



CENTRE FOR
SOCIAL ENTERPRISE
DEVELOPMENT

Ottawa Social Enterprise Needs and Opportunities

—— Survey Findings Report ——

September 2026

About CSED

The Centre for Social Enterprise Development (CSED) is an Ottawa-based connector and capacity builder that empowers changemakers through coaching, training, and strategic support. We champion social enterprise and social procurement to create stronger, more caring and more sustainable communities.

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We respectfully acknowledge that we live, work and learn on the unceded, traditional and ancestral lands of the Omàmìwininiwag (Algonquin) nation. To build a more just society, we promise to challenge systemic inequality and honour the original caretakers of this land through meaningful reconciliation, inclusion, and shared prosperity.

Introduction

The Ottawa Social Enterprise Needs and Opportunities Survey

The **Ottawa Social Enterprise Needs and Opportunities Survey** was launched to establish a baseline of social enterprise activity within the city's charitable and non-profit sector. Specifically, the survey sought to understand how local charities and non-profit organizations are (or are not) using social enterprise models, the barriers they face to growth, and where additional support is needed.

In April 2026, surveys were sent to CSED's database of organizations and also promoted through our e-newsletter and social media channels. A total of 70 charitable and non-profit organizations from across the city completed the survey by its close in early May.

This **Survey Findings Report** is divided into the following sections:

- Part 1: Respondent Profile
- Part 2: Current Social Enterprise Activity
- Part 3: Future Social Enterprise Aspirations
- Part 4: Reasons for Not Pursuing a Social Enterprise

The survey results provide valuable insights into the realities, priorities and impact of responding organizations. It helps to inform future programming and support services offered by CSED and other capacity-building organizations.

CSED is grateful to the Ottawa Community Foundation whose funding support helped to make this research possible.



We also extend our sincere appreciation to the organizations that responded to the survey.

Survey Results at a Glance

Ottawa Social Enterprise Insights

The *Ottawa Social Enterprise Needs and Opportunities Survey* captured insights from **70 charitable and non-profit organizations** located in the city at different stages and levels of social enterprise experience, from long-established social enterprises to those having no involvement.

45

organizations operating one or more social enterprises

16

organizations exploring or planning a future social enterprise

54

social enterprises represented in the survey data

Economic and Community Impact

Social enterprises play an important role across Ottawa's charitable and non-profit sector. They generate mission-aligned revenue, create meaningful employment opportunities, and strengthen long-term sustainability. Survey responses show that social enterprises operate at a range of scales—from small, emerging ventures to well-established enterprises—and contribute significantly to Ottawa's economy and communities.

376

Estimated full-time equivalent jobs supported by social enterprises

\$41.9 million

Estimated revenue generated by social enterprises during the last fiscal year

Barriers and Opportunities

While barriers related to capacity, capital, and market access continue to limit growth, the organizations surveyed identified clear opportunities to strengthen Ottawa's social enterprise sector. Addressing these priorities will help more organizations launch, grow, and sustain mission-driven enterprises.

1. Expand market access

- Organizations identified marketing, sales, and access to buyers as their greatest needs.
- ➡ Creating stronger connections between social enterprises and buyers, including through procurement opportunities, market development initiatives, and networking can help organizations increase earned revenue and expand their impact.

2. Increase access to flexible financing

- Limited resources remain a key challenge for organizations seeking to develop or expand social enterprises.
- ➡ Increasing access to flexible capital and financing models suited to mission-driven organizations can help social enterprises move from early development towards sustainability.

