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A REPORT TO ALBERTA CHAMBERS OF COMMERCE

## HIRING INTENTIONS

Labour Shortage Survey

July 2023

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## ABOUT THE RESEARCH

### OBJECTIVES

- This report continues research initiated in March 2020 dealing with labour market issues in Alberta. 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 (private sector, public sectors and NGO's) regarding their hiring needs over the next year. To this end, questions probed current staffing needs, incidence of staff shortages and the impact of shortages challenges hiring, incentives offered to induce hiring, barriers to hiring.
- In addition, respondents, agreeing to answer further questions, were asked about the likelihood of a possible recession and its impact and issues related to hiring outside the province.

### METHODOLOGY

- In all, 321 businesses completed the survey which was administered on the Alberta Perspectives platform by the Alberta Chambers of Commerce to members and other affiliated businesses.
- In addition, 205 of the initial respondents answered a number of follow up questions appended to the end of the survey. These are found at the end of the report.
- Those responding to the survey who are defined throughout the survey as businesses, self identify as either a business, a not-for-profit organization or a public sector organization.
- Fielding for the current survey was undertaken between June 14<sup>th</sup> and July 3<sup>rd</sup>, 2023.

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## SUMMARY OF FINDINGS

### Labour Market Shortages

- While the Alberta labour market continues to be tight in terms of the percent of employers reporting there are insufficient qualified candidates to meet their staffing needs, the intensity of this need has declined in the last six months. In the most recent survey, a shift from employers reporting a significant to a moderate staffing shortage has taken place.
- In all, while the proportion citing a significant or moderate shortage has remained at around 60%, the balance has tilted toward fewer saying they face a significant shortage (24% compared with 31% in December 2022) and more saying they face a moderate shortage (36% and up from 30% in December).
- However, the impact of staffing shortages on production and sales opportunities remains high with two thirds of employers continuing to saying there has been a significant or moderate impact. Further, unlike the move from significant to moderate staffing shortages, noted above, there has only been a slight decline in those saying the impact on sales/production is significant. This suggests that there continues to be a major cost to staffing shortages on businesses.
- And, in fact, this cost has a number of dimensions, which most importantly includes its impact on profitability (62%) but also in areas of potential expansion of businesses. In all, 38% of those experiencing staff shortages report being unable to tap into promising markets. This impact is especially a problem for those who are experiencing a significant shortage of staff with 57% among this group identifying this is an issue.
- The possibility that staffing shortages could intensify is also apparent from the fact that many employers continue to say they anticipate their staffing needs will increase in the next 6 months (36% say this) and in the next year (43% say this). If there is any positive news here it is that over the last two years the proportion saying this has declined somewhat, relieving slightly the pressure on shortages.

### Labour Market Shortages (cont'd)

- The extent of the experience of shortages continues to vary significantly by education level required for jobs and the level of skill required. Shortages continue to be least problematic for entry level jobs and those requiring only a high school education and over time appear to be less challenging in terms of hiring.
- But for all other types of positions, where skills are required, employers report a very or somewhat difficult employment environment.

### Response to Shortages

- Employers report responding to shortages in a number of ways, including the incentives offered and seeking workers from outside the province.
- In terms of incentives offered, over the last two years, and presumably a tightening labour market, the proportion citing raising wages or compensation has increased from 33% in July 2021 to 55% this July (a 22% increase) while over the same time period expanding benefits has increased from 24% to 38% (a 14% increase).
- Other frequently cited incentives include flexible hours or work arrangements (55%) and offering skills training (48%). In the case of flexible hours/arrangements this likely includes work from home and, in fact, there has been a 10% drop in those citing this incentive over the last two years.
- The other approach explored in the survey was the option of seeking workers outside of Alberta. More employers appear to be embracing this option or considering it. In the last year there has been an 8% increase to 53% saying they are recruiting outside Alberta (34%) or considering it (19%).

### Response to Shortages (cont'd)

- Among those already recruiting outside the province, 60% say they have been successful.
- In order to attract those from outside the province, employers have offered a variety of incentives and over the last year the proportion citing these incentives has increased. This suggests that in order to hire workers from outside the province, employers are having to offer more in terms of incentives to workers. As in the case of hiring incentives in general (cited above) raising wages or compensation saw a YoY increase of 19% to 40% citing this as something they have done. Similarly, expanding benefits saw a jump of 20% to 34% citing this incentive. Also, of interest, is the fact that more (34%) now say they are making jobs full-time rather than contract or part-time.
- Despite enhanced incentives among those already seeking workers outside Alberta, a lack of applicants is cited by 40% (up from 33% YoY) making this the most cited barrier. However, this is likely a symptom of other factors. This includes the cost issues of being unable to afford the going rates (up 11% to 30%) and budget constraints (up 11% to 29%) which have risen significantly this year as barriers. In addition, lack of technical skills/qualifications (30%) and government regulations also continue to be frequently cited.

### Barriers to Recruitment

- Three primary barriers to recruitment are identified: a lack of applicants (43%), the lack of candidates with the right qualifications, such as technical (34%) and interpersonal skills (39%), and a combination of wage related issues, including not being able to afford the going wage rate (34%), budget constraints (15%) and competition from other employers (27%).
- At the same time, there have also been YoY shifts in the proportion identifying specific recruitment barriers. In fact, compared with two years ago, and even in July 2022, there have been significant declines in the percent citing many barriers. It is likely that the increases in barriers were driven by the impact of the COVID pandemic. From this perspective this is likely the first time in at least two years that responses to recruiting barriers are not COVID influenced.
- When asked to identify their single biggest barrier to recruitment, no one barrier emerges and there is clearly no consensus. In fact, the most frequently cited was a lack of applicants and just 21% cited this as their major barrier.

### Recession Concerns

- While fears over a recession remain high (61%) this is well down from six months ago (84%). Further, this decline is largely in those who say a recession is very likely (down by 17% from December 2022 to 19% this July).
- But if there were a recession, a large majority of employers still believe their businesses would be impacted, although this is down slightly from 85% in December 2022 to 77% today. Similar to December 2022, employers continue to believe the main impact would be declines in revenue and customers/sales.



### Recession Concerns (cont'd)

- Those anticipating a recession say they have already begun to respond to the potential of a recession. The most frequently cited response is cutting back on spending/expenses (66%) holding off on expansions (44%) and limiting or holding off on pay raises (41%). This latter option is clearly a challenge in that there is extensive evidence throughout this survey of the continuing pressure employers are feeling on the wage front.

