Your Voice
Monthly Omnibus Survey

Key Results for September 2022
Your Voice survey - final results for September 2022

- Type: An omnibus, controlled-access online CFIB survey.
- Active dates: September 8-26, 2022.
- Results: Based on responses from 3,679 CFIB members who are owners of Canadian independent businesses, from all sectors and regions of the country.
- For comparison purposes, a probability sample with the same number of respondents would have a margin of error of +/-1.6%, 19 times out of 20.
Results featured in this report

Business priorities

• Reducing the tax burden (65%), addressing health care issues (60%) and labour shortages (57%) are top priorities

• Business would increase employee compensation (59%) and pay down their debt (55%) if tax burden was reduced

• Over the past 12 months, 1 in 3 owners have seen their commercial rent go up

• 9 in 10 business owners are impacted by inflation and are making changes to deal with it

Labour shortages

• 59% of business owners are directly affected by labour shortages, while 17% had to adjust (e.g., salary increases)

• 74% of business owners and 52% of their employees had to work more hours to make up for labour shortages

Business recovery/State of small business is Canada

• 58% of businesses are making less than normal sales, 64% are still holding pandemic debt, and 78% are still experiencing pandemic stress
Business Priorities
Top priorities for government according to business owners (% response)

- Reducing the overall tax burden: 65%
- Addressing health care challenges (e.g., lack of staffing, emergency room/ambulance shortages): 60%
- Helping employers deal with labour shortages (e.g., training tax credits, simplify immigration programs, support for automation, investing in skills training): 57%
- Addressing supply chain disruptions (e.g., improving border and port services): 53%
- Reducing red tape (e.g., simpler/fewer forms, plain language, shorter wait times): 53%
- Balancing the government budget/pay down debt: 46%
- Providing more flexibility around repayment of COVID-19 loans (e.g., CEBA, HASCAP): 37%
- Increasing investments in core infrastructures (e.g., roads, ports, broadband): 25%
- Ensuring fair and equitable labour policies (e.g., employment standards, employment insurance rules): 26%
- Increasing investment in green projects: 13%
- Supporting the adoption of digital technologies (e.g., ability to sell online, develop website): 10%
- Other: 7%
- Don't know/Unsure

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,677.

Question: “Heading into the fall, what would you most like governments to focus on? (select all that apply)”
Reducing the overall tax burden, addressing health care challenges and dealing with labour shortages are the top priorities across the country.

<table>
<thead>
<tr>
<th>Province</th>
<th>#1</th>
<th>#2</th>
<th>#3</th>
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</thead>
<tbody>
<tr>
<td>BC</td>
<td>Reduce Tax 68%</td>
<td>Healthcare challenges 59%</td>
<td>Labour Shortage 58%</td>
</tr>
<tr>
<td>AB</td>
<td>Reduce Tax 75%</td>
<td>Balance Budget 66%</td>
<td>Supply disruptions 59%</td>
</tr>
<tr>
<td>SK</td>
<td>Reduce Tax 71%</td>
<td>Balance Budget 62%</td>
<td>Supply disruptions 60%</td>
</tr>
<tr>
<td>MB</td>
<td>Reduce Tax 72%</td>
<td>Healthcare challenges 56%</td>
<td>Labour Shortage 51%</td>
</tr>
<tr>
<td>ON</td>
<td>Reduce Tax 66%</td>
<td>Healthcare challenges 60%</td>
<td>Labour Shortage 56%</td>
</tr>
<tr>
<td>QC</td>
<td>Labour Shortage 73%</td>
<td>Reduce Red Tape 62%</td>
<td>Healthcare challenges 62%</td>
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<tr>
<td>NL</td>
<td>Reduce Tax 75%</td>
<td>Healthcare challenges 67%</td>
<td>Labour Shortage 54%</td>
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<tr>
<td>NB</td>
<td>Healthcare challenges 79%</td>
<td>Reduce Tax 62%</td>
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<td>PEI</td>
<td>Labour Shortage 64%</td>
<td>Healthcare challenges 61%</td>
<td>Reduce Tax 52%</td>
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<tr>
<td>NS</td>
<td>Reduce Tax 66%</td>
<td>Healthcare challenges 65%</td>
<td>Labour Shortage 58%</td>
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</tbody>
</table>

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,677.