3. Strengthen business capacity

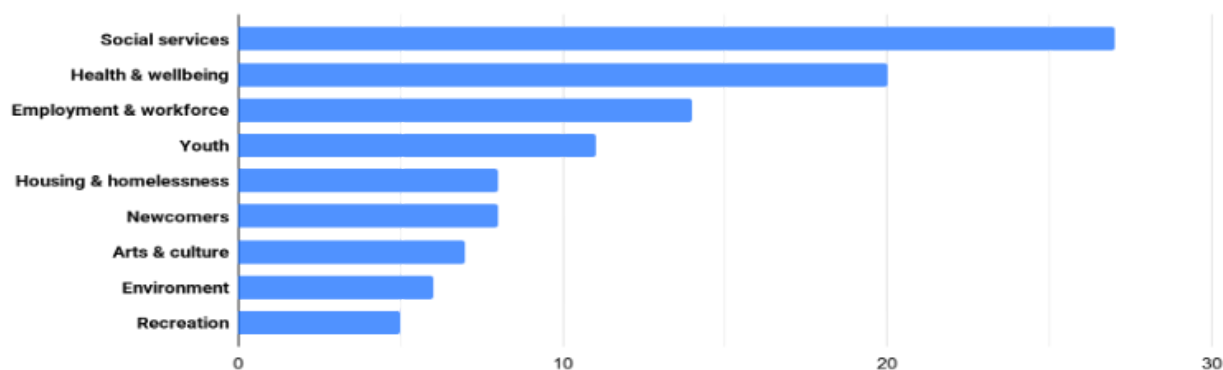
- Organizations identified one-on-one advisory services, training, workshops, and peer learning as the most valuable forms of support.
- ➡ Stronger connections among social enterprises and partners can facilitate knowledge sharing and access to resources.

Part 1: Respondent Profile

A Diverse Cross-Section of Ottawa's Charitable and Non-profit Sector

Primary Mission Area

The 70 organizations surveyed target a broad spectrum of community needs, with the top three mission areas being social services (27), health & wellbeing (20), and employment & workforce development (14). Other mission areas are youth (11), housing and homelessness (8), newcomers (8), arts and culture (7), the environment (6), and recreation (5).

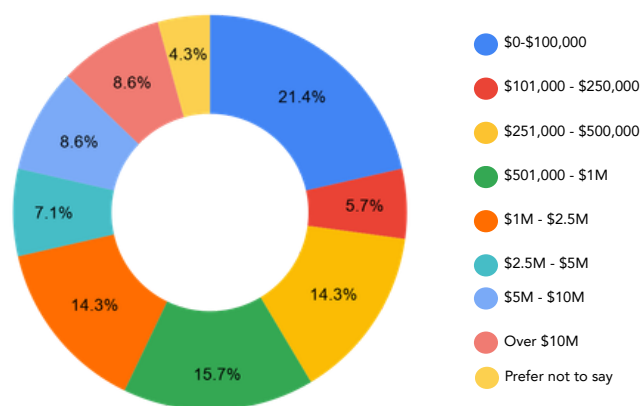


Number of Organizations

*Respondents could choose multiple answers.

Annual Budget Size

Responding organizations have a **wide range of budgets**, with 21.4% managing small budgets under \$100,000 and 17.4% exceeding \$5 million.

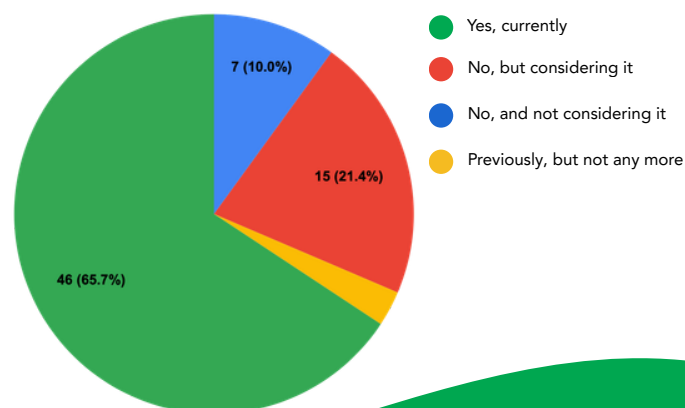


Earned Revenue Importance

In a separate question, the vast majority (90.0%) indicate that earned revenue from the sale of goods and services is either very important or important to their organization's future sustainability, a point not shown in the chart.

Social Enterprise Adoption

The majority of responding organizations currently operate a social enterprise (65.7%). Of those that do not, 21.4% are considering it, 10.0% are not considering, and 2.9% had a social enterprise previously, but are not considering it.