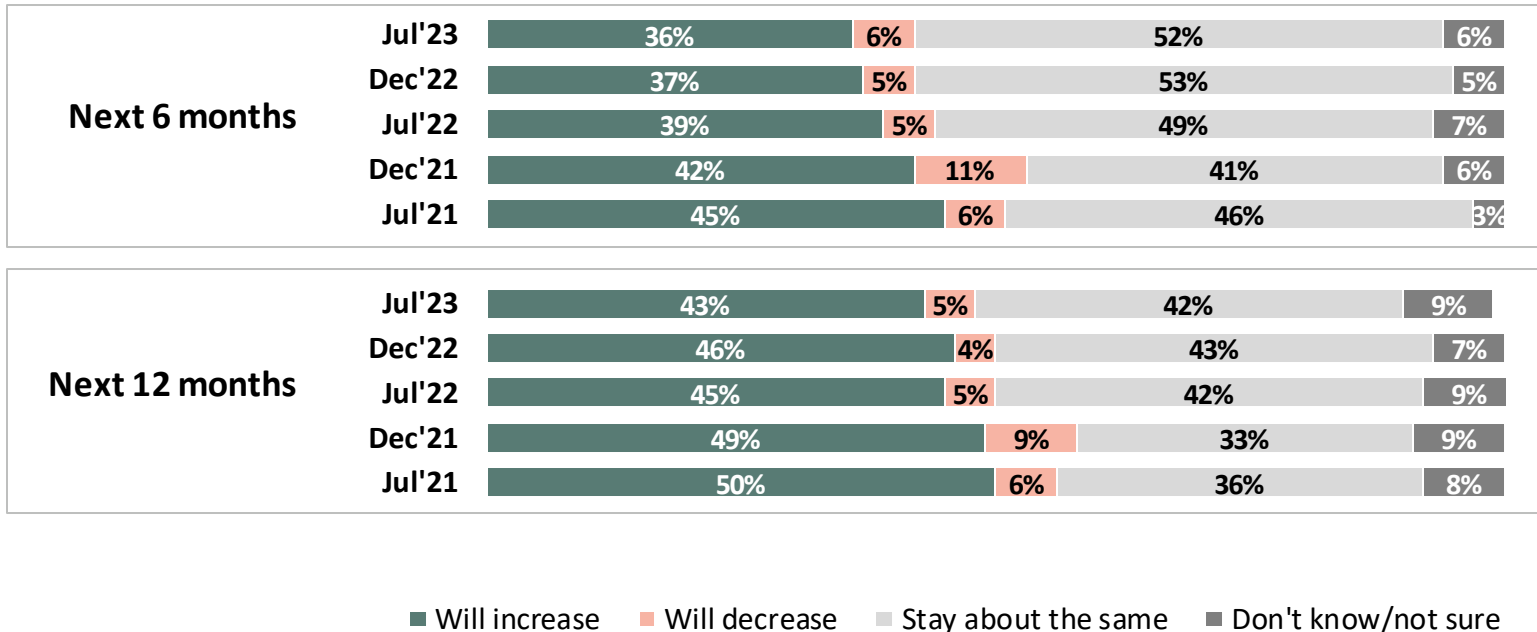
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## DETAILED FINDINGS

Employer perceptions of changes in the size of their workforce in the medium term is down marginally over December 2022. Over the last two years, the percentage of employers saying their workforce size will increase continues to decline, with more employers saying their needs will stay about the same.

- Organizations of 50 staff or more compared to smaller ones are much more likely to say their workforce size will increase in the next six months and a year.

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



For organizations of under 50 staff, the percent saying their workforce size will increase in 6 months and a year is 33% and 32%, respectively, compared with those of 50+ staff 49% and 50%, respectively.

Companies based out of Calgary were most confident that the size of the work force would increase over the next 6 months.

In the public sector/NGO sphere there is a widely held belief that their work force size will remain the same over the next year, in comparison to the private sector where a plurality of respondents believe that their workforce would increase.

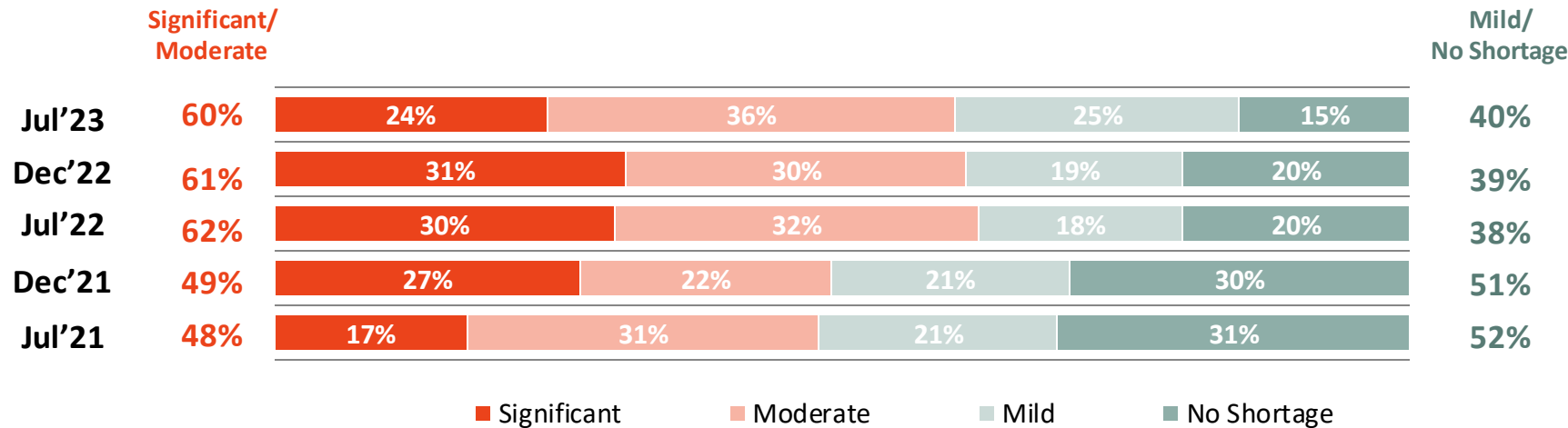
Q1. Aside from any seasonal fluctuations, do you anticipate any change in the size of your workforce relative to the following time periods: (previous phrasing) Aside from any seasonal fluctuations, do you anticipate any change in the size of your workforce in the next 6/12 months (relative to the previous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

Base: Total sample Jul'21 n=487, Dec'21 n=410, Jul'22 n=560, Dec'22 n=535, Jul'23 n=321

While as many employers as six months ago say they are facing either significant or moderate shortages, the intensity of the perceived shortages faced has declined (31% down to 24% saying significant) with more now moving to the moderate shortages category (30% to 36%).

- Among those saying they expect their workforce needs will increase in the short term, 52% say they are already facing a significant shortage compared with 24% among all employers, except those saying they anticipate staffing will decrease.

