



National Scorecard on Canada's Growth and Prosperity

2nd Edition
2022





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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Letter from the CEO

If we harboured any lingering doubts that COVID-19 would have a lasting impact on society, the past year has erased them. The pandemic has shown that what we may once have assumed is a given – like Canada's long-term prosperity – can no longer be taken for granted. Today, we live in a world where disruption and uncertainty are the norm, not the exception. And in an unpredictable world it is easy to lose sight of our longer-term objectives. Having a strategy, and a mechanism for measuring our progress against it, is the only way we will achieve the prosperous Canada we all want to leave future generations.

It is our vision of a bigger, bolder Canada that motivates us at the Century Initiative. That is why we are proud to release this second edition of our *National Scorecard on Canada's Growth and Prosperity*. The document you have before you is the product of months of intensive research and analysis, and of the input and perspectives of dozens of experts from a wide range of fields, backgrounds, and experience. We are grateful for their commitment and contributions. United by a recognition of the need for a longer-term plan for Canada's economic growth, and of the role that a growing population plays in achieving that, we have worked together to develop what we hope is viewed by policy- and decision-makers across the country as an invaluable tool for charting our progress as a nation toward that goal.

When we launched the Scorecard last year it was the first of its kind in Canada, pulling together a range of related indicators that reflect Canada's performance on the issues and factors influencing our ability to grow well as a country. From education, skills development, and innovation, to entrepreneurship, support

for children and families, infrastructure and the environment, the Scorecard provides a holistic view of where Canada is leading, keeping pace with global performance indicators, or falling behind.

This year's Scorecard shows that while Canada is making progress in some areas, there is much work to be done in others. For example, after years of advocacy, Canada is finally on the path to implementing a national plan for childcare. However, when we look at the labour market, the Scorecard shows that Canada has one of the highest rates of low-wage work amongst OECD countries, and low-wage workers tend to be racialized. Insights like these can help to guide the national conversation about what Canada needs to do to secure the future we want.

By focusing on the long term, with the right insights, and with a willingness to act and invest proactively, Canada can set itself on a course to fulfill our true potential, improving the quality of life for future generations, and building a more diverse, resilient country. Century Initiative is proud to contribute to that important goal.

I hope you'll join the conversation and let us know what you think.



A handwritten signature in black ink, reading "Lisa Lalande".

Lisa Lalande

Chief Executive Officer, Century Initiative

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Executive summary

Canada is at a crossroads. Our population is aging, our workforce is not growing fast enough, and our fertility rate is dropping, with the population growth rate at its lowest in more than 100 years due to Covid-19.¹ If these trends continue and the number of working-age people declines while the number of people depending on them increases, Canada's economy will suffer. This will mean fewer tax dollars to support essential and high-quality programs and services—including health care, income security programs, and necessary infrastructure. It will mean that key industries will grow more slowly, be less dynamic, and be less competitive. Without a growing population, we will not have the resources—human or economic—to advance the country's social, economic, or environmental goals.

To enhance Canada's economic strength, diversity at home, and influence abroad, we must prioritize population growth. To set us on this path, Century Initiative has set an aspirational goal of achieving a population of 100 million people by 2100.

The path to population growth is about more than solving for demographics: it's a hopeful and expansive vision for Canada founded in the goal of becoming a bigger, bolder country. To achieve this vision, we must “grow well” into the future. Growing well means ensuring that population growth is sustainable and that its benefits are shared by those who already call Canada their home and by those who will join us. This means closing critical gaps in outcomes that have developed for populations based on race, gender,

Indigeneity, and immigration status. This also means working in collaboration with Canada's provinces, territories, cities, towns, and Indigenous peoples. In this way, the specific population number is less important than the need to set an ambitious goal and work toward population growth that builds sustainable, shared prosperity.

Century Initiative's *National Scorecard on Canada's Growth and Prosperity* provides a strategic window into where Canada leads, remains on track, needs to focus attention, or is falling behind on the issues that will influence Canada's future. In doing so, the Scorecard provides a policy and practice road map to build a more prosperous, equitable, diverse, and resilient Canada. If we measure progress, we can manage it, and make the strategic decisions needed to propel Canada forward.

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 of this *National Scorecard* is its focus on Canada's progress on growing well: achieving population growth that builds sustainable, shared prosperity toward the goal of 100 million Canadians by 2100.

Structure

This second edition of Century Initiative's *National Scorecard on Canada's Growth and Prosperity* assesses 38 indicators across six focus areas on whether Canada is leading, on track, in need of attention, or falling behind on each. The indicators in the Scorecard are deeply interconnected, spanning across many traditionally siloed sectors and areas of policymaking and practice. Yet collectively they tell a story, assessing at once the groundwork that we must lay to grow Canada's population into the future and the key signals of whether we are effectively growing and achieving sustainable, shared prosperity on this path.

Legend

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.



The 2022 Scorecard: Key insights

Full Scorecard

A bigger, bolder, more prosperous Canada needs more Canadians, and the social and physical infrastructure required to allow them to live and thrive.

There are bright spots in the 2022 Scorecard: Canada is on track with respect to immigration and education, skills and employment, with high immigration targets and one of the world's strongest education systems. But challenges remain: fertility rates remain low, our infrastructure is aging, our productivity lags peer nations and our supports for families must be strengthened.

- | While Canada saw its slowest population growth in more than a century we are taking action through expanded immigration level targets, for which Century Initiative has advocated. Canada must also focus on increasing healthy life expectancy for all Canadians and on delivering policies that support Canadians' choices on family size.
- | Growing immigration must coincide with significant policy and systems changes to close gaps in educational opportunity, employment and infrastructure frequently experienced by Indigenous peoples.
- | Canada remains a destination for entrepreneurial and skilled immigrants worldwide. Work remains to be done in ensuring we retain the immigrants we attract, particularly in regions suffering from demographic challenges. We have successfully built systems that help us retain international students – this must be improved for other temporary residents.

- | The modern economy rewards innovation and creativity – but Canada lags its global competitors in both productivity and private sector R&D investment.
- | Canada's education system remains one of the best in the world – but supports for lifelong learning could be strengthened, through investment in skill-building, training and career navigation support.
- | The pandemic damaged Canadian mothers' employment rates. This harms women and their families but also the economy overall. Improving supports to families, through policies like a Canada-wide child care system, will better position Canada for long-term prosperity.
- | A Canada where more people live in denser, well-planned cities will be a Canada that is cleaner, greener, more prosperous and with a higher quality of life. At present, housing is becoming increasingly unaffordable for young Canadians and diminishes the country's value proposition to potential newcomers. That must change.
- | The status quo is unsustainable. Now is the time to take intentional and strategic action to set Canada on track for long-term growth and prosperity.

Growing to 100 million

Growing Canada's population means we will have the people, tax base, and economic means to sustain our quality of life and grow our global influence.

- | Canada's commitment to increasing immigration levels, as outlined in the federal immigration levels plan, is an important foundation to build on to help Canada get on track toward the goal of 100 million Canadians by 2100.

- | We must focus on continuing to secure long-term commitments to increasing immigration with policy changes and investments, and we need to ensure all Canadians fully benefit from our growth as a country.
- | The Indigenous population in Canada is increasing at a rate that is more than four times greater than the non-Indigenous population. Growing immigration must coincide with significant policy and systems changes co-developed with Indigenous peoples that ensure that educational, employment, and infrastructure gaps are addressed for Indigenous peoples.
- | While immigration is currently high, population growth overall is low. This is because fertility rates are too low to sustain population growth and Canada's innovative approach to boosting immigration during the pandemic drew primarily from temporary residents already in Canada.
- | As a result of the pandemic, birth rates and life expectancy have both declined this past year. Canada must focus on increasing healthy life expectancy for all Canadians and on delivering policies like child care that support Canadians' choices on family size.

Immigration

Immigration is a central way for Canada to increase its population, meet labour market needs, enhance innovation, and fulfill family reunification and humanitarian objectives.

- | A majority of Canadians have confidence in Canada's immigration system. This has meant that public support for immigration has remained high, even during the crisis of the pandemic.
- | Canada's international reputation is among the best in the world, which enhances our ability to attract talent. It has given us a running start in the global competition for talent but cannot be taken for granted.

- | Immigrants' well-being and Canadians' continued support for ambitious immigration levels are contingent on successful integration of immigrants from all immigration classes: economic, family, and refugee and protected persons classes.
- | Action is needed to ensure that Canada's economy and society are fully leveraging the depth of immigrants' talent and skills. There is a persistent income gap for immigrants. Many newcomers continue to face barriers such as discrimination and a lack of recognition of foreign credentials.
- | Many regions, particularly outside of Canada's large population centres, need increased immigration to bolster aging populations but are challenged to attract and retain immigrants. Canada's globally unique approach to local community involvement in immigration, settlement and integration can play a strong role in addressing the challenge.
- | Canada has successfully built mechanisms for international students to remain in Canada. We must improve pathways to immigration for other temporary residents to retain needed talent and skills.
- | Deep backlogs in Canada's immigration system have also developed during the pandemic, leaving many frustrated and waiting overseas. Recent investments from the federal government will help to address these challenges so that newcomers can fulfill their vision of making Canada their home.

Economy, innovation & entrepreneurship

A high-performing economy, thriving innovation system and strong entrepreneurship landscape are essential building blocks for Canada to grow its population and build sustainable, shared prosperity.

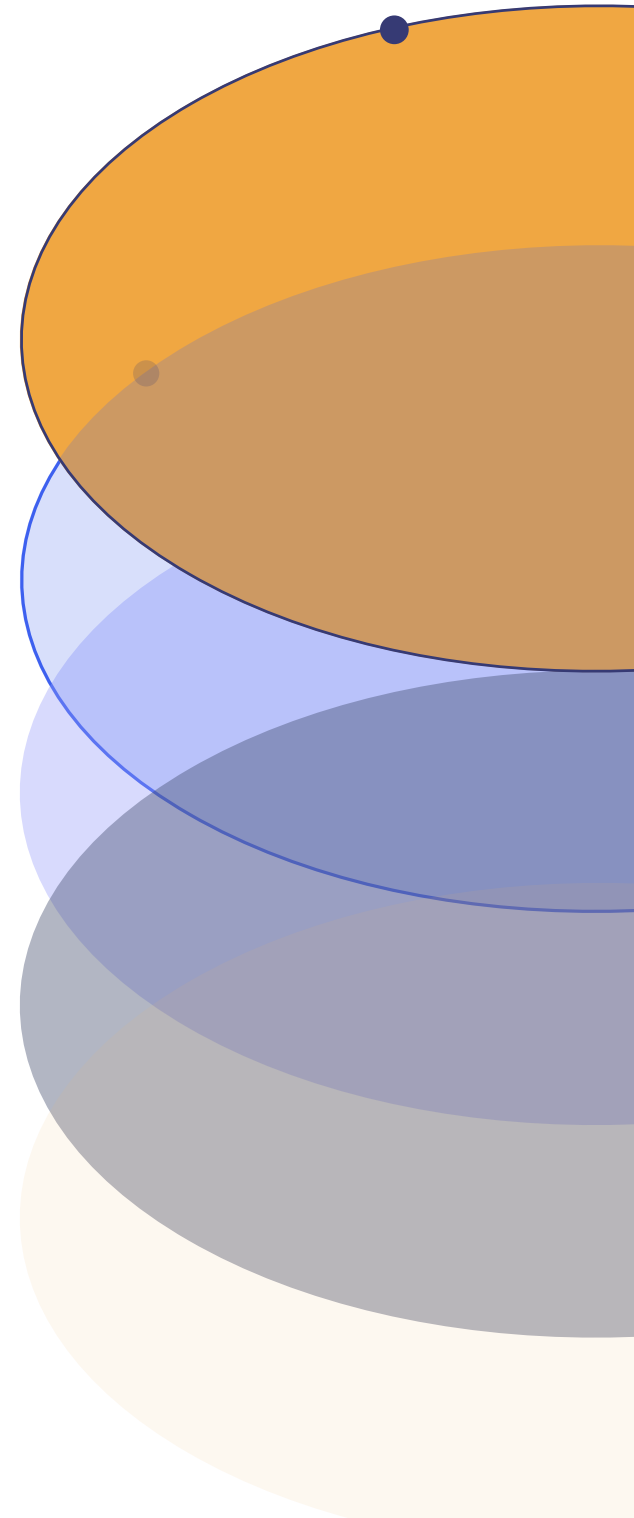
- | The direction of the economy is uncertain given persistent pandemic-related challenges, such as supply chain issues, inflation, impacts of climate-related events, and business' ability to find needed workers.

- | Despite decades of discussion, the country continues to have difficulty making progress on key innovation and entrepreneurship related metrics such as private sector investments in R&D and the scaling of small and medium-sized firms.
- | Productivity continues to grow slowly in Canada, despite short-term pandemic improvements. High rates of household debt, income inequality and the lack of diverse private sector leadership limit future economic growth and productivity.
- | Building upon emerging Indigenous economic strength would contribute to growth for Indigenous communities, have transformational effects on Canada's economy and help to move Canada toward a path of reconciliation.
- | There are many levers that Canada must activate to improve economic performance. These include investing in infrastructure and technology, growing our talent pool through immigration and skills development, and closing education and opportunity gaps.

Education, skills & employment

Canada's future prosperity and ability to grow well into the future depend on maintaining high performing education and training systems, supporting lifelong learning as technology changes, and enhancing the quality of employment in a rapidly evolving economy.

- | Canada remains a global leader in the academic performance of high school students and the proportion of the population with a postsecondary education. These achievements attract people, high skilled and high paid jobs, and investment to Canada and they help people participate in society and the economy.
- | To continue leading on education, we need to close gaps in education outcomes for Indigenous students and reduce the number of "NEET youth." The number of youth not in employment, education, or training (NEET) has been exacerbated by the



pandemic, moving Century Initiative's assessment of the NEET youth indicator in this year's Scorecard to "needs attention" from last year's "on track".

- | The pandemic has the potential to affect the long-term learning and employment pathways for many youth and particularly those already facing barriers such as immigrants learning a new language. This is a critical issue to monitor and address.
- | We need greater employer investment in skill-building and training and greater access to life-long learning and career navigation support for everyone, including for internationally educated and trained immigrants.
- | The labour market is undergoing many changes that impact job quality including digitization, increased demand for care workers, and increasing precarity. Policy and practice must adapt to these changes to better support workers across the labour market.

Support for children & families

Strong support systems for children and families are a strategic asset for Canada and a necessary pillar for ensuring sustainable population growth and Canada's long-term prosperity.

- | The pandemic substantially affected the well-being and support structures for children and families. This experience was compounded for groups that already face barriers such as women, immigrants, Indigenous peoples, Black Canadians, and racialized Canadians.
- | Access to child care became challenging, pushing many parents— and mothers of young children in particular—out of the workforce.
- | The historic drive to create a Canada-wide early learning and child care system in 2021 has moved Century Initiative's child care indicator assessment in this year's Scorecard to "needs attention" from last year's "falling behind." Maintaining momentum

to implement the new system will help fuel Canada's recovery from Covid-19 and build long-term prosperity.

- | Canada still has work to do to build a system of parental leave that connects seamlessly with child care. This is necessary to provide certainty to all parents that leave and care needs will both be met.
- | Canada needs to continue making progress in reducing child poverty and taking action to address youth well-being to ensure that this country remains an attractive place to stay and raise a family.
- | Improving support for children and families will help build a positive future for children, enable more labour force participation, create jobs, improve quality of life for families, help attract and retain newcomers, and support Canadians' choices on family size.

Infrastructure & environment

Canada has consistently underspent relative to its infrastructure needs even before considering large-scale population growth. The country's infrastructure is aging and in need of repair.

- | Canada has been struggling with long-running underinvestment in infrastructure, as municipalities own much of the country's infrastructure but lack financing and revenue tools to fund new infrastructure and to maintain existing infrastructure. Recent initiatives, including the federal government's introduction of permanent public transit funding, are signs of positive change.
- | The pandemic has further exacerbated housing challenges as greater proportions of Canadians reported problems with paying the rent or mortgage or accessing home ownership, moving Century Initiative's assessment in this year's Scorecard to "falling behind" from last year's "needs attention".

Costs are aggravated by high demand for housing in Canada's highly productive urban centres, coupled with a lack of adequate supply.

- | A Canada growing in population requires denser cities that are well-planned to improve urban quality of life, more population growth outside large cities, and an expansion of family-oriented and affordable housing supply.
- | While important progress is being made, there are gaps in rural and Indigenous populations' access to infrastructure, which includes broadband internet with sufficient speed, quality and affordability. These gaps place many at an economic and social disadvantage and reduce the attractiveness of smaller communities.
- | Significant new investments are needed to transition Canada to a net-zero economy and to protect key infrastructure from climate-related risks. As highlighted by the detrimental impacts of flooding, wildfires and heat waves in 2021, Canada needs to ensure core infrastructure resilience.

The way forward

In many senses, the last year has been a stress test of Canada's resilience in the face of a storm. The Covid-19 pandemic has transformed Canada's economy, labour market, and living standards and introduced consistent uncertainty and disruption into the lives of Canadians. The realities of climate change arrived at the doorstep of more Canadians than ever, and the country reckoned again with the unfinished path toward reconciliation with Indigenous peoples following tragic discoveries at former residential schools.

At the same time, notable victories have been achieved: after generations of advocacy, Canada is on a path to implementation of a national plan for child care, there have been some improvements on infrastructure investment in areas such as public transit, and critically, Canada

has chosen during a time of crises not to turn inward, but to commit to significant increases in immigration levels in the most recent federal immigration levels plan.

As we continue to grapple with current challenges and build on victories, we must focus on achieving progress toward the goal of growing well. The Scorecard serves as a tool to mobilize long-term thinking and planning across many dimensions that will support us on the path. It can serve to spur action from all sectors, including governments, the business sector, the non-profit sector and labour, the academic and research community, and all Canadians.



Introduction: The National Scorecard

This is Century Initiative's second annual *National Scorecard on Canada's Growth and Prosperity*. The Scorecard is designed to measure Canada's progress on achieving population growth that builds sustainable, shared prosperity toward the goal of 100 million Canadians by 2100. The Scorecard provides a strategic window into where we are leading, on track, in need of attention, or falling behind on the issues and factors that will influence Canada's ability to become bigger, bolder, and grow well into the future. In doing so, it provides a policy and practice road map to build a more prosperous, equitable, diverse, and resilient Canada.

The Scorecard assesses 38 indicators across six focus areas that were identified as critical for Canada to achieve these goals as a country: 1) Growing to 100 million, 2) Immigration, 3) Economy, Innovation & Entrepreneurship, 4) Education, Skills & Employment, 5) Support for Children & Families, and 6) Infrastructure & Environment.

Leveraging these focus areas, the *National Scorecard* has the following objectives:

- | Set a bold new economic and social vision for the country and rally a diverse group of Canadian leaders and organizations towards the vision of growing well: building sustainable, shared prosperity through population growth.
- | Identify key indicators of Canada's progress on this path to becoming a bigger, bolder country linked to Century Initiative's focus areas.
- | Leverage available data to set targets, track and monitor Canada's performance.
- | Direct Century Initiative's research, education, advocacy and convening efforts.
- | Inform policy and practice.

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. If we measure our progress, we can manage it, and make the strategic decisions we need to propel Canada forward.

The Scorecard's unique role

In Canada and internationally, there are many scorecards, report cards, and other assessment tools that explore economic, social, and environmental progress across multiple dimensions. Century Initiative's *National Scorecard* has been designed to be used collaboratively by different actors and sectors. This Scorecard should be seen as complementary – it was designed to both inform and be informed by other assessment tools, including those launched by the Senate Prosperity Action Group, Coalition for a Better Future, Conference Board of Canada, National Indigenous Economic Development Board, Canadian Index of Wellbeing, and other organizations.

