



NATIONAL SCORECARD ON

# Canada's Growth and Prosperity

3<sup>rd</sup> Edition  
**2023**



# Century Initiative | Initiative du Siècle

## ABOUT CENTURY INITIATIVE

**Century Initiative is a national, non-partisan charity with a mission to enhance Canada's long-term prosperity, resiliency and global influence by responsibly growing the population of Canada to 100 million by 2100.**

Century Initiative delivers its mission by leading, enabling and partnering on initiatives that support long-term thinking and planning in immigration; infrastructure and environment; economy, entrepreneurship and innovation; support for children and families; and education, skills and employment. Century Initiative takes a network approach, prioritizing inclusion of diverse perspectives to inform and advance its work.

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# Contents

Executive summary	4	Support for children & families	46
Introduction	8	Infrastructure & environment	53
Growing to 100 million	10	The way forward	61
Immigration	16	Appendix A: Data sources	62
Economy, innovation & entrepreneurship	25	Appendix B: Data selection & interpretation	68
Education, skills & employment	38	Endnotes	69

# Executive summary

**In a volatile age, Canada's commitment to stability and inclusion has made it a beacon to millions of people globally.**

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Recent public opinion research demonstrates that Canada's diversity is increasingly a foundation of its identity.<sup>1</sup> Canadian society is uniquely open to the world and this has been a consistent source of strength, enabling Canada to thrive as a country of immigration.

The past year has been remarkable around the world. Canada has emerged from the cocoon of Covid-19 with a slow return to the hum of social and economic life. Yet this emergence has been marked with upheaval and uncertainty. Canadians have faced an unusual economic cycle with rising inflation and an increasing cost of living. Global conflicts and climate-related disasters have upended Canada's sense of security. Existing inequities in Canada's society and economy have been exacerbated. All these events have been layered on top of ongoing structural challenges that imperil economic growth and the sustainability of high-quality public services, namely population aging, low fertility rates and a slow-growing workforce. From an international perspective, Canada commands a degree of global influence as a member of both the G7 and G20. But the simple fact is that bigger and more prosperous countries are better able to advance their interests – and global security – than smaller ones.

These challenges make it clear that it is now more crucial than ever to build a strong and resilient Canada by enhancing economic strength, diversity at home and influence abroad.

To accomplish these goals, Canada must become a bigger, bolder nation. Century Initiative believes that a key driver of future economic prosperity and a good standard of living will be Canada's scale: the population size, its composition and distribution, and the critical social and structural elements required to make population growth manageable and successful. A nation at scale will similarly give Canada greater access to international markets and will keep Canada at the head of international tables to ensure its voice is heard on transnational issues that affect the country.

To set the country on this path, Century Initiative has set an aspirational goal of achieving a population of 100 million people by 2100, along with building the physical and social infrastructure needed to support the population. The [\*National Scorecard on Growth and Prosperity\*](#) tracks Canada's progress toward achieving these goals – and highlights key insights and action items for stakeholders across Canadian society to make these goals a reality.

The unique value proposition of Century Initiative's *National Scorecard* is its focus on Canada's progress toward growing well: ensuring that population growth is sustainable and that the benefits of this growth are shared by everyone who does and will call Canada home.

## Scoring approach: Direction Canada is Trending

### Leading

Canada is a leader on this indicator, either ranking or rating among the best internationally or performing well against national goals.

### On track

Canada has either met the target identified for the indicator or is expected to meet the target in the near-term.

### Needs attention

Canada has not met the target identified for the indicator but is within a range where it could meet the target in future years with intervention and support.

### Falling behind

Canada is lagging compared to similar countries or failing to meet the target identified for the indicator and significant work is needed to meet the target in future years.



## How it works

This is the third edition of Century Initiative's *National Scorecard on Canada's Growth and Prosperity*, examining the factors that contribute to responsible population growth. Using data from a range of sources, including the OECD and Statistics Canada, the *National Scorecard* assesses 39 indicators grouped into six focus areas. The six focus areas are:

- | Growing to 100 Million
- | Immigration
- | Economy, Innovation & Entrepreneurship
- | Education, Skills & Employment
- | Support for Children & Families
- | Infrastructure & Environment

Each of the 39 indicators is assessed on whether Canada is leading, on track, in need of attention, or falling behind. While there are many ways to measure progress, the approach taken in the *Scorecard* focuses on assessing Canada's performance compared to similar countries or against goals set nationally utilizing reliable data (see **Appendix B** for more information on data selection and interpretation). The indicators in the *National Scorecard* are deeply interconnected, spanning across many traditionally siloed sectors and areas of policymaking and practice. Collectively, they tell a powerful story, assessing the groundwork that we must lay to secure Canada's economic and social prosperity.

The *Scorecard* has been designed to help key actors in the public, private and non-profit sectors discuss and identify the factors that will allow Canada to grow well. Century Initiative encourages everyone to utilize the *Scorecard* as a shared tool to drive systems change.

## Key insights

Canada's position in the world is in many ways enviable. Canada is a growing, multicultural society with a leading global reputation as a destination to work, study and live. The country's openness and commitment to immigration over multiple decades has produced dividends in economic growth, global connectivity and cultural vitality. Canadians and newcomers benefit from strong public systems of education, as does the Canadian economy, and the country is working to expand this success to its youngest learners through early learning and child care. However, there are significant areas including infrastructure, innovation and climate performance where Canada needs attention or is falling behind, threatening Canada's quality of life, standard of living and place on the international stage in the decades ahead.

The following key insights emerge from the 2023 *National Scorecard*:

**For the first time, Century Initiative has assessed that Canada is on track to achieve the goal of 100 million Canadians by 2100.**

1. The world-leading ambition of Canada's immigration levels plans and continued public support for immigration have played key roles in growing Canada's population. But administrative backlogs, rising cost of living, housing affordability and global competition for talent threaten Canada's ability to attract and retain newcomers.
2. Continued support for ambitious immigration levels, as well as immigrants' well-being, are contingent on the successful integration of

immigrants, regardless of their immigration class. Canada has a good policy framework for integration and it is notable that the children of economic immigrants out-earn their peers. But recognition of immigrants' professional experience and credentials continues to lag, depriving immigrants of equitable opportunities and the labour market of access to immigrants' skills and talent.

3. Growing immigration must coincide with significant policy and systems changes to close gaps in educational opportunity, employment and infrastructure frequently experienced by Indigenous peoples. These policies must be co-developed with Indigenous peoples.

**Investment in infrastructure has declined in recent years and stagnated overall. Housing is becoming increasingly unaffordable for young Canadians. At the same time, climate change is already reaching the homes of many Canadians due to extreme weather events.**

4. A bigger, bolder Canada requires investments in infrastructure such as affordable housing, broadband, roads, bridges, water and wastewater and public transit. Without planned and strategic investments in infrastructure, population growth will put a strain on Canada's economy, quality of life and well-being. Higher order governments with more fiscal capacity need to support cities and communities to address challenges.

5. Scaling Canada's population requires ambitious emissions reductions and investment in critical climate adaptation infrastructure to mitigate the impact of fires, floods, and other climate-related events.
6. Well-planned urban density is essential as Canada's population grows to address housing affordability, access to services, health outcomes, quality of life and environmental sustainability. Additionally, Canada's small- and medium-sized centres require investments in infrastructure like public transit and better links to large urban centres to support community prosperity and population growth.
9. Temporary pandemic financial supports prevented large numbers of Canadians from falling into poverty, but these improvements were short-lived. Now, Canadians are facing rising cost of living and mounting household debt, which is harming well-being and leading to hardships for many who have arrived recently.
10. A Canada-wide system for early learning and child care is starting to be implemented, and there are signals that it may already be improving support for mothers of young children to access employment. Commitment across all levels of government and through multiple election cycles will be critical to successful system implementation, benefitting children, families and the economy.

**Canada must build a cutting-edge, 21<sup>st</sup>-century economy to be an engine of innovation, entrepreneurship and talent.**

7. Canada is seeing positive economic developments including growing early-stage entrepreneurial activity and an increasing number of "unicorn" companies positioned to scale. However, the country faces key challenges including low business investment in R&D and slow productivity growth. Continuing economic uncertainty could undermine Canada's strong public support for immigration.
8. Canadians need the skills that tomorrow's economy requires if Canada is to compete and prosper. While Canada's education systems remain among the best in the world, supports for lifelong learning could be strengthened through investments in skill-building, training and career navigation support. Efforts by the public and private sectors to close opportunity gaps and reduce inequalities are still needed.

Canada can build on its strong fundamentals. Through long-term thinking and planning, improved performance across the 39 indicators of the *National Scorecard* can support Canada to grow well into the future.



# Introduction

This is the third edition of Century Initiative's *National Scorecard on Canada's Growth and Prosperity*. This edition of the Scorecard assesses 39 indicators across six focus areas that were identified as critical for Canada to achieve long-term economic and social prosperity: 1) Growing to 100 million, 2) Immigration, 3) Economy, Innovation & Entrepreneurship, 4) Education, Skills & Employment, 5) Support for Children & Families, and 6) Infrastructure & Environment.

## THE NATIONAL SCORECARD HAS THE FOLLOWING OBJECTIVES:

- | Set a bold new economic and social vision for the country.
- | Identify key indicators of Canada's economic growth and prosperity.
- | Build awareness of key issues impacting Canada's future with civil society, key opinion leaders and the interested public.
- | Provide a tool for Canadian policymakers and decision-makers to track Canada's progress on each indicator.
- | Direct Century Initiative's research, education, and convening efforts.
- | Inform policy and practice.

In Canada and internationally, there are many scorecards, report cards and other assessment tools that explore economic, social and environmental progress across multiple dimensions. The unique value proposition of Century Initiative's *National Scorecard* is its focus on Canada's progress toward growing well: ensuring that Canada has the physical and social infrastructure needed to support a growing population.

In this way, communities can accommodate growth and help ensure the benefits of this growth are shared by everyone who does and will call Canada home.

As Century Initiative's work progresses, the *National Scorecard* serves as its annual pulse check on what has been achieved and how we must apply long-term thinking and planning to enable Canada's progress into the future. Century Initiative encourages all stakeholders to utilize the *National Scorecard* as a shared tool to drive systems change.

## How to use this Scorecard

All Canadians should be at the table to build a better, more prosperous, inclusive and sustainable future.

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Century Initiative makes the *National Scorecard* public and accessible to ensure more people can join the conversation. Century Initiative's *National Scorecard* has been designed to be used collaboratively by different actors, sectors and all Canadians:

- GOVERNMENTS** can use the *Scorecard* to assess where Canada is performing well and where it is falling behind, and to identify critical areas of focus for public policy change and investment. Governments can highlight it in communicating with the public regarding the need for action on priority areas and the risks of maintaining the status quo.
- THE BUSINESS SECTOR** can use the *Scorecard* to identify challenges and interconnections between key areas such as education, training, infrastructure, climate and immigration. This knowledge can enable businesses to lead by improving business practices and advocating for policy change that will enhance Canada's investment environment and the country's global standing.
- THE NON-PROFIT SECTOR AND LABOUR** can use the *Scorecard* to mobilize community partners, donors and stakeholders around local and national actions that can influence social and economic well-being and further Canada's ability to build a country founded on sustainability and shared prosperity.
- THE ACADEMIC COMMUNITY** can use the *Scorecard* to explore priority areas for research that will deepen understanding of key challenges to Canada's future prosperity. The research and academic communities can also leverage it to mobilize existing research that proposes solutions to challenges identified.
- ALL CANADIANS** can engage with the *Scorecard* and its indicators to explore the role that growing Canada's population can play in building long-term, sustainable and shared prosperity.

## How to read this Scorecard

### INDICATOR ASSESSMENT

For each indicator, a target is identified based on one of the following criteria: where Canada should be in comparison to similar countries, goals and objectives set nationally, or the direction in which Canada has trended in recent years. Canada's progress on each indicator is assessed against specific indicator targets. This assessment follows the criteria outlined in "Scoring Approach" in the executive summary. Each indicator is accompanied by additional analysis below the indicator tables. This analysis may include additional perspectives on the indicator such as exploration of the experiences of key population groups including women, Indigenous peoples, Black and racialized groups and immigrants.

### INDICATOR SELECTION AND TARGET SETTING

The *National Scorecard* is designed to serve as a long-term barometer with monitoring value that will deepen over time. All the indicators in the second edition of the *National Scorecard* have been carried forward to this third edition. A select number of indicators have a change in their data source to reflect limitations in data, improvements in data or to focus attention on new avenues related to the indicator. One new indicator was added this year to assess temporary foreign workers' role in the labour force.

Specific indicators included in the *National Scorecard* are derived from a range of data drawn from public sources, such as Statistics Canada or the Organisation for Economic Co-operation and Development (OECD), as well as from private sources. The assumptions and methodologies behind some indicators are public to a greater degree than others. In some cases, Century Initiative selected indicators to serve as proxies for a wider range of issues covering complex topics. For example, the indicator on investment in infrastructure also tells a story about the state of infrastructure. In these instances, a more detailed picture of the issue is presented in the analysis.

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[Appendix A](#) contains further information and sourcing for each indicator and [Appendix B](#) contains more details on data selection and interpretation.

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# Growing to 100 MILLION

## Overview

Canada's long-term success depends on the country's ability to scale the population while growing well, delivering necessary infrastructure and supporting everyone to fully participate in building and benefitting from a growing economy and vibrant society.

Without continued high levels of population growth, Canada could face a future in which it does not have the human resources or the economic means to support a high quality of life and to advance the country's broader social, environmental and economic ambitions. There has been strong progress over the last year toward a goal of growing to 100 million by 2100. This is reflected in ambitious policy decisions. High levels of immigration have been the most critical component behind significant recent population growth. However, there are real challenges in the immigration system that need to be addressed such as administrative backlogs.

## GROWING TO 100 MILLION

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### At a glance

- | Canada had high **population growth** as the pandemic receded
- | Canada experienced significant growth in **immigrant admissions**
- | Canada's **fertility rate** remains low
- | The pandemic had a negative impact on Canada's **life expectancy**

# Canada had high *population growth* as the pandemic receded

 Upgraded from **Needs attention** in 2022 *National Scorecard*

## Why it matters

Canada's long-term prosperity will be determined by its ability to achieve robust population growth while building the physical, digital and social infrastructure needed to support that growth.

## Where Canada is at

Canada's average annual population growth rate was **1.14% over the last 10 years** and **1.27% over the last 5 years**.

## Target

**Population growth at between 1.25% and 1.30% of population** per year over the next decade.

## Direction Canada is trending On track

Population growth levels significantly rebounded after lows during the pandemic. In early 2022, growth was at its highest in several decades largely due to increases in immigration. Canada's average population growth rate over the previous 5 years is within the target range. High growth will need to be maintained in future years, alongside efforts to ensure Canada grows well, with capacity to support a larger population to thrive. The Indigenous population is growing faster than the country's population overall and forms an increasingly important part of working-age population growth.

*Note: Target is based on a population model developed by Conference Board of Canada*


## Analysis

Canada experienced record population growth in 2021/22, adding 703,404 people. The 2021/22 population growth rate of 1.8% is the highest in Canada in more than 50 years, since the end of the Baby Boom. Immigration was the key force behind population growth, accounting for 94% of growth. Atlantic Canada experienced significantly increased population growth rates, particularly in Prince Edward Island (3.5%), Nova Scotia, (2.8%) and New Brunswick (2.7%), with levels at their highest since Confederation.<sup>2</sup>

The Indigenous population in Canada is growing at a faster rate than the rest of Canada. Though not growing as fast as in the preceding four years, the Indigenous population grew by 9.4% between 2016 and 2021, compared to 5.3% for the non-Indigenous population over the same period.<sup>3</sup> By 2041, it is projected that the Indigenous population in Canada could reach between 2.5 million and 3.2 million.<sup>4</sup> As observed by the 2022 National Indigenous Economic Strategy, "Indigenous Peoples are the main or growing population base in many regions across Canada."<sup>5</sup>

Canada's population growth rate is also the fastest among G7 countries, growing at twice the rate of its peers between 2016 and 2021.<sup>6</sup> Statistics Canada projections indicate that Canada's total population could increase to between 42.9 million and 52.5 million by 2043 and between 45 million and 74 million by 2068.<sup>7</sup> The high-growth scenario outpaces the levels needed to reach 100 million Canadians by 2100, according to a demographic model developed for Century Initiative by the Conference Board of Canada.<sup>8</sup>

# Canada experienced significant growth in *immigrant admissions*

 Upgraded from **On track** in 2022 *National Scorecard*

## Why it matters

Immigration is a key pathway for Canada's population to grow and is needed for Canada's long-term economic prosperity, diversity, resilience and global influence.