Extent of Business Experiencing Staffing Shortage



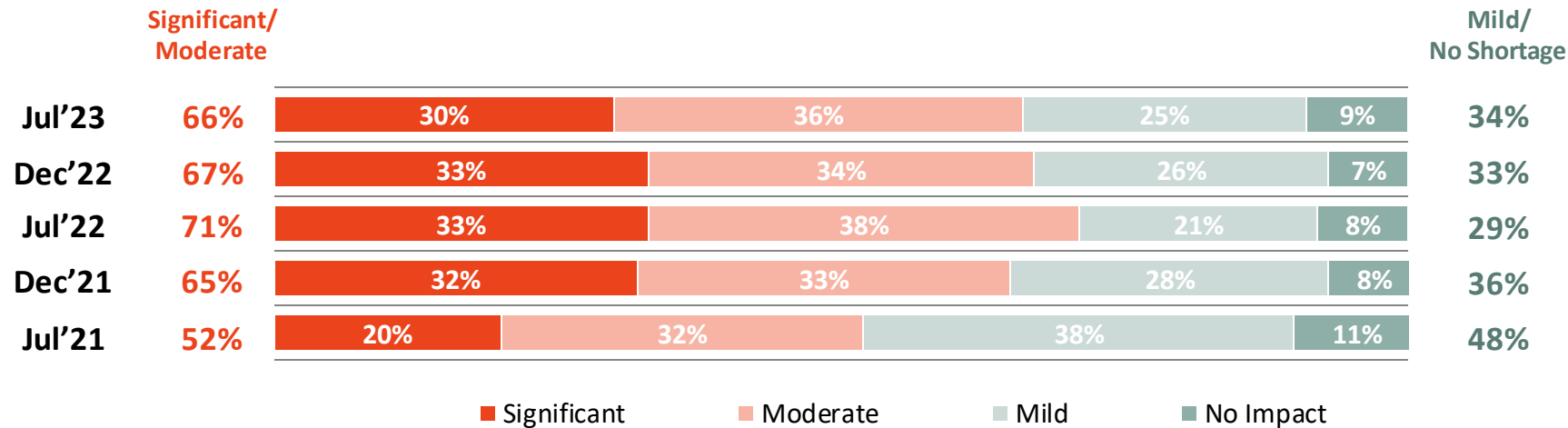
Employers of 50+ staff are more likely to cite the impact of these shortages as significant or moderate (76% compared with 60% among those with fewer than 50). But, among those with fewer than 10 staff, 25% compared with 10% among organizations of 10 or more, report no shortages.

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: Sample Jul'21 n=487, Dec'21 n=410, Jul'22 n=525, Dec'22 n=520, Jul'23 n=297 (From July'22 those saying a decline in staff at Q1 were not asked the staffing related questions)

A majority (66%) of employers, and largely unchanged over December, continue to report staffing shortages are having a significant or moderate impact on production and sales opportunities.

- Those businesses currently experiencing a significant staff shortage also report facing the biggest impact on production/sales; 70% of this group say the shortage is having a significant impact compared with only 23% when the shortage is considered moderate.

Impact of Staffing Shortage on Production and Sales Opportunities



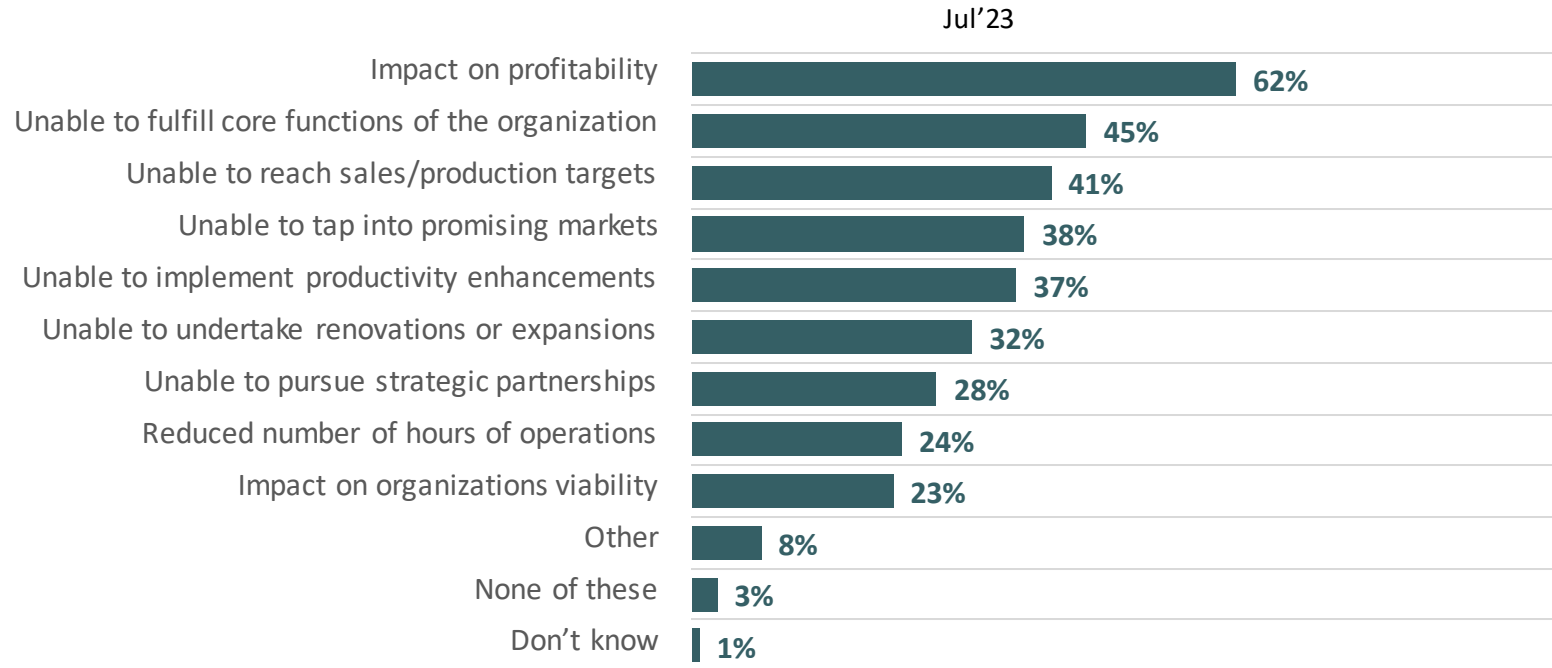
Q3. How much of an impact, if any, is your staffing shortage causing in loss of production or sales opportunities?

Base: Answered "Significant, Moderate or Mild Shortage" at Q2 Jul'21 n=336, Dec'21 n=287, Jul'22 n=390, Dec'22 n=414, Jul'23 n=251 (From July'22 those saying a decline in staff at Q1 were not asked the staffing related questions)

## IMPACT OF STAFF SHORTAGES ON DIFFERENT ASPECTS OF THE BUSINESS

The loss of sales or production due to staff shortages has had easily the biggest impact on profitability (62%) and this is followed by: core functions of the organization (45%) an inability to reach targets (41%) to tap into promising markets (38%) or implement productivity enhancements (37%).

- Not surprisingly, those employers reporting a significant impact of staffing shortages and on sales/production are more likely than others to identify all impacts more highly. In particular, though, one of the largest differences by impact is on being unable to tap into promising markets. In all, 57% of those saying there is a significant impact of staff shortages on sales/production cite this as an impact compared with only 29% citing this among those reporting a moderate impact on sales/production. The implication here is that staff shortages are having an impact on business growth.