Part 2: Organizations Operating a Social Enterprise

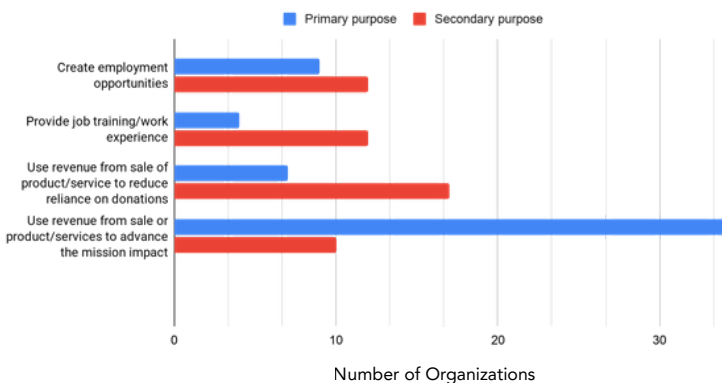
Social Enterprises Create Economic and Community Value

Purpose

Advancing mission impact is the leading primary purpose for social enterprises (34 of 54 responses or 63%), followed by creating employment (9), reducing donation reliance (7), and providing job training/work experience (4).

When evaluating secondary purposes, reducing reliance on donations emerges as the top priority (17).

Purpose (Primary and Secondary)

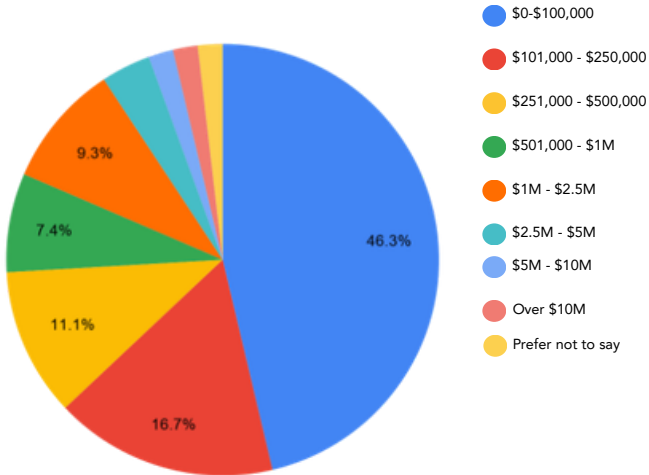


Earned Revenue

Social enterprises generate a **wide range of earned revenue**. While nearly half (46.3%) bring in \$100K or less, 14.9% generate over \$1M, including a few exceeding \$5M and one surpassing \$10M. This highlights the potential for social enterprises to grow into significant drivers of economic and community impact.

Over half of respondents report that earned income accounts for 75% or more of their total revenue mix, a point not reflected in the chart.

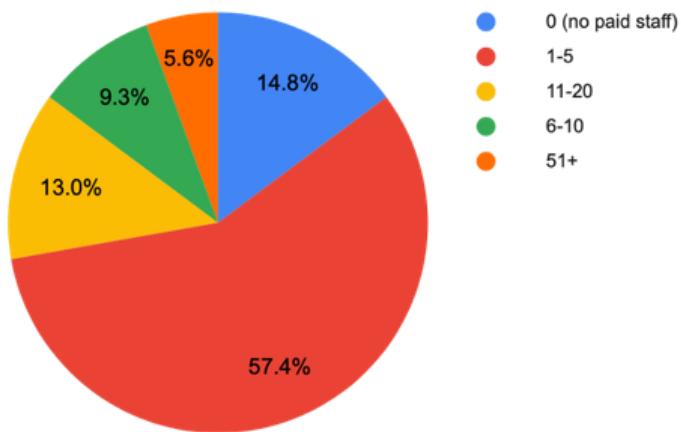
Amount of Earned Revenue



Employment

The majority of the 54 social enterprises are **grassroots** with 57.4% employing 1-5 full-time equivalent (FTE) staff. An additional 14.8% operate with no paid staff. Conversely, a small 5.6% minority are larger enterprises with workforces exceeding 51 staff. The range reflects the diversity operational models and stages of development within the sector.