The unique value proposition of Century Initiative's *National Scorecard on Canada's Growth and Prosperity* is its focus on Canada's progress toward growing well. Growing well means ensuring that population growth is sustainable and that the benefits of this growth are shared by everyone who calls Canada their home – those already here and for those who will join us. The Scorecard has been designed to help key actors identify related challenges and connected problems, and to work together to drive change. CI encourages others to utilize the Scorecard as a shared tool to drive systems change with a focus on growing well into the future.

How to use this Scorecard

All Canadians should be at the table to build a better, more prosperous, inclusive and sustainable future. Making this Scorecard public and accessible allows more people from across sectors to join this conversation. Different stakeholders can use the Scorecard in a range of ways:

- | **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 the Scorecard 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 community can also leverage the Scorecard to mobilize existing research that proposes solutions to challenges the Scorecard identifies.
- | **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

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.

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." Each indicator is accompanied by additional analysis below the indicator tables. Where relevant and possible, this analysis includes how the indicator affects key population groups such as women, Indigenous peoples, racialized groups and immigrants. Where indicators are aligned with the UN's Sustainable Development Goals, this is highlighted.

Indicator selection and target setting

Century Initiative reviewed and further improved its approach to selecting indicators for this second edition of the *National Scorecard on Canada's Growth and Prosperity* with feedback from its Scorecard Advisory Group and ongoing advice of its Expert Panel. As these indicators are assessed in the years ahead, the Scorecard will serve as a crucial long-term barometer with deepened monitoring over time.

Specific indicators included in the 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 and auditable 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 us about the state of infrastructure. In these instances, a more fulsome picture of the issue is presented in the analysis,

beyond what can be assessed through one high-level indicator. Appendix A contains further information and sourcing for each indicator and Appendix B contains more details on methodology. In most cases, each indicator is intended to open up a conversation, not be the final word.

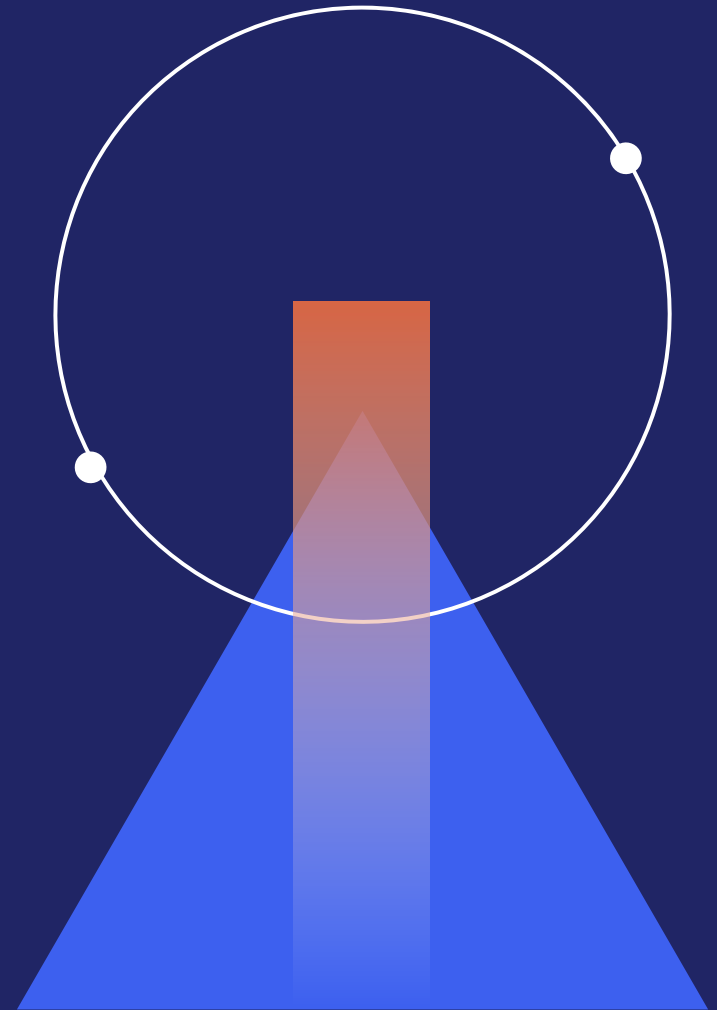
Text Box 1: Data availability

To enable long-term thinking and planning, we must enhance Canada's data-driven capacity to understand the trajectory of the country across multiple dimensions. Some progress has been made to strengthen data in Canada in recent years, for example, with recently improved data availability on infrastructure through the Core Public Infrastructure Survey and innovative crowd-sourcing methods by Statistics Canada during the pandemic. However, there is a need for deeper investment and collaboration between governments, business, academia and civil society on reporting robust, timely and disaggregated data. Statistics Canada's new Disaggregated Data Action Plan is an important step forward.²

Growing to 100 million

At a glance

- | Canada saw its slowest **population growth** in more than a century due to the pandemic
- | **Immigrant admissions** were heavily impacted by the pandemic but are recovering well
- | The **fertility rate** was already declining and fell sharply during the pandemic
- | **Life expectancy** is generally on the rise but declined during the pandemic





The population link

Canada is at a crossroads. In the next 15 years, seniors are projected to make up between 20% and 25% of Canada's population, with Statistics Canada estimating that by 2068, the number of dependents for every 100 Canadians of working-age could be close to 70.³ At the same time, Canada's fertility rate is dropping, with the population growth rate at its lowest in over 100 years due to Covid-19.⁴ These statistics point to a future in which Canada simply does not have the human resources, the tax base or the economic means to sustain the quality of life Canadians expect or to advance the country's broader social, environmental and economic ambitions.

Immigration can improve the ratio of those who are working-age to retirement age in Canada, which is critical to ensuring that we have the workforce to meet labour needs and the resulting tax base to support our social programs and investments. Recognizing the problem of shifting demographics, Century Initiative has set a target of 100 million people in Canada by the year 2100. The specific number is less important than the need to set a bold target and work toward it.⁵ Canada's long-term success depends on the ability to both scale the population and ensure that Canada "grows well" through infrastructure development, climate protection, and social and economic programs that support everyone to participate in the country's society and economy. This is an ambitious but vital national challenge, one that — if successfully met — can make Canada a more vibrant society and economy and an example to the world.

Current context

The pandemic has created significant disruptions to many aspects of the lives of Canadians, including to the factors that contribute to population growth. Almost 1 in 5 Canadians (18%) aged 25 to 44 reported that the pandemic made them want to delay plans to have children and about 14% wanted fewer children.⁶ However, the pandemic led to positive developments as well. After an initial shock, immigration levels rebounded and hit new highs in 2021. Though the lion's share of those immigrants were people already residing in Canada as temporary residents, the openness and commitment shown to boosting immigration levels will continue to reap deep benefits if sustained. In early 2022, the federal government announced an ambitious increase to immigration level targets over the next three years. It is vital to recognize that across Canada, the Indigenous population is growing at a faster rate than the population overall and becoming an increasingly critical portion of Canada's working-age population growth.

Indicators



Why it matters



Where
Canada is at



Target



Direction Canada is trending

Population growth

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.

Canada's average annual population growth rate was **1.09% over the last 10 years.**

Canada's population needs to grow at an average annual rate of **1.28% over the next 10 years** to reach 100 million by 2100.

Needs attention

Canada's annual population growth has been increasing in recent years primarily because of immigrants but not fast enough to meet the target of achieving 100 million Canadians by 2100. The pandemic had a detrimental impact on population growth in 2020 due to public health restrictions impacting the ability of those living abroad to come to Canada. A significant decline in fertility was also a key factor in slowed population growth. The Indigenous population is younger on average than the rest of Canada, making up an increasing portion of total population growth.

Immigrant admissions

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

There were **226,203 immigrants** admitted to Canada in 2020/21. Annual immigration represented an average **0.76% of Canada's population over the last 5 years.**

Assuming Canada meets the targets in its current Immigration Levels Plan for 2022 to 2024 and assuming moderate increases from 2025 to 2027, immigration should be held at a rate of **1.17% of Canada's population** starting in 2027/28 to reach 100 million by 2100.

On track

Canada's immigration levels have generally grown in recent years but significantly declined at the outset of the pandemic. In 2021, Canada achieved and surpassed its immigration target of 401,000 new permanent residents by prioritizing the transition of temporary residents already in Canada to permanent resident status. Immigration is set to increase with the federal government's ambitious immigration plans. As a result, Canada is potentially on track to reach 100 million, contingent on future decisions for continued steady expansion of immigration levels.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Fertility rate

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.

A fertility rate of **1.40 children per woman** in 2020.

A fertility rate of **1.60 children per woman** (the current OECD average), with growth toward that level over the next 10 years, could help support reaching 100 million population by 2100.

Falling behind

Canada's fertility rate has generally been on the decline in recent years. Impacts associated with the pandemic further accelerated the decline, with Canada's fertility rate falling from 1.47 in 2019 to 1.40 in 2020.

Life expectancy

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

Canada **ranked 15th out of 38 OECD countries** for its life expectancy in 2019 (tied with three other countries).
Canada's **life expectancy was 82.1 years** in 2019.

Top 10 of OECD countries for life expectancy.
Threshold: France was 10th in the OECD in 2019 with a **life expectancy of 82.9 years**.

Needs attention

Life expectancy in Canada was growing before the pandemic, including in 2019, but at a slower rate compared to its peers. However, in 2020, life expectancy declined, according to Statistics Canada, with older Canadians experiencing the highest mortality rates amid the pandemic. Low-income Canadians, Indigenous peoples and other groups facing barriers typically experience lower rates of life expectancy.

Analysis

Text box 2: Modelling population growth

Since 2016, Century Initiative has commissioned The Conference Board of Canada to develop population projection scenarios on immigration levels needed to grow to a population of 100 million by 2100. The modelling considers a variety of factors, including immigration, in/out migration, fertility, birth rates, and death rates. The modelling considers changes in immigration due to Covid-19, as well as projected increases in immigration resulting from the federal government's 2022 to 2024 immigration level targets. These long-term projections will be updated regularly. Indicators and targets in this focus area are based on this modelling.

Canada saw its slowest *population growth* in more than a century due to the pandemic

The world is changing at a rapid pace and Canada must be proactive about its future as the population ages and Canadians have fewer children. Based on Conference Board of Canada modelling, Canada's population must grow by an average of 1.28% annually throughout the 2020s (and by an average of 1.21% across all decades until 2100) to reach 100 million people by the year 2100. Over the last 10 years, Canada has fallen short of that target, with population growth of 1.09% between 2011 and 2020.

The pandemic had a negative impact on population growth in 2020-21, with only 0.5% growth. This represents half the level of growth Canada experienced in the previous year and the slowest growth in more than a century.⁷ Slow population growth was largely due to the impact of border restrictions reducing immigration flows from individuals who did not already live in Canada. Population growth was also impacted by increases in the number of deaths related to Covid-19 as well as a decline in births. Nonetheless, even with slower population growth in 2020-21, Canada still ranked in the top 10 OECD countries and above the OECD average.⁸

There was a positive recovery of international migration and population growth in 2021 as travel restrictions loosened.⁹ However, significant increases in population growth in future years will be needed. This goal can be pursued with ambitious policy decisions to continue increasing immigration and potentially increasing fertility. Increased immigration level targets in the most recent federal immigration levels plan are a strong step in this direction.

Notably, trends in population aging and slow population growth do not hold true for all groups in Canada. The Indigenous population is younger on average than the rest of Canada's population by almost a decade and is growing at a four times faster rate.¹⁰ Recent population projections indicate that the Indigenous population in Canada will increase significantly in coming decades, from 5% up to 6.8% in 2041 in a high-growth scenario.¹¹

As Canada grows its population through immigration, it must learn from the past and recognize the assets and strengths of Indigenous peoples. Growing immigration must coincide with significant policy and systems changes co-developed with Indigenous peoples that increase educational and employment opportunities and address socioeconomic and infrastructure gaps for Indigenous communities. Respectful and meaningful engagement with Indigenous peoples is essential. This will ensure all are supported to contribute to and experience the benefits of a growing Canada. Indigenous communities possess a strong capacity to drive economic development based on unique assets, approaches and worldviews – and many are pursuing this path with transformational potential for the country at large.¹² Canada's approaches must be informed by the Truth and Reconciliation Commission of Canada's 94 Calls to Action which provide a blueprint for all Canadians to understand the past and build a future that works for everyone.¹³ Education on Canada's history both for newcomers and existing Canadians is critical for our future.

Immigrant admissions were heavily impacted by the pandemic but are recovering well

Immigration is the key pathway for Canada's population to grow and is critical to driving Canada's long-term economic prosperity, diversity, resilience and global influence. Conference Board of Canada economic modelling conducted in partnership with Century Initiative has demonstrated that building upon the high immigration levels that began during the pandemic

would increase GDP by \$67 billion and federal revenues by \$15.5 billion annually by 2040, when compared to returning to pre-Covid immigration levels.¹⁴ The most recent federal immigration levels plan for 2022 to 2024 surpasses previously set immigration level targets which suggests the economic benefits would grow as well.

In 2020-21, immigrant admissions to Canada fell to 226,203 from more than 300,000 before the pandemic.¹⁵ The decrease was largely due to pandemic travel restrictions. The number of temporary residents also declined by 42,884 in 2020/21 after steady increases in previous years.

However, there was a strong recovery in immigrant admissions in 2021 driven by a shift in processing priorities to new and existing pathways to permanent residence for temporary residents already in Canada. In 2021, the federal government announced a new transition program designed to help Canada meet its immigration targets, that included a plan to grant permanent residency to 90,000 temporary workers in essential sectors and international students already in Canada.¹⁶ It also prioritized applications through its existing Canadian Experience Class (CEC) for temporary residents in Canada who attained qualifying work experience in the country.

According to the federal government's immigration levels plan for 2021 to 2023, Canada's target was to admit 401,000 new immigrants in 2021. This target was achieved and surpassed, representing the highest number of newcomers to arrive in Canada in any year in Canada's history.¹⁷ However, Canada has previously observed higher levels of immigrant admissions proportional to the

population. In 1913, immigration hit a high with the arrival of more than 400,000 newcomers to Canada,¹⁸ which was more than 5% of the population at the time. The current rate is around 1% of the population. Canada's immigration levels targets for 2022 to 2024, announced in February 2022, are for immigrant admission levels of 431,645 in 2022, 447,055 in 2023, and 451,000 in 2024.¹⁹ These admission levels represent an increase of about five percentage points compared to the previous federal immigration levels plan.²⁰ They align to Century Initiative's advocacy for immigration levels that will set Canada on a course of long-term population growth.

There are three major admission categories for immigrants arriving in Canada: economic class, family class, and refugees and protected persons class. In its new immigration levels plan, Canada has targeted close to 56% of admissions in the economic class in 2022, with a focus on selecting applicants to meet current and future economic needs. This represents a balanced approach from which Canada can continue to build to meet economic needs and fulfill Canada's family reunification and humanitarian commitments.

In the years ahead, global trends will shape Canada's immigration priorities. These trends include global competition for top talent, growing numbers of refugees that include climate refugees and an increase in displaced persons. Canada is currently responding to these trends by experimenting with pathways to accept skilled refugees as economic immigrants under the Economic Mobility Pathways Pilot.

Text box 3: Covid-19 and administrative challenges in the immigration system

The Covid-19 pandemic resulted in significant administrative challenges in Canada's immigration system. The number of temporary residents in Canada who transitioned to permanent residence substantially increased. However, prospective immigrants who applied from abroad, or who had their applications approved but were waiting to travel to Canada, experienced challenging and disappointing delays. This was particularly true for those seeking to reunite with spouses and family members. The result was an unprecedented growth in the number of pending applications within IRCC systems. As of October 2021, there was a backlog of 1.8 million applications for permanent residence, temporary residence, and citizenship combined.²¹ The federal government has committed to a project of digitalization and reforms focused on bottlenecks to speed processing, which includes \$85 million in funding.²² However, it will be important to stay aware that challenges that developed during the pandemic will take time to address.²³

The **fertility rate** was already declining and fell sharply during the pandemic

Fertility rates, which represent the average number of children per woman, are a key population growth indicator. In most OECD countries, fertility rates have experienced significant declines in recent years and are well below the rates needed for population replacement of 2.1 children per woman.²⁴ In 2020, Canada's fertility rate hit a record low of 1.40 births per woman. The pandemic was a factor in the sharp decline between 2019 and 2020 – dropping from 1.47 to 1.40 within a year. Statistics Canada noted that the decline represented the largest year-over-year decrease in the number of births since 2006. It identified social and economic factors such as job losses and school closures as among the reasons for the notable decrease in births.²⁵

Before the pandemic, Canada's fertility rate was already on the decline. For instance, five years earlier in 2016, the country's fertility rate was 1.59.²⁶ It has been projected that fertility rates in high-income countries are unlikely to significantly rebound in future years amid recovery from the pandemic.²⁷

Improved policies to support families and children, such as child care and parental leave, could have a moderate impact on Canada's fertility rate, supporting Canadians' choices on family size, while fostering significant social and economic benefits.²⁸ As one example, a universal child care system could increase annual GDP by \$63 billion to \$107 billion per year.²⁹ The urgency for change in these areas is heightened by the pressure that Covid-19 has placed on Canadian parents and Canadians wishing to have children. While Canada's fertility rate overall is on a steady decline, it is higher within Indigenous

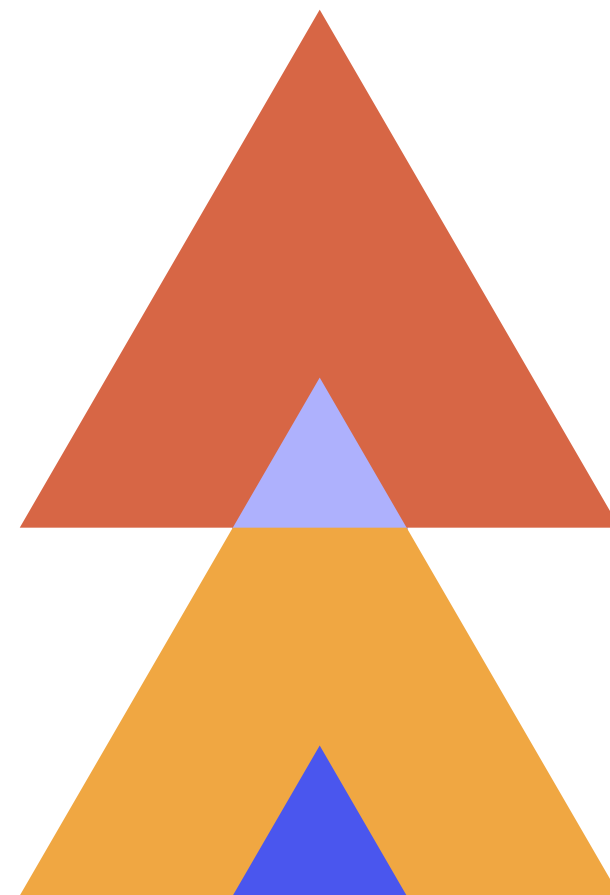
communities. In 2016, the fertility rate for Indigenous peoples in Canada was 1.9 births per woman.³⁰ This highlights the critical importance of supporting Indigenous parents and Indigenous youth to succeed and prosper.