## Where Canada is at

There were **492,984 immigrants admitted** to Canada in 2021/22. Annual immigration represented an **average 0.86% of Canada's population** over the last 5 years.

## Target

Immigrant admissions within a target range of **1.15% to 1.25% of population annually** over the next decade.

## Direction Canada is trending **Leading**

Immigrant admissions significantly increased in 2021/22, rebounding after declines due to the pandemic. In 2021/22, new immigrants represented 1.29% of the population. While this figure surpasses the target range and was higher than federal government targets, levels of immigration in previous years resulted in a lower five-year average. Sustained immigration in the target range will be needed to stay on track. The government has faced challenges with higher admission levels including significant application backlogs which pose risks to continued progress.

*Note: Target is based on a population model developed by Conference Board of Canada*

## Analysis

Immigration is the most significant driver of Canada's population growth. There are three major admission categories for immigrants: economic class, family class, and refugees and protected persons class. In 2021, immigrants (both current and former) made up the largest share of Canada's population in more than 150 years at 23%.<sup>9</sup> Immigration increased significantly in 2021/22, with Canada more than doubling the number of new immigrants compared to 2020/21.<sup>10</sup>

At the end of 2022, immigrant admissions surpassed planned levels in the federal government's Immigration Levels Plan for 2022.<sup>11</sup> Over the next three years, annual immigrant admission levels aligned with the latest federal government's Immigration Levels Plan (465,000 in 2023, 485,000 in 2024 and 500,000 in 2025)<sup>12</sup> would put Canada in a strong position to meet or surpass a goal of 100 million Canadians in 2100. In future years it may be possible to achieve population

growth that would meet the goal with lower year-over-year increases in new immigrants as a proportion of the population. The figure for immigrant admissions includes those already in the country who transition to permanent residence as well as those who newly arrive in Canada as permanent residents. It does not include those who newly arrive with temporary status, for example as workers or students.

While significant increases in admissions are a positive development, challenges persist in Canada's immigration system. As of December 2022, Canada had 2.2 million applications in IRCC inventories (for temporary residence, permanent residence and citizenship), with 1.09 million exceeding service standards for processing. This represented an improvement compared to months earlier in September when there were 2.6 million applications

in the inventory. High levels of application processing, supported by federal government efforts to address operational inefficiencies such as by hiring new staff and increasing application digitization, helped to make progress. While this is a positive sign, backlogs continue to persist.<sup>13</sup> The Business Council of Canada has called the backlog a "national crisis" with concerns it could exacerbate challenges with a tightened labour market.<sup>14</sup> The backlog has resulted in some newcomers who arrived in Canada on a temporary status leaving because their work permits expired, and they were unable to transition to permanent status in time. The government has varied its approach to inviting work permit holders to become permanent residents on different occasions throughout the pandemic as it sought to address backlogs. Changes to the approach and criteria have caused frustration for some applicants.<sup>15</sup>

# Canada's *fertility rate* remains low

## Why it matters

Births are a key input into population growth. Robust policies to support children and families could have a moderate impact on the fertility rate by supporting Canadians' choices on family size, while fostering significant social and economic benefits.

## Where Canada is at

A fertility rate of **1.43 children per woman** in 2021.

## Target

Fertility rate increasing toward the current OECD average of **1.6 children per woman** over the next decade.

## Direction Canada is trending

Falling behind

Canada's fertility rate slightly increased in 2021 compared to the previous year when it hit a historic low amid the pandemic. Fertility rates have been on a steady decline in Canada for more than a decade and fall well short of the OECD average.

## Analysis

Fertility rates in Canada have generally been on a downward trajectory for more than a decade. Rates have been below the population replacement level (2.1 children per woman) since the 1970s.<sup>16</sup> In 2021, the fertility rate in Canada was 1.43 children per woman with 367,684 babies born, a slight increase compared to the previous year when fertility rates were at a record low. Rates were highest in Nunavut (2.56) and lowest in Nova Scotia (1.11) in 2021.<sup>17</sup> The fertility rate among Indigenous peoples is historically higher than the fertility rate among the non-Indigenous population in Canada.<sup>18</sup>

The pandemic had a negative impact on the fertility plans of Canadians. Social and economic factors linked to the pandemic, such as closures of schools and child care centres, employment losses and precarious financial situations, may have led some Canadians to delay having children.<sup>19</sup> According to a 2021 survey, 24% of people aged 15 to 49 reported that the pandemic changed their fertility plans and 19% reported that it made them want fewer children than initially planned or to have children later in life. Racialized individuals reported they were more likely to have fewer children or to have children later in life (25%) compared to non-racialized individuals (17%).<sup>20</sup>

Canada's fertility rate is also low in relation to comparator countries.<sup>21</sup> A fertility rate that continues to decline, falling to a level of 1.3 children per woman or less would place Canada among countries with the lowest levels of fertility. Fertility rates can be connected to impacts on the labour market, public health systems and pension systems.<sup>22</sup>

# The pandemic had a negative impact on Canada's *life expectancy*



## Why it matters

Life expectancy is a driver of the size of the population and is closely tied to living standards, quality of life and health outcomes, which are important components of growing well into the future.



## Where Canada is at

Canada **ranked 16<sup>th</sup>** out of 37 OECD countries for its life expectancy in 2020.

Canada's life expectancy was **81.7 years** in 2020.



## Target

**Top 10** of OECD countries for life expectancy.

Threshold: Sweden and Spain were tied for 10th in the OECD in 2020 with a life expectancy of **82.4 years**.



## Direction Canada is trending

Needs attention

Life expectancy in Canada declined in 2020 compared to the previous year, with the pandemic having a significant negative impact. Life expectancy had been growing before the pandemic. Low-income Canadians, Indigenous peoples and other groups facing systemic barriers frequently experience lower life expectancy.

## Analysis

Canada's life expectancy fell at the start of the pandemic, declining by more than half a year (0.6 years) compared to the previous year – 82.3 years in 2019 to 81.7 years in 2020. Life expectancy rates were higher for women (84 years) than for men (79.5 years).<sup>23</sup> The decline was the largest experienced in Canada since it started tracking this figure in 1921 and a reversal from a steady increase in previous years.<sup>24</sup> However, Canada's decline in life expectancy was not as sharp as some peer countries and its level remains higher than the OECD average.<sup>25</sup>

Covid-19 was the third-leading cause of death in Canada in 2020, accounting for 5.3% of deaths, behind cancer (26.4%) and heart disease (17.5%). The pandemic may have had indirect impacts that led to higher mortality rates such as medical procedure delays and substance-related harms.<sup>26</sup> The mortality rate for Canadians aged 25 to 39 increased to the highest level in 20 years due to factors such as increases in deaths related to substance use.<sup>27</sup>

Mortality rates were significantly higher in low-income areas, with those living in such areas 1.7 times more likely to die due to Covid-19.<sup>28</sup> Before the pandemic, Indigenous peoples' life expectancy was nearly ten years shorter due to health inequities. There are indications the pandemic further widened these inequities.<sup>29</sup>



# Immigration

## Overview

Immigration is the most reliable way for Canada to grow its population. Steady increases in immigration levels can support Canada's long-term prosperity, global influence and quality of life now and in the years ahead.

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Immigrants must be effectively integrated and supported to realize these benefits. In 2021/22, there was a substantial increase in the number of new permanent residents admitted to Canada due to new federal policies designed to address immigration declines during the pandemic.

In 2022, Canada also accelerated temporary residence pathways for individuals fleeing the war in Ukraine, many of whom will transition to permanent residence. Alongside these developments, public support for high levels of immigration has increased. However, there are systemic challenges in Canada's immigration system. These include inefficient administrative processes that hamper Canada in the global competition for talent, lacking recognition of immigrants' skills and experience, and integration challenges including access to housing and the cost of living. These challenges, which affect all Canadians, highlight the importance of addressing housing, infrastructure and other needs of a growing population.

Canada's system of supports for newcomers is largely focused on permanent residents. This has resulted in gaps for those arriving on a temporary status, such as temporary foreign workers and international students. Despite being increasingly relied upon to support Canada's economy, those with temporary status frequently face precarity and challenges on the path to permanent residence.

## IMMIGRATION

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### At a glance

- | Canada's **global reputation** ranks among the best in the world
- | **Public support for immigration** continues to increase among Canadians
- | **Provincial retention of immigrants** has improved but variation remains across the country
- | Canada has a comprehensive system of **migrant integration policies**
- | Some progress has been made on the **immigrant income gap** but challenges remain
- | Recent policy change has spurred significant growth in **international students transitioning to permanent residence**
- | Canada has increasingly relied on **temporary foreign workers** in recent years

# Canada's *global reputation* ranks among the best in the world



## Why it matters

A strong global reputation can help attract talented immigrants to Canada, support investment and bolster global influence.



## Where Canada is at

Canada **ranked 3<sup>rd</sup>** in the 2022 Nation Brand Index.



## Target

**Top 5** countries in Nation Brand Index.



## Direction Canada is trending

Leading

Canada is consistently among the top countries with a strong national brand. While Canada fell in its ranking compared to the previous year, Canada continues to rank high among comparator countries on key factors related to reputation such as perceptions on quality of life. However, continued work will be needed to ensure Canada's brand remains strong in future years.

## Analysis

Canada's national brand and global reputation remain strong. In 2022, Canada ranked 3rd behind Germany and Japan on the 2022 Ipsos Nation Brand Index. Canada fell one spot from 2nd in 2021 to 3rd in 2022, connected to a decline on the Index's Governance dimension – which assesses the perceived competency of government and its respect for the rights of citizens.<sup>30</sup> Additional recent survey data found that citizens of 28 countries believe Canada is likely to have the most positive impact on world affairs over the next decade, ranking it at the top of the list.<sup>31</sup>

Canada's reputation as a diverse country that provides opportunities for all to succeed helps to build trade and investment while also supporting inclusive growth.<sup>32</sup> Canada's cities have helped the country build its reputation as well. Calgary,

Vancouver, and Toronto rank among the world's top ten most liveable cities, indicating that the standard of living in Canada is generally high.<sup>33</sup> However, liveability in these cities is challenged by affordability issues and heightened levels of income inequality compared to the rest of the country.

Immigration has helped Canada build a strong global reputation. Canada leads all other countries on the Immigration dimension of the Nation Brand Index (see **Appendix A** for a list of all dimensions of the index).<sup>34</sup> Canada is considered a safe and inclusive country, making it a top choice for international students.<sup>35</sup> However, while most Canadians and newcomers to Canada believe the country provides immigrants with a good quality of life, immigrants are much more likely to report that Canada is less welcoming than it was a decade

earlier and are also more likely to report that the rising cost of living makes it less likely they will stay in Canada.<sup>36</sup> These perceptions among immigrants can hurt Canada's brand and impact the ability for Canada to attract and retain newcomers in the future. Addressing challenges to successfully attracting international talent is critical as global competition for talent becomes more intense.<sup>37</sup>

# Public support for immigration continues to increase among Canadians

## Why it matters

Public support for immigration is an essential condition for Canada to effectively attract and retain immigrants and strategically grow its immigration levels over time.

## Where Canada is at

In 2022, **69% of Canadians** disagreed with the view that there is too much immigration in Canada.

## Target

Trending toward **increased support** for immigration levels across the country.

## Direction Canada is trending

On track

There was an increase in Canadians rejecting the view that immigration levels are too high in 2022 compared to the previous year. This is consistent with increasing support for immigration over the past two decades. Most Canadians report that they believe immigration has a positive impact on Canada, though a significant minority has a variety of concerns about immigration levels.

## Analysis

Public support for immigration in Canada has continued to improve in recent years, even in the context of economic uncertainty and global unrest. This support is also notable as Canada has increased the number of new immigrants admitted. In 2022, the largest majority ever expressed support for immigration levels at 69%, according to the annual Environics Institute Focus Canada survey.<sup>38</sup> Century Initiative has been a research partner on recent editions of the survey, which has tracked support for immigration since 1976. Support for immigration has been growing over the long-term, with attitudes becoming more positive over the last three decades. Positive attitudes toward immigration reflect the economic and cultural contributions of newcomers to Canada. The attitudes of Canadians

toward immigrants have been found to be unique compared to many peer countries. However, despite this overall positive trend, there has historically been some impact on public attitudes toward immigration based on economic conditions. For example, there was a decline in support during the 2008 to 2010 financial crisis and recession.<sup>39</sup>

Though most Canadians have a positive view of immigration, there remains some variation based on income, educational attainment and province of residence. Survey respondents with negative views on immigration raised concerns including that immigration represents a threat to Canadian culture, will hurt public finances or will have a negative impact on the economy.<sup>40</sup>

These types of perceptions highlight the importance of continuing to build the public case for the benefits of immigration while simultaneously addressing infrastructure needs, expanding housing supply, improving public services and ensuring that the benefits of immigration are shared widely. While there was strong support for immigration among Canadians in 2022, this situation is critical to monitor and could evolve alongside economic and societal pressures.

# Provincial retention of immigrants has improved but variation remains across the country

## Why it matters

For future prosperity to be shared across the country, all provinces need to be able to retain immigrants, particularly where the need for workforce growth is higher due to population aging.

## Where Canada is at

The average retention rate for immigrants who arrived five years earlier was **48.4%** in 2020 in the five provinces with the lowest retention rates.

## Target

More even retention across Canada for immigrants five years after they arrive, with low retention rate provinces better aligning to the average for all provinces of **65.3%** in 2020.

## Direction Canada is trending

National retention rates are high but there is significant variability in retention at a provincial level. There remains a notable gap in retention between the five provinces with the lowest retention rates and the rest of the provinces. Nonetheless, there are some recent positive signs, such as significant increases in retention of new immigrants in Atlantic Canada.

Needs attention

## Analysis

There remains significant variability in provincial retention rates of immigrants across Canada. In 2020, there was a 34-percentage point gap in average retention rates between the provinces with the highest retention rates and the provinces with the lowest retention rates (48.4% compared to 82.2%). The provinces with the lowest retention rates were: Prince Edward Island (28%), Newfoundland and Labrador (47.8%), New Brunswick (48%), Nova Scotia (55.2%) and Saskatchewan (62.9%).<sup>41</sup>

Employment opportunities, settlement services and connections to social networks are among the key contributing factors to where immigrants choose to settle. Access to housing, public transportation, child care and education are also important considerations.<sup>42</sup> A significant majority of immigrants settle in urban areas in Canada.

However, there may be indicators of changing trends. For instance, in 2021 an increasing share of immigrants settled outside of Canada's three largest cities. Additionally, the share of new immigrants who settled in Atlantic Canada has nearly tripled over the last 15 years.<sup>43</sup> At the same time, in 2022, Ontario experienced the largest net outflow of people recorded, with a rising number of people moving to other parts of the country such as Alberta and Atlantic Canada. This was part of a broader trend as housing costs have risen and as more people have worked remotely since the start of the pandemic.<sup>44</sup>

Canada takes a unique approach in involving local communities and provinces in the immigration process. Federal and provincial governments have successfully taken steps to improve retention through efforts such as Provincial Nominee

Programs, which enable provinces to select newcomers. There have recently been calls for the federal government to increase the number of newcomers that can be selected by provinces through the programs.<sup>45</sup> Additionally, the Atlantic Immigration Pilot Program has helped to significantly increase retention of skilled workers in all Atlantic provinces, which led to the program becoming permanent in 2022.<sup>46</sup> There are other initiatives like the Rural and Northern Immigration Pilot which could also contribute to positive change in the future.

# Canada has a comprehensive system of *migrant integration policies*

## Why it matters

Immigrants' integration is influenced by the supports and services available to them upon arrival. Integration policies can shape immigrants' attitudes, feelings of belonging, participation in the labour market and society, and overall well-being.

## Where Canada is at

Canada **ranked 4<sup>th</sup>** out of 42 countries in the 2020 edition of the Migrant Integration Policy Index.

## Target

**Top 5** countries in the Migrant Integration Policy Index.

## Direction Canada is trending

On track

Canada ranks among the top countries with comprehensive systems of support for immigrants. Governments in Canada have made significant investments in integration. However, there are disparities in support for different types of newcomers in Canada in need of integration supports, such as temporary residents, and immigrant talent is not always effectively leveraged.