Question: “Heading into the fall, what would you most like governments to focus on? (select all that apply)”

Notes: 1) Results shown are for the top 5.
2) *Small sample size (<40).
If the overall tax burden were reduced, business owners would prioritize increasing employee compensation and paying down their business debt (% response)

- Increase employee compensation (e.g., wages and benefits) - 59
- Pay down our business debt - 55
- Hire new employees - 44
- Expand our business (e.g., innovating, increasing production, adding stores/products) - 37
- Lower or maintain prices - 32
- Invest in employee training - 30
- Invest in automation (e.g., acquiring machinery, tools) - 21
- Increase charitable donations - 16
- Increase owner(s) dividends/salary - 13
- Other - 2
- Don’t know/Unsure - 2
- None of the above - 1

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,619.

Question: “If governments were to reduce the overall burden of taxes and fees, what would your business do with the savings generated? (Select all that apply)”

Business owners’ intended use of generated savings are consistent across provinces and sectors.
1 in 3 business owners have seen their commercial rent increase substantially over the past 12 months
(By province and sector, % response)

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,453.
Question: “Our business’s commercial rent has gone up substantially over the past 12 months.”
Notes: 1) *Small sample size (<40).
2) Totals may not add up due to rounding.
9 in 10 owners are making changes in their business to deal with the impacts of inflation
(By province and sector, % response)

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,472.
Question: “We’re making changes in our business to deal with inflation”
Notes: 1) *Small sample size (<40).
2) Totals may not add up due to rounding.
Labour shortages
59% of business owners are currently experiencing labour shortages, while an additional 17% have had to adjust (e.g., increases in salary, hiring bonuses, etc.)

Of 59%, about 40% don’t have all the staff needed for current operations, while 19% have all the staff needed to operate but cannot get the staff needed to expand.

Question: “Which of the following best describes your business situation regarding labour shortages (described here as difficulties hiring, retaining, or getting staff to work the hours needed)? (Select one)”

- We don’t have all the staff we need for current operations, due to labour shortages
- We have all the staff we need for current operations, but cannot get the staff that we need to expand
- We have all the staff we need, but at a significant additional cost to our business
- Other and Don’t know/Unsure
- Not applicable or No shortages

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n=3,489.
Share of businesses currently *experiencing* labour shortages (i.e. cannot fully operate or expand) varies by province and sector (% response)

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<thead>
<tr>
<th>Province</th>
<th>Cannot fully operate</th>
<th>Cannot expand</th>
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<tbody>
<tr>
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<td>27</td>
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<tr>
<td>PEI*</td>
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<td>18</td>
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<td>MB</td>
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<td>BC</td>
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<td>NS</td>
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<tr>
<td>NB</td>
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<tr>
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<th>Cannot expand</th>
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<tr>
<td>Construction</td>
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<td>21</td>
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<tr>
<td>Ent. &amp; Admin. Mgmt.</td>
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<td>14</td>
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<tr>
<td>Transportation</td>
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<td>21</td>
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<td>Hospitality</td>
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<td>Manufacturing</td>
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<td>Natural Resources</td>
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<td>29</td>
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<tr>
<td>Personal, Misc. Services</td>
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<td>21</td>
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<td>19</td>
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<td>Wholesale</td>
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<td>Arts, Rec. &amp; Information</td>
<td>33</td>
<td>23</td>
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<tr>
<td>Professional Services</td>
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<tr>
<td>Agriculture</td>
<td>42</td>
<td>17</td>
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<tr>
<td>Fin., Ins., etc.</td>
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<td>20</td>
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<tr>
<td>Retail</td>
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<td>16</td>
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<tr>
<td>Social Services</td>
<td>31</td>
<td>14</td>
</tr>
</tbody>
</table>

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n=3,489.

Question: “Which of the following best describes your business situation regarding labour shortages (described here as difficulties hiring, retaining, or getting staff to work the hours needed)? (Select one)"

Note: *Small sample size (<40).*
About 3 in 4 owners are working more hours to make up for labour shortages in their business (% response)

- Owners worked more hours to make up for the shortage: 73%
- Employee(s) worked more hours to make up for the shortage: 54%
- Turned down sales or contracts: 48%
- Decreased service offerings: 47%
- Extended the duration of existing contracts/delayed delivery dates: 28%
- Cancelled projects or contracts: 20%
- Outsourced/Sub-contracted out some of our work/services: 19%
- Simplified processes (e.g., no table service, pick up at counter): 9%
- Other: 6%
- Automated processes: 6%
- Don’t know/Unsure: 3%

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n=2,804.