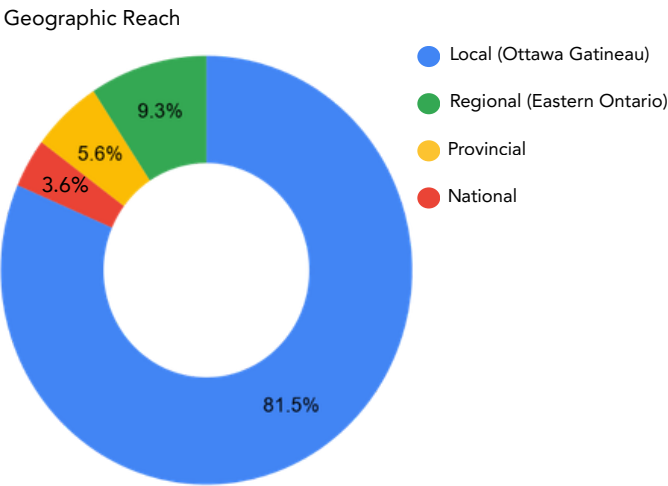
Number of Paid Staff (in FTEs)



Active Social Enterprises: Profile, Performance, and Outlook

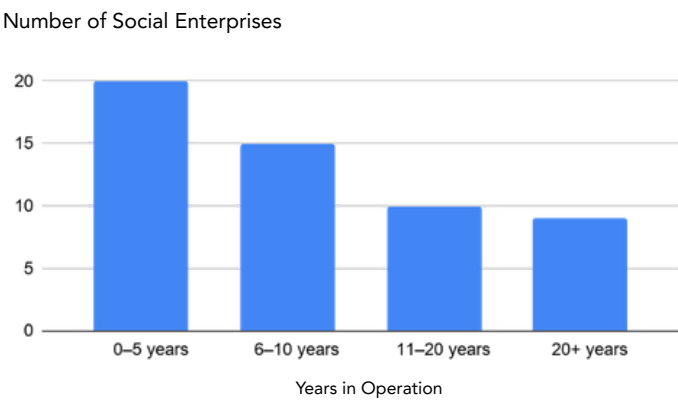
Geographic Reach

The survey data confirms a **predominantly local footprint** for the sector, with 81.5% of the 54 social enterprises selling their goods and services in the Ottawa-Gatineau market. The remaining social enterprises have an expanded reach with 9.3% serving Eastern Ontario, 5.6% operating provincially, and 3.6% having a national scope.



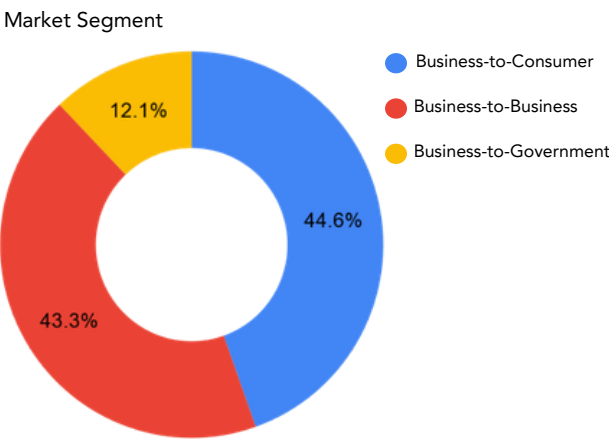
Years in Operation

Ottawa has a **balanced ecosystem** of social enterprises with a high volume of emerging startups and a resilient core of established operators. Newer enterprises operating five years or less comprise the largest cohort (20). The sector also shows steady longevity, with 15 social enterprises active for 6-10 years, 10 at 11-20 years, and 9 navigating the market for 20+ years.