## Analysis

Canada's policies to integrate immigrants are considered strong. While Canada scored well across most dimensions of the 2020 Migrant Integration Policy Index, it scored lower in areas related to labour market mobility, health and political participation.<sup>47</sup> Integration services generally focus on permanent residents and do not provide support to temporary workers or international students, who are increasingly likely to become permanent residents and therefore need access to support programs to assist them on this path.

Canada's spending on immigrant integration ranks high compared to other countries on a per capita basis. Recent studies found that immigrants to Canada have positive experiences overall, as they

generally find employment and remain long-term.<sup>48</sup> However, immigrants often have jobs which do not leverage their full talent and skills, which can have a negative impact on their social and economic well-being, as well as Canada's economy overall. A recent survey found only 35% of new immigrants reported they believe immigrants get fair opportunities in Canada's labour market.<sup>49</sup> Additionally, integration experiences can vary by region. A recent index found Manitoba and Newfoundland and Labrador had high levels of integration, while Québec and Prince Edward Island had lower levels.<sup>50</sup>

Citizenship is another important measure of integration, reflecting immigrants' sense of belonging in Canada. In 2021, more than six million

Canadians were people who had immigrated to the country and pursued citizenship through naturalization.<sup>51</sup> However, the citizenship acquisition rate among eligible immigrants has declined over the past decade, from 87.8% in 2011 to 83.1% in 2021.<sup>52</sup> The costs of obtaining citizenship and language requirements have been identified as barriers to citizenship for certain immigrants, particularly those with lower levels of income.<sup>53</sup>

# Some progress has been made on the *immigrant income gap* but challenges remain

## Why it matters

The gap in income between newcomers and all Canadians is an indicator of integration for recent immigrants. It reflects whether newcomers are experiencing economic success in Canada and whether the economy is leveraging their talent and skills effectively.

## Where Canada is at

There was a **difference of \$2,730** in 2020 in the median total income between immigrants five years after arrival and for all Canadians (\$37,900 compared to \$40,630).

## Target

**Narrowing the income gap** between immigrants five years after their arrival and all Canadians.

## Direction Canada is trending

Needs attention

There was notable progress in closing the income gap between immigrants five years after arrival in 2019 and 2020 compared to previous years. However, immigrant wages remain lower than for the Canadian population overall and the gap is higher among immigrants who arrived more recently. Disparities also remain based on gender, race, and immigration category, with indications the pandemic increased inequality. Pandemic supports helped improve incomes in 2020.

## Analysis

There has been recent progress in narrowing the income gap between immigrants five years after arrival and all Canadians. The gap in median total income was \$2,730 in 2020 (for the 2015 cohort), which represents a decrease of nearly 50% compared to 2019 (for the 2014 cohort) and nearly 60% compared to 2018 (for the 2013 cohort).<sup>54</sup> Increases in immigrant median total income in 2020 were largely due to pandemic-related supports. Total income levels increased even as employment income declined.<sup>55</sup> The median total income gap started to narrow significantly in 2019, however, reflecting an increasing share of economic immigrants among the 2014 cohort of new immigrants earning higher incomes. In particular, there was an increase in the number of those in the Canadian Experience

Class. Immigrants arriving through the Canadian Experience Class have Canadian work experience and are more likely to have higher earnings levels.<sup>56</sup> Additionally, requirements for assessment of academic credentials achieved abroad that were introduced in 2013 have been connected to higher levels of employment and earnings.<sup>57</sup>

Despite recent improvements, the income gap is persistent. The gap between immigrants and non-immigrants with similar sociodemographic circumstances widened between 2000 and 2015, though the trend started to reverse and improve in the late 2010s.<sup>58</sup> The pandemic had a negative impact on immigrants' employment experiences, particularly

for those who arrived recently and who are racialized, as they were more likely to earn less, lose hours of work or become unemployed.<sup>59</sup> Wage gaps are particularly deep for racialized immigrant women.<sup>60</sup>

Income levels of immigrants admitted as children are more comparable to the overall population due to participation in Canada's education system and proficiency with official languages. Considering a multi-generational lens, children of economic immigrants have higher median wages than Canadians overall after their mid-20s.<sup>61</sup>

# Recent policy change has spurred significant growth in *international students transitioning to permanent residence*

## Why it matters

International students are important contributors to growth and prosperity. They are a key source for increased permanent immigration to help meet labour market demands.

## Where Canada is at

Canada accepted **157,290 permanent residents in 2021** who had previously held a study permit.

## Target

Trending toward **increasing transitions to permanent residence** for international student graduates.

## Direction Canada is trending

On track

The number of new permanent residents who previously held study permits significantly increased in 2021, nearly quadrupling compared to the previous year. The large increase was primarily due to temporary policy changes made due to pandemic-related disruptions. International students are increasingly important to meet immigration targets and address labour market challenges. While some international students have positive experiences, others report challenges which will need to be addressed for Canada to stay ahead in future years.

## Analysis

Canada experienced significant growth in the number of new permanent residents who held a study permit in the past, increasing from 40,915 in 2020 to 157,290 in 2021.<sup>62</sup> This massive growth was supported by a temporary federal initiative which made it easier for international students to transition to permanent status, designed to make up for losses in immigration numbers due to the pandemic. The significant growth signals an increasing reliance on international students to help meet immigration targets and address labour market challenges.<sup>63</sup> In 2022, the federal government announced a temporary removal of limits to the number of hours international students could work off-campus. The effort was designed to help address students' challenges with affordability as well as to improve labour shortages.<sup>64</sup>

Despite the increased reliance on international students, Canada's immigration system has struggled to process student visas in time for some students to attend classes.<sup>65</sup> Additionally, some international students reported challenges with transitioning to permanent residence, particularly those in jobs considered low-skilled.<sup>66</sup>

Canada is one of the top destinations for international students. A recent survey of international students reported the majority planned to stay in Canada after their studies. Although many international students reported satisfaction, they also identified challenges such as finding accommodation and employment opportunities related to their skills and education.<sup>67</sup> Some international students reported they were enticed to study in Canada based on unrealistic

claims by recruiters. Canadian post-secondary institutions are particularly interested in attracting international students because they pay significantly higher tuition fees compared to domestic students. Concerns have arisen regarding the quality, cost and commitment to student well-being at some private post-secondary institutions active in attracting international students.<sup>68</sup> Concerns have also been raised that Canada is not effectively supporting international students to transition to the labour market or permanent residence. Supports typically available for integration and labour market success in Canada for new immigrants are often not available to international students.<sup>69</sup> The Conference Board of Canada recently noted concerns regarding a lack of strategy to retain international students in Canada.<sup>70</sup>



# Canada has increasingly relied on *temporary foreign workers* in recent years



## Why it matters

Canada's prosperity was built on a foundation of permanent immigration. Admitting individuals on a temporary status to fill short-term labour market needs can be appropriate but cannot be relied upon to address long-term challenges.



## Where Canada is at

Temporary foreign workers made up **4.1%** of Canada's employed workforce in 2021, representing a **61% increase** compared to five years earlier.



## Target

Trending toward **reduced reliance on temporary status** for workers coming to Canada.



## Direction Canada is trending

Needs attention

The number of temporary foreign workers has increased considerably in recent years, representing greater reliance on temporary workers to fill ongoing or long-term labour market needs. Temporary foreign workers are in a more precarious position than other workers and are unable to access the same level of supports. Greater opportunities for workers to enter as permanent residents and transition to permanent residence when filling ongoing labour market needs would have long-term benefits. Some steps have been taken recently to help improve pathways from temporary to permanent status.

## Analysis

There has been a growing reliance on temporary foreign workers<sup>1</sup> in Canada in recent years. In 2021, there were more than 777,000 temporary work permit holders in Canada.<sup>71</sup> The proportion of temporary foreign workers (through the International Mobility Program and the Temporary Foreign Worker Program) in the employed workforce increased from 2.6% in 2016 to 4.1% in 2021.<sup>72</sup> While this may represent a small percentage overall, the number of temporary work permit holders has grown considerably over the past two decades, with a more than seven-fold increase since 2000.<sup>73</sup> Certain sectors have even higher proportions of temporary foreign workers.<sup>74</sup>

There were record increases in temporary residents overall in 2022, driven by those with work permits as well as people fleeing the war in Ukraine.<sup>75</sup>

Temporary foreign workers are at greater risk of mistreatment compared to other workers as their ability to stay in Canada may be tied to specific jobs.<sup>76</sup> For some temporary foreign workers, particularly those in low-skilled jobs, it is more difficult to transition to permanent residence.<sup>77</sup> However, the heightened reliance on temporary foreign workers indicates they are not only being used to fill short-term gaps and address temporary needs. In recent

years, they have become a critical part of Canada's economy, particularly in low-wage jobs. In 2022, the scope of temporary foreign worker programs in Canada was expanded to help ease labour shortages.<sup>78</sup> While playing a potentially important role, this could increase reliance on temporary foreign workers for longer periods of time. At the same time, steps have been taken in recent years to help improve pathways from temporary to permanent status for some high-skilled or essential workers.<sup>79</sup> There are opportunities to improve transitions to permanent residence for all temporary foreign workers, drawing from experiences with international students.

<sup>1</sup> Temporary foreign workers are foreign nationals with status to work in Canada on a temporary basis. In Canada, there are two main streams for temporary labour migration in Canada: the Temporary Foreign Worker Program and the International Mobility Program.

# Economy, innovation & entrepreneurship

## Overview

Growing Canada's population and talent base are necessary for the country to be an engine of innovation and entrepreneurship – key drivers of competitiveness in the years ahead.

Canada must build a cutting-edge, 21st-century economy that is strong, dynamic, adaptive and resilient, alongside efforts to develop key investment networks and relationships. Supporting innovation, digital transformation and the transition to net zero are all necessary to not only grow the economy but to grow well. In 2022, Canada faced an unusual economic cycle amid recovery from the pandemic. While there were some positive signs, such as growing early-stage entrepreneurship activity, there has also been slow growth on key economic indicators such as productivity. High levels of inflation and increasing interest rates have impacted Canada's economy and the quality of life of Canadians. The cost of living has been increasing, which has meant household debt has grown and it has become more difficult for many Canadians to afford essentials such as food and housing. Pandemic supports helped to address inequalities early in the pandemic but with those supports no longer active, income inequality is expected to increase in the years ahead which will challenge the ability to grow well in the future.

### At a glance

- | Canada's **early-stage entrepreneurship** activity is growing in strength
- | **Business spending on R&D** in Canada remains well below peer countries
- | There were slight improvements to **innovation** performance but challenges remain
- | Canada's **productivity** has fallen at a faster rate compared to peer countries
- | Canada's **global competitiveness** remains stable but could improve
- | **Business growth** declined during the pandemic
- | **Diversity in leadership** has improved though progress remains slow
- | Continuing to build on the **strength of the Indigenous economy** is critical
- | **GDP per capita** increased amid pandemic recovery but growth has been slow
- | Canada continues to rank among countries with the highest levels of **household debt**
- | **Income inequality** improved with pandemic supports but progress is challenged by economic turmoil

# Canada's *early-stage entrepreneurship* activity is growing in strength



Upgraded from **On track** in 2022 *National Scorecard*



## Why it matters

Entrepreneurship activity is an important building block for the economic growth and job creation that is needed for Canada's future prosperity.



## Where Canada is at

Canada **ranked 8<sup>th</sup>** in total early-stage entrepreneurial activity out of 47 countries assessed by the 2021/22 Global Entrepreneurship Monitor.



## Target

**Top 10 countries** in the Global Entrepreneurship Monitor's assessment of total early-stage entrepreneurial activity.



## Direction Canada is trending

**Leading**

Canada's early-stage entrepreneurial activity improved significantly in 2021, reversing a decline in the previous year when Canada ranked 15th. Canada had the highest level of entrepreneurial activity among high-income countries.

## Analysis

Canada has strong levels of early-stage entrepreneurial activity and reached a record high level in 2021, according to the Global Entrepreneurship Monitor (GEM). Canada's total early-stage entrepreneurial activity, which is the proportion of adults who are starting or running a new business, was the highest among high-income countries, increasing in 2021 due to a growing economy and strong government support. Additionally, 67% of respondents to the GEM survey indicated that they saw new opportunities to start a business due to the pandemic.<sup>80</sup> Other research also shows that the pandemic sparked an entrepreneurship boom across Canada with one in four current entrepreneurs (24%) having started small businesses during the pandemic.<sup>81</sup>

While Canada has improved performance on early-stage entrepreneurial activity, challenges remain. For instance, Canada was identified as having weaknesses related to research and development and physical infrastructure.<sup>82</sup> Although the pandemic led to new opportunities for some entrepreneurs, it also created challenges for others. For instance, women-owned businesses experienced a greater decline in early-stage business activities, laid off more employees and were more likely to shut down or discontinue their businesses.<sup>83</sup>

Amid concerns in 2022 regarding inflation and rising costs, small businesses were more likely to expect a decline in profit due to a decrease in demand and greater financial constraints, with

businesses in high-contact services, construction, and in health and social sectors least likely to take on debt.<sup>84</sup> It is important for Canada's early-stage entrepreneurial activity to remain strong, as entrepreneurship is closely connected to economic recovery, future growth and long-term prosperity.<sup>85</sup> Continuing to attract and retain international talent plays a key role in achieving these objectives.

# Business spending on R&D in Canada remains well below peer countries



## Why it matters

Business spending on research and development is critical to creating an attractive environment for international talent. It is an indicator of the private sector's support for innovation and whether firms are investing in developing new ideas, products, processes or services.



## Where Canada is at

Canada **ranked 20<sup>th</sup>** out of 35 OECD countries on business spending on research and development in 2020.

Canada's business spending on research and development was **0.95% of GDP** in 2020.



## Target

Meet a federal government target to keep pace with the **OECD average** on business spending on research and development.

Threshold: OECD average for business spending on research and development was **1.92% of GDP** in 2020.



## Direction Canada is trending

Falling behind

Canada remains well below the OECD average on business spending on research and development (R&D). While Canada has slightly improved its business spending on R&D compared to recent years, significant work is needed to make progress on this indicator.

## Analysis

Canada's business spending on research and development (R&D) is well below peer countries. While Canada has experienced slight increases in business spending on R&D, growing from 0.90% in 2015 to 0.95% in 2020, it remains well below the OECD average.<sup>86</sup> Canada ranks last behind all other G7 countries on business spending on R&D.<sup>87</sup> Canada also ranks below the OECD average on gross domestic spending on R&D.<sup>88</sup>

Business spending on R&D was relatively unchanged during the pandemic and is expected to continue to grow slowly. Growth is expected to be uneven, with increases anticipated in service-producing industries but declines in the manufacturing sector.<sup>89</sup> A key factor contributing to Canada's low level of business spending on R&D is that the country's economy is largely concentrated in industries in which R&D is not a major component of activities, such as real estate, construction and financial industries.<sup>90</sup> In recent years, real estate has been a key industry powering the economy.<sup>91</sup>

Low levels of investment in R&D by businesses is connected to lagging innovation and slow productivity growth.<sup>92</sup> The ability to transform Canada's intellectual capital into economic output is critical to future growth. In light of its importance, governments around the world including in Canada have recently become more active in supporting R&D and, in particular, maximizing business investment to promote growth.<sup>93</sup>

# There were slight improvements to *innovation* performance but challenges remain

## Why it matters

Innovation is directly related to long-term economic growth as a key way to bolster productivity. Canada's ability to innovate drives its competitiveness, standard of living and preparedness for the future.

## Where Canada is at

Canada **ranked 15<sup>th</sup>** of 132 countries in the Global Innovation Index in 2022.

## Target

**Top 10** countries in the Global Innovation Index.

## Direction Canada is trending

Needs attention

Canada slightly improved its innovation ranking in 2022, returning to the top 15 in the Global Innovation Index for the first time since 2016. However, Canada remains below its rankings from previous years and still struggles with balancing the level of investment in innovation with results.

