afford higher wages (=10%) and staff pressure for wage increases (+8%)

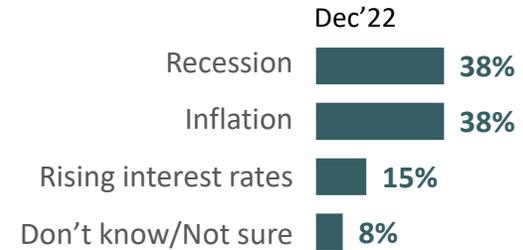
Q3. How, if at all, is inflation impacting your business?
 Base: Total sample Jul'22 n=80, Dec'22 n=324

Close to three-quarters of employers believe interest rate increases are having at least somewhat of an impact on their business. Far more, though, cite concerns over a recession (38%) or inflation (38%) as the single biggest negative impact on their business, however, than those who cite rising interest rates (15%).

Impact of Rising Interest Rates on Business



Biggest Negative Impact on Business



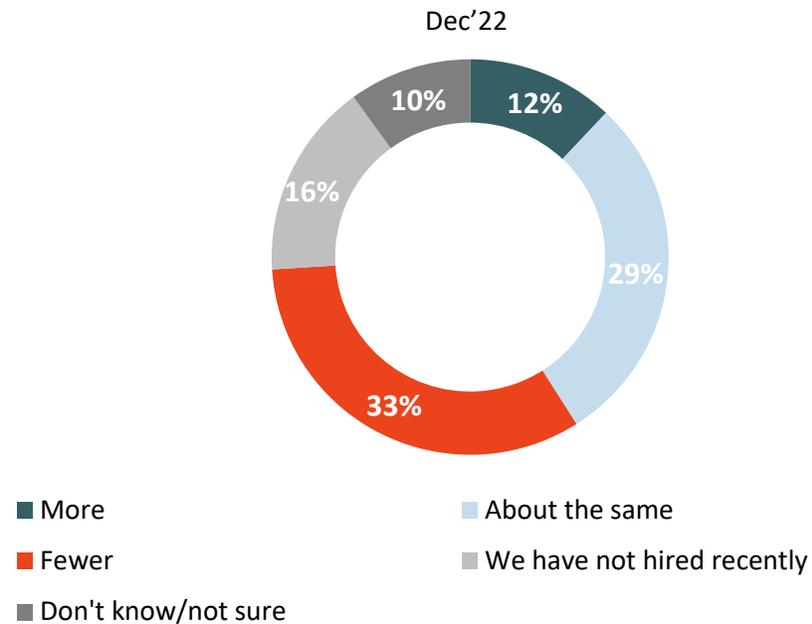
QF6. How much of an impact, if at all, are rising interest rates having on your business?
 QF7. Which one of the following has or would have the biggest negative impact on your business?
 Base: Total sample n=324

CHANGE IN NUMBER OF APPLICANTS FROM ELSEWHERE IN CANADA

Among those employers who have been hiring, when asked about applicants from elsewhere in Canada, most say there are fewer (33%) or about the same number (29%) than 6 – 12 months ago. Few (12%) believe there are more.

- When only those who report hiring elsewhere in Canada are analyzed, the proportion does not change much with 33% saying fewer and 16% saying more.

Applicants from Other Parts of Canada

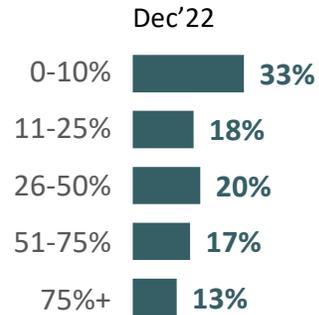


QF8. If you have been hiring new staff lately, compared with 6-12 months ago, are you noticing more, about the same number, or fewer applicants from other parts of Canada?

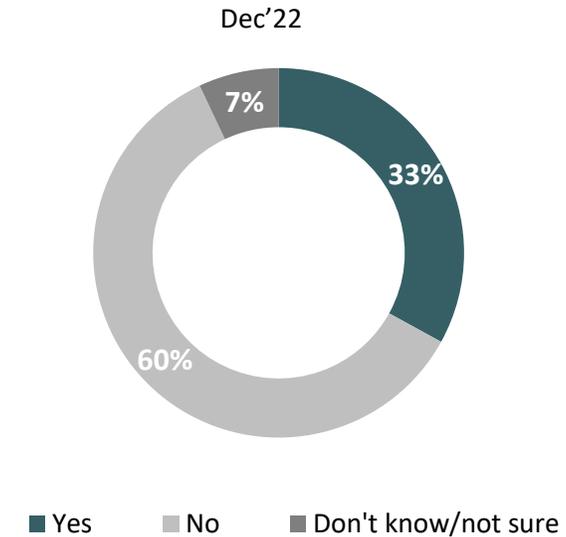
Base: Total sample n=324

Employee referrals appear to play a substantial role in many successful hires. Almost one-third (30%) of Insight Community members say over half of their successful hires come from employee referrals. Also related to recruitment, one-third of employers' report using internal software to support their recruitment efforts.