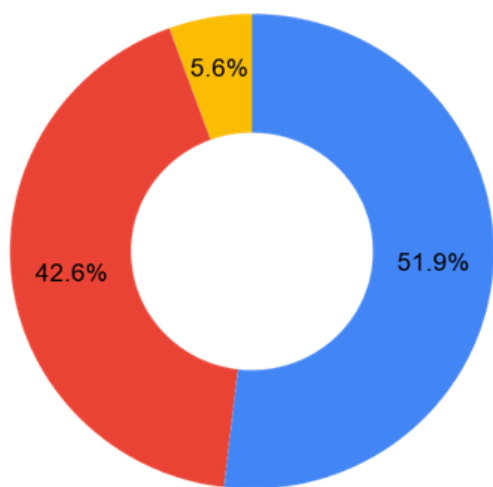
Market Segments

Social enterprises sell to a **highly diversified customer base in 3 market segments** with business-to-consumer (B2C) and business-to-business (B2B) segments commanding near-equal shares at 44.6% and 43.3%, respectively. In contrast, the business-to-government (B2G) segment accounts for only 12.1% of activity, underscoring public procurement as a significant, underutilized channel for future market development.

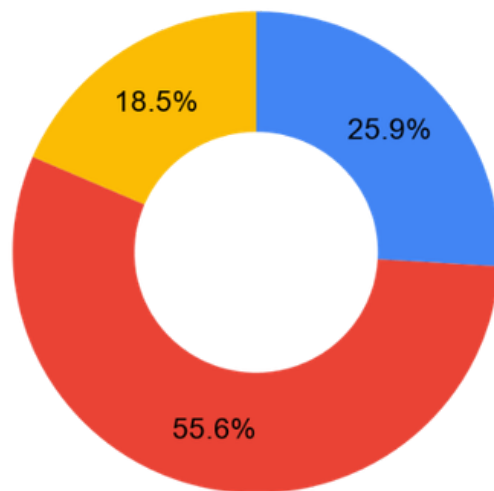


Active Social Enterprises: Profile, Performance, and Outlook

Satisfaction with social impact



Satisfaction with financial performance



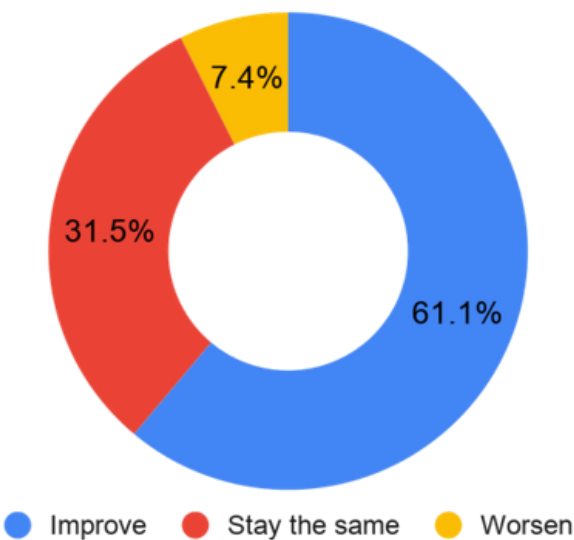
Very Satisfied Somewhat Satisfied Not Satisfied

Organizations with a social enterprise report **higher levels of satisfaction with its social impact** than with financial performance, with 51.9% being very satisfied with impact compared to just 25.9% for financials.

Future Market Outlook

Organizations with social enterprises have a **positive outlook for the market**, with 61.1% of respondents expecting conditions to improve and 31.5% predicting they will stay the same. Only a small minority of 7.4% anticipate the market will worsen.

Market Outlook

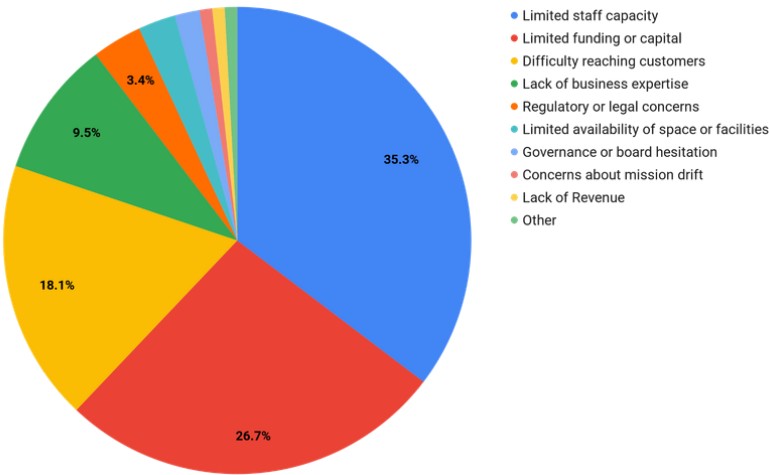


Building the Conditions for Growth

Key Barriers

Social enterprises face distinct operational barriers with **limited staff capacity** (35.3%), **funding** (26.7%), and **difficulty reaching customers** (18.1%) being the primary obstacles to growth. Additionally, 9.5% struggle with a lack of business expertise, followed by gaps in regulatory concerns (3.4%).