## Analysis

Canada has improved on innovation but still trails many peer countries. Innovation at its core refers to developing new ideas, devising new or improved products and services, and commercializing products and services in the market. Canada improved its innovation performance in 2022 compared to the previous year due to improved innovation efficiency, but still falls below the top 10 ranking it had achieved in the Global Innovation Index more than a decade ago.<sup>94</sup> A global economic downturn could have a detrimental impact on innovation performance in future years.<sup>95</sup>

Canada has particular challenges with innovation outputs.<sup>96</sup> Key weaknesses contributing to Canada's innovation performance in 2022 include infrastructure, knowledge and technology outputs, and business sophistication. Canada continues to be among high-income economies that struggle to balance investments in innovation and results.<sup>97</sup>

There is also uneven participation in Canada's innovation economy, with women, persons with disabilities, racialized Canadians and Indigenous peoples facing barriers. The ability to benefit from innovation, such as by participating in quality jobs

created by the innovation economy, is also not distributed equitably in Canada. An economy that is inclusive is more likely to have higher levels of innovation.<sup>98</sup> In response to challenges with Canada's innovation performance, the federal government announced three initiatives in 2022 to better support innovation – a shift to global innovation clusters, the launch of the Canada Growth Fund, and the creation of the Canadian Innovation and Investment Agency.<sup>99</sup>

# Canada's *productivity* has fallen at a faster rate compared to peer countries



## Why it matters

As Canada's population ages, enhancing productivity is key to maintaining economic growth. Productivity is an important driver of attractiveness for investment and global competitiveness.



## Where Canada is at

Canada **ranked 18<sup>th</sup>** out of 38 OECD countries on productivity in 2021.

Canada's GDP per hour worked was **\$53.97 USD** in 2021.



## Target

**Top 10** OECD countries on productivity.

Threshold: Germany was 10<sup>th</sup> in the OECD with GDP per hour worked of **\$68.30 USD** in 2021.



## Direction Canada is trending

Falling behind

Canada's productivity declined in 2021, after a jump the previous year related to pandemic restrictions. GDP per hour worked fell at a faster rate compared to the OECD average. The country continues to experience slow growth in labour productivity and remains well below the target.

## Analysis

Canada's productivity growth has been slow in recent years. After a jump in 2020 at the start of the pandemic that was largely fueled by lockdown measures at the time, Canada's GDP per hour worked in 2021 fell significantly. Canada's productivity declined more than 5% compared to the previous year while the OECD average declined less than 1%.<sup>100</sup> Additionally, Canada continues to rank behind other advanced economies in investing in and implementing new technologies that can improve productivity. Canada's labour productivity growth has fallen significantly since the 1960s and 1970s.<sup>101</sup>

There was slight growth in labour productivity for Canadian businesses in 2022, the first increase in two years. However, as of September 2022, productivity was 1.3% lower than the level seen during the fourth quarter of 2019, the final quarter before the beginning of the pandemic.<sup>102</sup> Lagging productivity alongside labour shortages have created continued challenges for businesses.<sup>103</sup>

Increases in productivity can help mitigate the impacts of high inflation.<sup>104</sup> Growth in immigration can have significant potential to boost productivity, when immigrants are effectively integrated, as it

helps expand the talent pool and brings in new ideas and approaches.<sup>105</sup> A recent analysis by Century Initiative found that in 2021, one-third of Canadian private tech companies that scaled successfully and were well positioned to grow into world-class firms were founded or co-founded by immigrants.<sup>106</sup>

# Canada's *global competitiveness* remains stable but could improve

## Why it matters

Competitiveness is a driver of Canada's economic prosperity and signal of Canada's attractiveness as a global jurisdiction and immigration destination. It reflects Canada's ability to attract investment, foster innovation and spur economic growth.

## Where Canada is at

Canada **ranked 14<sup>th</sup>** out of 141 countries in the 2019 edition of the World Economic Forum's Global Competitiveness Index.

## Target

**Top 10** in the Global Competitiveness Index.

## Direction Canada is trending

Needs attention

Canada remains a competitive economy but there is opportunity for improvement. Challenges to Canada's competitiveness identified in 2022 include inflation, supply chain constraints, low housing availability and labour market imbalances.

## Analysis

Canada's global competitiveness has generally remained stable and is ranked 14th out of 141 countries, according to the World Economic Forum, just below an ambitious target to place in the top 10. While Canada remains a competitive economy, key challenges persist in areas such as technology and innovation.<sup>107</sup> A 2022 annual review of competitiveness by the International Institute of Management Development (IMD) highlights challenges for Canada including persistent inflation, supply chain disruptions, housing affordability, labour market imbalances, extreme weather events, and low investment capital creating obstacles for innovation and retention of scaling companies.<sup>108</sup>

Other challenges to Canada's competitiveness include weakened export competitiveness, as Canada's share of the U.S. market has declined, and trade is no longer a major source of Canada's economic growth. To improve Canada's competitiveness, key areas of focus have been identified including trade, public and private investment, procurement, research and development and skilled labour.<sup>109</sup>

Nonetheless, Canada remains a desirable destination for international workers.<sup>110</sup> According to one survey, Canada ranked as the top choice among workers around the world when asked where

they would move for work. Canada was chosen as the top spot to work for those with a variety of backgrounds, including people with advanced degrees, people with digital training and expertise, and people younger than 30 years of age.<sup>111</sup>



# Business growth declined during the pandemic

## Why it matters

A growing population, with increased international talent and support for local entrepreneurs, can enhance business growth. High-growth firms make up a small proportion of firms in Canada but a more significant proportion of new jobs and GDP growth.

## Where Canada is at

There were **10,700 high-growth firms** in Canada in 2020.

## Target

Meet a federal government target to **double the number of high-growth firms** in Canada between 2015 and 2025.

## Direction Canada is trending

Needs attention

The number of high-growth firms (by revenue) declined in 2020 following years of incremental increases. However, there were positive signs on this indicator in 2022, including recent growth in the number of “unicorn” companies in Canada.

## Analysis

Business growth as measured by the number of high-growth firms in Canada declined at the start of the pandemic. The number of high-growth firms fell from 12,970 in 2019 to 10,700 in 2020. There had previously been slow growth in recent years in the number of high-growth firms (defined by having average annualized revenue growth greater than 20% per year over a three-year period and having at least 10 employees at the start of the three-year period). In 2020, high-growth firms made up a notable proportion of the following industries: information and cultural industries (11.2%), finance

and insurance (9.7%) and construction (9.3%). They previously made up the most significant proportion of the mining, quarrying and oil and gas extraction sector, but that figure declined significantly from 16.5% in 2019 to 8.1% in 2020.<sup>112</sup>

However, beyond 2020, there have been some positive signs. For instance, the number of unicorn companies, start-ups with a valuation of \$1 billion or more, has grown significantly in Canada’s tech sector since 2019.<sup>113</sup> The number of unicorn companies founded by women has nearly doubled

since 2019.<sup>114</sup> In the years ahead, most Canadian firms expect positive growth but few expect they will achieve high-growth status, according to a recent survey of Canadian businesses.<sup>115</sup> Businesses have faced several recent challenges including increases in costs, inflation, retention of workers in a tight labour market, supply chain constraints and limited access to capital, among others.<sup>116</sup>

# Diversity in leadership has improved though progress remains slow

Upgraded from **Falling behind** in 2022 National Scorecard

## Why it matters

As Canada pursues a path of population growth its population will become more diverse, and this diversity must be mirrored in leadership. Diversity contributes to firms' productivity and innovation, especially at the leadership level.

## Where Canada is at

Among public companies that disclosed diversity information, in 2021:

- **Women held 20%** of board seats;
- **Racialized individuals held 7%** of board seats;
- **Persons with disabilities held 0.4%** of board seats; and
- **Indigenous peoples held 0.4%** of board seats.

## Target

Meet federal government "50-30 challenge" objective of representation of **50% of women and 30% of other under-represented groups** on boards.

## Direction Canada is trending Needs attention

There were some improvements compared to the previous year in the proportion of women, racialized individuals, persons with disabilities and Indigenous peoples on boards. Transparency appears to be having a positive impact, but there is still significant ground to cover to achieve goals for representative leadership

## Analysis

Canada's diversity in leadership improved in recent years. Among public companies that disclosed diversity information, there were increases in 2021 compared to the previous year in the proportion of board seats held by women (from 17% to 20%) and racialized individuals (from 4% to 7%). Persons with disabilities and Indigenous peoples experienced only slight increases in board representation from 0.3% to 0.4%.<sup>117</sup>

There has been a greater focus on increasing diversity in leadership positions through initiatives such as the federal government 50-30 challenge

and legislative requirements on disclosing diversity in corporate settings. The most progress has been made on representation of women in leadership and management roles.<sup>118</sup> The proportion of women on boards has increased by an average annual rate of 2.5% starting in 2016.<sup>119</sup> However, progress on inclusion for racialized Canadians has been slower. While many companies announced commitments in 2020 to address anti-Black racism, there were only minor improvements over two years – with 10% of 481 companies that made commitments reporting improvements on key diversity metrics.<sup>120</sup>

Racism and discrimination continue to be problems in corporate settings and hinder Canada's future prosperity. Increasing diversity, equity and inclusion can help Canada's economy grow as diverse organizations are better at attracting and retaining top talent.<sup>121</sup> Boards for charities and non-profits also have diversity challenges, though less so than corporate settings. According to a 2020/21 survey of non-profit and charitable directors, 11% of respondents identified as racialized, 6% identified as having a disability and 3% identified as Indigenous.<sup>122</sup>

# Continuing to build on the *strength of the Indigenous economy* is critical

## Why it matters

Growth and development of the Indigenous economy and business sector is essential to fostering reconciliation with Indigenous peoples and is a key driver of the economic future of Canada, as the Indigenous population continues to grow at a faster rate compared to Canada's population overall.

## Where Canada is at

In 2020, GDP attributable to Indigenous peoples was **\$49 billion**.

## Target

Growing the Indigenous economy to **\$100 billion** annually.

## Direction Canada is trending

Needs attention

There have been positive steps in growing the Indigenous economy, including higher rates of new business creation among Indigenous peoples compared to the population overall. While progress has been made in recent years, there is significant potential to grow the Indigenous economy through partnership and Indigenous-led development.

## Analysis

The growth of the Indigenous economy is critical to reconciliation and to Canada's economy overall. The Indigenomics Institute has set a goal of achieving a \$100 billion annual Indigenous economy. According to a new Statistics Canada assessment, GDP attributable to Indigenous peoples has steadily grown over the past decade from \$41.7 billion in 2012 to \$48.9 billion in 2020. Indigenous GDP was at a high in 2019 at \$54.1 billion but declined in 2020 due to the pandemic.<sup>123</sup> Beyond GDP growth, there are more specific indicators of prosperity relevant to many Indigenous communities, such as the size of Indigenous-controlled trusts and of own-source community revenues (raised through taxation or business venture).

Indigenous peoples are creating new businesses at a significantly faster rate than the Canadian average.<sup>124</sup> The pandemic caused some challenges for Indigenous businesses, with two-thirds reporting in 2021 that the pandemic negatively impacted their operations. However, also in 2021, 60% of Indigenous businesses had an optimistic outlook.<sup>125</sup> Before the pandemic, the value of Indigenous output grew nearly 20% and the number of jobs held by Indigenous peoples grew more than 10% in less than a decade.<sup>126</sup>

Several initiatives and partnerships have helped to strengthen the Indigenous economy in Canada in recent years. For instance, 2022 saw work begin on the development of the Señákw Lands in Vancouver

in what has been called the "largest Indigenous-led economic project in Canadian history."<sup>127</sup> The first-ever National Indigenous Economic Strategy, developed by more than 20 Indigenous organizations, was also introduced in June 2022 as a guide for reducing poverty in Indigenous communities and growing Canada's economy.<sup>128</sup>

# GDP per capita increased amid pandemic recovery but growth has been slow

## Why it matters

GDP per capita reflects total economic output per person and is an important measure of Canada's overall prosperity, living standards, and economic well-being, though not its income distribution.

## Where Canada is at

Canada **ranked 15<sup>th</sup>** out of 38 OECD countries on GDP per capita in 2021.

Canada had a GDP per capita of **\$53,074.09 USD** in 2021.

## Target

**Top 10** OECD countries on GDP per capita.

Threshold: Sweden was 10th with GDP per capita of **\$59,973.97 USD** in 2021.

## Direction Canada is trending

Needs attention

Canada's GDP per capita increased in 2021 compared to the previous year, with the increase largely due to economic recovery from the pandemic. Nonetheless, GDP per capita remains below the target and overall there is a trend of slow growth.

## Analysis

Canada's GDP per capita experienced a recent increase amid economic recovery from the pandemic. Canada's GDP per capita in 2021 was close to the G7 average.<sup>129</sup> During the pandemic, Canada's GDP per capita declined due to reduced work intensity, employment rates and labour force participation rates.<sup>130</sup> Though there has since been a recovery, there was some decline even before the pandemic.<sup>131</sup>

Canada's economic recovery from the pandemic was driven by factors such as increasing domestic demand and growth in exports. However, global supply tensions and increasing levels of inflation led to pressures in 2022.<sup>132</sup> Growth was moderated by declines in housing investment and household spending, as well as a cooling housing market amid rising borrowing costs and higher interest

rates. Following Russia's invasion of Ukraine, increases in imports exceeding exports and rises in food and energy prices have also contributed to high inflation and moderated growth.<sup>133</sup>

Projections for Canada's GDP per capita in the years and decades ahead are low compared to peer countries. The OECD has projected that Canada's annual GDP per capita growth rate will be 0.7% between 2020 and 2030 while the OECD average projected growth rate over the same period is 1.3%.<sup>134</sup> Supporting immigrants to move more quickly to employment that matches their skills and experience would help accelerate GDP per capita growth as Canada's population grows.<sup>135</sup> International research indicates that immigration can lead to increases in GDP per capita in advanced economies, and that the

gains associated with immigration are shared broadly among the population.<sup>136</sup> Additionally, positive effects are more likely in the short-term if selection programs prioritize immigrants with in-demand skills.

# Canada continues to rank among countries with the highest levels of *household debt*

## Why it matters

Addressing high levels of household debt can improve economic growth and reduce barriers to Canadians' choices on family size. Household debt reflects the economic vulnerability of households and their ability to weather an economic shock. It also represents a risk to the economy.

## Where Canada is at

Canada **ranked 25<sup>th</sup>** out of 33 OECD countries on household debt in 2020. Canada's level of household debt was **178.6% of net household disposable income** in 2020.

## Target

**OECD average** on household debt levels. Threshold: OECD average level of household debt was **124.3% of net household disposable income** in 2020.

## Direction Canada is trending

Falling behind

Canada's level of household debt remains among the highest in the OECD. While Canada had a slight decrease in debt levels in 2020, likely due to pandemic supports provided at the time, debt hit record high levels in 2021 and continued to be high in 2022 amid rising inflation and cost of living.

## Analysis

Canada's household debt levels are significantly higher than peer countries. Canada has the highest level of household debt among G7 countries with a nearly 30-percentage point difference between Canada and the second-highest G7 country in 2020.<sup>137</sup> Debt can be taken on for both positive and negative reasons. Buying a house may lead to high debt levels but also helps build wealth while credit card debt has a detrimental impact on long-term wealth building.

Household borrowing hit record high levels in the second quarter of 2021, largely driven by unprecedented levels of demand for mortgages, with levels remaining high in 2022.<sup>138</sup> Households

in Canada are carrying approximately \$2.5 trillion in debt – about two-thirds of which is due to mortgages and one-third of which was other forms of debt including car loans or credit card debt.<sup>139</sup> In 2022, inflation and increases in the cost of living also added to Canadian debt levels.<sup>140</sup> At the same time, household savings declined as spending increased and pandemic-related supports were removed with consumption levels higher than disposable income.<sup>141</sup>

Overall, Canadians' financial well-being worsened in 2022 and remained below pre-pandemic levels. Young Canadians between 20 and 29 years had the lowest levels of financial well-being while those aged 70 to 79 had the highest levels. In general,

women have significantly worse financial well-being scores than men while Canadians with children have lower financial well-being scores compared to those with no children.<sup>142</sup> These factors point to risks to Canada's future prosperity, both at the level of overall economic health and the capacity of individual households to build wealth to sustain a high standard of living – which are key dimensions of growing well. There are risks that continued challenges to Canada's standard of living could have a negative impact on public support for immigration.

# Income inequality improved with pandemic supports but progress is challenged by economic turmoil



## Why it matters

Reducing inequality as Canada grows is necessary to building shared prosperity. Income inequality poses a social, economic and political risk to OECD countries, including Canada, and is associated with decreased access to opportunity, and poor health and social outcomes.