Question: “What impact, if any, have labour shortages had on your business? (Select all that apply)”
The top impacts of labour shortages on businesses are similar across all provinces

Owners worked more hours
- BC: 75%
- AB: 76%
- SK: 69%
- MB: 75%
- ON: 75%
- QC: 72%
- NL: 55%
- PEI*: 79%
- NS: 73%
- NB: 74%

Employees worked more hours
- BC: 51%
- AB: 55%
- SK: 51%
- MB: 52%
- ON: 54%
- QC: 58%
- NL: 52%
- PEI*: 50%
- NS: 60%
- NB: 51%

Turned down sales or contract
- BC: 48%
- AB: 51%
- SK: 45%
- MB: 45%
- ON: 50%
- QC: 47%
- NL: 45%
- PEI*: 43%
- NS: 43%
- NB: 51%

Decreased service offerings
- BC: 48%
- AB: 69%
- SK: 75%
- MB: 52%
- ON: 54%
- QC: 75%
- NL: 55%
- PEI*: 52%
- NS: 55%
- NB: 54%

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n=2,804.
Question: “What impact, if any, have labour shortages had on your business? (Select all that apply)”

Notes: *Small sample size (<40).
## Top 3 impacts of labour shortages, by sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>Owners worked more hours</th>
<th>Employees worked more hours</th>
<th>Turned down sales or contract</th>
<th>Decreased service offerings</th>
<th>Extended the duration of existing contracts/delayed delivery dates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hospitality</strong></td>
<td>73%</td>
<td>54%</td>
<td>48%</td>
<td>47%</td>
<td>28%</td>
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<td><strong>Retail</strong></td>
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<td><strong>Arts, Recreation &amp; Information</strong></td>
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<td><strong>Enterprises &amp; Admin. Mgmt.</strong></td>
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<td><strong>Agriculture</strong></td>
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<td><strong>Personal, Misc. Services</strong></td>
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<td><strong>Professional Services</strong></td>
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<td><strong>Transportation</strong></td>
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<td><strong>Manufacturing</strong></td>
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<td><strong>Construction</strong></td>
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<tr>
<td><strong>Finance, Insurance, Real Estate &amp; Leasing</strong></td>
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<tr>
<td><strong>Social Services</strong></td>
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<tr>
<td><strong>Natural Resources</strong></td>
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</tbody>
</table>

**Canada**

- Owners worked more hours: 73%
- Employees worked more hours: 54%
- Turned down sales or contract: 48%
- Decreased service offerings: 47%
- Extended the duration of existing contracts/delayed delivery dates: 28%

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n=2,804.

Question: “What impact, if any, have labour shortages had on your business? (Select all that apply)”

Notes: *Small sample size (<40).
Business recovery
State of Small Business

Small businesses are still feeling the impacts of the pandemic, with more than half making less than normal sales (56%), just under two thirds still reporting pandemic related debt (64%) and about 3 in 4 indicating they are still under pandemic stress (77%).

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n (sales) = 3,387, n (debt) = 3,382 and n (stress) = 3,386.

Data also available at Small Business Recovery Dashboard https://initiative.cfib-fcei.ca/dashboard/.
As of September 2022, over 1 in 2 Canadian small businesses have not yet returned to normal revenues

- Up to half of normal revenues (50% and less)
- More than half of normal revenues (51% to 94%)
- Normal or better than normal revenues (95%+)

<table>
<thead>
<tr>
<th>Year</th>
<th>Month</th>
<th>Percentage Making Less Than Normal Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>Mid-June</td>
<td>80%</td>
</tr>
<tr>
<td>2021</td>
<td>Mid-October</td>
<td>66%</td>
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<tr>
<td>2021</td>
<td>Mid-January</td>
<td>75%</td>
</tr>
<tr>
<td>2022</td>
<td>End-September</td>
<td>56%</td>
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<tr>
<td>2022</td>
<td>End-June</td>
<td>54%</td>
</tr>
<tr>
<td>2022</td>
<td>End-September</td>
<td>52%</td>
</tr>
</tbody>
</table>

56% of Canadian businesses are still not making normal sales, up 2 percentage points from June 2022.