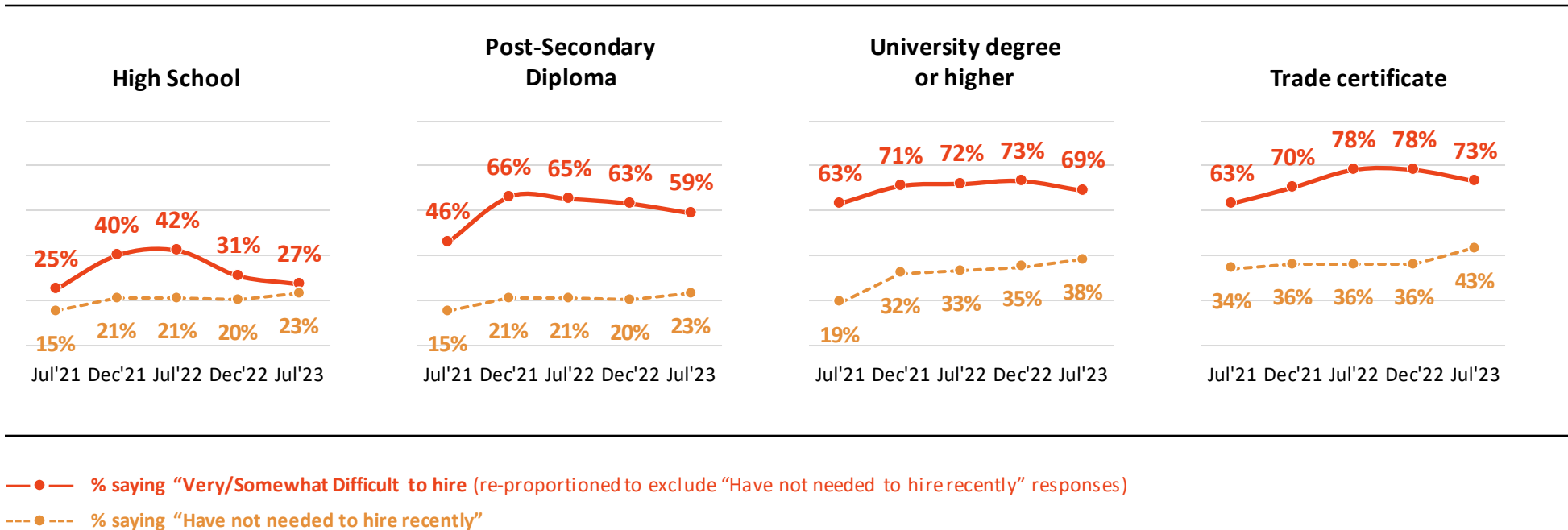
Q4. In addition to any loss of sales or production are these shortages causing any of the following?

Base: Answered "Significant, Moderate or Mild impact" at Q3 Jul'23 n=229 (From July'22 those saying a decline in staff at Q1 were not asked the staffing related questions)

## DIFFICULTY OF HIRING DIVERSE EDUCATION BACKGROUNDS

Among those reporting staffing shortages, a majority continue to say it is very or somewhat difficult to hire all but the high school educated and, in fact, for this group there has been a large (15%) YoY decline in those saying it is difficult to hire. However, for all other groups employers report a slight decline in perceived difficulty to hire.

- However, the high school only and college educated appear to continue to be the most in demand re hirings, with only 23% saying they have not needed to hire at these education levels recently, compared with 38% and 43%, respectively, saying this for those with a university education or a trade certificate.
- But across all education levels, small employers (under 10 staff) are the easily most likely to say they have not had a need to hire recently.

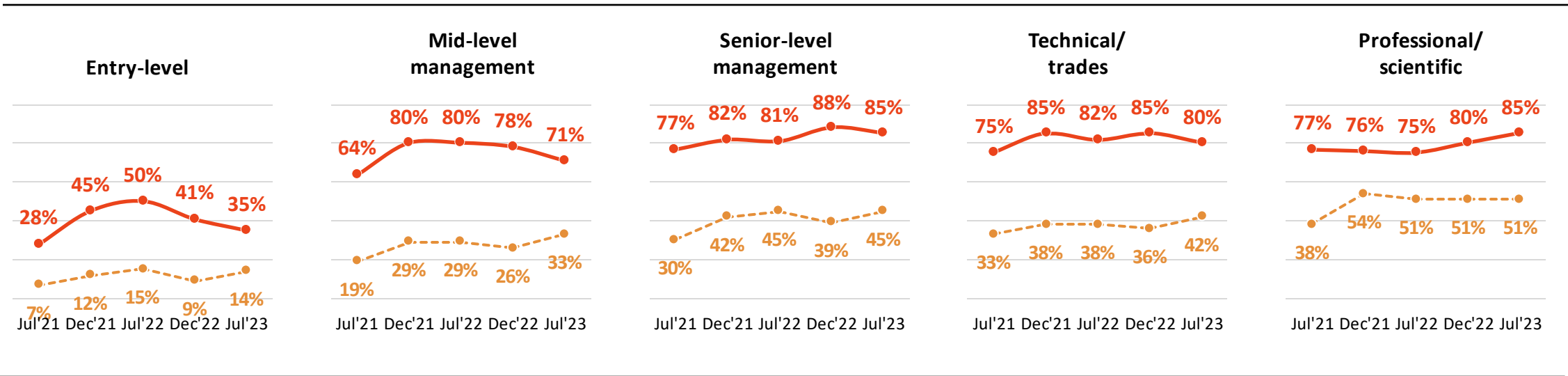


Q5. (Previously Q4) How easy or difficult is it to hire people with the following education levels to manage your business?

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, Jul'23 n=297 (From July'22 those saying a decline in staff at Q1 were not asked the staffing related questions)

All employers continue to report entry level positions as the least difficult to fill and becoming easier (a 15% drop over the last year). For other levels three-quarters or more continue to report a difficulty in hiring.

- Small employers (less than 10 staff) are the most likely to report not needing to hire at a mid or senior level and presumably this is a function of their lack of need for these positions.
- The decline in the difficulty in hiring mid-level management is coming from a YoY decline in those saying it is very difficult to hire for this position (from 41% down to 28%).
- Entry level positions appear to continue to be the most frequently hired; only 14% say they have not needed to hire at this level lately



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

Q6. (Previously 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, Jul'23 n=297 (From July'22 those saying a decline in staff at Q1 were not asked the staffing related questions)



The most frequently cited incentives continue to be offering flexible work conditions, raising wages or compensation, and offering skills training. Of note since July 2021, the proportion citing raising wages has increased by 22% and for expanding benefits by 16%. Other incentives have shown much far less change.

- The larger the company the more likely they are to increase wages to attract talent. Small Companies (sized 1-4) were more likely to use flexible work conditions to sway talent.
- The Public and Private sector were both likely to use wage increases as a way to attract talent. However, the private sector was more willing to offer skills training (52% vs. 39%) and the public sector was more likely to expanded benefits (36% vs. 43%).

**Types of Incentives Offered to Attract Talent**

	Jul'21	Dec'21	Jul'22	Dec'22	Jul'23
Provide flexible hours or work arrangements	65%	60%	54%	57%	55%
Raise wages or compensation	33%	46%	45%	53%	55%
Offer skills training	44%	42%	50%	49%	48%
Expand benefits	24%	27%	30%	32%	38%
Allow staff to work from home, all or partly	-	-	23%	27%	18%
Make jobs full time rather than contract or part time	-	-	22%	23%	30%
Covering relocation costs	-	-	13%	13%	-
None	18%	13%	-	-	5%
Other, please specify	6%	9%	7%	4%	5%
Don't know	-	-	4%	4%	8%

The acuteness of the staffing shortage impact did not typically affect the company's willingness to offer incentives to attract talent. There are few real differences in incentives offered by the impact of shortages on sales/productivity.

Q9. (Previously Q11) What incentives, if any, is your company offering or planning to offer to attract talent?

Base: Jul'21 n=187, Dec'21 n=151, Jul'22 n=371, Dec'22 n=414, Jul'23 n=251 (From July'22 those saying a decline in staff at Q1 were not asked the staffing related questions)

## TOP THREE RECRUITMENT BARRIERS

The most common barrier to recruiting continues to be a lack of applicants but continues to be down from the high of 59% in December 2021 (59% vs. 43%) and was presumably a COVID induced impact. Lack of technical and people skills continue to be cited by large minorities of employers as are the related issues of the affordability of staff, business budget constraints and competition from other employers.