Life expectancy is generally on the rise but declined during the pandemic

Canada's life expectancy, which is defined as how long a newborn can expect to live on average if current death rates do not change, is closely connected to living standards, quality of life and health outcomes. Life expectancy in Canada has steadily increased over the past 20 years (from 78.7 years in 1999 to 82.1 years in 2019).³¹ However, Canada hasn't ranked in the top 10 OECD countries in more than 15 years. Life expectancy in Canada was higher for women (84.2 years) than for men (80.0 years) in 2019. Healthy life expectancy – which represents the number of healthy years likely from birth – has not kept pace with increases in life expectancy. Canada's healthy life expectancy at birth was 71 years in 2019.³²

The pandemic has led to a reversal of the previous steady increase in overall life expectancy. Statistics Canada estimated that Covid-19 contributed to a reduction in life expectancy of 0.41 years in 2020.³³ Life expectancy had typically grown by 0.13 years on average over the past decade. The pandemic also significantly worsened the ongoing opioid crisis, which already had a negative impact of Canada's life expectancy before 2020.³⁴ The decline in life expectancy linked to Covid-19 also varied considerably by province, ranging from a difference of 0.05 years (in Nova Scotia) to 0.84 years (in Québec).

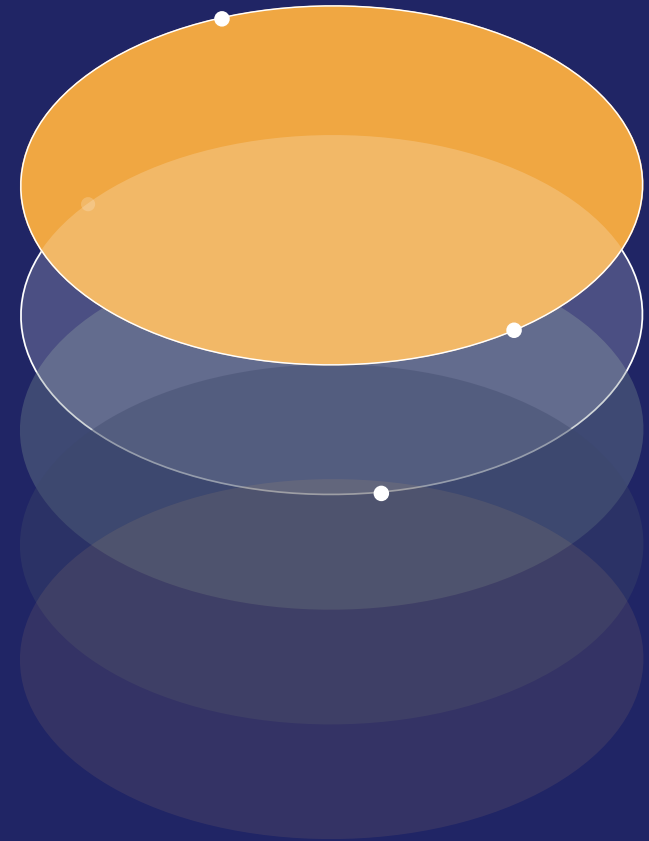
Life expectancy is an indicator of underlying living standards, lifestyle, education systems, and health services. Life expectancy in Canada is not equal for all Canadians, reflecting underlying gaps in the social determinants of health. For example, there is a well-documented link between life expectancy and income.³⁵ One study found that high-earning men can be expected to live eight years longer than low-earning men, while another found a 21-year life expectancy gap across neighbourhoods that was influenced by poverty and low-income.³⁶ Additionally, life expectancy for Indigenous peoples in Canada is approximately 15 years shorter than for non-Indigenous people – a critical gap that must be addressed through multidimensional action to support Indigenous communities.³⁷



Immigration

At a glance

- | Canada's strong **global reputation** is a strategic advantage
- | There is strong **support for immigration** among the Canadian public
- | **Regional retention of immigrants** has slightly declined
- | **Migrant integration policy** in Canada is comprehensive but barriers to integration remain
- | Progress on the **immigrant income gap** has stalled
- | Opportunities for **international students to transition to permanent residence** have grown significantly





The population link

Immigration is one of the most important ways for Canada to grow its population and help to secure its long-term prosperity, resilience, global influence, and quality of life now and in the years ahead. In order to be successful, Canada's immigration system must be effective in attracting and selecting immigrants who will help meet the country's economic needs, while fulfilling Canada's family reunification and humanitarian commitments. Immigrants must be supported to succeed in Canada and fully contribute to the country's society and economy. To ensure this integration is inclusive of all immigrants, all sectors will have to work together to remove barriers to opportunity such as discrimination and lack of credential recognition.

Current context

As the pandemic entered its second year, immigration levels rebounded to new highs. With continued travel restrictions, these increases were driven primarily by prioritizing the transition of temporary residents already in Canada to permanent residence. This included the creation of new time-limited pathways to permanent residence for 90,000 international students and essential workers in the health and non-health sectors, as well as francophones in all these categories.³⁸ September 2021 saw a record 45,000 new permanent residents welcomed.³⁹

By contrast, there was a record low intake of new permanent residents at the start of the pandemic, with only 4,000 landing in April 2020.⁴⁰ In February 2022, the Government of Canada set a target of admitting more than 1.3 million immigrants over the course of three years starting in 2022.⁴¹ Canada achieved and surpassed its 2021 target of 401,000 admissions. While immigration levels reached new highs through temporary-to-permanent resident transitions in 2021, administrative and travel challenges left many prospective immigrants outside of Canada waiting for applications to be assessed, or not being able to enter Canada even if approved. The federal government is planning to address these deep challenges through a project of digitization and reforms, though progress will take time (see text box 3 above).

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Global reputation

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

Canada **ranked 2nd** in the 2021 Nation Brand Index.

Top 5 countries in Nation Brand Index.

Leading

Canada is consistently among the top countries with a strong national brand, with opinion of Canada's citizens and trust in its government being particularly positive. While Canada has a solid global reputation and is considered highly attractive to top talent, the country cannot afford complacency, particularly as key immigration source countries such as China and India seek to attract talent back.

Public support for immigration

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

In 2021, **65%** of Canadians disagreed with the view that there is too much immigration in Canada.

Trending toward **increased support** for immigration levels.

On track

In recent years there has been a consistent overall increase in Canadians rejecting the view that immigration levels in Canada are too high.

Regional retention of immigrants

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

The average retention rate for immigrants who arrived five years earlier was **49%** in 2019 in the five provinces with the lowest retention rates.

More even retention across Canada for immigrants five years after they arrive, with lowest retention rate provinces increasing rates to better align to the current (2019) average for all provinces of **67%**.

Needs attention

While national level retention is high, there was a small decline in retention among the five provinces with the lowest retention rates in Canada in 2019 and significant variation remained across the country.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Migrant integration policy

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.

Canada **ranked 4th** out of 52 countries in the 2020 edition of the Migrant Integration Policy Index.

Top 5 countries on Gallup's Migrant Acceptance Index.

On track

Canada ranks among the top countries with comprehensive systems of support for immigrants. However, there are still gaps to be addressed to ensure effective integration support for newcomers to Canada, such as challenges with the ability for temporary migrant workers to access settlement services and obtain permanent residence.

Immigrant income gap

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.

There was a **difference of \$7,300** in 2018 in the total median income between immigrants five years after arrival and for all Canadians (\$29,800 compared to \$37,100).

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

Needs attention

There has been limited progress in closing the income gap in recent years. There is typically variation in income levels based on gender, race, and immigrant admission status, with lack of foreign credential and experience recognition and discrimination leading to bigger barriers and a larger income gap for many.

International students transitioning to permanent residence

International students, along with other temporary residents, are important contributors to Canada's growth and prosperity. International students are a key source for increased permanent immigration to help meet labour market demands.

Canada admitted **40,920 permanent residents** in 2020 who had previously held a study permit.

Trending toward **increasing admissions** of permanent residents who held study permits in the past.

On track

The number of new permanent residents who previously held study permits significantly increased in the first half of 2021 to make up for sharp declines in 2020 due to the pandemic.



Analysis

Canada's strong *global reputation* is a strategic advantage

A strong global reputation can help support investment, bolster global influence and help Canada compete against the many countries vying to attract talented immigrants.⁴² Fortunately, Canada has a consistently strong global reputation. Canada ranked 2nd out of 60 countries in 2021, according to the Anholt-Ipsos Nation Brands Index (NBI).⁴³ The NBI provides insights on country reputations across a series of dimensions (see Appendix A for more information). Canada's ranking in 2021 is its highest ranking since the NBI's inception in 2008.

According to the NBI, Canada had a strong reputation in the following three dimensions in 2021:

- | **Governance:** Public opinion on government competency and fairness, and commitment to global issues;
- | **People:** Views on the population's reputation for openness, friendliness and tolerance; and
- | **Immigration and investment:** The ability to attract people to live, work and study in the country, and perceptions on quality of life and business environment.

Canada's brand was identified to be not as strong in other areas:

- | **Exports:** Views of products and services from a country and the extent to which consumers seek or avoid products from that country; and
- | **Tourism:** Levels of interest in visiting a country and the draw of tourist attractions.

Canada's brand is particularly weak in relation to its contribution to science and technology, according to the NBI.⁴⁴ This and the other identified areas of weakness can be supported and strengthened by robust immigration strategies and collaboration between business, academic institutions, and government.

A separate survey on country reputations has highlighted threats to Canada's reputation such as declining confidence that Canada can compete at a global scale.⁴⁵ Focus on these issues is important as key immigrant source countries for Canada, such as India and China, are working to attract back top talent from abroad.⁴⁶

There is strong *support for immigration* among the Canadian public

A welcoming environment for immigrants is critical for Canada to attract and retain newcomers. Strong public support for immigration is an essential condition for Canada to strategically grow its immigration levels over time. A country which is accepting of high immigration levels will also be more prepared to integrate immigrants, and to support immigrant success, retention, economic contribution, and quality of life.

In 2021, public support for immigration in Canada remained strong, even amid the turmoil of the pandemic. The annual Environics Institute Focus Canada survey, with which Century Initiative is a research partner, found that 65% of respondents disagreed with the view that immigration levels were too high.⁴⁷ The survey also found that a majority of Canadians (57%) agreed that Canada needs more

immigration to increase its population and that Canadians are almost four times as likely to say that immigration is making the country a better place than a worse one. Over half of Canadians supported the government's plan to resettle Afghan refugees.

International survey research conducted by Gallup has also found that Canada ranks at the top of the world in its acceptance of migrants.⁴⁸ Even before the pandemic began, Canadians were more accepting of newcomers at a time when much of the rest of the world was growing less accepting.⁴⁹

While Canada has demonstrated strong support for immigration, there is still more work to be done. Support varies across the country, for instance, with the highest levels of support in Atlantic Canada and lowest levels of support in the Prairies.⁵⁰ Additionally, though in the minority, there were respondents to the Focus Canada survey who believe that immigrants created a drain on public finances, took jobs from other Canadians or created security risks. These views emphasize the importance of continuing to build the public case for the benefits of immigration.

Regional retention of immigrants has slightly declined

Regional retention of immigrants is a key way to help Canada's population grow in a way that builds prosperity across the country and not just in the largest urban centres. Smaller cities and less-populated regions, need people to live, work, and contribute to their economic success. This is particularly true for those regions where need for workforce growth is higher due to population aging and declining fertility, Ensuring immigrants who arrive are interested in staying can help these regions thrive.

There is significant variability in retention across the country. In 2019, the average retention rate for immigrants who arrived five years earlier was 48.7% in the provinces with the five lowest retention rates.⁵¹ In comparison, the average in the provinces with the five highest retention rates was 85%. The provinces with the lowest retention rates were: Prince Edward Island (28.1%), New Brunswick (42.4%), Newfoundland and Labrador (47%), Nova Scotia (62.8%) and Saskatchewan (63.2%). Canada's territories had a retention rate of 68.4% in 2019. While the average retention rate increased among provinces with the lowest performance between 2016 and 2018 (from 52% in 2016 to 54% in 2018), it declined in 2019 to 49%.

Lower retention rates layer upon the challenge of attraction. In 2019, the share of immigrants arriving outside of Ontario, Québec or British Columbia was roughly 30%.⁵² The majority of new permanent residents (56% in 2019) settle in Canada's three largest cities (Toronto, Montreal or Vancouver).⁵³

Immigrants are incentivized to stay in regions for similar reasons as other Canadians. Shifting from a focus on why immigrants leave to why they stay can help improve retention in smaller communities. Reasons why immigrants choose to live in smaller communities can include the community being welcoming; positive perceptions of the community; the presence of family, friends and/or other immigrants; employment opportunities; educational opportunities; access to cultural and religious amenities; employer support; and desire for a small community lifestyle.⁵⁴

There has been some success in attracting and retaining economic immigrants and meeting local labour market needs through provincial programs

and pilots that can be studied and scaled. These are part of a unique Canadian regionalization approach to local involvement in immigration that includes the Provincial Nominee Program, the Atlantic Immigration Pilot, the emerging Rural and Northern Immigration Pilot, and the planned Municipal Nominee Program. Nova Scotia has recently set a goal to double the province's population by 2060 and announced a \$2.5 million marketing program to support immigration to the province.⁵⁵ In early 2022, the federal government announced a new investment of \$35 million to expand settlement services in small towns and rural communities with a focus on better supporting refugee resettlement in these communities.⁵⁶ This is an important support for regionalization.

However, regionalization initiatives have also had challenges, such as increasing system complexity (i.e. multiple channels for immigrants to apply) and at times reducing transparency and integrity of application systems.⁵⁷ The pandemic has also slowed down progress. For instance, the Atlantic Immigration Pilot saw a 61% decrease in admissions to the region between March and August 2020 compared to a similar time period the previous year.⁵⁸ Despite the challenges, continued regionalization is a promising path for a country of Canada's scale and diversity.

Migrant integration policy in Canada is comprehensive but barriers to integration remain

Around the world, immigrant-attracting countries are focused on how to best support integration for immigrants.⁵⁹ Countries that are most successful in supporting immigrants to feel at home and to fully contribute their knowledge and skills in the labour

market shortly after arrival are best positioned to succeed into the future. When immigrants arrive in Canada, their ability to integrate and their desire to stay in Canada will be influenced by the supports available to them. The success of integration policies and programs can influence how willing the public is to accept immigration, and can shape immigrants' attitudes, feelings of belonging, participation in society and overall well-being.⁶⁰

Canada's integration policies are comprehensive and highly regarded. In 2020, Canada ranked fourth out of 52 countries on the Migrant Integration Policy Index.ⁱ While Canada scored well across most dimensions of the index, some of its lower scores were related to labour market mobility, health and political participation.⁶¹ Additionally, the index highlighted challenges with the ability for temporary migrant workers to obtain permanent residence. This is a key area in which Canada can improve based on learnings from the new temporary pathways announced in 2021 to transition temporary residents

to permanent status during the pandemic. A related challenge is the ineligibility of most temporary residents for key settlement supports, which could play a critical role in helping them on a path to permanent residency.⁶²

Despite a strong policy framework, challenges persist. Immigrants face significant barriers in the labour market due to factors such as lack of foreign credential and experience recognition, requirements for language supports, discrimination, and racism.⁶³ Immigrants are more likely to be overqualified for their jobs compared to those born in Canada.⁶⁴ To have a positive impact on Canada's future growth, integration policies must come with additional efforts to reduce barriers to immigrant success.

Additionally, during the pandemic, some new integration challenges emerged. IRCC suspended in-person services and told service providers to focus on delivering only critical re-settlement and settlement services until further notice


(including income support and basic services for government-assisted refugees, support with medical appointments and interpretation and crisis counselling to newcomers).⁶⁵ While some non-critical services were made available online or by telephone, others remained unable to accommodate new immigrant clients. As a result, many newcomers were left in vulnerable situations, rendering them in positions of instability and isolation.⁶⁶

Progress on the *immigrant income gap* has stalled

Strengthening access to opportunity and addressing the income gap is vital to the health and well-being of immigrants.⁶⁷ The gap between immigrant income and the income of the rest of the population has been a long-standing challenge. The pandemic widened already significant wage inequalities for immigrants in many countries around the world.⁶⁸ Conference Board of Canada and Century Initiative research has found that, "If Canada can help

i. The index assesses integration policies across three dimensions: basic rights (the degree to which immigrants have comparable rights to non-immigrants), equal opportunities (the degree to which immigrants receive supports to achieve opportunities comparable to non-immigrants), and secure futures (the degree to which immigrants can settle long-term and feel secure about their future in the country).





immigrants move more quickly to employment that matches their skills and experience, they will be more productive, improve their earnings, and raise GDP and GDP per capita to the benefit of all Canadians.”⁶⁹

In Canada, it is clear by the continued income gap between immigrants and the rest of the population that immigrants face barriers to opportunity. There are many ways to measure the income gap and comparing median income five years after arrival is one of them. This focuses attention on the experiences of immigrants who recently arrived in Canada, which reflects recent immigration and settlement policy and labour market trends. In 2018, the median income for immigrants five years after arrival (with an admission year of 2013) was \$29,800,⁷⁰ while the median income for all Canadians was \$37,100.⁷¹ This represents a gap of \$7,300. The gap increased compared to the previous year but has generally remained around \$7,000 between 2015 and 2018. This means that the human capital potential of immigrants is not being fully or effectively utilized by the economy.

There was significant variability in median income levels for immigrants five years after arrival based on their immigrant admission category. While economic immigrants had median income levels higher than for all Canadians, immigrants arriving under other admission categories had significantly lower levels. For example, in 2018, the median income for immigrants who arrived as refugees was \$25,300 five years after arrival, representing a gap of \$11,800 compared to the overall Canadian population.

Additionally, there is variation in income levels based on gender and race. Immigrant women faced much lower levels of median income five years after arrival (\$25,000 in 2018) compared to men (\$36,200 in 2018).⁷² A 2019 review found racialized immigrants earn less compared to non-racialized immigrants—and these gaps continue beyond the first generation.⁷³ Research has shown that these barriers can compound on one another and make it particularly challenging for those experiencing intersecting barriers to move ahead.⁷⁴ When comparing immigrants to non-immigrants, immigrant wages generally grow over time though it can take decades to achieve parity with those born in the

country.⁷⁵ Additionally, even when immigrants have the same education levels (such as a bachelor’s degree) as non-immigrants, there is a significant overall gap in median income levels, reflecting labour market barriers.⁷⁶

Income levels of immigrants admitted as children are more comparable to the overall population, improved by factors such as a Canadian education that contributes to integration and strong proficiency in Canada’s official languages.⁷⁷ A vision for the success for their children is often a key motivator for immigrants to settle in Canada. However, barriers still exist for these students including English being a second language, social and cultural accommodation supports not being met and low socio-economic status. Inclusive school environments, social integration and reducing discrimination are critical factors connected to immigrant children’s future prospects for inclusion and participation in social, economic and political life in Canada.

Opportunities for *international students to transition to permanent residence* have grown significantly

International students, and temporary entrants to Canada overall, are an important contributor to future growth and prosperity, and a key source for potential new permanent residents positioned to contribute their talent and skills to Canada's labour market.