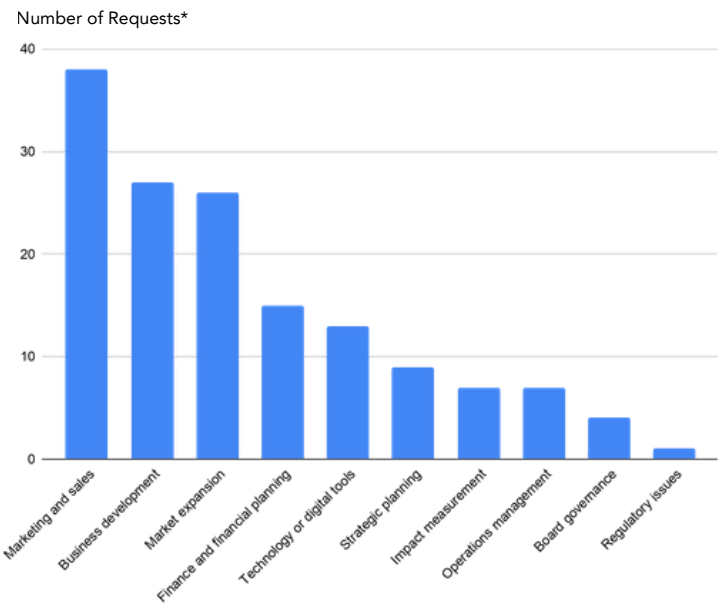
Addressing these challenges allows individual enterprises to scale their operations smoothly, expand their customer base, and secure long-term financial viability. For the sector as a whole, it fosters cross-sector collaboration, accelerates regional economic growth, and significantly increases the collective impact across the Ottawa area.



Supports Needed

Organizations prioritize **capacity-building supports tied directly to commercial growth and market readiness**, led heavily by marketing and sales (38 requests) and business development (27). Help with market expansion (26) remains high, followed by requests for finance (15), digital tools (13), and strategic planning (9).

The remaining operational needs are less frequent, spanning impact measurement (7), operations management (7), board governance (4), and regulatory issues (1).



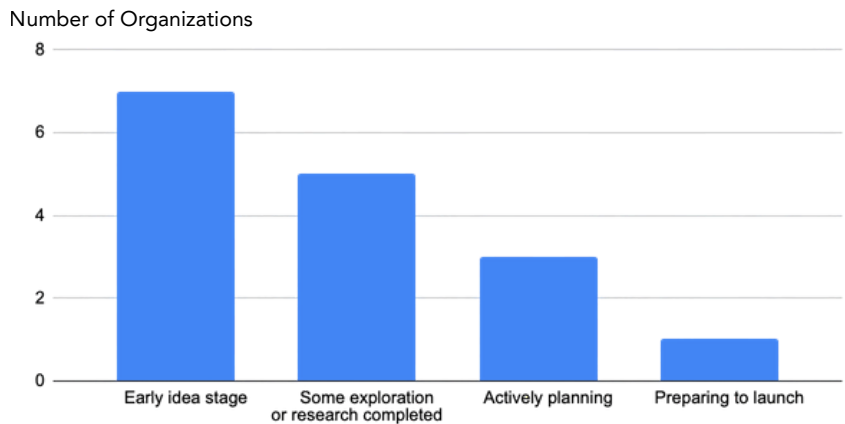
*Respondents could choose multiple answers.