### Top Barriers for Recruiting Skills Your Business Needs

Many of the most cited barriers are down significantly from the COVID years (2021/2022)

	Mar' 20	Mar' 21	Jul' 21	Dec' 21	Jul' 22	Dec' 22	Jul' 23	<i>Cont'd</i>	Mar' 20	Mar' 21	Jul' 21	Dec' 21	Jul' 22	Dec' 22	Jul' 23
Lack of applicants	28%	42%	54%	59%	48%	39%	43%*	Candidates unwilling to forgo government income support programs	-	-	24%	25%	18%	5%	7%
Lack of technical skills or qualifications	35%	44%	45%	47%	43%	37%	34%	Applicants cannot access adequate childcare	9%	11%	14%	15%	12%	4%	7%
Can't afford the going rates for the staff we would like to hire	36%	37%	35%	38%	36%	28%	34%	Language barriers (English as a second language)	9%	6%	9%	9%	-	-	7%
Lack of people skills or qualifications	40%	44%	48%	51%	50%	33%	29%	Applicants don't have adequate transportation	9%	10%	9%	13%	16%	5%	5%
Competition for skills from other employers	23%	28%	48%	43%	38%	29%	27%	Candidates cannot pass screening (drug, criminal record check, etc.)	10%	11%	12%	11%	11%	4%	4%
Business budget constraints	36%	29%	27%	33%	24%	18%	15%	Foreign credentials recognition	2%	2%	8%	6%	8%	3%	3%
High cost of training someone without some basic skills we need	-	-	-	-	28%	14%	13%	Interprovincial credential recognition	3%	3%	7%	3%	5%	1%	2%
Candidates unwilling to relocate	18%	23%	20%	19%	18%	9%	12%	Lack necessary language skills (require recruits to be bilingual or multilingual)	3%	3%	5%	3%	12%	4%	2%
Lack of management and/or leadership skills	19%	17%	31%	29%	21%	11%	10%	There are no significant barriers	-	4%	3%	2%	4%	8%	6%
Government regulation for hiring workers from outside Canada	6%	8%	13%	19%	13%	7%	8%	Other	7%	7%	11%	10%	10%	5%	6%
Applicants do not have accessible housing to relocate	8%	8%	8%	8%	9%	7%	8%	Don't know/not sure	3%	1%	1%	2%	2%	4%	1%

Q7. (Previously Q9) What are the three top barriers for recruiting the skills your business needs? Previous phrasing (Q8) What are the top barriers for recruiting the skills your business needs?  
 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, Jul'23 n=297  
 (From July'22 those saying a decline in staff at Q1 were not asked the staffing related questions)

\*Note: Green indicates a downwards trend. The brighter green indicates a decline of 20% or more.

## RECRUITMENT BARRIERS

Asked to identify their most significant recruitment barrier, a general lack of applicants and a lack of various types of skills (highlighted in red) continue to be the most important challenges.

- When all barriers related to cost related issues (can't afford going rate, business budget constraints and competition from other employers) are combined, 33% cite one of these issues as the most important recruiting barrier they face.

### Largest Barrier for Recruiting Skills

	Mar'20	Mar'21	Jul'21	Dec'21	Jul'22	Jul'23
Lack of applicants	11%	20%	20%	28%	22%	21%
Lack of technical skills or qualifications	11%	19%	14%	17%	15%	16%*
Can't afford the going rates for the staff we would like to hire	18%	16%	9%	12%	11%	17%
Competition for skills from other employers	5%	5%	14%	10%	11%	8%
Lack of people skills or qualifications	13%	12%	9%	10%	10%	9%
Business budget constraints	18%	11%	8%	11%	8%	8%
Candidates unwilling to relocate	4%	7%	5%	3%	4%	3%
High cost of training someone without some basic skills we need	-	-	-	-	4%	3%
Candidates unwilling to forgo government income support programs	-	-	7%	5%	3%	2%
Government regulation for hiring workers from outside Canada	3%	2%	2%	8%	2%	3%
Lack of management and/or leadership skills	4%	2%	3%	6%	2%	3%
Applicants do not have accessible housing to relocate						3%

Mentions of 1% or less are not shown in table. They include (Jul'23):

- Language barriers (English as a second language)
- Applicants cannot access adequate childcare
- Foreign credentials recognition
- Interprovincial credential recognition
- Other

\*Note: The figures in red are related to a lack of various types of skill

Q8. Which of the barriers you selected is the largest barrier to recruiting the skills your business needs?

Base: Mar'20 n=280, Mar'21 n=343, Jul'21 n=325, Dec'21 n=277, Jul'22 n=451 (Excludes those who answered "No significant barriers", "Don't know/not sure" at Q7 Jul'21 n=9, Dec'21 n=10), Jul'23 n=276 (From July'22 those saying a decline in staff at Q1 were not asked the staffing related questions)

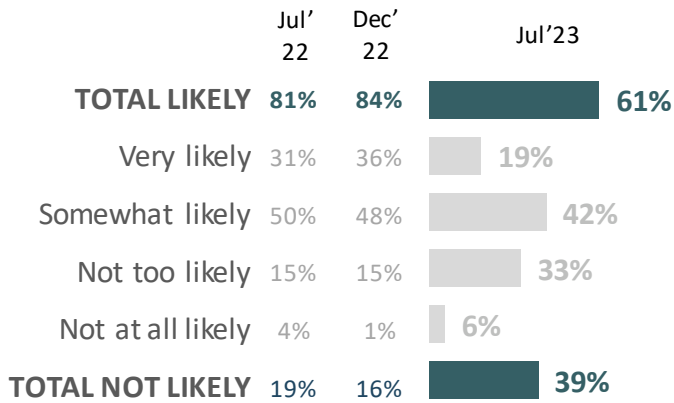
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## THOSE ANSWERING ADDITIONAL QUESTIONS

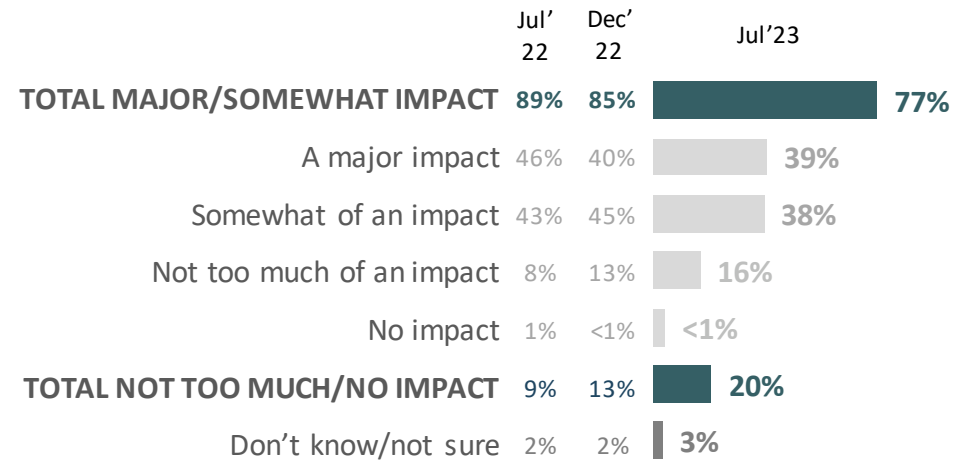
There has been a major shift downwards in perceptions of a recession among Alberta employers (a decrease of 23% to 61%), but a majority continue to believe a recession is at least somewhat likely. While lower by 8%, a large majority (77%) continue to say a recession would impact them, with 39% saying this would be major.