Canada is among the top countries for attracting international students and has experienced major growth in the number of international students, with a 185% increase between 2010 and 2019.⁷⁸ Over the last two decades, Canada has made it easier for students from other countries who come to Canada for their post-secondary education to obtain permanent residence. There have been steady and significant increases in international students transitioning to permanent residence in recent years as a result, though there was a decline in 2020 due to pandemic restrictions. In 2020, 40,920 applicants who previously held a study permit were granted permanent residence in Canada. In the first half of 2021 alone, due to temporary federal policy changes spurred by the impacts of the pandemic (see text box 4), there was a significant rebound, with 54,155 who previously held a study permit receiving permanent residency. By comparison, in all of 2019, 58,515 permanent residents were processed who were previously international students.⁷⁹

The growth in international students who stay permanently in Canada reflects the increased focus on two-step immigration in Canada, which requires an immigrant to spend a certain period of time as a temporary resident before becoming permanent. In the case of students, this means

studying, graduating, obtaining a post-graduate work permit, getting a job, and applying for permanent residence if sufficient professional work experience is attained.⁸⁰ Many provinces also have Provincial Nominee Programs with streams focusing on international students. The growth of this pathway for international students means that Canada is increasing retention of international talent developed through its post-secondary systems.

As the number of international students in Canada grows, it is important that governments ensure that post-secondary systems and institutions do not become dependent on international student fees, a challenge that has been highlighted by Covid-19. Further, not all forms of international study in Canada present potential pathways to permanent residency. Transparency and clarity for prospective international students is vital.

Text box 4: Transitions to permanent residence for temporary workers

The pandemic has shed light on the broad range of skills needed to make Canada's economy and society function and the important role that immigrants play within the newly recognized "essential workforce." Immigrants continue to have a vital role in responding to Covid-19, accounting for one in four frontline health care workers.⁸¹ Their impact has led to calls to re-examine pathways to permanent residence and the definition of skilled work, considering vital supply chain, health and safety functions.⁸²

There is high potential to increase pathways to permanent residence for temporary residents already in Canada who are making positive contributions to the labour market and who are familiar with the country and its communities. A successful example of this approach is Canada's Global Talent Stream, launched as part of the 2017 Global Skills Strategy. The Global Talent Stream enables accelerated work permit processing for international talent hired into Canada's technology sector.⁸³ Global Talent Stream workers are then eligible to apply for permanent residence after one year in Canada. This employer-driven flagship program is now permanent.

In 2021, Canada introduced a temporary initiative to make it easier for international students and temporary workers to transition to permanent status. This initiative was designed to make up for losses in immigration numbers due to the pandemic and in acknowledgement of the critical role played by essential workers. The government announced it would accept 20,000 applications for permanent residence from temporary workers in health care, 30,000 applications for temporary workers in other essential occupations and 40,000 applications for international students who graduated from a Canadian institution.⁸⁴ Design and implementation concerns have been raised about the program including whether it was most effective in reaching intended essential workers. In November 2021, the stream for essential health workers had more than 13,000 spots open, despite the significant need for these workers, while the cap was reached for the other two streams.⁸⁵

Since 2006, Canada has admitted more temporary than permanent residents each year.⁸⁶ Nearly three temporary residents were admitted to work or study in Canada for every new permanent resident in 2019.⁸⁷ Deepening pathways to permanent residence for those with temporary status could help address skills and labour shortages as we emerge from the pandemic and as the population ages in the future.⁸⁸ The creation of these new, temporary pathways could provide valuable lessons, such as how newly admitted permanent residents are faring in the labour market, and could help inform a more long-term approach.⁸⁹

Economy, innovation & entrepreneurship

At a glance

- | Canada's healthy **early-stage entrepreneurship** rates can support economic growth in the recovery
- | Canada continues to struggle making progress on **business spending on research and development (R&D)**
- | There have been slight improvements in **innovation**
- | Canada continues to experience slow growth in labour **productivity**
- | **Business growth** is trending in the right direction, but the rate of growth remains too slow
- | Attention and action are needed to make headway on **diversity in leadership**
- | Building on the existing strength of the **Indigenous economy** will be transformational for Indigenous communities and all Canadians
- | Canada's **GDP per capita** is above average, though still requires attention
- | **Household debt** has grown consistently, creating vulnerabilities for households and the economy
- | **Income inequality** threatens economic growth and shared prosperity
- | Canada remains **globally competitive**, but has declined in recent years compared to other countries





The population link

Growing Canada's population and talent base are necessary for Canada to be an engine of innovation, entrepreneurship and talent – key drivers of 21st century competitiveness. It is also crucial to have greater levels of capital investment, support for scaling innovative firms in high-growth sectors, growth and diversification of exports, and focused investments in skills, talent retention and attraction. Many traditional assumptions about how the global economic system works are being challenged daily. A strong economy and high-quality jobs are integral to Canada's future growth.

Current context

The pandemic has meant a bumpy road for Canada's economy in the past two years, and a less certain future moving forward as the world transitions in and out of new Covid-19 waves and recovery. Federal and provincial governments provided a range of business supports to help companies survive the instability of the pandemic. For example, the federal government implemented the Canada Emergency Wage Subsidy (CEWS) that helped businesses avoid layoffs, and provinces took independent action as well.⁹⁰ As Canada continues to struggle with waves of the pandemic, it is unclear what will happen with short-term economic growth.

However, there are a range of long-standing challenges that will make the longer-term recovery more difficult for Canada: low productivity, low business investment in R&D, increased household debt, and a population that is rapidly aging. These are layering on top of more immediate issues: growing supply chain challenges, rising inflation, and challenges that many businesses are having in hiring workers. The fissures that have continued in the economy—with certain populations like Black, Indigenous, racialized people and women, experiencing continued barriers—also make developing a strong economy with shared prosperity challenging. There is a central role for the business sector in driving wealth creation and an inclusive, sustainable recovery.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Early-stage entrepreneurship

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

Canada ranked **15th** in **early-stage entrepreneurial activity** out of 43 countries assessed by the Global Entrepreneurship Monitor.

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

On track

Canada ranked 15th with a rate of 15.6% of adults engaged in early-stage entrepreneurial activity in 2020, falling from the top 10 on this indicator between 2019 and 2020 with entrepreneurial activity impacted by the pandemic. However, high-income countries were more likely to experience decline in entrepreneurial activities during the pandemic compared to lower-income countries. Despite modest declines, a robust recovery is expected in future years.

Business spending on R&D

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.

Canada **ranked 24th** out of 34 OECD countries on business spending on research and development in 2019.
Canada's business spending on research and development was **0.81% of GDP** in 2019.

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 **1.76% of GDP** in 2019.

Falling behind

Canada remains well below the OECD average on business spending on research and development. It fell in its ranking between 2018 and 2019 from 21st to 24th among OECD countries.

Innovation

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.

Canada ranked **16th of 132 countries** in the Global Innovation Index in 2021.

Top 10 countries in the Global Innovation Index.

Needs attention

Canada improved its ranking on the Global Innovation Index between 2020 and 2021. It is positioned with countries that have performed above expectations on innovation for their level of economic development. However, the index notes that Canada is also among countries that struggle to obtain the right balance between levels of investment and innovation results.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Productivity

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

Canada ranked **16th out of 38 OECD countries** on productivity in 2020.

Canada's **GDP per hour worked was \$56.61 USD** in 2020.

Top 10 OECD countries on productivity.

Threshold: France was 10th in the OECD with **GDP per hour worked of \$67.60 USD** in 2020.

Falling behind

While Canada's labour productivity increased in 2020, this was largely due to impacts related to the pandemic. Canada continues to experience slow growth in labour productivity overall and remains below the target.

Business growth

A growing population, with increased international talent and support for local entrepreneurs, can enhance business growth. High-growth firms drive wealth and job creation.

There were **12,970 high-growth firms** in Canada in 2019.

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

Needs attention

Canada has trended in a positive direction in number of high-growth firms, increasing from 11,140 in 2016 to 12,970 in 2019. However, this rate of increase is not high enough to meet a federal government goal to double the number of high-growth firms in Canada.

Diversity in leadership

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 a firm's productivity and innovation, especially when there is diverse leadership.

Among public companies that disclosed diversity information, **women held 17% of board seats** in 2020. Additionally, other groups were even more significantly under-represented: **racialized individuals held 4% of board seats, persons with disabilities held 0.3% of board seats and Indigenous peoples held 0.3% of board seats.**

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

Falling behind

Canada is very short of its target for diverse representation on boards, with significant underrepresentation among women, racialized people, Indigenous peoples and people with disabilities. While there has been increased attention on this issue and some progress in recent years, the gap in representation remains large.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Strength of Indigenous economy

The growth and development of the Indigenous owned and controlled business sector and economy is essential to fostering reconciliation with Indigenous peoples and is a key driver of the economic future of Canada, particularly as the Indigenous population continues to grow at a faster rate than Canada overall.

The approximate value of the Indigenous economy was **\$32 billion** in 2016.

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

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. The launch of a federal 5% Indigenous business procurement target is an important step forward, but barriers remain and more action is needed to meet the annual target of \$100 billion.

GDP per capita

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.

Canada ranked **17th out of 38 OECD countries** on GDP per capita in 2020.

Canada had a **GDP per capita of \$46,051.35 USD** in 2020.

Top 10 OECD countries on GDP per capita.

Threshold: Sweden was 10th with **GDP per capita of \$55,148.58 USD** in 2020.

Needs attention

Canada's GDP per capita decreased in 2020, similar to most OECD countries, as a result of the impacts of the pandemic. Canada's GDP per capita in 2020 was slightly higher than the OECD average. Fully leveraging the talent and skills of immigrants in the labour market is one important path to improving GDP per capita in Canada.

Household debt

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, and represents a risk to the overall economy.

Canada ranked **25th out of 33 OECD countries** on household debt in 2019.

Canada's level of household debt was **186.2% of net household disposable income** in 2019.

OECD average on household debt levels.

Threshold: OECD average level of household debt was **121% of net household disposable income** in 2019.

Falling behind

Canada's household debt levels are significantly higher than in most OECD countries. Debt as a percentage of net household disposable income has steadily grown over the past two decades. For individual households, debt can mean many different things, from a mortgage that is helping build wealth to credit card debt with the opposite effect. Mortgages make up a significant proportion of debt in Canada.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Income inequality

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.

Canada ranked **16th out of 34 OECD** countries on income inequality in 2018. Canada's level of **income inequality using the Gini coefficient was 0.303** in 2018 (0 represents perfect equality and 1 represents perfect inequality).

Top 10 most equal OECD countries. Threshold: Austria was 10th in the OECD with a **Gini coefficient of 0.28** in 2018.

Needs attention

Canada's level of income inequality remains below the target. Before the pandemic, there had been some slight decreases in income inequality. However, the pandemic has increased the gap between high-income and low-income individuals in Canada.

Global competitiveness

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.

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

Top 10 in the Global Competitiveness Index.

Needs attention

Canada remains a competitive economy, but its ranking has declined in recent years. There is opportunity for improvement.

Analysis

Canada's healthy **early-stage entrepreneurship** rates can support economic growth in the recovery

Entrepreneurship—the ability to see a business opportunity and the capacity to implement it—is critical to economic growth, development and long-term prosperity.⁹¹ Early-stage entrepreneurship can help generate jobs and drive sustainable and inclusive economic recovery from the pandemic. In 2020-21, Canada ranked 15th out of 43 countries, with 15.6% of adults engaged in early-stage entrepreneurial activity, according to the Global Entrepreneurship Monitor (GEM).⁹² The GEM report highlights entrepreneurship trends from around the world (see Appendix A for more information).

Canada fell from ranking 9th out of 50 countries with 18.2% of adults engaged in early-stage entrepreneurial activity in 2019-20.⁹³ Entrepreneurial aspirations declined overall due to the pandemic for many high-income countries.⁹⁴ However, Canadian entrepreneurs were also more likely to pursue new opportunities associated with the pandemic, ranking 10th out of 43 countries. As a result, there is high confidence that early-stage entrepreneurial activity in Canada will recover well from the pandemic and adapt to new conditions in future years.

Canada is generally a strong environment in which to start new businesses. Canada ranked 3rd in the 2018 Global Entrepreneurship Index, which tracks a country's ecosystem for entrepreneurship.⁹⁵ This strong ecosystem for entrepreneurship has important benefits, including high attractiveness to entrepreneurs who live abroad to come to Canada. Canada was found to be the most attractive of all OECD countries for entrepreneurs.⁹⁶ However, the potential of Canada's strong ecosystem for entrepreneurship is not always fully realized with many new Canadian businesses facing challenges to scaling and growing beyond the Canadian market — another key indicator in this focus area.

Women entrepreneurs have noted that they often face barriers, including challenges with access to capital and harmful stereotypes that can hamper growth.⁹⁷ In the 2020/21 GEM, the rate of early-stage entrepreneurial activity was higher for men than for women - 17.3% compared to 13.9%.⁹⁸ Racialized Canadians also face similar barriers of discrimination and lack of access to large-scale opportunities.⁹⁹ This is particularly true for Black and Indigenous women.

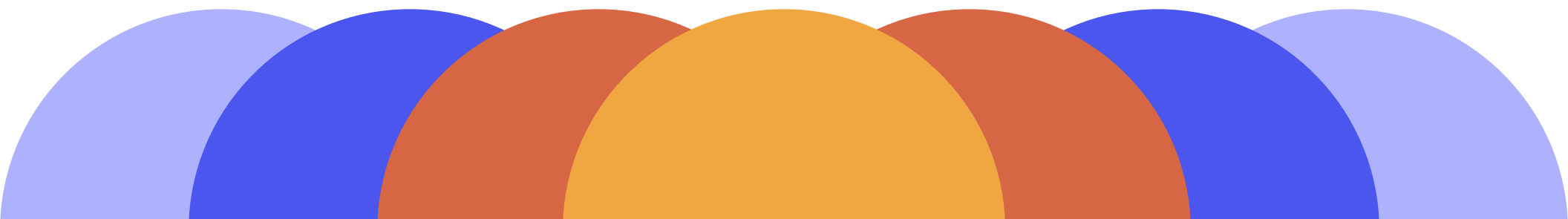
While many pathways to improving innovation and entrepreneurship performance in Canada have been examined over the years, the role that immigrants play has not received sufficient attention.¹⁰⁰ Immigrants are twice as likely to engage in entrepreneurial activities compared to those born in

Canada.¹⁰¹ Additionally, firms founded or co-founded by immigrants made up one-third of tech companies best poised to become world-class firms (known as narwhal companies).¹⁰² Settlement agencies play a key role in supporting newcomers as they integrate in Canada, though they provide mixed levels of support for immigrants who want to pursue entrepreneurship. At the same time, organizations that typically provide general assistance to entrepreneurs are often not well-equipped to handle needs that are specific to immigrant entrepreneurs.¹⁰³ The federal government has funded some initiatives designed to support immigrant entrepreneurs but gaps remain.¹⁰⁴

Canada continues to struggle making progress on **business spending on research and development (R&D)**

Business spending on research and development is an indicator of the private sector's support for innovation: a key driver of growth. It provides insight on whether firms are investing in developing new ideas, products, processes, or services and their support for innovation.¹⁰⁵ High business spending on R&D will improve Canada's attractiveness to top talent.

In 2019, Canada ranked 24th out of 34 OECD countries in business spending on R&D at 0.81% of GDP.¹⁰⁶ Business spending on R&D in Canada has been on the decline in recent years while it has



been on the rise among peer countries. Canada's level of spending was well below the OECD average of 1.76% of GDP in 2019. Early signals point to minimal changes in R&D spending as a result of the pandemic.¹⁰⁷ Canada ranked slightly better but still poorly relative to other peer countries on total spending on R&D, which reflects spending on R&D from multiple sources beyond the private sector.¹⁰⁸

There has been a shift in business R&D spending from manufacturing to services: service sector industries have been the largest investor in R&D in recent years, surpassing the manufacturing sector which had previously been dominant.¹⁰⁹ A notable positive trend is an increase in software-related R&D spending, reflecting efforts by businesses to incorporate digital technologies to improve products and services.¹¹⁰ Canada has the highest proportion of business spending on ICT-related R&D compared to all other G7 countries.¹¹¹

There have been slight improvements in innovation

Innovation is a key pathway to building Canada's future prosperity and the imperative to increase innovation continues to be a central concern of government and private sector leaders focused on growing Canada's economy. Innovation involves taking new ideas, devising new or improved products and services, and commercializing products and services in the market.¹¹² Innovation can occur at the level of an individual organization, in a community or across the country. As globalization brings markets closer together, the population ages, technology evolves, and environmentally sustainable growth becomes an increasingly critical necessity, innovation is more important than ever before for future economic prosperity.¹¹³

In the 2021 Global Innovation Index, Canada ranked 16th out of 132 countries.¹¹⁴ The index provides insight on national innovation capacity and output (see Appendix A for more information). Canada slightly improved its ranking between 2020 and 2021, moving up from 17th to 16th.¹¹⁵ Canada ranked particularly well in terms of its market sophistication and its institutions but poorly on infrastructure for innovation. Canada is grouped in the index among countries that have performed above expectations on innovation for their level of economic development, though it remains in the low end among that group. Canada is also highlighted among countries that struggle to obtain the right balance between levels of investment and innovation results, which has a negative impact on overall performance.¹¹⁶

A 2021 Conference Board of Canada review of innovation found that Canada's innovation performance has improved in recent years, but it is still weak in comparison to many peer countries, with a grade of "C" on innovation.¹¹⁷ Ontario and Québec were the only provinces to perform better than Canada overall on innovation. Most provinces received a grade of "D" or "D-". Key areas in which Canada fell behind were patent production and venture capital investment while performing strongly in terms of entrepreneurial ambition.

Nevertheless, there are some areas of innovation in which Canada has done well. For instance, Canada was found to be among the top countries that have managed and navigated transitions to digital technologies, which are an important element of innovation.¹¹⁸ The launch of Canada's Innovation and Skills Plan, which includes the Strategic Innovation Fund, was highlighted as a key factor in Canada's performance. Canada's open approach

to immigration is also beneficial to its innovation performance, as immigrants have been found to have an outsized contribution to innovation in Canada. For instance, immigrant-owned SMEs (small and medium-sized enterprises) had higher rates of product innovation, process innovation and marketing innovation compared to SMEs with owners born in Canada.¹¹⁹

Canada continues to experience slow growth in labour productivity

Productivity is an important driver of economic growth, attractiveness to investment, and global competitiveness. As Canada's population ages, enhancing productivity is key to maintaining economic growth. Canada requires more productivity-enhancing investments (e.g. technology, capital, economies of scale, and skills) that would lead to the growth of more globally competitive firms. In 2020, Canada ranked 16th out of 38 OECD countries on productivity, with GDP per hour worked of \$56.61 USD.¹²⁰ Canada increased GDP per hour worked compared to the previous year from \$52.69 to \$56.61. The rate of Canada's increase in productivity between 2019 and 2020 was more significant than the OECD average. However, this increase is not sufficient and may be largely driven by the pandemic.