Extent Employee Referrals of Hiring Candidates Contribute to Successful Hires



Use of Internal Software to Assist in Recruitment Efforts



Q10. To what extent do employee referrals of hiring candidates contribute to successful hires of new employees in your business?

Base: Dec'22 n=272

Q11. Do you currently use internal software to assist your recruitment efforts?

Base: Dec'22 n=272

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DEMOGRAPHICS

Sample Demographics

OPERATING REGIONS OF BUSINESSES

	Jul'21	Dec'21	Jul'22	Dec'22
n=	462	388	522	535
All regions of Alberta	28%	19%	27%	21%
Calgary area	30%	14%	13%	7%
Central	17%	25%	17%	19%
Edmonton area	31%	27%	16%	22%
NET - Northern AB/Mountain	20%	36%	-	-
Mountain parks	3%	6%	4%	4%
Northeast	10%	12%	10%	11%
Northwest	11%	18%	20%	18%
NET - Rest of South	8%	15%	9%	-
Southeast	5%	7%	5%	9%
Southwest	5%	8%	5%	15%

TOURISM INDUSTRY (Answered "Fishing OR Hunting OR Retail trade OR Transportation OR Information and cultural services OR Insurance OR Private real estate OR Other" at Q11)

	Jul'21	Dec'21	Jul'22	Dec'22
n=	283	296	365	332
Yes	18%	20%	19%	18%
No	82%	80%	81%	82%

PUBLIC OR PRIVATE SECTOR

	Jul'21	Dec'21	Jul'22	Dec'22
n=	485	409	529	535
Public	14%	13%	16%	15%
Private	70%	74%	70%	66%
Not for profit	16%	13%	14%	19%

BEST DESCRIPTION OF INDUSTRY (Non-Hub Members)

	Jul'22	Dec'22
n=	539	471
Professional, Scientific and Technical Services	8%	11%
Construction	15%	10%
Other Services (except public administration)	17%	8%
Retail Trade	12%	8%
Food Services	6%	6%
Health Care	4%	6%
Manufacturing	3%	6%
Transportation	2%	5%
Finance	4%	4%
Educational Services	4%	4%
Agriculture	3%	4%
Social Assistance	2%	3%
Recreation	2%	3%
Information and Cultural Industries	2%	3%
Public Administration	1%	3%
Accommodation	4%	2%
Rental and Leasing	1%	2%
Oil & Gas Extraction	2%	1%
Insurance	1%	1%
Administrative and Support	1%	1%
Commercial Real Estate	1%	1%
Management of Companies and Enterprises	1%	1%
Private Real Estate	1%	<1%
Other	2%	6%

EMPLOYMENT NUMBERS

	Jul'21	Dec'21	Jul'22	Dec'22
n=	487	410	579	535
NET - 1-9	27%	46%	48%	42%
1-4	15%	26%	30%	22%
5-9	12%	20%	18%	20%
NET - 10-49	20%	30%	29%	57%
10-19	11%	18%	16%	18%
20-49	9%	12%	13%	13%
50-199	22%	15%	12%	16%
200-499	10%	4%	3%	5%
500+	20%	5%	8%	5%

YEARS IN OPERATION

	Jul'22	Dec'22
n=	422	524
2 – 5 years Jul'22/5 yrs. or less in Dec'22	12%	13%
6 – 10 years	13%	13%
11 – 15 years	12%	10%
16 – 20 years	10%	8%
21 – 30 years	18%	18%
31 – 50 years	22%	23%
More than 50 years	13%	16%
Don't know/not sure	<1%	<1%

OWNER OR PARTNER

	Jul'22	Dec'22
n=	450	441
Yes	74%	70%
No	26%	30%

Sample Demographics

JOB TITLE

	Jul'22	Dec'22
	n= 539	535
President, CEO, Owner or Executive Director	57%	59%
Vice president or equivalent	6%	4%
C-Suite executive (CFO, CMO, CTO, CXO)	3%	5%
Partner, advisor or associate	5%	7%
Other senior manager	13%	10%
Contractor or self-employed	5%	3%
Assistant, coordinator or manager (or equivalent)	8%	10%
Unemployed	<1%	<1%
Other	2%	3%

GENDER

	Jul'22	Dec'22
	n= 528	535
Female	49%	54%
Male	47%	41%
Other	-	<1%
None of the above	-	<1%
Prefer not to answer	4%	4%