- The public/NGO sector are as likely as the private sector to believe a recession would impact them; which suggests they do not see their organizations as recession proof.
- The two biggest impact concerns for employers continue to be declines in revenues and declines in customer sales.

### Likelihood of Alberta Experiencing a Recession in the Next Twelve Months



### Impact of Recession on Business



Among those believing a recession is very likely, 69% believe this would have a major impact on their business, compared to those with other views regarding its likelihood (32%).

### Ways a Recession would Impact Business

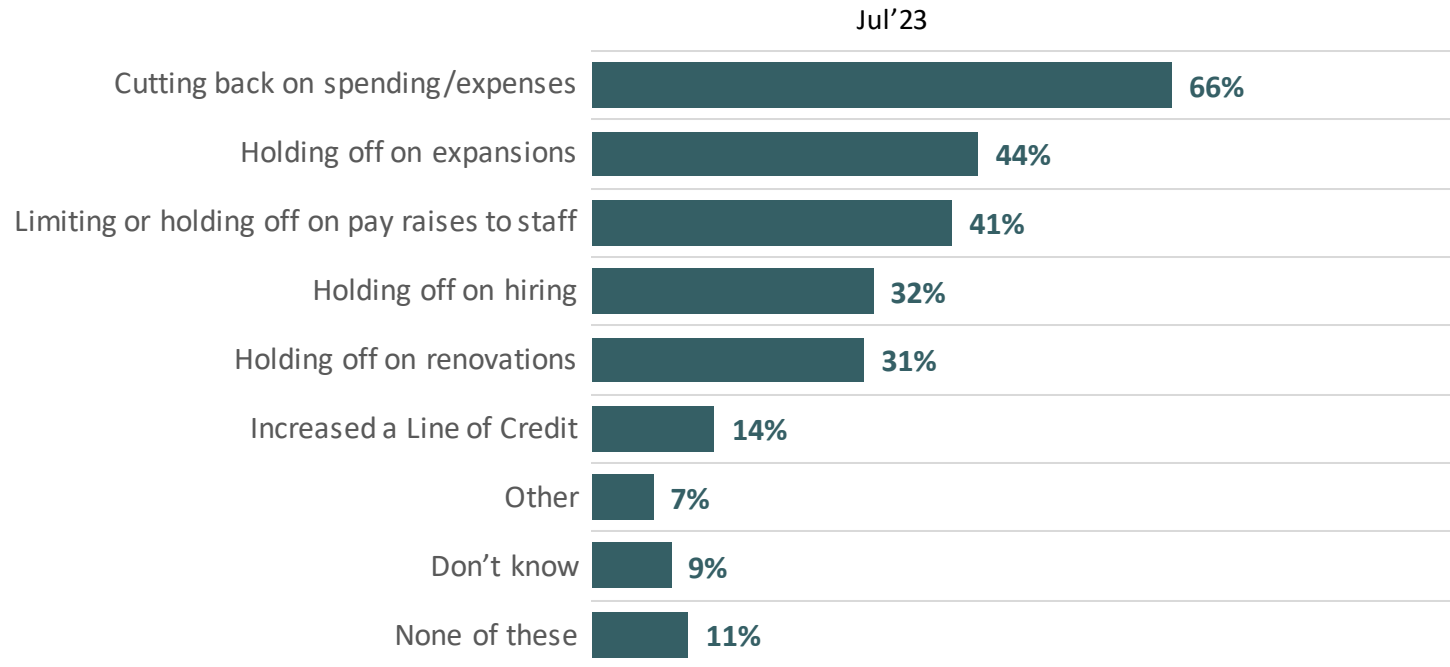
	Jul' 22	Dec' 22	Jul' 23
Revenue/cash flow will decline	81%	81%	83%
Decline in customers/client/sales	78%	74%	79%
Have to let staff go/layoff staff	51%	50%	49%
Might not be able to pay down business loans/ line of credit	28%	34%	32%
Might not be able to keep up with bill payments/invoices to creditors	32%	30%	32%
Other	3%	9%	4%
Don't know/not sure	1%	1%	4%

Those believing a recession would have a major impact on their business are the most likely to say staff reductions (61%) and not being able to pay down loans/LOC (45%) would be impacts.

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, Jul'23 n=205  
 Q2. How much of an impact would a recession have on your business?  
 Base: Total sample Jul'22 n=80, Dec'22 n=330, Jul'23 n=205  
 Q4. (Previously Q2a) In what way would a recession impact your business?  
 Base: Total sample Jul'22 n=80, Dec'22 n=276, Jul'23 n=158

The most common way that Albertan businesses are responding to a potential recession is by cutting back on spending (66%). This is followed by holding off on expansions (44%) and limiting pay raises (41%).

- Companies facing a significant labour shortage are the least likely to say they are holding off on hiring new staff (21%) but are the most likely to report limiting/stopping pay raises to staff (54%) and holding off any expansions (56%). Possibly, such organizations are trying to fill existing vacancies.
- Those believing a recession would have a major impact on their business compared with those saying minor are more likely to report holding off on expansions (50% to 37%, respectively).



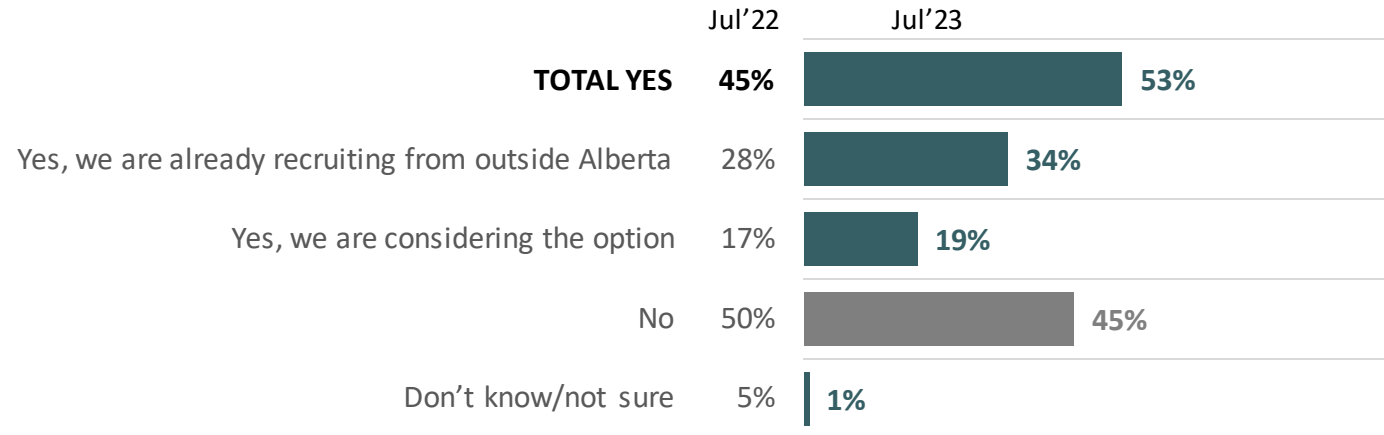
Q3. Which of the following, if any, are ways you are responding to a potential recession?