Between the end of 2019 and end of 2020, Canada had its second-largest increase in productivity since 1981. The growth during this period was related to a more significant proportion of labour being focused on essential activities, which are more productive than non-essential activities like tourism or hospitality. While productivity declined early in the pandemic, it significantly increased once pandemic-related restrictions loosened enabling hours worked

to rise more quickly than output.¹²¹ However, in 2021, labour productivity once again experienced declines with business output back to pre-pandemic levels.¹²²

The pandemic has affected productivity differently based on industry due to varying restrictions on operation and growth. It remains unclear the degree to which a significant shift toward working from home in many sectors has had an impact on business productivity and what this will mean for the future.¹²³

Business growth is trending in the right direction, but the rate of growth remains too slow

High-growth firms are positioned to innovate, foster global connections and create high-quality jobs.¹²⁴ Business growth can be enhanced by a growing population that has more international talent and by supports for local entrepreneurs to thrive. High-growth firms are defined by Statistics Canada as 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.¹²⁵ High-growth companies make up a small proportion of firms in Canada, but a more significant proportion of new jobs and GDP growth.¹²⁶

In 2019, there were 12,970 high-growth firms in Canada (with growth based on revenue). This is an increase from 11,920 high-growth firms in 2018. While the number of high-growth firms in Canada is increasing and trending in the right direction, the rate of growth remains too slow to meet a federal government objective to double the number of high-growth firms by 2025.¹²⁷

Among businesses with 10 or more employees in 2019, high-growth firms represented 6.2% of all businesses.¹²⁸ High-growth firms stretch across industries, and provinces, but are overwhelmingly small and medium-sized enterprises, which aligns with the proportion of SMEs in the Canadian market in general. More than 98% of high-growth firms have fewer than 100 employees.¹²⁹ High-growth firms made up a notable proportion of the following industries in Canada in 2019: mining, quarrying and gas extraction (16.5%), information and cultural industries (12.0%) and construction (11.5%). British Columbia had the highest proportion of high-growth firms in 2019 (7.0%), followed by Alberta (6.9%), Québec (6.6%).¹³⁰

While the pandemic has been harmful to businesses, it has also presented new opportunities for firms to grow and innovate, setting the stage for growth in entrepreneurship.¹³¹ It will be important to focus on what is enabling and what is creating barriers to growth. An important enabler of success for high-growth firms is access to capital, an area in which Canada risks falling behind. Canadian businesses that are scaling can struggle to access large amounts of capital, even amid strong growth in the venture capital market in recent years.¹³² Nonetheless, there are promising signs in 2021 with a record high level of venture capital being invested in Canada.¹³³ Other challenges for high-growth firms include: supply of talent, access to markets and challenges with government supports.¹³⁴

Attention and action are needed to make headway on *diversity in leadership*

Diversity contributes to a firm's productivity and innovation, especially when there is diversity at the top of an organization.¹³⁵ In one study, companies that had above average diversity produced a higher proportion of revenue from innovation (45%) compared to companies that had below average diversity (26%).¹³⁶ Diversity in leadership is also essential to building a more equitable society and it enables key opportunity gaps to close for people who experience multiple barriers. As Canada pursues a path of population growth, its population will become more diverse, and this diversity must be mirrored in leadership. Diversity in leadership can also positively impact other key issues of inequality cited in this Scorecard, namely the immigrant income gap, women's employment rate, income inequality and GDP per capita.

Among public companies that disclosed diversity information, women held 17% of board seats in 2020, according to the first annual Corporations Canada report tracking diversity disclosure.¹³⁷ Other groups were even more significantly under-represented, with racialized individuals holding 4% of board seats, persons with disabilities holding 0.3% of board seats and Indigenous peoples holding 0.3% of board seats.¹³⁸ This is well below the federal government's targets as outlined in the "50-30 Challenge" of women making up 50% of Canadian boards and senior management positions and under-represented groups—including racialized individuals, people living with disabilities, people who identify as LGBTQ2 and Indigenous peoples—making up 30% of board seats and senior management positions.¹³⁹

There have generally been increases in the representation of women on boards and in senior leadership positions, though progress remains slow. Larger companies are more likely to add female directors, at least partly because they have set targets for increasing gender representation.¹⁴⁰ Progress is even slower among other under-represented groups despite attempts to increase transparency about the diversity of company workforces.¹⁴¹ According to one review of diversity and leadership at public companies, among more than 2,200 board positions at 316 companies that provided diversity disclosures, there were only eight positions held by Indigenous peoples and nine positions held by persons with disabilities in 2020.¹⁴²

Building on the existing strength of the *Indigenous economy* will be transformational for Indigenous communities and all Canadians


The growth and development of the Indigenous-owned and controlled business sector and economy are essential to fostering reconciliation with Indigenous peoples and is a key driver of the economic future of Canada, particularly as the Indigenous population continues to grow at a faster rate than Canada's population overall.

The Indigenous population is younger on average than the rest of Canada's population by almost a decade and is growing at a four times faster rate.¹⁴³ Indigenous communities form an increasingly critical component of working-age population growth. Indigenous peoples make up around 5% of the population in Canada.¹⁴⁴ Around 40% of the Indigenous population in Canada live in rural parts of

Canada while 20% live in small population centres.¹⁴⁵ In many such communities, the Indigenous population is growing while the overall working-age population is in decline, meaning that Indigenous peoples are positioned to be central drivers of future prosperity in these communities.

According to TD Economics, the value of the Indigenous-owned market was approximately \$32 billion in 2016.¹⁴⁶ The Indigenomics Institute has set a goal of achieving a \$100 billion annual Indigenous economy. The opportunities and assets of the Indigenous economy are not being realized to their full potential. There is a growing trend of Indigenous economic investment and growth and building new pathways for investment will help build upon this success. Approximately 2% of SMEs in Canada are operated by Indigenous entrepreneurs, which is approximately 32,000 businesses both on- and off-reserve and worth roughly \$927 million in earnings.¹⁴⁷ According to the Canadian Council for Aboriginal Business, Indigenous peoples are creating new businesses at nine times the Canadian average.¹⁴⁸ Indigenous-owned economic development corporations which invest in, own or manage businesses to advance community interests are also very significant actors.¹⁴⁹

The Indigenomics Institute has developed a strategic list of twelve enablers that could grow the Indigenous economy from \$32 billion to \$100 billion. Some of these include: equity ownership, capital, entrepreneurship, procurement, clean energy and infrastructure.¹⁵⁰ These are all emerging investible pathways for designing Indigenous economic growth. The federal government's 2021 launch of a 5% Indigenous business procurement target is



a significant step forward.¹⁵¹ There is an increasing need to design Indigenous economic growth, which will take work and leadership. This will enable Canada to collectively act on economic reconciliation in a way that centres Indigenous inclusion and leads to shared prosperity for all.

Canada's GDP per capita is above average, though still requires attention

GDP per capita is an important measure of Canada's overall prosperity. Sustaining per capita economic growth is a UN Sustainable Development Goal.¹⁵² GDP per capita represents average income per person but does not reflect income inequality. In 2020, Canada ranked 17th out of 38 OECD countries in its level of GDP per capita at \$46,051.35 USD.¹⁵³ Canada's GDP per capita declined from the previous year, in line with a trend experienced among most OECD countries due to the impacts of the pandemic. Canada remained slightly above the OECD average. Before the pandemic, Canada has generally experienced steady increases in GDP per capita.

There are signs of GDP recovery in 2021, with real GDP increases driven by household spending and exports as pandemic-related restrictions were removed.¹⁵⁴ However, overall, as of mid-2021, GDP per capita remained on the decline compared to the end of 2019. Canada experienced particularly high growth in real household income, with the most significant growth among G7 countries. While Canada's GDP per capita declined between the end of 2019 and mid-2021, household income per capita experienced cumulative growth of 9.4%.¹⁵⁵

Improved performance on productivity and innovation would help strengthen Canada's GDP per capita. Higher immigration levels result in marginally lower GDP per capita growth. However, efforts to support immigrants to move more quickly to employment that matches their skills, closing the wage gap between immigrants and the rest of Canada, will help to accelerate GDP per capita growth supporting newcomers and Canadians alike to fully benefit from increased immigration.¹⁵⁶

Efforts to close economic development and participation gaps across Canada could further boost Canada's GDP and drive future economic growth. For instance, the National Indigenous Economic Development Board found that Canada's economy could grow by \$27.7 billion annually if gaps were addressed in economic outcomes between Indigenous and non-Indigenous people.¹⁵⁷

Household debt has grown consistently, creating vulnerabilities for households and the economy

Household debt reflects the economic vulnerability of households and their ability to weather an economic shock. High household debt can make financial systems vulnerable, as high debt defaults could harm the economy overall.¹⁵⁸ Low levels of household debt, on the other hand, can contribute to inclusive and sustainable growth. In 2019, Canada ranked 25th out of 33 OECD countries with debt as a percentage of net household disposable income of 186% in 2019.¹⁵⁹ Canada's household debt levels are significantly higher than in most OECD countries and have steadily grown over the past three decades both in absolute terms and in relation to the size of Canada's economy.¹⁶⁰

Household debt slightly declined in Canada in the context of the pandemic.¹⁶¹ Household savings and disposable income increased partly due to government supports alongside limited opportunities to spend during lockdowns.¹⁶² Government support measures were effective in preventing widespread financial challenges among households with high levels of debt.¹⁶³ Nonetheless, Canada's level of household debt remains high compared to other OECD countries. Rapid growth in housing prices alongside low borrowing costs are key contributing factors to household debt and can increase risks to financial stability and household consumption.¹⁶⁴ High debt levels can pose a barrier to young people forming households and their choices on family size.¹⁶⁵

Debt can be taken on for both positive and negative reasons. While buying a house may lead to high debt levels, it also helps build wealth, but credit card debt has a detrimental impact on long-term wealth building. As of 2021, Canadian households carried approximately \$2.5 trillion in outstanding debt. Around two-thirds of this debt was mortgage debt while the other one-third was made up of other forms of debt (including car loans, home renovation, credit card payments).¹⁶⁶ There are some concerning recent consumer debt trends, such as an estimated 37% of Canadians indicating they intend to use a credit card that already carries a balance.¹⁶⁷ However, a notable trend during the pandemic was that the most significant reductions in debt were among individuals with the lowest credit ratings, indicating that some financially vulnerable Canadians were able to improve their debt position.¹⁶⁸

Income inequality threatens economic growth and shared prosperity

Income inequality poses a social, economic and political risk to OECD countries, including Canada. Reducing inequality is one of the UN's Sustainable Development Goals.¹⁶⁹ Income inequality has a detrimental impact on the economy as it can slow down economic growth.¹⁷⁰ In addition, it hurts inclusive growth, access to opportunity and life expectancy. A more equal society is critical for short-term recovery and long-term prosperity. In 2018, Canada ranked 16th out of 34 OECD countries with Canada's level of income inequality using the Gini coefficient at 0.303 (0 representing perfect equality and 1 representing perfect inequality).¹⁷¹ Canada's level of income inequality declined compared to the previous year, which means it became more equal.

The Gini coefficient does not fully capture all elements of inequality but a similar trend was identified through other measures. For example, while the top 10% of the income distribution receives more income (22.7%) than the bottom 40% of the income distribution (21.0%), there was some improvement between 2010 and 2019, with income share of the bottom 40% growing slightly and the top 10% seeing some decreases.¹⁷²

There is also evidence that income inequality in Canada perpetuates social inequality between different groups, with racialized people, Indigenous peoples, immigrants, and women facing gaps.¹⁷³ The pandemic further widened economic inequalities overall and heightened other socio-economic challenges among these groups, as well as increasing vulnerabilities among low-income



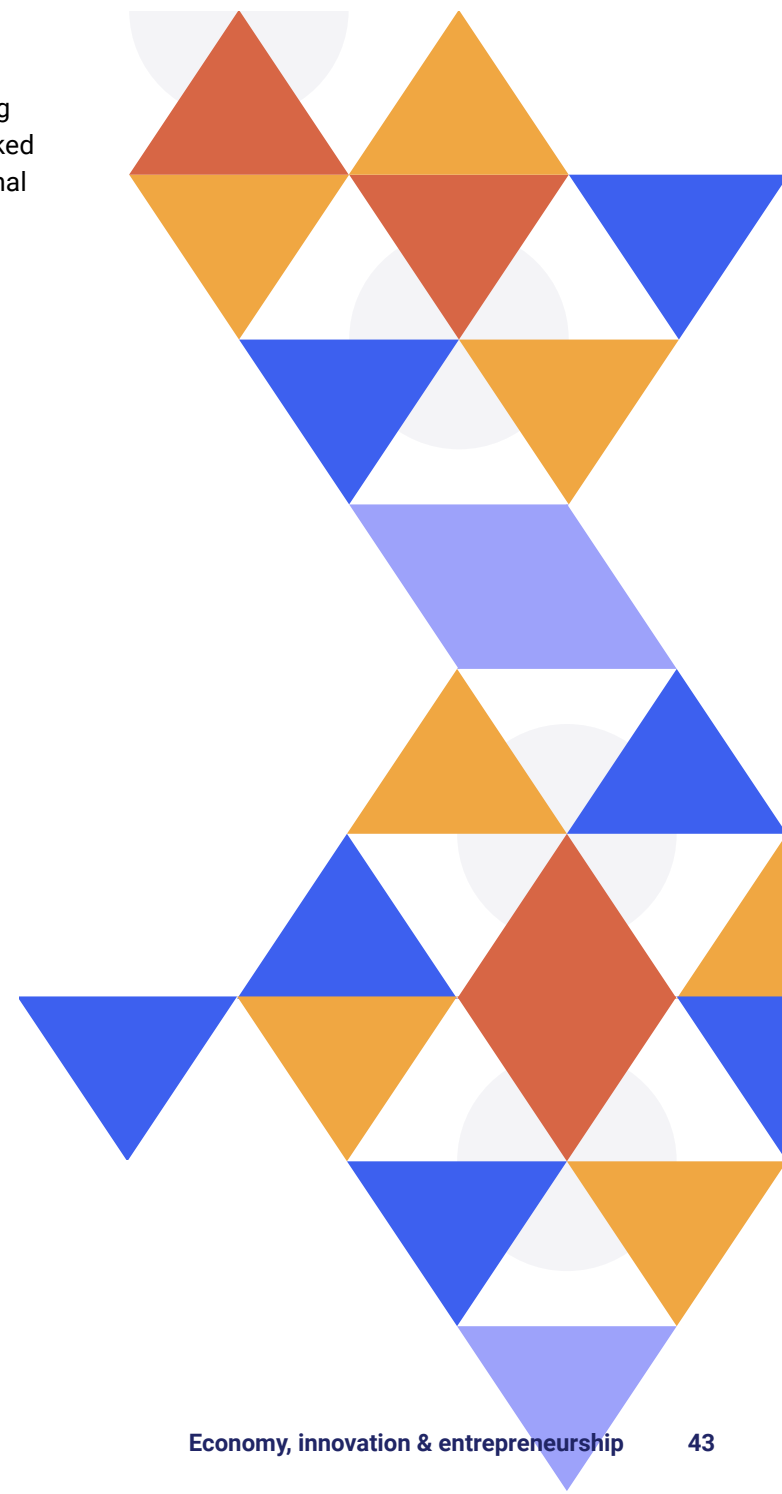
households.¹⁷⁴ However, pandemic-related benefits helped limit economic challenges for low-income individuals.¹⁷⁵ The full picture of the pandemic's impact on income inequality still has yet to be determined.

Canada remains *globally competitive*, but has declined in recent years compared to other countries

Competitiveness reflects the ability to attract investment, foster innovation and spur economic growth. It is a driver of Canada's economic prosperity and signal of Canada's attractiveness as a global jurisdiction and immigrant destination. While Canada remains a competitive economy and ranks well compared to many other similar countries, it could do better on its competitiveness. Canada's global competitiveness has declined in recent years, according to the World Economic Forum's Global Competitiveness Index. The index provides insight on the economic prospects of countries on an annual basis (see Appendix A for more information). Canada fell two places in its ranking in the index between 2018 and 2019—from 12th to 14th. Canada had previously ranked among the top 10 countries in 2010.¹⁷⁶

A 2021 annual review of competitiveness by the International Institute of Management Development (IMD) ranked Canada similarly on its competitiveness in 2021, with Canada falling in its ranking to 14th out of 64 countries in 2021 from 13th in 2019 and 8th in 2020. IMD identified that key challenges for Canada's competitiveness

performance in 2021 included a shortage of skilled talent in high-growth sectors, challenges for scaling SMEs to develop intellectual property, commercialize and export, and challenges building local and international supply chains. Canada ranked particularly low on indicators related to international trade and employment.¹⁷⁷



Education, skills & employment

At a glance

- | Canada's strong **performance in reading, science and math among 15-year-olds** reflects the country's strong education systems
- | Canada remains a global leader in **post-secondary attainment** and this is a foundation for innovation and creating quality jobs
- | The rate of **youth not in employment, education or training (NEET)** is a growing concern due to the pandemic
- | **Participation in adult learning** is comparatively high in Canada, but there is room to improve access to training
- | The **employment rate** is rebounding but key labour market barriers remain for equity-seeking groups hit hardest by the pandemic
- | Canada continues to have a high and persistent incidence of **low-wage work** that reflects the prevalence of low quality jobs





The population link

Strong education, skills and employment systems will attract people to Canada and serve as a solid foundation to support a growing economy and foster social participation. To grow sustainably over the rest of this century, Canada must improve its life-long learning opportunities, ensure a strong recovery in employment rates and increase the quality of jobs. Canada's education systems will have to continue to attract people from around the world, to support economic dynamism and enable people of all backgrounds to succeed. High quality and accessible education, training and employment opportunities in Canada are essential to building the human capital foundation for innovation and creating good, high-wage jobs. In turn, Canada's economy and labour market must fully leverage the depth of talent and skills that Canada's education and training systems develop through quality employment.

Current context

Canada's education systems are among the best performing in the world and a foundation of the country's knowledge economy, though just like education across the globe, they have been deeply impacted by the pandemic. School closures and online learning have led to losses that are predicted to last into the future.¹⁷⁸ In-person training and skill-building opportunities were also impacted by the pandemic. Young people between the ages of 21 and 24 were among the hardest hit by pandemic restrictions on employment and education.¹⁷⁹

With governments' cautious reopening of schools in 2021, the long-term impacts on youth will have to be closely tracked, especially given the pandemic led to school closures in 2022 as well. Canada's labour force is among the most educated in the world, though challenges that existed well before the pandemic have been magnified in 2021.¹⁸⁰ Key groups are more likely to be working in low-income, poorer quality jobs than others. This is especially true for women, racialized Canadians including Black Canadians and Indigenous peoples.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Performance in reading, science and math among 15-year-olds

A strong education system will attract people to Canada and form a solid foundation to prepare youth to have the skills they need 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 further education and labour market success for students.

Canada **ranked 4th** 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.

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.

Leading

Canada is among the top performing OECD countries on performance in reading, science, and math for 15-year-olds, as assessed through the OECD's Programme for International Student Assessment (PISA). Nonetheless, given that there was variability in scores across the country and some declines in recent years, Canada's high ranking shouldn't be taken for granted.

Post-secondary attainmentⁱⁱ

Post-secondary education is often associated with the highest quality, most resilient, and highest growth 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.

Canada **ranked 2nd** out of 35 OECD countries on post-secondary education attainment in 2020.

64.4% of Canadian 25-to-34 year-olds had a post-secondary education in 2020.

Top 5 OECD countries on post-secondary education attainment.

Threshold: Lithuania was 5th in the OECD with **56.2%** post-secondary education attainment in 2020.

Leading

Canada remains among the top OECD countries in the proportion of the population with a post-secondary education. Post-secondary attainment has steadily increased over the past three decades. Even with high rates of post-secondary attainment, there are barriers to access for many Canadians including students from low-income families, students whose parents did not attend post-secondary, and Indigenous students.

ii. In this analysis, we have used the 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."

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Youth not in employment, education or Training (NEET)

A growing Canada must fully support and harness the talents and energy of its young people to build shared prosperity and mitigate the effects of population aging. 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.

Canada **ranked 14th out of 32 OECD** countries on youth NEET rate in 2020.

Canada's **youth NEET rate was 14.0%** of the population of 20-to-24 year-olds in 2020.

Top 10 OECD countries with lowest youth NEET rate.

Threshold: The Slovak Republic was 10th with a **youth NEET rate of 13.8%** in 2020.