## Where Canada is at

Canada **ranked 13<sup>th</sup>** out of 29 OECD countries on income inequality in 2019.

Canada's level of income inequality using the **Gini coefficient was 0.300** in 2019 (0 represents perfect equality and 1 represents perfect inequality).



## Target

**Top 10** most equal OECD countries.

Threshold: Hungary was 10<sup>th</sup> in the OECD with a **Gini coefficient of 0.286** in 2019.



## Direction Canada is trending

Needs attention

Canada observed reduced income inequality in 2019 and 2020. Pandemic-related supports had a particularly positive impact at the start of the pandemic. However, there are indications that this positive direction has not continued in 2021 and 2022 without similar levels of support available and amid rising inflation and cost of living, particularly in 2022.

## Analysis

Canada's level of income inequality declined before the pandemic and at its outset.<sup>143</sup> Income inequality levels improved across all Canadian provinces between 2015 and 2020, with the largest decline in inequality over a five-year period since 1976. However, there was variation by province. In 2020, the highest levels of income inequality using the Gini coefficient (based on after-tax income) were in Nunavut, Ontario, Alberta and British Columbia. There were also particularly high levels of income inequality in Canada's large urban centres.<sup>144</sup>

Federal Covid-19 emergency and recovery benefits, such as the Canada Emergency Response Benefit (CERB), are credited with helping lessen income inequality in 2020.<sup>145</sup> An estimated 84% of Canadians aged 15 and older obtained income from government transfers in 2020, an increase from 69% from 2015.<sup>146</sup> Despite improvements to income inequality, these income trends did not continue into 2021 and 2022 as pandemic-related benefits ended. In 2022, income inequality increased to pre-pandemic levels. Most Canadians' income and

savings were negatively impacted in 2022 amid rising inflation. Those in low-income brackets and young people were the most impacted by cost-of-living increases and were most likely to experience declines in disposable income and savings.<sup>147</sup> These challenges signal a threat to Canada's capacity to support young people to build a prosperous future.

# Education, skills & employment

## Overview

Strong education, skills and employment systems will attract people to Canada and serve as a solid foundation to support a growing population.

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As recovery continued in 2022, the impact of the pandemic was still felt, especially by young people in school and early in their careers. While Canada continues to have strong educational performance and attainment, challenges persist due to pandemic disruptions. Equity-seeking groups including Indigenous peoples and Black Canadians were particularly impacted, as existing barriers to education and employment opportunity were exacerbated. Canada's economy and labour market must fully leverage the depth of talent and skills that its education and training systems develop to help build a prosperous future. At the same time, employment rates increased alongside a tightened labour market. In this context, efforts to attract and retain employees, such as flexible work environments, received heightened attention. Likewise, skills development and lifelong learning opportunities have become increasingly important amid changing labour market conditions.

## EDUCATION, SKILLS & EMPLOYMENT

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### At a glance

- | Canada leads in **reading, science and math among 15-year-olds** but pandemic impacts could hurt future performance
- | Canada is a leader in **post-secondary attainment** but access remains a challenge for some Canadians
- | The rate of **youth not in employment, education or training (NEET)** worsened from early pandemic levels
- | There are good levels of **participation in adult learning** but more could be done to support lifelong learning
- | Canada's **employment rate** increased but economic slowdowns create future risk
- | Canada has high rates of **low-wage work** and wages have not kept pace with inflation



# Canada leads in *reading, science and math among 15-year-olds* but pandemic impacts could hurt future performance

## Why it matters

A strong education system will attract people to Canada and form a solid foundation to prepare youth to participate in society and the economy. Performance among secondary school students in reading, science and math reflects the quality and effectiveness of Canada's education systems and high performance is more likely to lead to education and labour market success.

## Where Canada is at

Canada **ranked 4<sup>th</sup>** out of 36 OECD countries in 2018 on performance in reading, science and math among 15-year-olds.

Canada had an **average score of 516.7** in 2018 across reading, science and math.

## Target

**Top 10** OECD countries on performance in reading, science, and math among 15-year-olds.

Threshold: New Zealand was 10th, with an **average score of 502.7** for reading, science and math in 2018.

## Direction Canada is trending

Leading

Canada is among the top-performing OECD countries on reading, science and math for 15-year-olds. However, there are indications that pandemic effects on education could have a negative impact on performance among Canadian students in future years, with disproportionate impacts for equity-seeking groups.

## Analysis

Canada has strong academic performance among secondary school students. Before the pandemic, Canadian students ranked high on reading, math and science compared to students in other OECD countries. Canada was one of only five OECD countries that placed in the top five in at least two of the three PISA domains. Canada ranked highest among OECD countries on reading (2nd), followed by science (5th), and then math (7th).<sup>148</sup> However, there are concerns that the impacts of the pandemic could lead to poor literacy and math outcomes in future years, as well as absenteeism and disengagement, particularly among vulnerable children and youth.<sup>149</sup>

School closures during the pandemic may further widen gaps in academic achievement, especially for low-income families, racialized groups, Indigenous peoples, newcomers and persons with disabilities.<sup>150</sup>

In some provinces, students performed lower than expected in reading and math in 2020 and 2021.<sup>151</sup> A review in Québec found that 80% of fourth-grade students experienced learning losses as a result of the pandemic. These findings have raised concerns among some experts as educational performance is closely connected to physical and mental health among children and youth.<sup>152</sup> While online learning

was introduced to lessen the impact of school closures, low-income students had less access to the internet, putting their academic progress at risk.<sup>153</sup> Few provinces and territories have developed a comprehensive recovery plan responding to the educational impact of the pandemic.<sup>154</sup>

# Canada is a leader in *post-secondary attainment* but access remains a challenge for some Canadians

## Why it matters

Post-secondary education is often associated with the highest quality and most resilient jobs. Countries with high post-secondary attainment rates are best positioned to attract investment and highly skilled immigrants, and to drive innovation and economic growth.

## Where Canada is at

Canada **ranked 2<sup>nd</sup>** out of 37 OECD countries on post-secondary education attainment<sup>ii</sup> in 2021.

**66.4%** of Canadian 25-to-34 year-olds had a post-secondary education in 2021.

## Target

**Top 5** OECD countries on post-secondary education attainment.

Threshold: Ireland was 5th in the OECD with **62.9%** post-secondary education attainment in 2021.



## Direction Canada is trending

Leading

Canada continues to increase the proportion of the population with post-secondary education and remains among the top OECD countries. However, access is not the same for all, with equity-seeking groups such as low-income families facing barriers. Access to post-secondary education for all Canadians remains a key area for improvement.

## Analysis

Canada is among the global leaders in post-secondary education attainment. Canada has consistently ranked 2nd among OECD countries on the proportion of the population with post-secondary education.<sup>155</sup> The high proportion of post-secondary education attainment in Canada is partly driven by Canada's large college sector, as 24% of people have attained a college education in Canada compared to the OECD average of 8%.<sup>156</sup> Additionally, significant increases in immigration have helped boost Canada's attainment rate as Canada's immigration system favours skilled and educated immigrants.<sup>157</sup> Recent

immigrants made up nearly half the growth in the proportion of Canadians with a bachelor's degree or higher level of education between 2016 and 2021.<sup>158</sup>

Young Canadians have higher levels of educational attainment and are more likely than other generations to have a post-secondary credential. In 2021, 39.7% of young Canadians (aged 25 to 34) completed a bachelor's degree or higher compared to 22.5% of older Canadians (aged 55 to 64).<sup>159</sup> However, challenges persist with post-secondary attainment due to pandemic-related disruptions. In 2021, 19%

of young Canadians stopped or postponed their post-secondary studies due to the pandemic, with a larger proportion in the youngest cohort.<sup>160</sup> Additionally, key underrepresented groups continue to face challenges to accessing, participating in and completing post-secondary education that were exacerbated by disruptions due to the pandemic. The affected groups include Indigenous peoples, Black Canadians, persons with disabilities and/or special needs and individuals with parents who did not complete post-secondary education.<sup>161</sup>

<sup>ii</sup> In this analysis, we use the more common Canadian term "post-secondary" whereas the OECD uses "tertiary". According to the OECD: "Population with tertiary education is defined as those having completed the highest level of education. This includes both theoretical programmes leading to advanced research or high skill professions such as medicine and more vocational programmes leading to the labour market."

# The rate of *youth not in employment, education or training (NEET)* worsened from early pandemic levels

## Why it matters

A growing Canada must fully support and harness the talents and energy of its young people to build shared prosperity. Youth who are not in employment, education or training (NEET) are at risk of being excluded from full participation in Canada's society and economy, and of experiencing negative long-term economic and social outcomes.

## Where Canada is at

Canada **ranked 15<sup>th</sup>** out of 33 OECD countries on youth NEET rate in 2021.

Canada's **youth NEET rate was 15.3%** for 20- to 24- year-olds in 2021.

## Target

**Top 10** OECD countries with low youth NEET rate.

Threshold: Australia was 10<sup>th</sup> with a **youth NEET rate of 12.1%** in 2021.

## Direction Canada is trending

Needs attention

The proportion of Canada's youth who were NEET grew in 2021, increasing from levels at the start of the pandemic and hitting its highest point since 2010. In contrast to some comparator countries which saw improvements to NEET rates from 2020 to 2021, Canada's rate worsened. While the picture is not uniform across the country, the impacts of the pandemic have been particularly acute for young Canadians, disrupting plans for employment and education, with potential long-term consequences for career trajectories.

## Analysis

Canada's rate of youth not in employment, education or training (NEET) continues to worsen, hitting its highest level in more than a decade in 2021. The NEET rate for young people (20-24 year-olds) increased from 12.6% in 2019 to 14% in 2020 to 15.3% in 2021. There was a higher NEET rate among men (17.3%) compared to women (13.1%) in 2021.<sup>162</sup> The pandemic has continued to have a detrimental impact on youth by disrupting their education, skills development and transitions to the labour market. While some peer countries saw declines in NEET rates in 2021, Canada's NEET rate continued to increase with ongoing pandemic-related restrictions that impacted youth employment. This is because

Canada was among the countries that experienced stricter public health measures in 2021, which had a negative impact on youth employment. In this context, Ontario and Québec experienced increases in NEET rates with more strict public health measures in place in 2021 while other provinces experienced declines amid fewer restrictions. Economic disruptions also led to increased NEET rates in some provinces in 2021 such as Saskatchewan.<sup>163</sup>

Certain youth continued to experience greater impacts from the pandemic, even after economic activity returned to pre-pandemic levels and post-secondary institutions resumed activities. Indigenous

youth, youth who work in jobs related to sales and services, and youth with a disability were most likely to have lost hours of work or lost employment due to the pandemic.<sup>164</sup> Additionally, immigrant women experienced an increased NEET rate, widening the gap with non-immigrant women. The NEET rates of young Indigenous women and men continued to be higher than those of non-Indigenous youth.<sup>165</sup>

# There are good levels of *participation in adult learning* but more could be done to support lifelong learning

## Why it matters

As economic and technological change accelerates, it is increasingly critical that Canadians and newcomers alike are supported to be lifelong learners. Training is an important factor in ensuring Canada's workforce has the essential skills required to meet labour market needs and to boost human capital potential.

## Where Canada is at

Canada **ranked 10<sup>th</sup>** of 31 OECD countries on participation in adult learning.

The proportion of 25- to 64- year-olds in Canada who reported participating in adult learning was **46.7%**.

## Target

**Top 10** OECD countries on participation in adult learning.

## Direction Canada is trending

Canada is within the top 10 OECD countries in participation in adult learning, according to data reported by OECD in 2021. However, more recent assessments indicate work needs to be done to build a thriving skills development system in Canada and to promote lifelong learning.

On track

## Analysis

Canada has higher than average levels of participation in adult learning among OECD countries.<sup>166</sup> In addition to participation rates, willingness to participate is better than average across a number of dimensions including levels of disengagement and hours spent on learning.<sup>167</sup> Additionally, nearly half of Canadians aged 18 to 34 indicated they participated in either employer-provided or self-directed skills training during the pandemic, with younger workers more likely to do so. Participation in skills training was also more likely among those who shifted to working from home during the pandemic.<sup>168</sup> However, there have also been criticisms of Canada's systems for skills development compared to other countries,

particularly in relation to the lack of long-term comprehensive systems to promote lifelong learning.<sup>169</sup> Additionally, adults in Canada used career guidance services less than those in many other OECD countries, with only 19% of Canadian adults using such services in the past five years. This suggests Canadians are less likely to obtain guidance when pursuing education or training.<sup>170</sup>

Adults without a high school education were the least likely to participate in re-skilling or up-skilling, despite higher levels of vulnerability to labour market shifts. Low participation in adult learning by those with low levels of education may be due to challenges such as financial and time constraints, institutional barriers

and learners' attitudes and self-perceptions.<sup>171</sup> In the context of the pandemic, young Canadians from equity-seeking groups including Indigenous peoples, persons with disabilities, and Black Canadians were more likely to stop or postpone skills training<sup>172</sup>

# Canada's *employment rate* increased but economic slowdowns create future risk

## Why it matters

Broad employment is needed for Canada's businesses to thrive, for household incomes to rise, for the effects of population aging to be mitigated and for tax revenues needed to support essential services for a growing population.

## Where Canada is at

Canada **ranked 14<sup>th</sup>** out of 38 OECD countries in 2021 on its employment rate.

Canada's **employment rate was 73.2%** in 2021.

## Target

**Top 10** OECD countries on employment rate.

Threshold: United Kingdom was 10<sup>th</sup> with an **employment rate of 75.1%** in 2021.

## Direction Canada is trending

Needs attention

Canada's employment rate increased in 2021 compared to the previous year. Canada saw employment gains in 2021 and 2022 as the labour market rebounded with the removal of pandemic-related restrictions. However, economic slowdowns in the second half of 2022 resulted in job losses and increased levels of unemployment amid rising inflation levels.

## Analysis

Canada's employment rate increased in 2021 as the removal of pandemic-related restrictions enabled a rebound in the labour market. The employment rate continued to grow in early 2022 and the unemployment rate hit record lows while concerns grew about labour shortages and significant job vacancies.<sup>173</sup> However, while the employment rate hit a high in the second quarter of 2022, it fluctuated as the year progressed amid increasing levels of inflation.<sup>174</sup>

There was wide variation in employment rates across the provinces. In early 2022, in Québec and British Columbia there were fewer unemployed people than job vacancies, while New Brunswick,

Prince Edward Island and Newfoundland and Labrador had more than two unemployed people per vacancy, highlighting structurally higher unemployment in Atlantic Canada.<sup>175</sup>

Employment rates among immigrants were at a record high in October 2022, as those admitted to Canada within the previous five years had an employment rate 5.6 percentage points higher than before the pandemic.<sup>176</sup> Indigenous peoples also observed record high employment rates in early 2022. However, Indigenous peoples and Black Canadians were more likely to experience lower levels of employment compared to Canadians overall.<sup>177</sup> Additionally, LGBTQ2S+ Canadians faced significant

inequities in the labour market during the pandemic particularly due to the high proportion of youth within this population and the labour market challenges facing youth.<sup>178</sup> Increasing employment opportunities for equity-seeking groups is central to Canada's prosperity and growing well. The rise in women's labour force participation over roughly the last 40 years has accounted for about one-third of the rise in Canada's real per capita gross domestic product (GDP), translating to more than \$9,000 per person.<sup>179</sup>

# Canada has high rates of *low-wage work* and wages have not kept pace with inflation



## Why it matters

The quality of people's employment is an important indicator of quality of life, a core building block for creating shared prosperity. There are many facets to quality of work, which can include regular work hours, opportunities to move from temporary to permanent employment, and access to benefits. A key element associated with poor job quality is low pay.



## Where Canada is at

Canada **ranked 19<sup>th</sup>** out of 25 OECD countries reporting data on incidence of low-wage work in 2020.

Canada's **incidence of low-wage work was 18.7%** in 2020.



## Target

OECD average on incidence of low-wage work.

Threshold: The OECD average for **incidence of low-wage work was 14%** in 2020.



## Direction Canada is trending

Falling behind

Canada has one of the highest rates of low-wage work among OECD countries. In recent years, wages for many workers have not kept pace with growth in inflation, exacerbating challenges with low-paid work. The employment incomes of young people in particular are not keeping up with the cost of living. Low wages suppress fertility and immigrant retention rates.