Base: Major/some impact at Q2 Jul'23 n=158

The tight labour market is leading just over a majority (53%) of employers to actively recruit (34% and up 6%, YoY) or consider recruiting (19%) from outside the province.

- There is a significant divide between organizations of 10 or more staff (45%) and those with fewer than 10 (18%) in actively recruiting outside Alberta.
- Public sector/NGO employers are as likely as the private sector to be actively recruiting outside the province (36% to 33%, respectively).

### Business has considered trying to recruit from outside Alberta

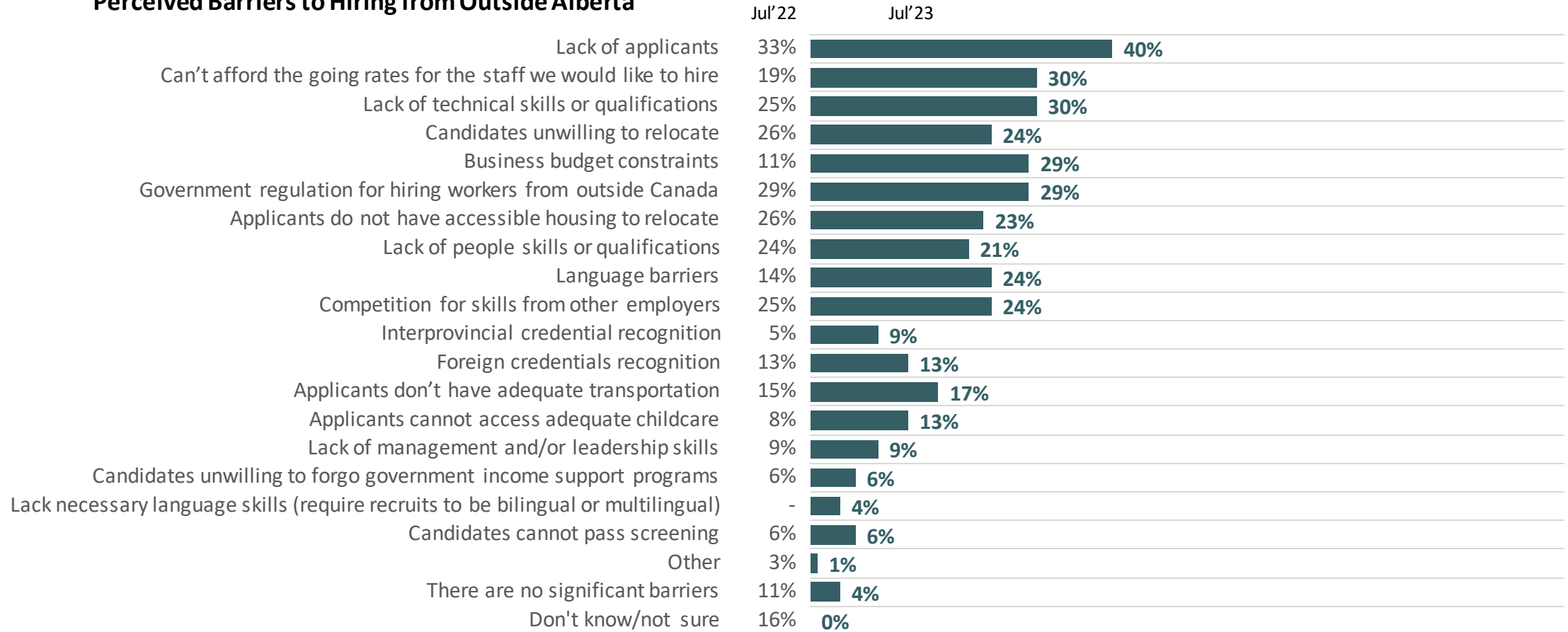


Organizations facing a significant staff shortage and those in the tourism industry are the most likely to already be recruiting outside Alberta (54% and 43%, respectively).

**BARRIERS TO RECRUITING FROM OUTSIDE THE PROVINCE**

While lack of applicants (40%, up 7%) continues to be the most cited barrier for those already seeking outside Alberta, this is likely a symptom of other factors. This includes the cost issues of being unable to afford the going rates (up 11% to 30%) and budget constraints (up 11% to 29%) which have risen significantly this year as barriers. Lack of technical skills/qualifications (30%) and government regulations also continue to be frequently cited.

**Perceived Barriers to Hiring from Outside Alberta**

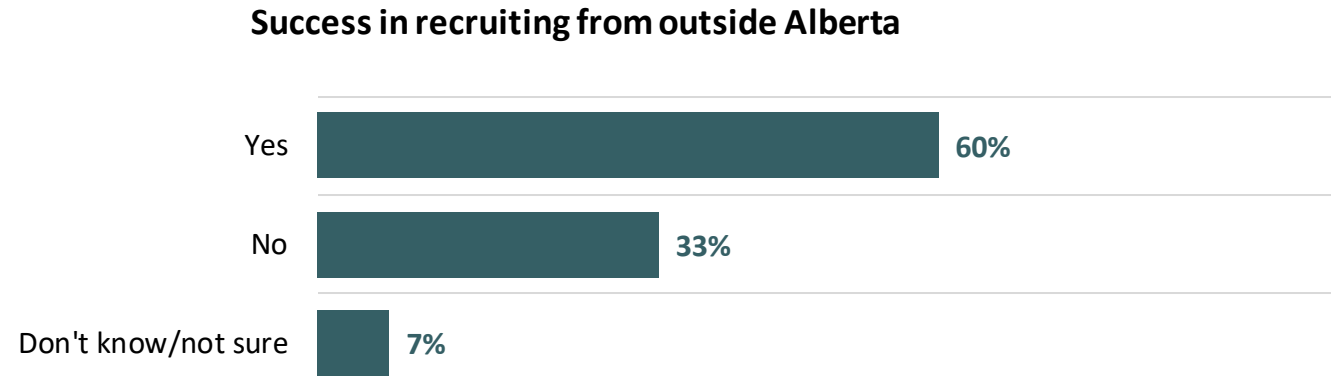


Q6. What are the major barriers to recruiting from outside of Alberta?