Needs attention

Canada's youth NEET rate increased in 2020, due to the impacts of the pandemic, though NEET rates had improved in previous years. Canada experienced a more significant increase in its NEET rate during the pandemic compared to other OECD countries, which is why the assessment of this indicator declined from "on track" in the 2021 Scorecard to "needs attention" this year. Groups at higher risk for being NEET include young women with children, immigrants and Indigenous youth.

Participation in adult learning

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.

Canada **ranked 10th** of 31 OECD countries on participation in adult learning.

The proportion of Canadians participating in adult learning was **46.7%**.

Top 10 OECD countries on participation in adult learning.

On track

Canada is within the top 10 of OECD countries in participation in adult learning. Nonetheless, Canada is behind many international counterparts in its support for and prioritization of employee training.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Employment rate

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.

Canada **ranked 19th** out of 37 OECD countries in 2020 on employment rate.

Canada's employment rate was **70.0%** in 2019.

Top 10 OECD countries on employment rate.

Threshold: Denmark was 10th with an employment rate of **74.4%** in 2020.

Needs attention

Canada's employment rate fell nearly five percentage points between 2019 and 2020 due to the impacts of the pandemic. Canada's ranking in relation to OECD countries also fell - from 14th to 19th. In the second quarter of 2021, Canada observed some rebound but still fell below the target. Canada has supported many of those unable to work during the pandemic. These efforts have been critically important to mitigating the fallout of Covid-19. Barriers in the labour market can lead to lower employment rates for many key groups, including racialized Canadians and Indigenous peoples.

Incidence of low-wage work

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

Canada **ranked 15th** out of 16 OECD countries reporting data on incidence of low-wage work in 2019.

Canada's incidence of low-wage work was **20.7%** in 2019.

OECD average on incidence of low-wage work.

Threshold: The OECD average for incidence of low-wage work was **13.9%** in 2019.

Falling behind

Canada has one of the highest rates of low-wage work among OECD countries. While the incidence of low-wage work has improved slightly in recent years, significant work needs to be done in this area. Low-wage workers are more likely to be racialized.



Analysis

Canada's strong *performance in reading, science and math among 15-year-olds* reflects the country's strong education systems

Strong education systems will attract people to Canada and form a solid foundation to prepare youth to have the skills they need 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 success for students in further education and in the labour market.¹⁸¹ Canada ranks well in international comparisons of scores on reading, science and math among secondary school students. While Canada's average scores, as reported in the OECD's Programme for International Student Assessment (PISA), have declined slightly in more recent years – from an average of 529.3 in 2006 to an average of 516.7 in 2018 – Canada remains a top performer. Among OECD countries, Canada had the second-highest reading score.

Among OECD countries, Canada has demonstrated that it is possible to achieve equity and excellence. Canadian secondary students scored high in reading performance and did not have notable differences in performance based on students' socioeconomic status.¹⁸² Additionally, Canada performed well in academic outcomes for children with an immigrant background.¹⁸³ Nonetheless, there are key challenges, with lower performance in science based on socioeconomic status.¹⁸⁴ There was also some variability on scores in different parts of Canada.

For instance, more than 40 points separated the reading scores of students in Alberta compared to New Brunswick.¹⁸⁵ Given this variability and recent declines in scores, it is important for Canada not to take its high ranking for granted.

Overall, Canadian students perform well on digital literacy—higher than the OECD average—which was particularly important in the context of remote learning.¹⁸⁶ However, there were some reported drops in academic performance amid the pandemic, including a doubling of the failure rate in a review conducted by one district board.¹⁸⁷ Inequities in educational outcomes that had previously existed were exacerbated.¹⁸⁸ Disruptions in schooling have been referred to as a “lost year in education” and the situation has led to calls for changes to education systems.¹⁸⁹

Continued progress will require a focus on learners in communities that face barriers such as discrimination and low-income. This is especially true for Indigenous learners. The Truth and Reconciliation Commission's Calls to Action that are on closing educational gaps between Indigenous and non-Indigenous peoples frame the direction for change.¹⁹⁰

Canada remains a global leader in *post-secondary attainment* and this is a foundation for innovation and creating quality jobs

Post-secondary education is required to obtain the highest quality, most resilient, and highest growth jobs.¹⁹¹ Countries with high post-secondary

attainment rates are best positioned to attract investment and highly skilled immigrants, and to drive innovation and economic growth. In 2020, Canada ranked 2nd out of 35 OECD countries with 64.4% of 25-to-34 year-olds having post-secondary education.¹⁹² This represents an increase of more than a percentage point from the previous year. Canada's large college sector has been identified as a key factor behind Canada's high attainment rate.¹⁹³ This is important to note, as a range of post-secondary options that includes university but also extends to college, micro-credentials or employee skilling programs, are correlated with social mobility.¹⁹⁴ Post-secondary education attainment was higher for women (73.4%) compared to men (55.7%) in 2020.¹⁹⁵

Foreign-born adults in Canada are more likely than Canadian-born adults to have received a post-secondary education: 70% compared to 56%.¹⁹⁶ However, barriers to access and completion remain. Post-secondary access is lower among lower-income households compared to higher-income households.¹⁹⁷ There is also a significant gap between the Indigenous and non-Indigenous population in completion of university, with 13.6% of the Indigenous population aged 25 to 64 receiving a certificate, degree or diploma compared to 32.4% of the non-Indigenous population.¹⁹⁸ In First Nations reserve and northern communities, 33.4% of adults completed some form of post-secondary education.¹⁹⁹

Though post-secondary completion in Canada is high, systemic challenges remain, including low high school graduation rates among key groups creating barriers to access and a need for post-secondary institutions to enhance their role in connecting both domestic and international students to the

labour market. However, many post-secondary institutions are using innovative practices to reach out to populations who experience barriers and to be responsive to emerging labour market challenges such as automation.²⁰⁰ Insufficient funding for post-secondary education in Indigenous communities is also a widely acknowledged challenge.²⁰¹ These barriers stand in the way of supporting development of a critical workforce. At the same time many Indigenous communities are innovating to build their own solutions to meet community post-secondary education and training needs.²⁰²

The rate of youth not in employment, education or training (NEET) is a growing concern due to the pandemic

A growing Canada must fully support and harness the talents and energy of its young people to build shared prosperity and mitigate the effects of population aging. The rate of youth not in employment, education or training (NEET) represents the degree to which young people are on track to fully participate in Canada's society and economy. The UN's Sustainable Development Goals include a goal for a substantial decrease in the youth NEET rate.²⁰³ Canada's NEET rate for 20-to-24 year-olds increased, largely due to impacts from the pandemic, from 12.6% in 2019 to 14.0% in 2020, with Canada ranking 14th out of 32 OECD countries in 2020.²⁰⁴ Due to pandemic effects on the NEET rate and ongoing disparities between key groups, the assessment of the direction Canada is trending moved from "On track" in the 2021 *National Scorecard* to "Needs attention" in 2022.

Though Canada continues to perform better than the OECD average, Canada's NEET rate increased more significantly than most other OECD countries during

the pandemic.²⁰⁵ Prior to the pandemic, Canada had seen some improvements in recent years. Education, training and employment disruptions for youth spurred by the pandemic and reflected in the NEET rate could have long-lasting effects.²⁰⁶

NEET rates were higher for men than for women overall in 2020.²⁰⁷ This is at least partly attributed to increased presence of young women compared to men in post-secondary education. NEET rates were also higher for populations who face barriers in 2020. For instance, a review of Canadian NEET data found not only increased rates for women who are immigrants but a growing gap between immigrant and non-immigrant women during the pandemic.²⁰⁸ NEET rates also remained high among Indigenous youth and racialized Canadians aged 15 to 29 years old. In September and October 2020, the NEET rate was 20% for young Indigenous women and 21% for young Indigenous men compared to 12% for young non-Indigenous women and 14% for young non-Indigenous men.²⁰⁹ Similar trends were observed among racialized Canadians, though the gap was less pronounced for men compared to women.²¹⁰ In addition, recent research indicated that young adults who were most impacted by the pandemic's effects on education were individuals with disabilities, Black Canadians and Indigenous peoples.²¹¹

Supporting NEET youth to reconnect to education, training and/or employment has been deemed a global priority as there is concern that a short time not in education, training or employment can become permanent.²¹² In addition, NEET youth are at risk of being in poverty and having long-term negative economic and social outcomes. Canadians that were NEET as youth are more likely to report poor physical and mental health.²¹³

Participation in adult learning is comparatively high in Canada, but there is room to improve access to training

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. This is especially true in the context of a pandemic which has changed the way people work. In recent years, Canada has reported approximately 47% of Canadians aged 25 to 65 participated in job-related formal or informal training. This is higher than the OECD average of 40% and ranks among the top 10 OECD countries as assessed in the 2021 OECD Skills Outlook.²¹⁴

A 2020 survey by Environics Institute found a similar proportion of participation in work-related training provided by employers at 51%.²¹⁵ However, it reported lower levels of training participation by workers who may be most in need of it, including

only 20% of unemployed workers. According to the Environics Institute survey, only two in five Canadians believe they would receive a grant from government to support training in work-related skills.²¹⁶ In 2021, Canada's Future Skills Centre released results from its large-scale "Responsive Career Pathways" research stream, finding that fragmentation of career guidance systems and inconsistent information about education and training opportunities are key issues in Canada, with employers increasingly concerned about how to ensure workforce resilience in the face of labour market change.²¹⁷

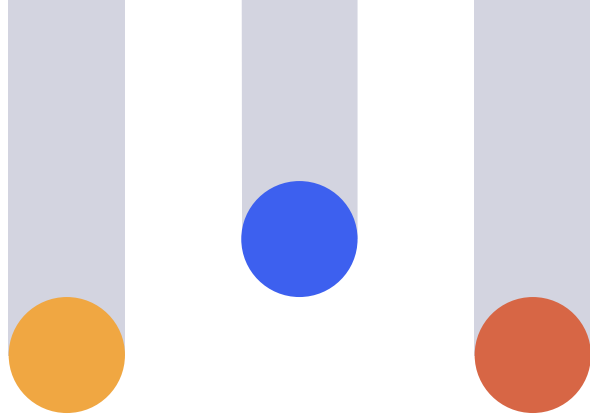
Training of working-age people requires investment, support and collaboration from multiple stakeholders. The federal government has recognized that a skills agenda is essential to supporting career transitions for workers, supporting Canadians with re-skilling, and serving as a foundation for fueling a longer-term innovation agenda for Canada.²¹⁸ Employers, post-secondary institutions and training providers all play key roles in ensuring that we are preparing Canadians to meet emerging labour force needs and the best outcomes are achieved when they work together. While there are indications that Canadian employers are more

willing to invest in training in recent years,²¹⁹ Canada still falls behind many international counterparts in employers' support for employee training. In the International Institute of Management Development's 2021 competitiveness rankings, Canada fell to 28th in 2021 from 20th in 2020 in the degree to which employee training is prioritized by executives.²²⁰

The employment rate is rebounding but key labour market barriers remain for equity-seeking groups hit hardest by the pandemic

The employment rate serves as an indicator of the strength of Canada's labour force and the degree to which Canadians are working. Broad participation in employment is needed for Canada's businesses to thrive, to raise household incomes, mitigate the effects of population aging, and to grow tax revenues needed to support essential services for a growing population. In 2020, Canada's employment rate was 70.0%, ranking 19th out of 37 OECD countries.²²¹ The employment rate fell more than four percentage points from 2019 to 2020, from 74.2% to 70.0% due to the impacts of the pandemic. Though Canada's

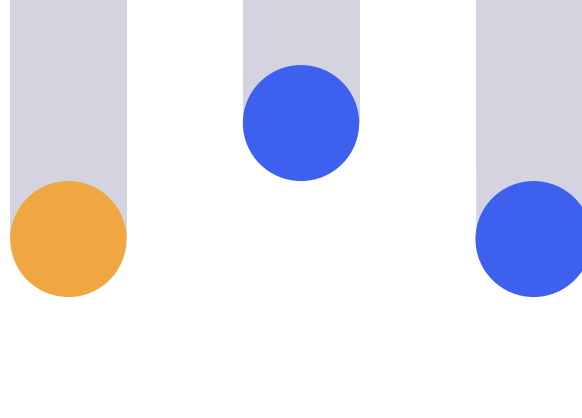




employment rate is higher than the OECD average, it fell more significantly than the OECD overall during the pandemic's early stages.

In 2021, Canada's employment rate started to rebound and was back to pre-pandemic levels by September 2021. The labour force participation rate, which counts both those who are employed and those who are actively searching for employment, also returned to pre-pandemic levels in 2021 after a significant drop at the beginning of the pandemic.²²² However, the number of unemployed Canadians was still higher than before the pandemic and subsequent Covid-19 waves continued to effect the labour market. The rebound to pre-pandemic employment levels also didn't account for lost population growth or employment growth that would have occurred without the shock of the pandemic.²²³ There are an estimated 3 million Canadians who want to work more hours, but who aren't captured in the current Statistics Canada data, which indicates a labour underutilization rate of 15%.²²⁴

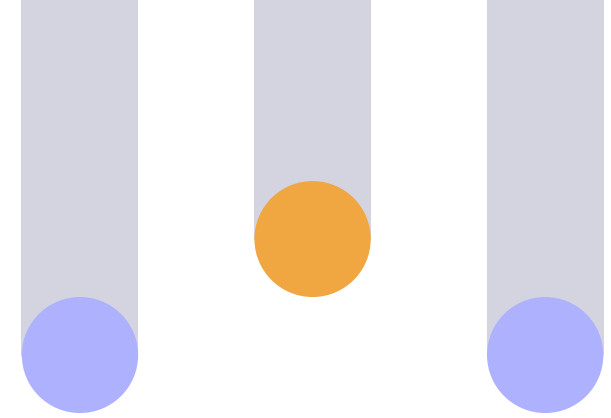
Workers who lost their jobs or lost a significant number of hours during the pandemic, particularly in its earlier stages, were able to make ends meet due to the emergency income security measures implemented by the federal and provincial and territorial governments, like the federal Canada



Emergency Response Benefit (CERB) and later Canada Recovery Benefit (CRB). These unprecedented government expenditures had a critical role in maintaining livelihoods and bolstering public confidence in a time of deep crisis.

Barriers in the labour market have translated to lower employment rates for many key groups, both prior to and during the pandemic. In 2016, there was a gap in employment rates between Indigenous and non-Indigenous people of 8.4 percentage points for adults aged 15 years or older. Non-Indigenous people had an employment rate of 60.5% compared to 52.1% for Indigenous peoples. Although assessing a different age range, the employment rate for adults aged 18 or older in First Nations reserve and Northern communities was 48.7%, based on survey research conducted by the First Nations Information Governance Centre.²²⁵ Both Indigenous and non-Indigenous women experienced declines in employment during the pandemic, but employment among Indigenous women took more time to recover.²²⁶

Additionally, there was an employment gap between racialized and non-racialized workers that grew from 6 percentage points before the pandemic to 6.5 percentage points during the pandemic.²²⁷ Immigrants were also particularly impacted by



Covid-19. At the beginning of the pandemic, the employment gap between immigrant and Canadian-born workers was approximately 1%. By May 2020, this gap increased as immigrants were 4% more likely to be unemployed than Canadian-born workers.²²⁸

Canada continues to have a high and persistent incidence of **low-wage work** that reflects the prevalence of low quality jobs

The quality of people's employment is an important indicator of quality of life and is a core building block for creating shared prosperity, which can also bolster Canada's attractiveness. There are many ways in which "quality work" can be defined, but important indicators include regularity of work hours, opportunities to move from temporary to permanent employment, and access to benefits.²²⁹ According to Statistics Canada, low pay is correlated to elements of poor job quality.²³⁰ In the past few decades, wage disparities have led to growth of higher incomes and stagnation in middle and low incomes, which contributed to growing income inequality and declines in access to opportunity and social mobility.²³¹

The OECD defines low-pay as earning less than two-thirds of median earnings. In 2019, 20.7% of Canadian workers earned low pay by this definition, representing a high incidence of low-paid work compared to other OECD countries (Canada was 15th out of 16 OECD countries who had reported 2019 figures).²³² Canada has observed some decreases in low-wage work in recent years, down from 22.5% in 2014. Nonetheless, it remains higher than the OECD average of 13.9% in 2019.

The highest quality jobs are generally considered those that are full-time with security, high pay and benefits. There has been a significant rise in precarious employment in Canada and many OECD countries in recent years. The proportion of gig workers—one form of precarious workers—has grown from 5.5% in 2005 to 8.2% in 2016.²³³ While Canada has seen some declines in temporary employment, levels remain higher than the OECD average.²³⁴ The percentage of paid workers covered by a registered pension plan has also steadily decreased over the past two decades.²³⁵

The early days of the pandemic and its public health measures significantly affected low-wage workers, with substantial lay-offs.²³⁶ At the same time, wage levels among high-wage jobs increased.²³⁷ Low-wage workers are more likely to be racialized with, on average, racialized Canadians earning 87.4 cents per dollar compared to non-racialized Canadians.²³⁸

As of October 2021, wages in Canada increased overall over a two-year period by around 5%.²³⁹ Mounting job vacancies threatening the operational capacity of many employers have led to widespread discussions about whether increased wages will be necessary for employers to attract and retain workers at the lower end of the wage spectrum. However, labour demand increases have so far not led to growth in wages across many sectors in Canada, with limited change in the accommodation and food services industry, as one example.²⁴⁰



Support for children & families

At a glance

- | **Child care** participation continues to be low but access could be improved with implementation of the Canada-wide early learning and child care system
- | **Parental leave uptake** could be improved and would better support families if it worked seamlessly with child care
- | The **employment rate for mothers** was damaged by the pandemic and is core to economic recovery
- | Canada has made progress on **child poverty** but risks to further progress are significant
- | Canada entered the pandemic behind on **youth well-being** and Covid-19 has exacerbated these challenges





The population link

Implementing ambitious improvements to policies supporting children and families such as early learning and child care can support Canadians' choices on family size. Properly planned, a robust system to support children and families can enable women in particular to work, be a good source of jobs, contribute to greater GDP, help families recover from the pandemic, and position Canada as an attractive jurisdiction for potential immigrants. Child care is especially critical for newcomer mothers who may need it so they can learn English or French, to participate in training or education and so they can gain quality employment to support their families' successful transition to life in Canada. An accessible, reliable system to support children and families is critical to encouraging well-being for children and youth and important to supporting their development and future success.

Current context

The challenges facing children and families were heightened during the past two years since the start of the pandemic. Disruptions in work, school, and the ability to connect led to extreme stress, which was magnified for women, working-age people 25 to 54, LGBTQ2+ people, and those living with children.²⁴¹ On one hand, individual characteristics like parental resilience have impacted the ability of families to cope, but the supports around them in the form of policy and practice changes have played a major role as well.²⁴²

In the past year, Canadian public policy has seen significant shifts that are providing better supports for families. This has included the commitment to transforming child care through the creation of a Canada-wide Early Learning and Child Care (ELCC) system and the launch of federal-provincial agreements for implementation. In addition, there were income supports such as top-ups to the federal government's Canada Child Benefit (CCB) and various provincial government income security supports for families during the pandemic. In January 2020, legislation came into force co-developed between the Government of Canada and Indigenous peoples, provinces, and territories focused on enabling Indigenous peoples to exercise authority over child and family services, and while much work remains, implementation is now beginning with a focus on better serving Indigenous youth and families and reducing the number of children in foster care.²⁴³

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Child care participation

Robust systems for quality early childhood education and care can improve children's future skills development, 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.

Canada had **52.2% of children aged 0 to 5** in some form of child care outside of the immediate family (not including kindergarten) in 2020.