## Analysis

Canada's incidence of low-wage work is very high compared to other OECD countries. While low-wage work levels declined in 2020, they increased again for the first time in five years in 2021.<sup>180</sup> Rising inflation rates compounded challenges in 2021, as wages did not keep pace. Between early 2020 and early 2022, 64% of workers had average wage increases that were less than the average inflation rate of 3.4% over the same period, representing real wage declines.<sup>181</sup> Even amid reported labour shortages in 2022, there was resistance among many employers to increase wages – with one

analysis finding that 63% of job postings were in industries in which the salary range was lower than wages sought by job seekers.<sup>182</sup> Temporary work has also been increasing in recent years, growing 50% over the last two decades. Temporary work is associated with lower levels of pay and fewer benefits compared to permanent employment.<sup>183</sup>

During the pandemic, racialized Canadians were more likely to work in low-wage jobs with high exposure to Covid-19.<sup>184</sup> Youth were also more likely to be employed in low-wage jobs. In 2021,

30% of youth (aged 15 to 29) were precariously employed compared to 17% of workers aged 30 or older.<sup>185</sup> Additionally, temporary foreign workers are a major source of low-wage labour in Canada.<sup>186</sup> Low wages among newcomers can affect Canada's ability to attract and retain additional immigrants.

# Support for children & families

## Overview

An accessible, reliable system to support children and families is important for the well-being of children and youth and to support the participation of parents, particularly mothers, in the workforce.

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Implementing ambitious improvements to policies benefitting children and families can also support Canadians' choices on family size and increase Canada's attractiveness abroad. Overall, Canada's children and youth are still experiencing negative impacts of the pandemic and disruptions to their key formative years. However, there are some efforts underway to improve the lives of children and families, such as building a Canada-wide system for early learning and child care focused on quality, affordability and accessibility. Development of this system is in its initial stages and successful implementation of the plan is crucial to support the goal of growing well and securing Canada's long-term prosperity.

## SUPPORT FOR CHILDREN & FAMILIES

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### At a glance

- | **Child care participation** remains stagnant as challenges to access persist
- | **Parental leave uptake** in Canada overall is stable but falls short of Québec's more generous system
- | The **employment rate for mothers** has rebounded with pandemic recovery but remains low compared to other groups
- | **Child and youth poverty** significantly declined due to pandemic supports but improvement will likely not be sustained
- | Challenges to **youth well-being** were exacerbated by the pandemic



# Child care participation remains stagnant as challenges to access persist

## Why it matters

Robust systems for quality and accessible early childhood education and care can improve children's well-being and learning. They can help parents, particularly mothers, enter or re-enter the labour force. They can also contribute to supporting Canadians' choices on family size and newcomer families' transition to Canada.

## Where Canada is at

Canada had **51.6% of children aged 0 to 5 in some form of child care** (outside of the immediate family, not including kindergarten) in 2022.

## Target

**Increased levels of participation** in early learning and child care, particularly regulated child care.

## Direction Canada is trending

Participation in some form of child care remained at similar levels in 2022 as during the pandemic and decreased compared to pre-pandemic levels. A commitment to a Canada-wide early learning and child care system has been a big step to improve access to regulated child care. However, implementation remains a challenge with significant variation in approaches across the country.

Needs attention

## Analysis

Participation in child care in 2022 remained at similar levels seen during the height of the pandemic. About half of children up to five years old were enrolled in regulated or unregulated child care (outside of immediate family, not including babysitting or kindergarten) in 2022 (51.6%) – a slight decline from 52.3% in 2020 and a more significant decrease from 59.9% in 2019 before the pandemic.<sup>187</sup> Currently available data do not differentiate between regulated and unregulated care. Recent efforts have aimed to transform the system to enable access to affordable and quality child care across the country, focusing on supporting not-for-profit, regulated child care and the sector's workforce.

Government bodies across Canada are in the first phase of implementing plans for a Canada-wide early learning and child care (ELCC) system designed to strengthen affordability, accessibility and quality of child care. In 2021 and 2022, federal, provincial and territorial governments completed bilateral agreements to build a high quality \$10-a-day Canada-wide ELCC system. Provincial and territorial governments have begun receiving significant public funding to implement the agreements. However, many challenges persist with implementation, with inconsistent approaches by province and territory.<sup>188</sup> While child care fees are set to drop substantially across Canada, several provinces were

expected to miss the 50% fee-reduction targets established for 2022. In 2021, monthly fees were as high as \$1,615 for toddlers in child care.<sup>189</sup>

Unequal access to child care across Canada continues to be a challenge including for low-income families and those in precarious positions such as temporary foreign workers or those working non-standard hours.<sup>190</sup> Hundreds of thousands of new child care spaces will be needed in coming years to meet demand.<sup>191</sup> A key challenge to expansion of regulated child care spaces is continued shortages of qualified ELCC educators across Canada.<sup>192</sup>

# Parental leave uptake in Canada overall is stable but falls short of Québec's more generous system

## Why it matters

Paid parental leave can help to support maternal and infant well-being. It supports new parents and particularly mothers to temporarily exit employment with job security and income support. Robust leave options can contribute to supporting Canadians' choices on family size.

## Where Canada is at

Among recent mothers with insurable employment (which is about 77.8% of recent mothers), **91%** of new mothers living in Canada (outside of Québec) reported having received parental benefits, and **19.5%** of spouses reported receiving benefits in 2020.

## Target

**Increasing trend in uptake of parental leave** for mothers and fathers outside of Québec.

## Direction Canada is trending

Needs attention

There have been some increases in recent years in the number of new mothers with insurable employment receiving parental benefits across Canada. However, the proportion is much higher in Québec, which has a more generous system, with nearly all new mothers with insurable employment receiving benefits. The proportion of all new mothers receiving parental leave benefits, including those without insurable employment, is much lower than among those with insurable employment.

## Analysis

Use of paid parental leave was similar in 2020 to previous years but access remains a challenge for those without standard work arrangements. Parental benefits are provided by the federal government in Canada through EI, except in Québec which has its own system with lower eligibility requirements and more generous benefits (including higher wage replacement rates and wage ceilings). While 91% of new mothers with insurable employment outside of Québec reported receiving parental benefits in 2020, 99.1% of new mothers in similar circumstances received benefits in Québec.<sup>193</sup> However, when including those with and without insurable employment, approximately 70% of all mothers in Canada receive parental benefits outside of Québec compared to nearly 90% in Québec.<sup>194</sup>

Mothers not in insurable employment include those who are self-employed, in school and recently not employed.

Québec also has a much larger share of spouses receiving benefits (78.1%) compared to the rest of Canada (19.5%), largely due to its approach to paternity benefits which, in comparison with Canada's approach, is higher paid and is an individual entitlement not dependent on the spouse taking leave. The main reasons spouses outside Québec did not claim benefits were due to preference, lack of eligibility or for financial reasons.<sup>195</sup> Higher levels of fathers taking parental leave has important benefits to families, in normalizing parental leave and in supporting labour market equity.<sup>196</sup>

Low-income families, racialized Canadians, new immigrants and Indigenous peoples are less likely to be eligible to access parental benefits. Disruptions during the pandemic exacerbated challenges for these groups, as loss of work impacted the ability to have insurable employment.<sup>197</sup> A system of parental leave that connects seamlessly with child care would provide greater levels of certainty to parents that their children's needs will be met. The current system is a barrier to entrepreneurship for prospective parents, particularly women, as self-employed people have greater difficulty in accessing benefits.

# The *employment rate for mothers* has rebounded with pandemic recovery but remains low compared to other groups

## Why it matters

The employment rate of mothers is a key enabler of Canada's social and economic progress, as women's contributions are crucial to the country's long-term success. Women's labour force participation contributes to increased productivity and reduced earnings inequality.

## Where Canada is at

Canada **ranked 12<sup>th</sup>** out of 36 OECD countries on maternal employment rate.

Canada had a maternal employment rate of **76.5%** in 2021.

## Target

**Top 10** OECD countries on maternal employment rate.

Threshold: 10<sup>th</sup> in the OECD had a maternal employment rate of **77.6%**.

## Direction Canada is trending

Needs attention

The employment rate of mothers rebounded in 2021 to pre-pandemic levels after a fall in 2020. However, rates remain lower for mothers than for women with no children, as well as lower than men with or without children. Rates are also lower for mothers with lower educational attainment.

## Analysis

The employment rate for mothers increased recently as pandemic restrictions receded. The employment rate for mothers (aged 20 to 49 with children aged 17 or younger) dipped in 2020 at the start of the pandemic to 74.1% but increased to 76.5% in 2021.<sup>198</sup> During the pandemic, mothers faced employment challenges due to simultaneously caring for children while increasingly working from home. The burden of care often fell disproportionately on women. Efforts to strengthen Canada's child care system may be helping to increase women's participation in the workforce as more mothers may be able to go back to work if they are able to access child care at reduced fees.<sup>199</sup> In 2022, there was a notable increase in the employment rate from pre-pandemic levels among mothers with young children.<sup>200</sup>

However, even with recent increases, the employment rate for mothers in 2021 was lower than for fathers (91.8%), for women with no children (77.6%) and for men with no children (77.9%). Employment rates for mothers in 2021 varied based on level of education, with mothers with at least a bachelor's degree at 82.8% and mothers with a high school education or less at 57.8%.<sup>201</sup>

Women who are mothers can face a "motherhood penalty," as they continue to do more unpaid work than men at home which can impact their ability to pursue opportunities outside of the home. A 2021 survey found 40% of mothers considered quitting after returning to work from a maternity leave, with 95% of mothers reporting inadequate support at work as they transitioned back to employment and 33%

feeling discriminated against for being a mother.<sup>202</sup> Additionally, a 2022 survey found mothers with a child less than 16 years of age were twice as likely to not apply for a job or promotion in the previous year compared to men in the same position and nearly twice as likely to turn down a job offer in the previous year due to child care responsibilities.<sup>203</sup>

# Child and youth poverty significantly declined due to pandemic supports but improvement will likely not be sustained



## Why it matters

Poverty among children and youth can have a negative impact over the long-term. It can be a barrier to children's development and limit access to opportunity in the future. The rate of child and youth poverty in Canada reflects the quality of living standards for families.



## Where Canada is at

4.7% of Canadians under the age of 18 were in low income in 2020.<sup>iii</sup>



## Target

**Continued decrease in child poverty in Canada,** toward the federal government goal to eliminate it.



## Direction Canada is trending

On track

Canada experienced a significant decline in child and youth poverty in 2020, following steady decreases in recent years. The decline in 2020 was closely connected to pandemic-related supports that were provided that year. However, these supports were temporary. It is unlikely that the significant reduction in poverty will be sustained in future years without similar levels of support.

## Analysis

Poverty rates for children and youth declined significantly in 2020, largely due to the impact of pandemic-related supports. The poverty rate for Canadians less than 18 years of age declined from 10.6% in 2018 to 9.4% in 2019 to 4.7% in 2020.<sup>204</sup> Incomes increased for many low-income families because of government support programs designed to help Canadians impacted by pandemic-related restrictions.<sup>205</sup> Additionally, Canada Child Benefit payments helped to reduce poverty rates among young Canadians in 2020.<sup>206</sup>

However, it is anticipated that poverty rate declines will not be permanent as government transfers that reduced poverty in 2020 were temporary. Additionally, following 2020, some pandemic-related benefits were clawed back by the federal government, including child-related benefits impacting low-income families with multiple children.<sup>207</sup> High levels of inflation over the past year are expected to have a negative impact on real income levels and to increase poverty rates.<sup>208</sup> While Canada's poverty rate for children and youth has declined in recent years, Canada typically ranks around the middle among OECD countries on this measure.<sup>209</sup>

There was some variation in poverty rates among children and youth based on province of residence, with higher levels in Atlantic provinces such as Newfoundland and Labrador and Prince Edward Island, and lower levels in Québec and Alberta. Additionally, children living in lone-parent families were more likely to live in poverty (16.9%) compared to those living in families with two parents (3%) in 2020.<sup>210</sup> Younger children were also more likely to experience higher poverty levels, with children 0 to 5 years old experiencing higher levels than older children. Overall poverty rates are higher among Indigenous peoples, recent immigrants and racialized groups.<sup>211</sup>

<sup>iii</sup> Canada's child and youth poverty rate is higher when using other measures beyond the Market Basket Measure. For instance, it was 7.5% in 2020 using the Low Income Measure, After Tax (LIM-AT).

# Challenges to *youth well-being* were exacerbated by the pandemic

## Why it matters

Well-being among children and youth is key to their future development, health, success and quality of life. It is critical to Canada's ability to prepare youth for full participation in society and the economy, and to Canada's attractiveness to those who wish to raise a family.

## Where Canada is at

Canada ranked **26<sup>th</sup> of 32 OECD countries** on youth well-being in 2018.

The percentage of **students who reported always feeling sad was 9%** in Canada in 2018.

## Target

**Top 10** OECD countries on youth well-being.

Threshold: Slovenia was 10th in the OECD in 2018 with **5% of students who reported always feeling sad.**

## Direction Canada is trending

Falling behind

The well-being of Canada's youth is well below comparator countries according to several assessments. Youth well-being in Canada has also been negatively affected by the pandemic, particularly due to its disruptions to education, rise of isolation and impacts on mental health.

## Analysis

The pandemic had a detrimental impact on the well-being of children and youth in Canada. However, even before the pandemic, Canadian youth reported feeling sad at higher levels than most OECD countries.<sup>212</sup> Another review from 2019 found that more than one-quarter of Canadian children reported feeling sad or hopeless for a long period.<sup>213</sup>

The mental health of young Canadians was particularly impacted by the pandemic. In 2021, one survey found that more than 70% of children and youth reported the pandemic resulted in feelings of depression, anxiety and irritability, among other

symptoms. Another survey found that 62% of parents reported the pandemic had exacerbated mental health challenges for their children, with 48% indicating it created new issues for their children.<sup>214</sup> In 2022, the top threats to childhood in Canada identified by Children First Canada were: unintentional and preventable injuries, poor mental health, and systemic racism and discrimination. Disruptions to education was one of the most significant challenges facing children, with learning losses particularly impacting children from low-income families.<sup>215</sup>

The pandemic also had negative impacts on the physical health of children and youth. For instance, a survey of child and youth well-being in Alberta found that 73% of young people in the province reported being less physically active due to the pandemic, while 51% were eating less healthy foods and 48% were getting less sleep. Overall, around 60% of parents reported that their children's physical health had deteriorated due to the pandemic.<sup>216</sup>

# Infrastructure & environment

## Overview

Population growth can only be done well if it is accompanied by long-term planning and investments in core infrastructure and climate adaptation.

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Canada's infrastructure has fallen short of the needs of a growing population in recent years, particularly as housing costs continue to rise, congestion increases and broadband coverage remains uneven across the country. Canadian municipalities have the greatest responsibility for infrastructure but have the least capacity to address these challenges. Additionally, recent climate-related disasters have highlighted the importance of resilient infrastructure. Canada's performance on protecting the climate and ability to adapt to changing weather patterns requires attention as extreme weather, flooding, and fires increasingly threaten Canadians' lives, homes, businesses and the natural world. Robust infrastructure is a critical factor in Canada's ability to grow well and support the needs of all Canadians.

## INFRASTRUCTURE & ENVIRONMENT

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### At a glance

- | **Investment in infrastructure** has declined in recent years and stagnated overall
- | **Housing affordability** slightly improved with pandemic supports but costs have escalated and ownership rates declined
- | There is a gap between **rural broadband coverage** and the rest of Canada
- | **Population density of metropolitan areas** has increased in Canada but is below peer countries
- | Canada ranks poorly among peer countries on **climate change performance**
- | Canada's **resilience** remains stable but challenges to adaptation remain

# Investment in infrastructure has declined in recent years and stagnated overall

## Why it matters

A bigger, bolder Canada requires investments in infrastructure such as affordable housing, climate adaptation infrastructure, broadband, roads, bridges, water and wastewater, and public transit. Without planned and strategic investments in infrastructure, population growth will put a strain on Canada's economy, quality of life and well-being.

## Where Canada is at

Investment in infrastructure represented **3.7% of GDP** in 2021.

## Target

Increase the rate of infrastructure investment to **5% of GDP** in order to close the infrastructure gap.

## Direction Canada is trending

Needs attention

Infrastructure investment in Canada declined in 2021 compared to the previous year. Investment has stagnated over the past several years. Increased spending and long-term planning are needed as Canada's population grows. Heightened investment is needed to make up for decades of underinvestment in Canada's infrastructure and to adapt to climate change and extreme weather.