Part 3: Organizations Pursuing Social Enterprise

A Pipeline of Future Social Enterprises

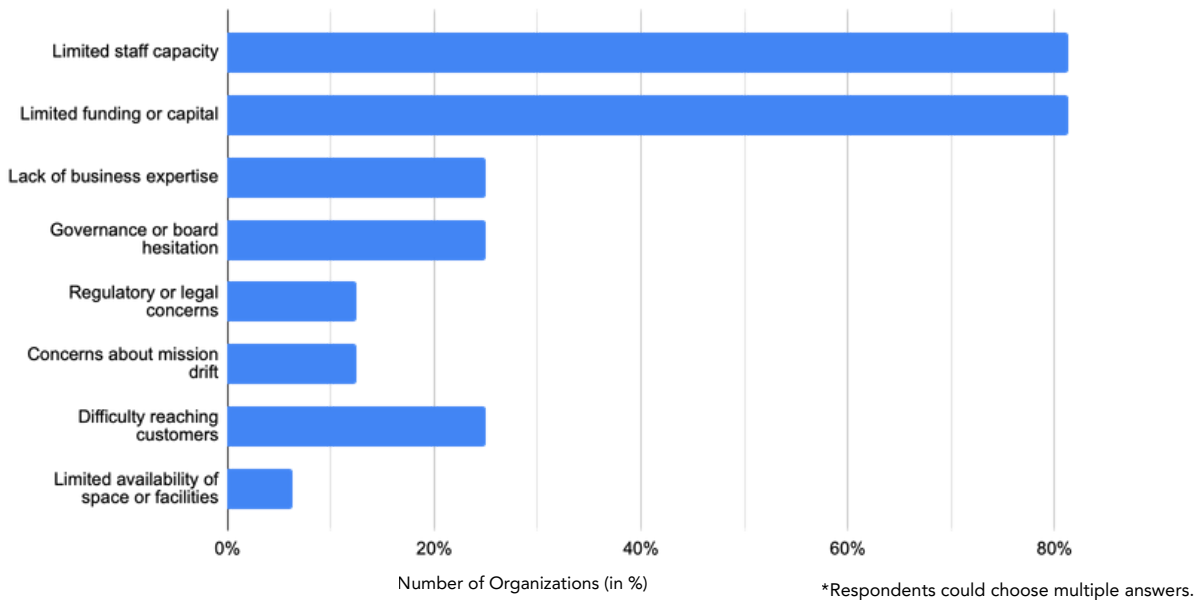
Planning Stage

Interest in social enterprise extends well beyond organizations already operating an enterprise, with **16 organizations** actively pursuing opportunities to develop one. The majority are just beginning with an initial idea (7) or some research completed (5). There are three organizations that are actively planning or preparing to launch expect to do so within one year, a detail not reflected in the chart. The survey paints a picture of a promising pipeline of future social enterprises.



Barriers

The primary barriers to the development of social enterprises are **organizational capacity** and **access to funding** (81% each). Addressing these challenges would increase the pace at which more organizations move from planning to implementation.



Business Interest Areas

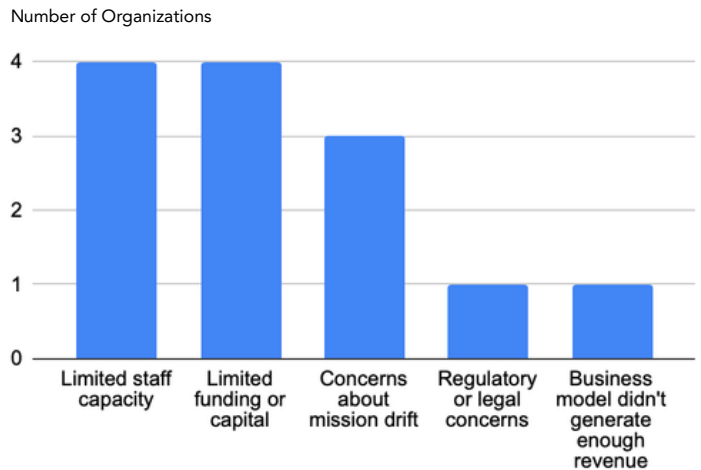
The 16 organizations are exploring a diverse range of social enterprise businesses, with **professional services, education and training, and community-based services** being the most common. At the same time, interest in **retail, arts and culture, and food services** highlights how flexibly social enterprise can advance a wide range of missions.