Increased levels of participation in early learning and child care.

Needs attention

Participation in early learning and child care fell between 2019 and 2020 due to substantial pandemic disruptions. However, the federal government took significant steps in 2021, in partnership with provinces and territories, to strengthen Canada's child care system for future years, and to improve access, affordability and quality of child care in Canada. As a result, this indicator improved from "falling behind" in 2021 to "needs attention" this year.

Parental leave uptake

Parental leave contributes to positive child development and improves quality of life for the full family. A strong paid parental leave system can support new parents and particularly mothers to temporarily exit employment, with job security and income support. Accessible and robust leave options can contribute to supporting Canadians' choices on family size.

Among recent mothers with insurable employment, **87.9% of those living in Canada (outside of Québec)** reported having received maternity or parental benefits in 2019.

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

Needs attention

While there was an uptick in 2019 in uptake of parental leave across Canada (outside of Québec), there was a general decline in recent years. Additionally, this uptick was among mothers who had standard jobs that paid into EI. When taking into account all mothers, instead of the 74.2% with insurable employment, the share accessing parental leave is much lower. Québec has a more generous parental leave system, which has led to greater uptake in that province. A gap in uptake between low-income and high-income households is expected to widen amid the pandemic, including for racialized, immigrant and Indigenous families.

Indicators



Why it matters

Employment rate for mothers

The employment rate of mothers is a key enabler of Canada's social and economic progress, and it is essential to addressing challenges of workforce aging, building long-term prosperity, and recovering from Covid-19.



Where Canada is at

Canada ranked **12th out of 36 OECD countries** on maternal employment rate in 2019.

Canada had a **maternal employment rate of 76.8%**.



Target

Top 10 OECD countries on maternal employment rate.

Threshold: Austria was 10th in the OECD in 2019 with a **maternal employment rate of 77.6%**.



Direction Canada is trending

Needs attention

Canada was below the target on its maternal employment rate in 2019. The pandemic resulted in significant job losses and losses of hours worked for women, which has set back progress toward equity in the workforce and may impact maternal employment in future years. Employment rates for mothers can vary based on age of the child (with mothers of younger children typically having lower rates of employment), as well as by education level and place of birth. Canada's renewed efforts to build a Canada-wide early learning and child care system has the potential to help make progress on this indicator.

Child poverty

Child poverty can have a negative impact on children over the long term and be a barrier to children's development. The rate of child poverty in Canada reflects the quality of living standards for families.

9.7% of Canadians under the age of 18 were in low income in 2019.

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

On track

Canada continued to see improvements in reducing child poverty in 2019. There are indications that emergency relief benefits may have offset potential increases in poverty associated with the pandemic, but risks remain that child poverty rates could increase in future years. Racialized and Indigenous children and youth are more likely to live in poverty compared to Canada overall, as well as children living in a lone-parent household. Child poverty has been identified among the top 10 threats to childhood by leading advocates.

Indicators



Why it matters

Youth well-being

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 here.



Where Canada is at

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

The percentage of **students who reported always feeling sad was 8.9%** 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

Even before the pandemic, Canada had a high proportion of students who reported always feeling sad compared to students in other OECD countries. Children in low-income households and other vulnerable populations were more likely to experience mental health challenges during the pandemic.



Analysis

Child care participation continues to be low but access could be improved with implementation of the Canada-wide early learning and child care system

Robust systems for quality early childhood education and care can improve children's future skills development, well-being and learning and enable greater participation in the labour force by parents, particularly for mothers. This is essential to economic recovery from Covid-19. Furthermore, access to quality and affordable child care is "indispensable to sustaining higher fertility rates," according to the UN Population Fund.²⁴⁴ A universal ELCC system can have major economic impacts, with one projection finding that it could increase annual GDP by \$63 billion to \$107 billion per year.²⁴⁵ A UN Sustainable Development Goal is for all children to have access to quality early childhood learning.

In 2020, the participation rate in regulated or unregulated child care (outside of immediate family, not including babysitting or kindergarten) for children up to five years old was 52.2%.²⁴⁶ This is a decline from 59.9% in 2019.ⁱⁱⁱ The data illustrates that participation in child care was significantly impacted by the pandemic. Two-fifths of parents who used child care during the pandemic reported difficulties in finding child care.²⁴⁷ Participation rates varied across the country in 2020, with the highest rates

in Québec (which launched a universal child care program in the 1990s) and the Atlantic provinces, and the lowest rates in Alberta, Ontario and Nunavut.²⁴⁸ A review of child care fees in Canadian cities found that cities outside of Québec reported having at least 10% fewer children in child care in fall 2020 compared to February 2020, with some cities experiencing drops of 20% or more.²⁴⁹ In Québec, enrolment drops were smaller at publicly funded centres with low fees.²⁵⁰

While the provision of child care services was significantly impacted by the pandemic, the federal government took important steps in 2021, entering into agreements with provinces and territories to begin building an ambitious Canada-wide early learning and child care system. This plan has significant potential to improve Canada's child care system in the future, though the process of implementation will be ongoing for many years and cannot be taken for granted. The Canada-wide plan aims to increase child care affordability, to grow the number of spaces with a focus on the not-for-profit sector, and to improve quality by focusing on the workforce with proposed investments totaling \$27.2 billion over five years.²⁵¹

Child care affordability and quality are key to participation. In 2020, among parents who did not use child care and reported difficulty in finding care, 59% reported the difficulty was related to affordability of child care.²⁵² There is significant variability in child care fees across the country. In 2020, median monthly fees for infants in child care ranged from \$181 in several cities in Québec

iii. There are limitations in how early learning and child care is measured and reported in Canada. The Survey on Early Learning and Child Care Arrangements does not provide a full picture of ELCC in Canada, as it does not include kindergarten and does not provide full insight on the number of children in regulated care. With the new federal plan there is an opportunity for better data collection to obtain a clearer picture on early learning and child care in Canada.

to \$1,866 in Toronto.²⁵³ A major goal of the new Canada-wide plan is to reduce fees for regulated child care by 50% by the end of 2022 and to bring fees down to \$10 a day within five years.²⁵⁴ Family income is an important factor in child care participation: low-income families are 20% less likely to use non-parental child care.²⁵⁵

In addition, the quality of child care varies across Canada and is linked to the quality of work for the child care workforce. Regulation of child care is important for quality, but also basic health and safety.²⁵⁶ However, regulated child care spots are too limited to meet parental demand. In 2019, Canada had regulated child care spaces for a little more than a quarter of children (26.9% for children aged zero to five).²⁵⁷ The Canada-wide early learning and child care plan aims to transform the system to enable all parents to have access to quality and affordable child care across the country.²⁵⁸

Parental leave uptake could be improved and would better support families if it worked seamlessly with child care

Paid parental leave is designed to protect maternal and infant health, to allow for important early childhood care for children, and to support employment that promotes gender equity. To support future fertility rate growth, Canada needs a system of parental leave that connects seamlessly with its child care system, providing certainty to parents that their leave and care needs will be met.²⁵⁹ Only about 74% of new mothers outside of Québec have traditional “insurable” employment that makes them potentially eligible for leave.²⁶⁰ Of those who do, in 2019, 87.9% had received benefits.²⁶¹ This was a 2.5 percentage point increase compared to 2018.

An assessment of 2017 data found that only 65% of all new mothers, including those without insurable employment, received parental benefits outside of Québec.²⁶²

Québec has its own approach to parental leave. The Québec Parental Insurance Plan (QPIP), which is more generous than what is available in the rest of Canada in a number of ways, has higher levels of uptake compared to the rest of the country. In 2019, 97.2% of mothers with insurable employment received benefits under QPIP.²⁶³ The assessment of 2017 data found that 89% of all mothers in Québec received parental benefits.²⁶⁴ Québec’s parental leave system has lower eligibility requirements based on earnings and mandatory enrolment of self-employed individuals.²⁶⁵ It also pays considerably higher benefit rates compared to the rest of Canada.²⁶⁶ Additionally, Québec’s system enables high levels of paternity leave, which can act as a lever toward gender equality at work and at home and can facilitate father-child bonding. The difference in uptake of parental leave by spouses of new mothers (mostly men) between Québec and the rest of Canada is significant – 85.6% in Québec compared to 20.5% in the rest of Canada in 2019.²⁶⁷

Outside Québec, Canada’s current parental leave system has eligibility challenges and relatively low benefit rates. To access parental leave, one typically must have 600 hours of employment in the previous year. However, the federal government temporarily loosened eligibility criteria to 420 hours in response to the pandemic.²⁶⁸ Additionally, benefit rates are a maximum of 55% of income with a lower ceiling compared to Québec,²⁶⁹ though international research indicates rates of at least 70% would be more effective in supporting parents, especially fathers, to take leave.²⁷⁰ These factors leave out

low-income families from accessing parental leave, particularly those who are in precarious employment or self-employed.²⁷¹ The gap in uptake between low-income and high-income households is expected to widen amid the pandemic, including for racialized, immigrant and Indigenous families.²⁷²

Enabling better access to parental leave for all mothers, regardless of income, race, Indigeneity, immigrant status, or location in Canada is key to creating the seamless parental leave to child care system that can reap benefits for Canadian families and Canada’s future.

The employment rate for mothers was damaged by the pandemic and is core to economic recovery

The employment rate of mothers is a key enabler of Canada’s social and economic progress, and it is essential to addressing challenges of workforce aging, building long-term prosperity, and recovering from Covid-19. Women’s economic and social contributions have been a critical component of Canada’s success and will be crucial to Canada’s economic recovery.²⁷³ The rise in women’s labour force participation in recent decades has contributed to increased productivity and reduced earnings inequality, and has enabled children and families to thrive.²⁷⁴ Over the last 40 years, the growth of women’s labour force participation has accounted for about one-third of Canada’s real per capita GDP growth.²⁷⁵ However, even before the pandemic, there were barriers to employment due to a lack of supports for mothers as well as bias. In 2019, Canada ranked 12th out of 36 OECD countries in its employment rate for mothers with children aged 0 to 17, at 76.8%.²⁷⁶

Employment rates for mothers vary, including by:

- | **Age of the child:** Mothers in Canada with a youngest child aged 0 to 5 had a lower employment rate of 71.1% in 2019, while mothers with a youngest child aged 6 or older had a higher employment rate of 81.4%;²⁷⁷
- | **Education levels:** Mothers in Canada with children aged 0 to 17 who had a low education level had an employment rate of 42.4% in 2019;²⁷⁸
- | **Place of birth:** Mothers in OECD countries who are immigrants are less likely to be employed.²⁷⁹

Before the pandemic, women who became mothers already faced significant earnings penalties compared to men with children and women without children.²⁸⁰ This means that barriers associated with having children limit the economic and social contributions that women are able to make.

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. Among parents using child care who reported difficulties, 36% reported they had to change their work schedule and 31% reported working fewer hours.²⁸¹ This brought attention to the need to improve Canada's child care system and led to the momentum needed to develop a Canada-wide early learning and child care system.

While there was some recovery in 2021, with reports that September 2021 employment rate levels were similar to September 2019 levels for mothers with a youngest child less than 13 years of age,²⁸² mothers returning to employment after pandemic-related lockdowns could face a prolonged gap in earnings with serious setbacks to equity gains over the past

decades.²⁸³ Additionally, racialized women were more likely to face unemployment during pandemic recovery efforts compared to non-racialized women.²⁸⁴

Canada has made progress on *child poverty* but risks to further progress are significant

Child poverty can have a negative impact on children over the long-term and the rate of child poverty in Canada reflects the quality of society that Canada is building. Children who live in poverty are more likely to stay in poverty as they get older. This is partly why the global community has established a UN Sustainable Development Goal to reduce poverty around the world.²⁸⁵ For too many children in Canada, poverty limits access to opportunity. In 2019, 9.7% of Canadians under the age of 18 lived under Canada's official poverty line, known as the Market Basket Measure.²⁸⁶ This represents a slight decrease in poverty levels from 10.8% in the previous year.²⁸⁷ Poverty rates can also be measured through the Low Income Measure (LIM), a different approach referenced by key advocates which shows more modest progress in reducing poverty.^{iv}

Poverty has been identified as one of the top 10 threats to childhood in 2021 by Children First Canada, with particularly high rates for First Nations children living in reserve communities and for racialized children.²⁸⁸ Children living in households with a female lone parent were significantly more likely to be living in poverty compared to children in two-parent families, 29.8% compared to 7.2% in 2019 (using the Market Basket Measure).²⁸⁹ Additionally,

iv. Canada's child poverty rate is higher when using other measures beyond the Market Basket Measure. For instance, it was 11.4% in 2019 using the Low Income Measure, After Tax (LIM-AT).

according to 2016 Census data, immigrants aged 0 to 17 were much more likely to live in low income (32.2%) compared to non-immigrants (15.4%) based on the Low Income Measure After Tax (LIM-AT).²⁹⁰ There are also significant differences in child poverty rates depending on where one lives in Canada, with particularly high rates in Manitoba, Saskatchewan and Nunavut.²⁹¹

The federal Canada Child Benefit (CCB), introduced in 2016 and topped-up during the pandemic, has had a positive impact in reducing child poverty.²⁹² However, a 2021 report card on child poverty by Campaign 2000 found that poverty deepened for many children in Canada in 2019 compared to previous years, with those living in poverty moving further away from the poverty line.²⁹³ This means that many families were already facing significant challenges before the pandemic began. While data are not yet available and the impact of the pandemic on the child poverty rate has yet to be fully determined, there are indications that pandemic-related benefits mitigated the negative impact of employment income losses for many households.²⁹⁴

The federal government set a goal to reduce poverty across Canada by 50% by 2030 (compared to 2015 levels) as part of an overall effort to end poverty in line with UN Sustainable Development Goals.²⁹⁵ Ensuring that child poverty remains on the agenda is important to Canada's recovery and the larger project of building a prosperous Canada that grows in population and grows well into the future.

Canada entered the pandemic behind on youth well-being and Covid-19 has exacerbated these challenges

Well-being among 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 our society and economy, and to Canada's attractiveness to those who wish to raise a family in Canada.

Youth well-being can be assessed in multiple ways, including by assessing mental health. In 2018, 9% of 15-year-old Canadian students reported always being sad, ranking 26th out of 32 OECD countries.²⁹⁶ The OECD average was 6% while top countries reported much lower levels at 3%. At the same time, the proportion of students in Canada who reported sometimes or always feeling happy was higher than the OECD average (93% compared to 91%). However, students that were disadvantaged socioeconomically were less likely to report positive feelings.²⁹⁷

UNICEF similarly identified challenges for Canada on its report card on child well-being,^v with Canada falling from 10th to 30th between 2010 and 2020.²⁹⁸ In 2020, Canada was below average in more than half of the measures used by UNICEF.²⁹⁹ A 2019 survey on children and youth found that 17% of youth aged 15 to 17 reported fair or poor levels of mental health, with girls reporting higher levels of mental health challenges than boys.³⁰⁰ Low levels of mental health were connected to lower academic performance and can have lasting impacts on developmental and social skills. In Canada's first-ever state of the youth report, released in 2021, Indigenous, Inuit and

Black youth reported lower levels of life satisfaction. Additionally, a notably lower proportion of Indigenous, First Nations, Métis and Inuit youth reported an overall strong health status.³⁰¹ This was the baseline of how some young people entered the pandemic.

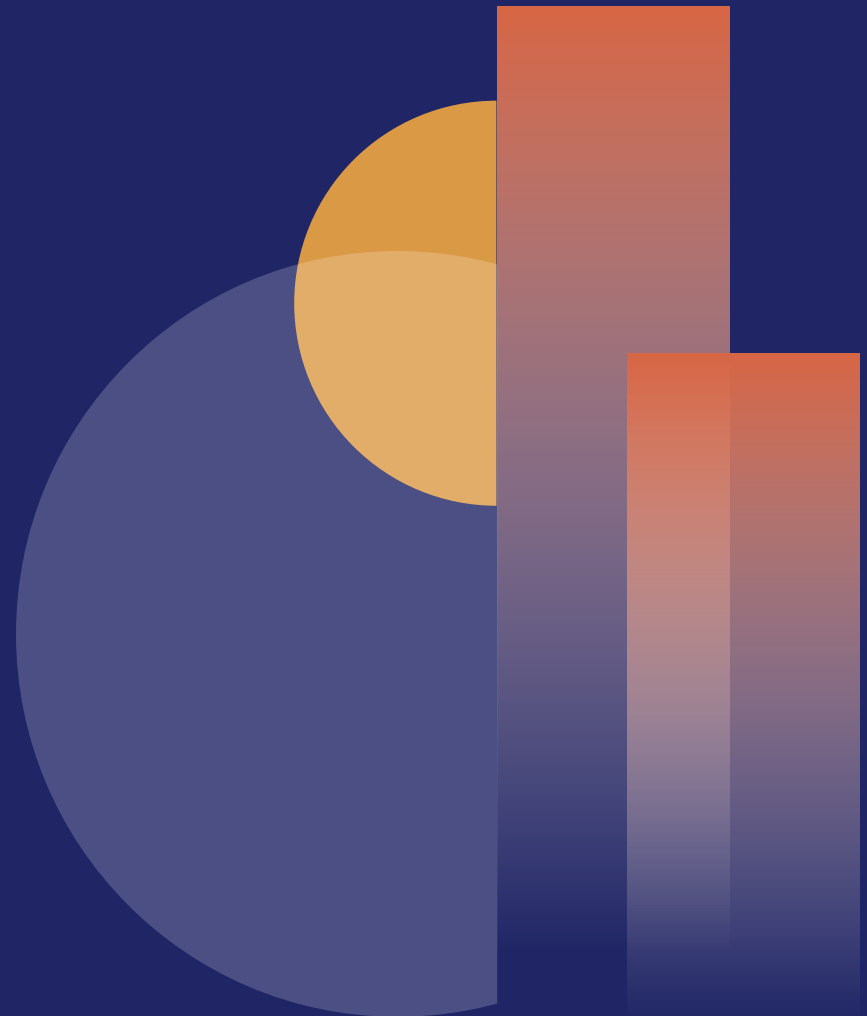
The pandemic had a particularly detrimental impact on youth well-being and exacerbated challenges for those already facing mental health issues. In May 2020, 27% of youth aged 15 to 24 reported moderate to severe levels of anxiety, which was a higher proportion compared to older age groups.³⁰² Children in low-income households and other vulnerable populations were more likely to experience mental health challenges during the pandemic.³⁰³ Among the top threats to childhood in 2020 identified by Children First Canada were poor mental health and systemic racism and discrimination.³⁰⁴ It is important to factor youth mental health in with other key economic and labour market policies to ensure that youth are well supported to transition into further education, employment and training given the barriers they have faced in recent years. This is especially true for multi-barriered youth.

v. UNICEF measures of child well-being generally vary in each report card, which impacts direct comparability. However, UNICEF has noted that many indicators remain consistent and overall patterns can be observed.

Infrastructure & environment

At a glance

- | **Investment in infrastructure** requires significant attention after decades of underinvestment
- | **Housing** is becoming increasingly unaffordable for more Canadians
- | **Broadband uptake** is strong, though key gaps for populations such as rural, low-income and Indigenous populations remain
- | Canada has insufficient **density in cities**, which is necessary to reduce emissions, shorten commute times, and provide better access to services
- | Canada's poor **climate change performance** could turn a corner if commitments are followed by robust action
- | Canada can counter the risks of climate change by building its **resilience**





The population link

Population growth can only be done well if it is accompanied by investments in core infrastructure and climate adaptation. This includes investments in critical areas such as affordable housing in communities of all sizes, digital infrastructure, and urban infrastructure like public transit that will need to keep pace with and anticipate population growth. Access to core infrastructure supports all households and businesses to meet their needs. Low-income people, racialized and Indigenous peoples and those in rural and remote communities often bear the burden of poor access to quality infrastructure.³⁰⁵ Clearly articulating a goal of a growing population could unlock new approaches to building and planning more sustainable infrastructure that can accommodate more people and be resilient to climate-related events. We need a paradigm shift in how we approach our built environment toward more resilience, density, connectivity between communities, and accessibility.