## Analysis

Canada's level of infrastructure investment has declined over the past decade, including a decrease in 2021 compared to the previous year. Spending has generally remained at less than 4% of GDP in recent years.<sup>217</sup> Compared to other countries, Canada has middling levels of investment in infrastructure. In particular, Canada has fallen behind peer countries in spending on transportation, utilities and energy infrastructure.<sup>218</sup> The country's current level of spending does not make up for significant underinvestment in previous decades. The Federation of Canadian Municipalities has estimated there is

an infrastructure backlog of at least \$175 billion.<sup>219</sup> Additionally, the pandemic highlighted major infrastructure gaps in many Indigenous communities such as overcrowded housing, poor connectivity, and limited access to clean and reliable drinking water.<sup>220</sup>

A recent report card on Canada's infrastructure noted that Canada's public infrastructure is "at risk" as a significant portion of assets are in poor condition. Nearly 40% of Canada's roads, bridges and tunnels are in fair or worse condition and only 20% were built in the past 20 years.<sup>221</sup>

As Canada relies on the movement of goods for approximately two-thirds of its income, infrastructure is of significant importance for the Canadian economy. However, a recent analysis found Canada differs compared to many peer countries as it lacks a national long-term strategy as part of its planning for major transportation projects. Canada was noted to be among the least rigorous and most ad hoc in its approach to infrastructure of the countries under review.<sup>222</sup>



# Housing affordability slightly improved with pandemic supports but costs have escalated and ownership rates declined

## Why it matters

Access to affordable housing that is suitable and adequate is needed to support the health and well-being of a growing Canadian population. Strong housing quality and security are correlated with positive health outcomes and support long-term social cohesion, helping Canada to grow well in the years ahead.

## Where Canada is at

Proportion of households in core housing need was **10.1%** across Canada and **11.2%** in large urban centres in 2021.

## Target

Meet CMHC target of **affordable housing for everyone** by 2030.

## Direction Canada is trending

Falling behind

Levels of core housing need declined slightly in 2021 as the proportion of those living in unaffordable housing decreased. Improved household incomes were a key factor though this may be in part driven by temporary pandemic income supports which have since concluded. Canada continues to face significant challenges as the cost of living rises, with some of the most significant affordability challenges in large urban areas and among vulnerable populations.

## Analysis

The number of Canadians living in unaffordable housing declined in 2021 as household incomes improved. However, this improvement may be driven in part by temporary pandemic income supports, such as CERB, which have since wound down.<sup>223</sup> As a result, improvement may be temporary. The proportion of households across Canada living in core housing need (which refers to households in unsuitable, inadequate or unaffordable dwellings) decreased to 10.1% in 2021 from 12.7% in 2016.<sup>224</sup> The same trend was observed in large urban population centres, in which there was a decline to 11.2% in 2021 from 13% in 2018.<sup>225</sup>

However, housing in Canada continues to be very unaffordable for many, with nearly 1.5 million Canadian households identified as living in core

housing need in 2021. Core housing need was much higher in 2021 among renters (20%) compared to homeowners (5%).<sup>226</sup> Average monthly shelter costs (including rent or mortgages, utilities, property taxes and condo fees) increased across Canada between 2018 and 2021. Additionally, the proportion of Canadians who own a home slightly declined between 2018 and 2021, with Canadians who identify as racialized reporting lower levels of home ownership compared to non-racialized Canadians.<sup>227</sup> Indigenous peoples were also more likely than the general population to live in overcrowded housing or in dwellings in need of major repairs.<sup>228</sup>

Purchasing a home remains difficult as affordability continues to decline. Housing prices fluctuated in 2022 while borrowing costs increased.<sup>229</sup> Increased

immigration is one of many factors that have heightened the need for affordable housing in the context of a shortage of housing supply and high housing prices. Canada has had one of the most significant increases in housing prices among peer countries.<sup>230</sup> It is estimated it will take an additional 3.5 million affordable housing units by 2030 to restore affordability in Canada.<sup>231</sup> Immigration will be an important contributor to growing the skilled workforce needed to expand housing supply.<sup>232</sup> While the federal government had made commitments and investments under the National Housing Strategy by supporting the creation of hundreds of thousands of new units, further work is required.<sup>233</sup> Robust growth of housing supply through investment and policy that removes barriers to housing supply expansion is key to growing well.

# There is a gap between *rural broadband coverage* and the rest of Canada

## Why it matters

Access to broadband across Canada, including in rural and remote parts of the country, is critical for Canada to grow in a way that builds shared prosperity. This will enable both Canadians and newcomers to access education, critical services, and to fully participate in Canada's economy and society from anywhere in the country.

## Where Canada is at

Coverage of 50/10 unlimited broadband was **54.4%** in Canada's rural areas in 2020.

## Target

Coverage of 50/10 unlimited broadband in Canada's rural areas that is comparable to overall access in Canada - **89.7%** in 2020.

## Direction Canada is trending

Needs attention

While Canada is on a good trajectory in providing broadband coverage at speeds of 50/10 Mbps overall, there remain significant gaps in rural areas, Indigenous communities and northern parts of Canada. Rural and remote parts of Canada experience much lower levels of coverage compared to the rest of Canada. Access to broadband has become essential for all Canadians to connect to education, health care and work in recent years, particularly as a result of the pandemic.

## Analysis

While broadband coverage at speeds of 50/10 Mbps has increased in recent years, there remains a significant gap between coverage in rural and remote parts of Canada and the rest of the country. Canada has met a target to provide access to 50/10 unlimited broadband to reach 90% of households across the country by 2021. However, the proportion of households with access to broadband is much lower in rural and remote parts of Canada. This may lead to challenges in meeting a federal government target to reach 100% of households in Canada by 2031.<sup>234</sup> In 2020, 54.4% of rural Canada had broadband coverage at 50/10 speeds compared to 38.9% in 2016. While this represents progress, coverage in urban areas was 99% in 2020, indicating the majority of those without access are outside

urban areas. There were approximately 1.5 million households in Canada with no coverage in 2020.<sup>235</sup> Bridging the gap in broadband connectivity will require providing broadband in rural and remote parts of Canada comparable to urban areas in relation to speed, quality and cost.<sup>236</sup> Innovative solutions may be required to address challenges to access in rural and remote areas such as approaches to funding and network management.<sup>237</sup>

Northern communities and First Nations reserve communities also had low levels of broadband coverage in 2020, at 44.1% and 39.1%, respectively.<sup>238</sup> Many Indigenous communities in remote areas do not have online access to essential services such as health care, education, counselling and news

media.<sup>239</sup> Broadband coverage became even more essential at the start of the pandemic in 2020 to work, study, shop and stay connected from home – trends which have continued and become solidified. Other events in recent years, including the 2022 nationwide internet and wireless Rogers outage, have emphasized the need for quality, reliable, affordable and secure Internet services for all Canadians. Prices have also been rising for high-speed internet across Canada which compounds challenges. Canada's internet prices are higher than many peer countries and for some types of internet, for instance speeds between 101 and 150 Mbps, costs are the highest in Canada.<sup>240</sup>

# Population density of metropolitan areas has increased in Canada but is below peer countries

## Why it matters

Well-planned density can address issues of housing affordability, access to services, health outcomes, and the environment, and will be essential as Canada's population grows to ensure growth is sustainable and all Canadians can benefit.

## Where Canada is at

The average population density of the core areas of Canadian cities with populations of more than 250,000 (16 cities) was **1,233 inhabitants per square-kilometre** in 2020.

## Target

The **OECD average** for population density of the core areas. Threshold: The OECD average for population density in core areas was **1,394 inhabitants per square kilometre** in 2020.

## Direction Canada is trending

Population density in Canada's core urban areas has increased in recent years. While Canadian cities have become denser, Canada remains below the OECD average. There is also a wide range in density levels across Canada. There is significant scope for Canada to grow up instead of out in order to accommodate a growing population in more affordable, liveable, low-carbon and transit-oriented communities.

Needs attention

## Analysis

Canada has become increasingly urbanized and Canadian cities have become increasingly dense in recent years.<sup>241</sup> As of 2021, nearly three-quarters of Canadians lived in one of Canada's 41 largest urban centres.<sup>242</sup> The population of downtown areas in large urban centres increased by 10.9% between 2016 and 2021, growing at twice the rate of the previous five-year period. This growth occurred even with a slowdown in 2020 due to the pandemic, with more people working from home and less commuting to downtown offices. Nonetheless, for many Canadians there remains a strong interest in living in dynamic areas of cities and closer to work. Vancouver's downtown area had the highest level of population density in 2021. Canada's largest

cities had some of the fastest growing downtown areas over the 2016 to 2021 period, including Montreal (which increased by 24.2%), Calgary (which increased by 21%) and Toronto (which increased by 16.1%). Halifax's downtown area was the fastest growing, increasing by 26.1%. Population growth in downtown areas across Canada has occurred alongside efforts by many cities to adopt plans that involve increasing density and housing supply.<sup>243</sup>

However, Canada's level of density remains below the levels observed in the urban areas of peer countries. For instance, Toronto is 64% as dense as Copenhagen, according to one assessment.

There are opportunities for increased intensification in Canada's urban areas. Strong transit systems are one of the most effective ways to encourage density.<sup>244</sup> Additionally, less than a quarter (23%) of those living in Canadian cities reside in the most liveable neighbourhoods.<sup>245</sup> With well-planned density, the number of liveable neighbourhoods could increase and well-being could be heightened for people living in those neighbourhoods.

# Canada ranks poorly among peer countries on *climate change performance*

## Why it matters

Climate change poses an existential risk to Canadian and global prosperity, as well as health and well-being. Improving performance on protecting the climate is vital to current and future generations.

## Where Canada is at

Canada **ranked 58** out of 63 on the 2023 Climate Change Performance Index.<sup>iv</sup>

## Target

**Top 15** countries on the Climate Change Performance Index, with a “high” performance rating.

## Direction Canada is trending

**Falling behind**

Canada remains among the lowest-performing countries on the Climate Change Performance Index, with very low performance on GHG emissions, renewable energy and energy use. Canada slightly improved its ranking in the index due to improved assessments on climate policy following the newly announced Emissions Reduction Plan in 2022.

## Analysis

Canada is one of the worst-performing countries in terms of its protection of the climate. Canada was one of the “very low” performers on the 2023 Climate Change Performance Index (CCPI) and was identified as one of the countries with the highest GHG emissions per capita. Canada rated higher on its climate policies compared to the previous year, which slightly improved its overall ranking in the 2023 edition of the CCPI.

Canada’s level of emissions increased in 2021 including an increase in CO2 emissions by 3% after a decline of 10% the previous year due to the pandemic economic slowdown. Canada has made the least progress in cutting emissions since 2005 among countries in the G7.<sup>246</sup> The CCPI notes that it is positive that in 2022 Canada

published its 2030 Emissions Reduction Plan. The plan provides a roadmap with an aim to reduce emissions by 40% by 2030 and to reach net zero by 2050.<sup>247</sup> However, concerns were raised that the plan does not go far enough and about the likelihood of implementing commitments such as eliminating fossil fuel subsidies.<sup>248</sup> Canada also released its first-ever National Adaptation Strategy in November 2022, designed to help Canada adapt to the impacts of climate change. Implementation of the strategy will be important to help improve performance in future years.<sup>249</sup>

In recent years, Canada has experienced major climate-related events such as deadly heat waves, forest fires, flooding and hurricanes. Marginalized and racialized communities are particularly

vulnerable to extreme weather events, especially extreme heat. Seniors and low-income households are also among the vulnerable groups requiring targeted support to reduce risks from extreme weather events.<sup>250</sup> While most regions of Canada can be harmed by changing weather patterns, some are more likely to be hit hard such as northern regions and Alberta.<sup>251</sup> It is estimated that extreme weather resulted in \$2.1 billion in insured damages across Canada in 2021.<sup>252</sup> Additionally, climate change could slow economic growth by \$25 billion a year, which would have a detrimental impact on government budgets, household income and competitiveness.<sup>253</sup> Canada’s ability to grow well into the future will be closely tied to its performance on climate change.

<sup>iv</sup> The Climate Change Performance Index (CCPI) identifies that no country has an overall “very high” rating on climate change performance and, as a result, leaves the top 3 positions blank. Thus, Canada technically held the 55th spot out of 60 (including 59 countries and the EU) in the index, due to the top three blank positions.

# Canada's *resilience* remains stable but challenges to adaptation remain

## Why it matters

Resilient systems that can withstand the shocks of climate change are critical to the success of a growing Canada and necessary to help the country prepare for risks from global challenges.

## Where Canada is at

Canada **ranked 14<sup>th</sup>** out of 47 upper income countries in the 2020 Notre Dame Global Adaptation Initiative (ND-GAIN) Index.

## Target

**Top 10** most resilient countries in Notre Dame Global Adaptation Initiative (ND-GAIN) index.

## Direction Canada is trending

Needs attention

Canada retained the same ranking as the previous year on the ND-GAIN Index, which assesses countries' vulnerability to climate change and other global challenges, in combination with their readiness to adapt. However, Canada's scores on both readiness and vulnerability have worsened in recent years and challenges to adaptation remain. Nonetheless, Canada still has a low level of vulnerability in a global context and there is an opportunity for the country to play a global leadership role.

## Analysis

Canada's level of resilience remains stable, but the country has fallen in its ranking on the Global Adaptation Initiative (ND-GAIN) index over the last two decades. The index notes that Canada continues to face adaptation challenges. Nonetheless, Canada was found in 2020 to have a low level of vulnerability to climate change in a global context and a high level of readiness to adapt (see **Appendix A** for definitions of these dimensions).<sup>254</sup> Climate-related events in 2022, such as Hurricane Fiona which hit Atlantic Canada and eastern Québec, highlighted the need for a robust national adaptation process in Canada.<sup>255</sup> Additionally, compared to other parts of Canada, regions where northern and Indigenous communities live are warming faster, and in these regions the impact of climate change is likely to be even more pronounced and require additional levels of support.<sup>256</sup>

In November 2022, Canada released its first-ever National Adaptation Strategy and Federal Action Plan. The draft strategy aims to provide a whole-of-society framework to make Canada more resilient to the impacts of climate change, including a monitoring and evaluation framework. The Action Plan includes a series of existing and new federal efforts to support implementation of the strategy.<sup>257</sup> An expert panel on disaster resilience has indicated that by 2030 Canada has the ability to “show a measurable reduction” in the number of Canadians exposed to dangers from extreme weather.<sup>258</sup>

Climate Proof Canada, a coalition focused on climate adaptation and disaster resilience, has highlighted the importance of setting adaptation targets, including wildfire protection plans for communities at risk and requirements for air conditioning in all

buildings because of extreme heat in the summer. By 2050, it is expected that most cities in Canada will have summer daily temperatures up to five degrees higher than the normal maximum, with the number of days with a temperature of more than 30 degrees Celsius doubling or tripling. The coalition also states Canada should reduce risks and protect houses at high risk of flooding by 2028.<sup>259</sup> A 2022 poll by the Insurance Bureau of Canada found 85% of Canadians support climate adaptation and want action from government to provide protection from climate-related natural disasters.<sup>260</sup>

# The way forward

Canada is a growing, multicultural society and a global destination to work, study, and live. The country's high standard of living, quality of life, and good public services benefit everyone who does and will call Canada home.

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However, structural challenges threaten this position domestically and internationally. Population aging, low fertility rates and a slow-growing workforce put Canada's economy and public services at risk. Likewise, emerging global challenges including conflict and climate-related risks threaten Canada's future.

A growing population can help to advance our economic, social, environmental, and national security interests. The *National Scorecard* highlights where we've established the right conditions to grow well – and where we need to make more progress.

Though there are significant system challenges, Canada is a global leader on immigration. Sustained public support for immigration enables Canada to pursue immigration as a foundational national strategy, even in the face of crises like the pandemic. Canada has continued to demonstrate high levels of support for immigration with recent increases in targets under the federal government's annual Immigration Levels Plan. The current path puts Canada in a strong position to achieve a goal of 100 million Canadians by 2100.

Canada has also made some important progress on social infrastructure necessary to grow well in the decades ahead. The country's strong public education systems and commitment to improving access to early learning and child care boosts its attractiveness to people from around the world, as well as supporting Canada's economy and the well-being of all Canadians.