Source: CFIB, Your Voice - September 2022 survey, September 8 - 26, 2022, final results, n = 3,387
## Businesses making less than normal revenues, September 2022
(By province and sector, % response)

<table>
<thead>
<tr>
<th>Province</th>
<th>Hospitality</th>
<th>Arts, Rec. &amp; Info.</th>
<th>Soc. Services</th>
<th>Ent. &amp; Admin. Mgmt.</th>
<th>Pers./Misc. Services</th>
<th>Transportation</th>
<th>Retail</th>
<th>National</th>
<th>Prof. Services</th>
<th>Wholesale</th>
<th>Fin. Ins. etc.</th>
<th>Construction</th>
<th>Agriculture</th>
<th>Manufacturing</th>
<th>Natural Resources*</th>
</tr>
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<tbody>
<tr>
<td>NL*</td>
<td>57</td>
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<td>MB</td>
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<td>51% - 94%</td>
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<td>AB</td>
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</tbody>
</table>

Source: CFIB, Your Voice - September 2022 survey, September 8 - 26, 2022, final results, n = 3,387.
Question: “How much of your usual revenues for this time of year is your business currently making?”
Notes: 1) *Small sample size (<40).
2) Totals may not add up due to rounding.
About 3 in 5 (64%) businesses are still holding pandemic debt, 2 in 5 have not been able to start repaying anything.

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,382.
Question: How much of your pandemic-debt has your business been able to repay? When responding consider all forms of debt taken on, including provincial and/or federal government loans?
Note: *In June 2022, 62% of businesses were holding pandemic-debt.
Businesses with pandemic debt, September 2022
(By province and sector, % response)

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,382.
Question: “How much of your pandemic-debt has your business been able to repay? When responding consider all forms of debt taken on, including provincial and/or federal government loans?”
Notes: 1) *Small sample size (<40).
2) Totals may not add up due to rounding.
Among businesses that are still holding debt incurred due to the pandemic (64%), the average amount held is $143,771.

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 1,694.

Question: Are you in a position to tell us roughly how much additional debt incurred due to COVID-19 your business is still holding?

Note: *Small sample size (<40).
A majority (55%) of businesses agree that their financial situation, including debts taken on due to the pandemic, continue to be a significant challenge for their business (By province and sector, % response)

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,463.
Question: “Please indicate the extent to which you agree or disagree that your financial situation, including debts taken on due to the pandemic, continue to be a significant challenge for your business.”
Notes: 1) *Small sample size (<40).
2) Totals may not add up due to rounding.
77% of business owners are still under pandemic stress, with nearly 1 in 5 that have not recovered at all.

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, preliminary results, n = 3,386

Question: “To what degree have you recovered from your pandemic-related stress as a business owner?”

Businesses still under pandemic stress

- Not applicable - never had pandemic-related stress: 7
- Completely recovered: 13
- Partially recovered: 43
- Barely recovered: 17
- Not recovered at all: 17
- Don’t know/Unsure: 3

78% of businesses are still under pandemic-related stress. This is down 1 percentage point since June 2022.
Businesses still under pandemic stress, September 2022
(By province and sector, % response)

Source: CFIB, Your Voice - September 2022 survey, September 8 - 26, 2022, final results, n = 3,386

Question: “To what degree have you recovered from your pandemic-related stress as a business owner?”

Notes: 1) *Small sample size (<40).
2) Totals may not add up due to rounding.
37% of businesses agree that online sales/e-commerce is important to their business

Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,457.
Question: “Please indicate the extent to which you agree or disagree with each of the following statements. (Select one for each line) e. Online sales/e-commerce is important to our business”
Note: 1) Small sample size (<40). 2) Totals may not add up due to rounding.
About 1 in 3 businesses (34%) would say that their current financial situation is better than at the same time in non-pandemic years.

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Source: CFIB, Your Voice - September 2022 survey, September 8-26, 2022, final results, n = 3,454.

Question: “Please indicate the extent to which you agree or disagree with each of the following statements. (Select one for each line) 1. Our business’s current financial situation (e.g., volume of sales, profits) is better than at the same time in non-pandemic years”

Notes: 1) Small sample size (<40). 2) Totals may not add up due to rounding.
Questions or data requests

Simon Gaudreault
Chief Economist and Vice-President, Research
simon.gaudreault@cfib.ca

Marvin Cruz
Director, Research
marvin.cruz@cfib.ca

Additional information

Small business recovery dashboard
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