Part 4: Reasons for Not Pursuing Social Enterprise

Barriers to Adoption

For the seven organizations that do not currently operate a social enterprise and have no plans to start one in the future, the two most common barriers were **limited staff capacity** and **limited funding or capital**, each selected by four organizations. Concerns about mission drift were also noted by three organizations.

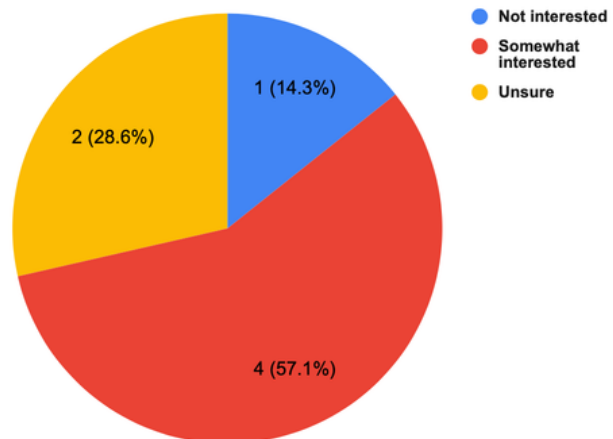
Overall, the responses point less to a lack of interest and more to capacity and resource constraints as the main barriers to developing a social enterprise.



*Respondents could choose multiple answers.

Openness to Future Social Enterprise Development

Despite barriers to adoption, there remains an **openness to future social enterprise development**. Four of the seven organizations (57.1%) reported being somewhat interested, two (28.6%) were unsure, and one (14.3%) was not interested.



When organizations were asked what would encourage them to consider social enterprise in the future, they indicated that their **interest would depend on key supports and enabling factors**. The responses highlighted the need for **adequate funding, staff capacity**, and a clear, **sustainable business model**, as well as support in planning and early-stage development. Several also emphasized that any social enterprise would need to be **strongly mission-aligned** and clearly **benefit their communities**. Additional factors that could encourage future consideration included dedicated start-up funding, stable resourcing for the first 1–5 years, and external support from a backbone organization, such as CSED. One organization noted that they would also consider a social enterprise if a strong, unexpected opportunity arose.

Final Thoughts

Navigating the Future of Ottawa's Social Enterprise Ecosystem

The *Ottawa Social Enterprise Needs and Opportunities Survey* provides a critical baseline for understanding social enterprise across the local charitable and non-profit sector.

Core Insights:

- **Deep Integration across the Sector:** Social enterprise models are actively embedded across Ottawa's charitable and non-profit landscape, driving community impact across diverse organizational sizes, stages, and mission areas.
- **Earned Revenue as a Catalyst:** Social enterprises serve as essential mechanisms for revenue diversification and financial resilience, allowing organizations to expand their reach beyond traditional funding streams.
- **Resource and Capacity Bottlenecks:** Growth and new venture adoption remain primarily constrained by operational bandwidth, access to early-stage capital, and specialized business development support rather than a lack of sector interest.

Recommendations:

The data validates that charities and non-profits are eager to leverage market-based solutions, but require tailored infrastructure to translate strategic intent into viable, scalable enterprises by:

- **Building Target Capacity Supports:** Provide accessible coaching, specialized business planning, marketing, and operational execution training to help emerging ventures navigate startup and growth phases.
- **Unlocking Flexible Early-Stage Funding:** Develop dedicated capital pathways, grants, and seed financing tailored specifically for social enterprise startup costs and early-stage stabilization.
- **Fostering Collaborative Networks:** Strengthen regional peer-learning hubs and social procurement connections to link non-profits, corporate partners, and ecosystem champions.

Ottawa's social enterprise sector stands at a pivotal turning point. By addressing key capacity gaps and aligning strategic supports with organizational needs, regional partners and stakeholders can unlock significant long-term economic resilience and heightened community impact across the city.

Connect with CSED

We invite you to connect with us at team@csedottawa.ca to discover how our coaching, training, and strategic support can help you on your social enterprise/social impact journey.