Base: Yes at Q6 Jul'22 n=80, Jul'23 n=70



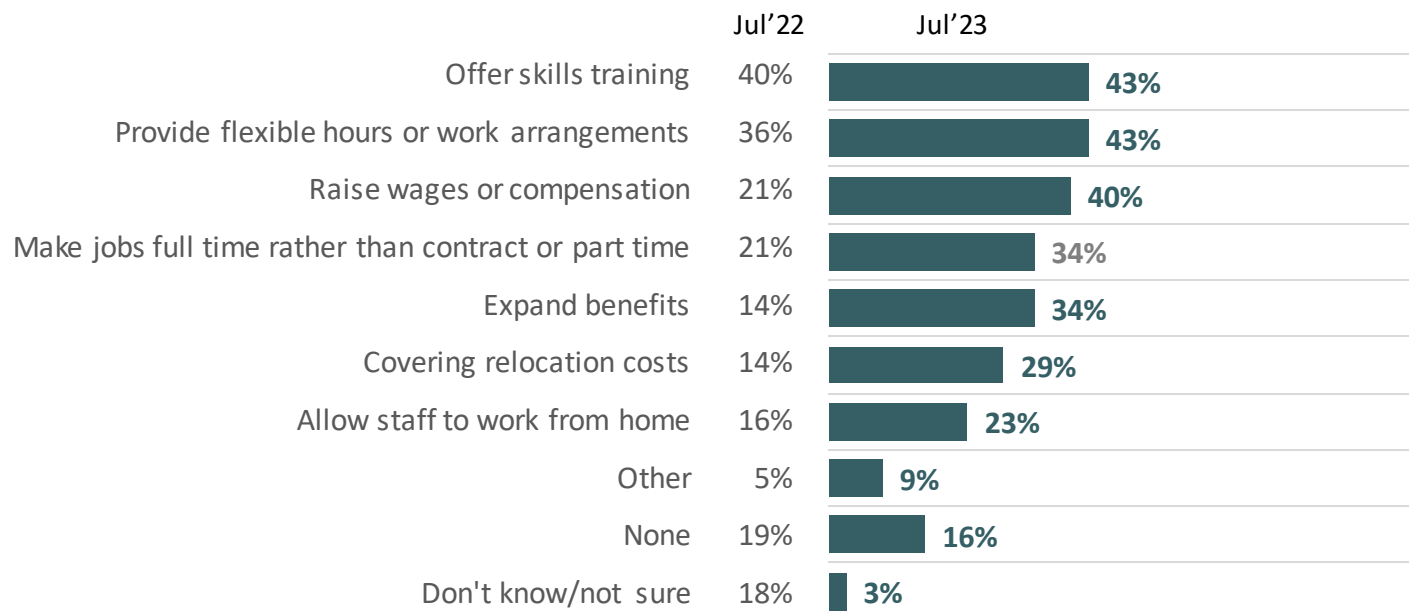
The majority (60%) of those recruiting from outside of the province say they have been successful.



Q7. Have you been successful in recruiting out of province?  
Base: Already recruiting from outside Alberta at Q5 (Jul'23 n=70)

In their effort to attract staff from outside Alberta, more employers than a year ago say they are using a wide variety of approaches. While offering skills training is still frequently cited, it is the only incentive to not be cited much more. In particular, raising wages/compensation (40%, up from 21% a year ago) has seen a significant increase, as has expanding benefits (34%, up from 14%) offering full-time jobs rather than gig type work (34%, up from 21% a year ago) and to a lesser extent flexible hours/work arrangements (up 7% to 43%).

### Incentives offered to attract workers from Outside Alberta



Q8. What incentives, if any, has your company offered to attract out-of-province talent?

Base: Yes at Q5 (Jul'22 n=80, Jul'23 n=70)

# 5

## DEMOGRAPHICS

# Sample Demographics

## OPERATING REGIONS OF BUSINESSES

	Jul'21	Dec'21	Jul'22	Dec'22	Jul'23
n=	462	388	522	535	321
All regions of Alberta	28%	19%	27%	21%	20%
Calgary area	30%	14%	13%	7%	12%
Central	17%	25%	17%	19%	24%
Edmonton area	31%	27%	16%	22%	17%
NET - Northern AB/Mountain	24%	36%	34%	33%	32%
Mountain parks	3%	6%	4%	4%	4%
Northeast	10%	12%	10%	11%	13%
Northwest	11%	18%	20%	18%	15%
NET - Rest of South	10%	15%	10%	24%	11%
Southeast	5%	7%	5%	9%	4%
Southwest	5%	8%	5%	15%	7%

**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	Jul'23
n=	283	296	365	332	193
Yes	18%	20%	19%	18%	23%
No	82%	80%	81%	82%	77%

## PUBLIC OR PRIVATE SECTOR

	Jul'21	Dec'21	Jul'22	Dec'22	Jul'23
n=	485	409	529	535	321
Public	14%	13%	16%	15%	15%
Private	70%	74%	70%	66%	70%
Not for profit	16%	13%	14%	19%	15%

## BEST DESCRIPTION OF INDUSTRY (Non-Hub Members)

	Jul'22	Dec'22	Jul'23
n=	539	471	320
Construction	15%	10%	12%
Professional, Scientific and Technical Services	8%	11%	11%
Other Services (except public administration)	17%	8%	9%
Retail Trade	12%	8%	9%
Health Care	4%	6%	6%
Food Services	6%	6%	5%
Finance	4%	4%	5%
Manufacturing	3%	6%	4%
Public Administration	1%	3%	4%
Accommodation	4%	2%	4%
Transportation	2%	5%	3%
Oil & Gas Extraction	2%	1%	3%
Agriculture	3%	4%	3%
Educational Services	4%	4%	2%
Social Assistance	2%	3%	2%
Recreation	2%	3%	2%
Insurance	1%	1%	2%
Information and Cultural Industries	2%	3%	1%
Rental and Leasing	1%	2%	1%
Management of Companies and Enterprises	1%	1%	1%
Private Real Estate	1%	<1%	1%
Arts	-	-	1%
Entertainment	-	-	1%
Utilities	-	-	1%
Administrative and Support	1%	1%	<1%
Other	2%	6%	4%

## EMPLOYMENT NUMBERS

	Jul'21	Dec'21	Jul'22	Dec'22	Jul'23
n=	487	410	579	535	321
<b>NET - 1-9</b>	27%	46%	48%	<b>42%</b>	<b>42%</b>
1-4	15%	26%	30%	22%	25%
5-9	12%	20%	18%	20%	17%
<b>NET - 10-49</b>	20%	30%	29%	<b>57%</b>	<b>34%</b>
10-19	11%	18%	16%	18%	21%
20-49	9%	12%	13%	13%	13%
50-199	22%	15%	12%	16%	16%
200-499	10%	4%	3%	5%	5%
500+	20%	5%	8%	5%	4%

## YEARS IN OPERATION

	Jul'22	Dec'22	Jul'23
n=	422	524	321
5 years or less	12%	13%	12%
6 – 10 years	13%	13%	15%
11 – 15 years	12%	10%	9%
16 – 20 years	10%	8%	8%
21 – 30 years	18%	18%	18%
31 – 50 years	22%	23%	22%
More than 50 years	13%	16%	16%
Don't know/not sure	<1%	<1%	-

## OWNER OR PARTNER

	Jul'22	Dec'22	Jul'23
n=	450	441	237
Yes	74%	70%	80%
No	26%	30%	20%

# Sample Demographics

## JOB TITLE

	Jul'22	Dec'22	Jul'23
n=	539	535	321
President, CEO, Owner or Executive Director	57%	59%	60%
Vice president or equivalent	6%	4%	5%
C-Suite executive (CFO, CMO, CTO, CXO)	3%	5%	3%
Partner, advisor or associate	5%	7%	6%
Other senior manager	13%	10%	12%
Contractor or self-employed	5%	3%	2%
Assistant, coordinator or manager (or equivalent)	8%	10%	10%
Unemployed	<1%	<1%	-
Other	2%	3%	2%

## GENDER

	Jul'22	Jul'23
n=	528	321
Female	49%	51%
Male	47%	45%
Other	-	1%
None of the above	-	-
Prefer not to answer	4%	3%