However, Canada also faces many challenges. For instance, Canada's lagging investments in infrastructure and R&D are holding the country back from building a dynamic economy and shared prosperity for all. Increasingly unaffordable housing, rising cost of living, economic uncertainty, and mounting climate risk all challenge the well-being of Canadians.

As we continue to grapple with current challenges and build on victories, we must keep our goal of growing well in mind. By acting today, we can build a bigger, bolder and brighter tomorrow for all Canadians – those already living here and those yet to come.

# Data sources

## Focus area: *Growing to 100 million*

INDICATOR	INDICATOR DATA SOURCE AND DESCRIPTION
<b>Population growth</b>	<p><b>Statistics Canada</b> – <a href="#">Estimates of the components of population growth, annual</a></p> <p>Data represents annual changes in population resulting from births, deaths, net migration and other components of population growth. (Using Statistics Canada demographic data, the Conference Board of Canada conducted modelling commissioned by Century Initiative that included suggested benchmarks on the rates of population growth needed for Canada to reach 100 million by 2100 incorporating recent federal Immigration Levels Plans and assumptions such as Canada’s fertility rate.)</p>
<b>Immigrant admissions</b>	<p><b>Statistics Canada</b> – <a href="#">Estimates of the components of population growth, annual</a></p> <p>Data represents the number of immigrants admitted to Canada on an annual basis. (Using Statistics Canada demographic data, the Conference Board of Canada conducted modelling commissioned by Century Initiative that projected the levels of immigration needed to reach 100 million by 2100 incorporating recent federal Immigration Levels Plans and assumptions such as Canada’s fertility rate.)</p>
<b>Fertility rate</b>	<p><b>Statistics Canada</b> – <a href="#">Crude birth rate, age-specific fertility rates and total fertility rate (live births)</a></p> <p>Data represents fertility rate based on the total number of children that would be born to each woman if she lived to the end of her child-bearing years and gave birth to children in alignment with the prevailing age-specific fertility rates. (Conference Board of Canada used the fertility rate target to inform its demographic model.)</p>
<b>Life expectancy</b>	<p><b>OECD</b> – <a href="#">Life expectancy at birth</a></p> <p>Data represents life expectancy at birth based on how long on average a newborn can expect to live if current death rates remain unchanged.</p>

## Focus area: *Immigration*

INDICATOR	INDICATOR DATA SOURCE AND DESCRIPTION
Global reputation	<b>Ipsos</b> – <a href="#">Anholt-Ipsos Nation Brands Index 2022</a> Data based on an annual study on perceptions of 60 countries through online interviews with more than 60,000 adults aged 18 and over in 20 core panel countries. Countries are assessed across a number of categories related to reputation including: exports, immigration and investment, culture, people, tourism and governance.
Public support for immigration	<b>Environics Institute for Survey Research</b> – <a href="#">Focus Canada Fall 2022: Public opinion about immigration and refugees</a> Data based on annual public opinion research on Canadian views of immigration from interviews with 2,000 Canadians, focused on the question of whether respondents think immigration levels are too high.
Provincial retention of immigrants	<b>Statistics Canada</b> – <a href="#">Interprovincial migration of immigrant taxfilers, by pre-admission experience and tax year, for Canada and provinces</a> Data represents retention rate of immigrants 5 years after they arrived in Canada, focusing on the five provinces that had the lowest retention rates.
Migrant integration policies	<b>Migration Policy Group</b> - <a href="#">Migrant Integration Policy Index 2020</a> Data based on an index that measures policies to integrate migrants in 52 countries across five continents, including labour market mobility, family reunion, education, health, political participation, permanent residence, access to nationality and anti-discrimination.
Immigrant income gap	<b>Statistics Canada</b> – <a href="#">Income of Immigrant tax-filers, by immigrant admission category and tax year, for Canada and provinces, 2019 constant dollars; Income of individuals by age group, sex and income source, Canada, provinces and selected census metropolitan areas</a> Data based on measuring the gap in median total income levels between immigrants 5 years after arrival and the overall Canadian population.
International students transitioning to permanent residence	<b>IRCC</b> – <i>Admissions of Permanent Residents Who Ever Had a Study Permit by Immigration Category, 2015 - June 30, 2022 (Data provided by IRCC Chief Data Office)</i> Data represents the number of annual permanent residents admitted who previously held a study permit.
Temporary foreign workers	<b>IRCC</b> – <a href="#">International Mobility Program (IMP) work permit holders on December 31st by country of citizenship; Temporary Foreign Worker Program (TFWP) work permit holders on December 31st by country of citizenship</a> <b>Statistics Canada</b> – <a href="#">Labour force characteristics by industry, annual (x 1000)</a> Data represents the proportion of temporary foreign workers in the employed labour force. The number of annual temporary foreign workers is based on IRCC data collected on work permit holders through the Temporary Foreign Worker Program and the International Mobility Program.



## Focus area: *Economy, innovation, & entrepreneurship*

INDICATOR	INDICATOR DATA SOURCE AND DESCRIPTION
Early-stage entrepreneurship	<p><b>Global Entrepreneurship Monitor</b> – <a href="#">GEM 2021/2022 Global Report: Opportunity and Disruption</a></p> <p>Data based on total early-stage entrepreneurial activity (TEA), which is the percentage of adults aged 18 to 64 actively engaged in starting or running a new business. This is one of several indicators in the annual Global Entrepreneurship Monitor report.</p>
Business spending on R&D	<p><b>OECD</b> – <a href="#">Main Science and Technology Indicators: BERD as a percentage of GDP</a></p> <p>Data represents business enterprise expenditure on research and development as a percentage of GDP.</p>
Innovation	<p><b>Global Innovation Index</b> – <a href="#">Global Innovation Index 2022: What is the future of innovation-driven growth?</a></p> <p>Data based on an index and provides a ranking of countries by their capacity for and success in innovation. The index looks at innovation from the following lenses: science and innovation investments, technological progress and socioeconomic impact.</p>
Productivity	<p><b>OECD</b> – <a href="#">GDP per hour worked</a></p> <p>Data represents labour productivity measured through GDP per hour worked.</p>
Business growth	<p><b>Statistics Canada</b> – <i>High growth enterprises (growth based on revenue) (Data provided by Statistics Canada Centre for Special Business Projects)</i></p> <p>Data represents the number of high-growth enterprises in Canada measured by revenue. Statistics Canada defines high-growth enterprises as those with average annualized growth greater than 20% per annum over a three-year period.</p>
Diversity in leadership	<p><b>Innovation, Science and Economic Development Canada</b> – <a href="#">Diversity of Boards of Directors and Senior Management of Federal Distributing Corporations – 2021 annual report</a></p> <p>Data based on federal government annual report measuring representation among boards of directors and among senior management of women, visible minorities, Indigenous peoples and persons with disabilities at distributing corporations (public companies) governed by the Canada Business Corporations Act.</p>
Strength of Indigenous economy	<p><b>Statistics Canada</b> – <a href="#">Indigenous Peoples Economic Indicators, Gross Domestic Product by industry, Canada</a></p> <p>Data represents the levels of GDP attributable to Indigenous peoples in Canada, based on a pilot project by Statistics Canada to develop economic indicators measuring the economic contribution of Indigenous peoples to the Canadian economy.</p>
GDP per capita	<p><b>OECD</b> – <a href="#">Gross domestic product (US dollars/capita)</a></p> <p>Data measures standard of living as assessed by dividing GDP by population.</p>
Household debt	<p><b>OECD</b> – <a href="#">Household debt (% of net disposable income)</a></p> <p>Data represents the liabilities of households requiring payments of interest or principal to creditors and is measured as a percentage of net household disposable income.</p>

## Focus area: *Economy, innovation, & entrepreneurship (cont.)*

INDICATOR	INDICATOR DATA SOURCE AND DESCRIPTION
Income inequality	OECD – <a href="#">Income inequality (Gini coefficient)</a> Data measures how income is distributed across a population through the Gini coefficient, ranging between 0 in the case of perfect equality and 1 in the case of perfect inequality, based on a comparison of cumulative proportions of the population against cumulative proportions of income they receive.
Global competitiveness	World Economic Forum – <a href="#">The Global Competitiveness Report 2019</a> Data based on an index focused on key factors of competitiveness, ranking countries around the world through the lens of 12 pillars: institutions, infrastructure, ICT adoption, macro-economic stability, health, skills, product market, labour market, financial system, market size, business dynamism and innovation capability.

## Focus area: *Education, skills & employment*

INDICATOR	INDICATOR DATA SOURCE AND DESCRIPTION
Performance in reading, science and math among 15-year-olds	OECD – <a href="#">Reading performance</a> , <a href="#">Mathematics performance</a> , <a href="#">Science Performance</a> Data based on average of test scores on science, math and literacy for 15-year-olds based on the Programme for International Student Assessment.
Post-secondary attainment	OECD – <a href="#">Population with tertiary education</a> Data represents the percentage of the population with tertiary education ages 25 to 34. Tertiary education is defined as those having completed the highest level of education, including theoretical programs leading to advanced research or high skill professions such as medicine and vocational programs leading to the labour market.
Youth not in employment, education or training (NEET)	OECD – <a href="#">Youth not in employment, education or training (NEET)</a> Data represents the share of young people who are not in employment, education or training (NEET), as a percentage of the total number of young people ages 20 to 24.
Participation in adult learning	OECD – <a href="#">OECD Skills Outlook 2021: Promoting interest and participation in adult learning (Participation in adult learning, by country)</a> Data measures the percentage of 25-to-65 year-olds who reported having participated in at least one form of formal or non-formal adult learning opportunity in the previous 12 months based on the Survey of Adult Skills (PIAAC). Data was reported by OECD in 2021 and is the most recent available data on the subject but is based on information reported in previous editions of PIAAC.
Employment rate	OECD – <a href="#">Employment rate</a> Data represents the percentage of working-age people who are employed.

## Focus area: *Education, skills & employment (cont.)*

INDICATOR	INDICATOR DATA SOURCE AND DESCRIPTION
Incidence of low-wage work	OECD – <a href="#">Wage levels (Low pay)</a> Data measures incidence of low pay, which is the share of full-time workers earning less than two-thirds of median earnings.

## Focus area: *Support for children & families*

INDICATOR	INDICATOR DATA SOURCE AND DESCRIPTION
Child care participation	Statistics Canada – <a href="#">Survey on Early Learning and Child Care Arrangements, 2022</a> Data measures participation in any form of early learning and child care (regulated or unregulated) for children aged 0 to 5 years based on the Survey on Early Learning and Child Care Arrangements. The survey measures participation in some form of child care outside of immediate family, not including babysitting or kindergarten.
Parental leave uptake	Canada Employment Insurance Commission – <a href="#">2020/2021 Employment Insurance Monitoring and Assessment Report</a> Data measures the share of recent mothers with insurable employment who received maternity or parental benefits through EI.
Employment rate for mothers	OECD – <a href="#">Maternal employment rates, 2019 or latest available year</a> Statistics Canada – <a href="#">Employment rate of mothers and fathers, 1976 to 2021</a> Data on Canada's maternal employment rate based on Statistics Canada Labour Force Survey, represents employment rates for mothers aged 20 to 49 years of age. Data with international comparisons on maternal employment based on most recent available data in the OECD Family Database, represents employment rates for women aged 15 to 64 with at least one child.
Child and youth poverty	Statistics Canada – <a href="#">Low income statistics by age, sex and economic family type (Persons under 18 years of age)</a> Data represents percentage of people in low income using Canada's official poverty measure (market basket measure) for persons under the age of 18.
Youth well-being	OECD – <a href="#">PISA 2018 Results: What school life means for students' lives (Percentage of students who reported always feeling sad)</a> Data based on percentage of students 15 years of age who reported always feeling sad based on the Programme for International Student Assessment.

## Focus area: *Infrastructure & environment*

INDICATOR	INDICATOR DATA SOURCE AND DESCRIPTION
Investment in Infrastructure	<p>Statistics Canada – <a href="#">Infrastructure Statistics Hub: Total infrastructure assets</a></p> <p>Statistics Canada – <a href="#">Gross domestic product, expenditure-based, provincial and territorial, annual (x1,000,000) (Gross domestic product, current prices)</a></p> <p>Data represents investment on infrastructure divided by GDP in current prices.</p>
Housing affordability	<p>Statistics Canada – <a href="#">Percentage of households in core housing need by tenure, 2016 and 2021</a></p> <p>Statistics Canada – <a href="#">Core housing need, by tenure including first-time homebuyer and social and affordable housing status</a></p> <p>Data includes proportion of households in core housing need across Canada and proportion of households in core housing need in large urban centres.</p>
Rural broadband coverage	<p>CRTC – <a href="#">Broadband coverage across Canada: Summary of year-end 50/10 unlimited broadband coverage</a></p> <p>Data represents the proportion of households and businesses that have access to and can subscribe to services with download speeds of 50Mbps and upload speeds of 10Mbps with unlimited data transfer.</p>
Population density of metropolitan areas	<p>OECD – <a href="#">Metropolitan areas: Population density of the core area (inhabitants per km2)</a></p> <p>Data measures population density of the core area as inhabitants per square-kilometre based on data in OECD's metropolitan database. 16 Canadian cities are in the OECD database with populations of more than 250,000.</p>
Climate change performance	<p>Climate Change Performance Index – <a href="#">Climate Change Performance Index 2023</a></p> <p>Data based on an index tracking the climate protection performance of 59 countries and the EU. The index is published annually by organizations focused on the environment and equity - Germanwatch, the NewClimate Institute and the Climate Action Network.</p>
Resilience	<p>University of Notre Dame - <a href="#">Notre Dame Global Adaptation Initiative Country Index</a></p> <p>Data based on an index assessing adaptation at a country level on two dimensions: 1) vulnerability to disruptions related to climate change and 2) readiness to improve resilience and take on adaptive actions. The index uses 20 years of data across 45 indicators to rank 191 countries.</p>

# Data selection & interpretation

Century Initiative has aimed to select data sources for indicators based on their ability to facilitate international comparisons as well as to track changes over time.

The general target for Canada was to rank in the top 10 of OECD member countries or another relevant internationally comparative group. In a few cases, the top 5 was chosen in areas in which it was particularly important for Canada to lead. There were also instances where an average among peer countries was determined to be most appropriate. The National Scorecard diverged from this internationally comparative approach when engaging with indicators for which Canada had either national approaches to measuring progress, had set national targets, or for which there was lacking comparative data. For all indicators, data from the latest year publicly available was used, which is predominantly from 2018 or later. In some instances, data with international comparisons lagged data focused only on Canada. As a result, the indicator assessment may focus on less recent data than that which is found in the analysis incorporating more recent national data. (Note: All data was accessed in Fall 2022. In some cases, data may have been updated or adjusted since it was retrieved.) The date format presented in the Scorecard (such as 2021/22) can have multiple meanings depending on how data is reported by sources. This format may refer to an April to March fiscal year or other time periods spanning more than one calendar year depending on the source.

For indicators in the Growing to 100 Million focus area, population growth and immigrant admissions targets are based on demographic modeling conducted by the Conference Board of Canada in Winter 2022, commissioned by Century Initiative. The modelling takes into consideration recent declines in immigration due to Covid-19, as well as projected increases in immigration resulting from the federal government's three-year immigration level targets. Given the long-term nature of these projections, which are useful for goal-setting, assumptions will continue to be reviewed and revised occasionally to reflect current circumstances or unforeseen events.

The 2023 National Scorecard generally leverages publicly available data for the 39 indicators and for analysis surrounding each indicator. Key priorities for indicator data sources were to select data that is reported annually, consistently and can be compared internationally. However, in many cases, it can be challenging to identify regularly updated data, both from Canadian and international sources, to assess topics that were identified as important to Canada's future prosperity. For instance, on some key topics international organizations like the OECD report data on a topic every few years and therefore the most up-

to-date data is not always readily available. There are also important topics on which data availability and reliability must improve. In the National Scorecard, gaps in indicator data are addressed through a deeper analysis which follows the assessment tables.

In most cases, the indicators in the National Scorecard provide a summary-level picture of the status or trend of issues in Canada at an overall population level. Differential experiences and outcomes on the basis of race, gender, Indigenous identity, income, disability status, and/or immigration status or arrival class are often significant and frequently highlight the core issues to address and gaps to close for Canada to progress overall. Equity implications were considered in the analysis of relevant indicators presented in each focus area. Several indicators including Indigenous market strength, employment rate for mothers, and diversity in leadership focus on specific equity dimensions.

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