Current context

Canada has experienced long-running challenges in investment in critical infrastructure, which is in part due to municipalities owning a significant amount of infrastructure, but having few financial levers to maintain and support this infrastructure independently.³⁰⁶ However, there are positive recent signals of change including new federal investment streams in public transit. Similarly, when it comes to environmental sustainability, Canada is facing deep challenges, but it is also seeing developments that could change the country's trajectory if implemented successfully.³⁰⁷ In 2021, Canada announced new investments in climate change adaptation and resilience including wildfire resilience, flood maps, health adaptation, and standards to support infrastructure resilience.³⁰⁸ After the Glasgow Climate Change Conference (COP26), Canada committed to a hard cap on oil and gas emissions.³⁰⁹ The flooding, wildfires and heat wave events in Canada in 2021 illustrate the impact of climate change and the need to implement these and other proactive strategies.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Investment in infrastructure

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

Investment in infrastructure represented **3.7% of GDP** in 2020.

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

Needs attention

Much of Canada's public infrastructure is aging and in need of repair. Infrastructure needs also vary across the country, with rural and remote areas and Indigenous communities in particular facing distinct challenges compared to urban areas. Infrastructure investment levels have stagnated at around 4% of GDP, with some declines in recent years. Experts have projected more than 5% of GDP should be spent on infrastructure to make up for previous limited spending. Municipalities own a significant amount of infrastructure, but have few financial levers to maintain and support this infrastructure. Recent federal investments and planning could help put infrastructure spending on track.

Housing affordability

Access to affordable housing that is suitable and adequate is needed to support the health and well-being of a growing Canadian population. Poor housing quality and mounting housing insecurity are correlated with negative health outcomes and pose a risk to long-term social cohesion.

Incidence of core housing need in urban areas in Canada was **12.9%** in 2019.

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

Falling behind

Core housing need increased in urban areas in 2019. Renters, single or divorced individuals, seniors, women and Indigenous peoples were more likely to enter and remain in core housing need. Between 2005 and 2020, Canada recorded one of the largest increases in housing prices in the OECD. People with low and moderate incomes, newcomers to Canada, and students have found it difficult to find suitable, affordable housing. The pandemic has continued to exacerbate housing challenges, moving this indicator from "needs attention" in 2021 to "falling behind" this year. However, these challenges have also spurred innovative actions on the part of government that could support a path forward.

Indicators



Why it matters



Where Canada is at



Target



Direction Canada is trending

Broadband uptake

Widespread access to broadband 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.

Canada **ranked 8th** out of 38 OECD countries in fixed broadband subscriptions per 100 people in 2020.

There were **41.56 subscriptions per 100 people** in Canada in 2020.

Top 10 OECD countries for fixed broadband subscriptions.

Threshold: The United Kingdom was 10th in the OECD with **40.92 fixed broadband subscriptions per 100 people** in 2020.

On track

Canada has consistently increased fixed broadband subscriptions per 100 inhabitants over the last decade. However, challenges remain related to cost, access and quality, particularly for rural, remote, and Indigenous communities, as well as for low-income households across Canada, including those in urban areas.

Population density of metropolitan areas

Well-planned density can address issues of housing affordability, access to services, health outcomes, and environmental sustainability, and will be essential as Canada's population grows. Urban areas in Canada are typically among the least dense in OECD countries and there is a wide range in density levels.

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

The OECD average for population density of metropolitan areas.

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

Needs attention

Population density in Canada's urban core areas has increased at a faster rate than in the OECD overall, though it remains below the OECD average. While Canadian cities have become denser over the past two decades, there is significant need to build to accommodate new residents and to do so in a way that emphasizes quality of life, affordability, green space, transit, walkability, and access to jobs and community amenities.

Climate change performance

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

Canada **ranked 61st** out of 64 on the 2022 Climate Change Performance Index.

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

Falling behind

Canada ranks among the lowest-performing countries on the Climate Change Performance Index, which assesses performance on GHG emissions, renewable energy, energy use, and climate policy. However, recent policy decisions on climate change show promise for improving Canada's progress toward the international goal of achieving net-zero emissions if they are followed with robust action.

Indicators

 **Why it matters**

 **Where Canada is at**

 **Target**

 **Direction Canada is trending**

Resilience

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.

Canada **ranked 14th** of 45 upper income countries in the 2019 Notre Dame Global Adaptation Initiative (ND-GAIN) Index.

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

Needs attention

Canada has been trending slightly downward over the last decade on the ND-GAIN Index, which assesses a country’s vulnerability to climate change and other global challenges, in combination with its readiness to adapt. Canada is rated as “low vulnerability” and “high readiness” but could do more to improve.



Analysis

Investment in infrastructure requires significant attention after decades of underinvestment

Sustainable population growth will require renewed investments in infrastructure across a wide variety of areas including roads, bridges, hospitals, affordable housing, digital infrastructure, urban infrastructure like public transit, and wastewater, sports and recreational facilities. Without planned and strategic investments, population growth will put a strain on quality of life and well-being.

Infrastructure helps both households and businesses achieve their goals, by enabling goods to flow and enabling people to live in adequate spaces, get to work, to travel from place to place, to connect to the internet, and much more. For these reasons, investment in infrastructure is closely tied to economic growth, competitiveness, productivity, as well as environmental and social well-being. While Canada needs infrastructure investment rates closer to 5% of GDP, investment levels have fallen from 4.0% of GDP over the last few years to 3.7% of GDP in 2020.³¹⁰ Higher levels of investment are needed to make up for decades of underinvestment, with one estimate of Canada's infrastructure deficit at between \$110 billion and \$270 billion.³¹¹

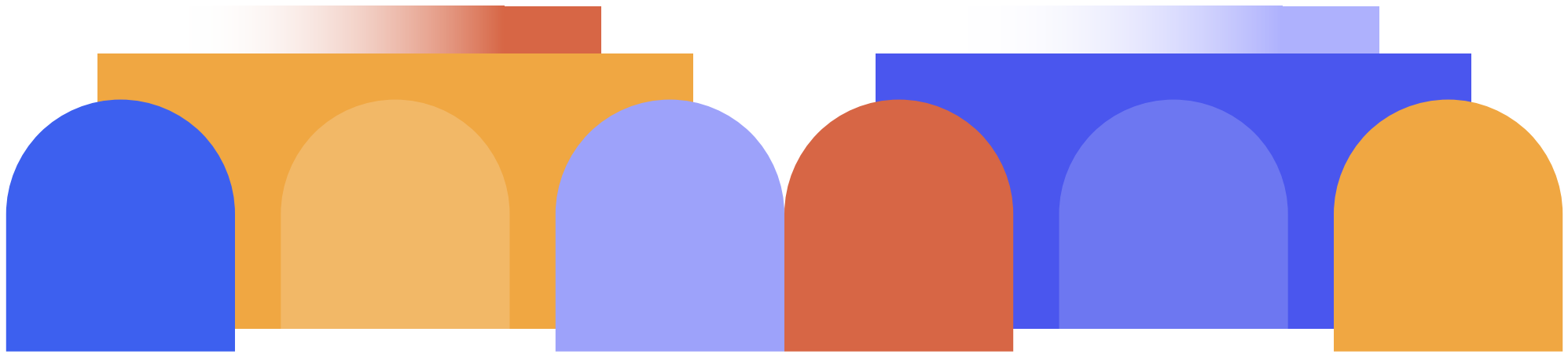
Much of Canada's public infrastructure is aging and in need of repair. As of 2019, Canada's infrastructure was identified as at risk overall, with nearly 40% of roads and bridges in Canada being in fair, poor or very poor condition and 80% of infrastructure assets having been built more than 20 years ago.³¹² Infrastructure needs can also vary across the

country, with rural and remote areas facing distinct challenges compared to urban areas. For example, in northern parts of Canada, housing adequacy, electricity reliability, and road and airport quality are bigger challenges compared to the rest of the country.³¹³ Access to critical infrastructure including transportation, clean water, sewage treatment, and clean power is particularly lacking for many Indigenous communities. The Canadian Council for Public-Private Partnerships estimates it will take up to \$30 billion in investment to address infrastructure deficits for First Nations communities.³¹⁴

The way infrastructure is financed has also led to challenges. Different levels of government are responsible for specific types of infrastructure, with much core public infrastructure owned by municipalities. This can pose a challenge as municipalities have limited powers for revenue generation to invest in the infrastructure they own and do not receive the tax revenues from this infrastructure.³¹⁵ As a result, municipalities rely on provincial and federal dollars for support in areas in which priorities are shared.³¹⁶ All levels of government have a role to play in improving Canada's infrastructure.

While these underlying challenges remain, there have been promising recent steps taken on infrastructure investment:

- | The federal government has planned additional funding for the construction, repair and support of affordable housing units and is considering new measures to help cities expand housing supply such as the Housing Accelerator Fund.³¹⁷
- | Due to the results of provincial and federal broadband investments, more than 890,000 households across Canada are on track to be connected to high-speed Internet in rural and remote areas.³¹⁸



Canada now has important infrastructure data to inform planning through the Core Public Infrastructure Survey.

Building on this foundation of investment and action is a critical way for Canada to grow its economy, improve quality of life for Canadians, and plan for a bigger population into the future.

Housing is becoming increasingly unaffordable for more Canadians

Access to affordable housing that is suitable and adequate is needed to support the health and well-being of Canadians today and to accommodate a growing population. Poor housing quality and rising housing insecurity are correlated with negative health outcomes and pose a long-term risk to social cohesion.³¹⁹

The rates of core housing need in urban areas have worsened in recent years. Core housing need is a measure that “determines if a household can afford suitable and adequate housing in their community.”³²⁰ Many people in Canada live in housing that is below standards of affordability, adequacy and suitability. In 2019, core housing

need in Canada’s urban areas was 12.9%, a slight increase from the previous year.³²¹ This is higher than the rate of core housing need for all of Canada – both urban and rural – which was 11.6% in 2018.³²² Core housing need is less common among rural households, at 7.6% in 2018.³²³ CMHC has identified that renters, single or divorced individuals, seniors, women and Indigenous people were more likely to enter and remain in core housing need.³²⁴ Indigenous households are in core housing need 1.4 times more often than non-Indigenous households.³²⁵ Additionally, in First Nations northern and reserve communities, housing scarcity is often the primary housing challenge, with 46.8% living in crowded households.³²⁶

The OECD has found that housing prices and debt related to housing are high in Canada, particularly in Toronto and Vancouver. This has a detrimental impact on affordability and poses broader economic risks.³²⁷ Between 2005 and 2020, Canada recorded one of the largest increases in housing prices in the OECD.³²⁸ As a result, people with low and moderate incomes, newcomers to Canada, and students have found it particularly difficult to find suitable, affordable housing.³²⁹

The pandemic further exacerbated housing challenges as greater proportions of Canadians reported problems with meeting financial obligations such as rent or mortgage payments. The impact on the pandemic was more significant for racialized people and those born outside Canada, with 51% of racialized peoples and 47% of people born abroad reporting the pandemic had a major or moderate impact on their ability to meet financial obligations compared to 29% of people born in Canada and 29% of non-racialized people.³³⁰ In 2021, there were declines in housing affordability across Canada in all markets and housing categories, a trend expected to continue in the future.³³¹

The federal government has identified housing as a core priority and has taken steps to support more affordable housing, including implementing the National Housing Strategy and investing \$2.5 billion to support creation of new affordable housing units.³³² The Rapid Housing Initiative, introduced by the federal government during the pandemic, has demonstrated a commitment to the use of new approaches, including modular housing, to help achieve the goal of ending chronic homelessness.³³³

There are also extensive programs across provinces, territories and municipalities.³³⁴ However, these programs are insufficient to meet the current demand.

Canada faces a critical shortfall of housing overall, with the lowest number of housing units per 1,000 residents of any G7 country.³³⁵ This scarcity, along with factors such as low interest rates, are key contributors to price increases and the growing affordability crisis. This crisis is affecting households and contributing to departures from major cities for even some high-income professionals, who are citing affordability challenges.³³⁶ However, mechanisms to increase housing supply can be politically challenging, often balancing the interests of current residents invested in the character of their neighbourhoods with those of potential new residents who require housing. A breakthrough on these issues will require all-of-government collaboration and attention to building both middle-income and low-income housing when addressing supply.³³⁷ The Housing Accelerator Fund in development by the federal government could play an important role in this regard.

Broadband uptake is strong, though key gaps for populations such as rural, low-income and Indigenous populations remain

Widespread access to broadband is critical for Canada to grow in a way that builds shared prosperity, enabling all Canadians and newcomers alike to fully participate in the economy and society from anywhere in the country.³³⁸ The pandemic has reinforced the importance of broad-based access to reliable, accessible, and high-speed internet

in all regions of the country. It is also a critical factor in attracting newcomers and Canadians to communities in need of workforce growth, particularly as remote working options expand.

In 2020, Canada ranked 8th out of 38 OECD countries on the number of fixed wired broadband subscriptions, with 41.56 subscriptions with download speeds of 256 kbit/s or greater per 100 inhabitants (this includes DSL, cable modem, fibre-to-the-home and other fixed technologies).³³⁹ However, Canada does worse in terms of mobile broadband subscriptions, ranking 37th out of 38 OECD countries in mobile subscriptions that advertise data speeds of 256 kbit/s or greater with 72 per 100 inhabitants in 2020.³⁴⁰ While Canada has had some successes related to broadband uptake, there are areas for improvement in overall broadband connectivity that Canada will need to work on to stay on track.

There is a significant gap in broadband availability between different locations and populations. For example, there is a gap between urban and rural and remote parts of Canada, with 45.6% of rural households and 34.8% of First Nations reserve communities able to access 50/10 broadband service in 2019 compared to 99.6% of households in large population centres.³⁴¹ Lower-income households are more likely to face internet access challenges compared to higher-income households in both urban and rural areas across Canada.³⁴² The pandemic has widened the digital divide, as low-income families and those in remote regions of the country have faced challenges connecting to needed resources. Canada is among the countries with the highest prices for high-speed broadband,³⁴³ which can further contribute to divides across Canada.

The federal government has set an objective to connect every Canadian household to broadband internet at speeds of 50/10 Mbps by 2030. It has acknowledged that such speeds are necessary to ensure quality of services in health and education and has also indicated that investments to enable faster speeds will be considered.³⁴⁴ In 2019, 50/10 broadband service was available to 87.4% of Canadian households. However, 50/10 speeds may no longer be adequate for many online activities.³⁴⁵ The Council of Canadian Academies has called for a focus on closing the gap in broadband speed, quality and cost between rural and remote parts of Canada and urban centres (where speeds are often faster).

When investing in long-term broadband infrastructure solutions, it is crucial that Canada consider not only what is needed today, but what will allow for growth in the future based on rapidly evolving technology. Improved speed could boost Canada's economy, support productivity, enhance social connections, improve educational access, improve access to virtual health care and support immigration regionalization. Further, it is critical to note that access to the internet is just one component of digital equity, which according to analysis by the Deloitte Future of Canada Centre, is "a state where all people and organizations can fully benefit from the digital technology necessary to succeed in the digital economy," and a necessary condition for bridging economic, health, and education gaps.³⁴⁶

Canada has insufficient *density in cities*, which is necessary to reduce emissions, shorten commute times, and provide better access to services

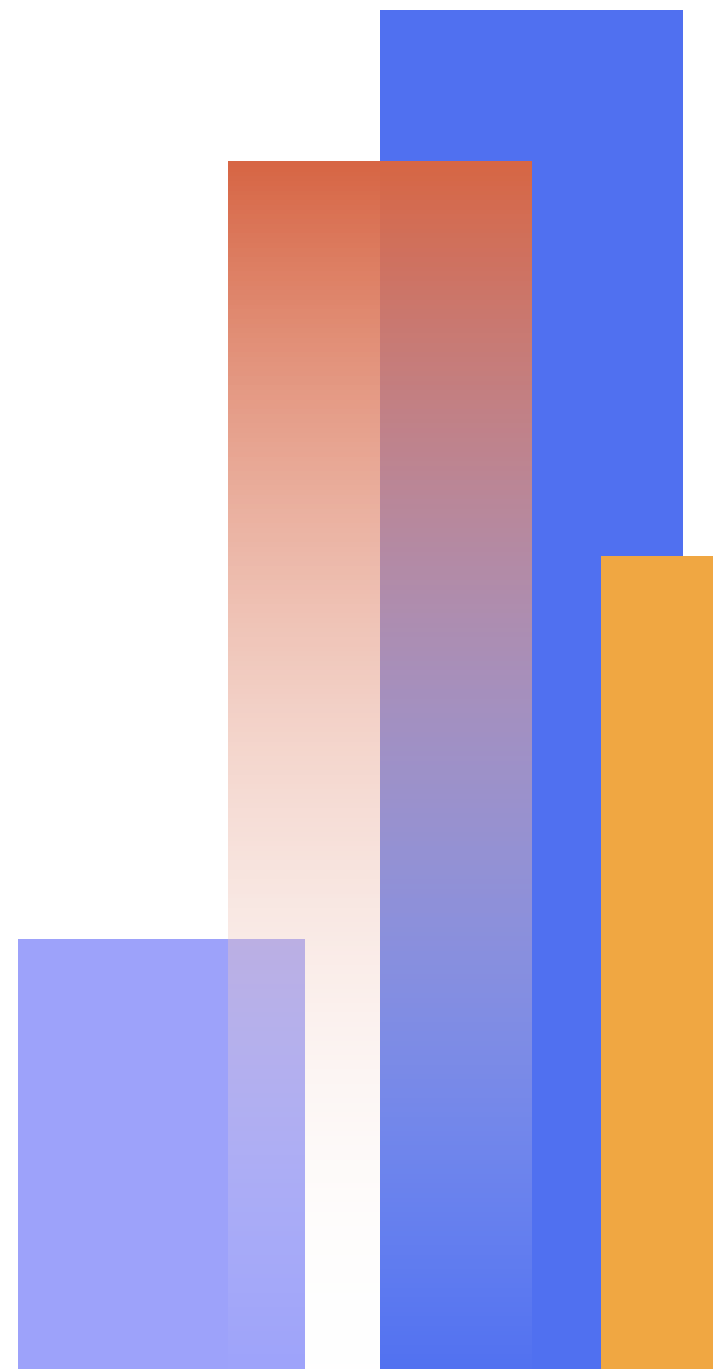
When planned well, density can support Canada's objective of a more sustainable economy by contributing to reduced emissions, shorter commute times, and vibrant communities with more affordable housing, accessible services and job opportunities.³⁴⁷ Canada Mortgage and Housing Corporation (CMHC) has highlighted that increased density can help to address challenges such as housing affordability, access to services, health outcomes and environmental issues.³⁴⁸ Population growth must be accompanied by well-planned density, which is essential to growing in a way that protects the climate and enhances quality for life. Without it, cities can be associated with gridlock, sprawl, detrimental environmental impacts and increased housing costs.³⁴⁹ Well-planned density takes into account a wide variety of factors on top of number of people per square kilometre: green space, walkability, transit and access to community amenities are factored in as well.³⁵⁰

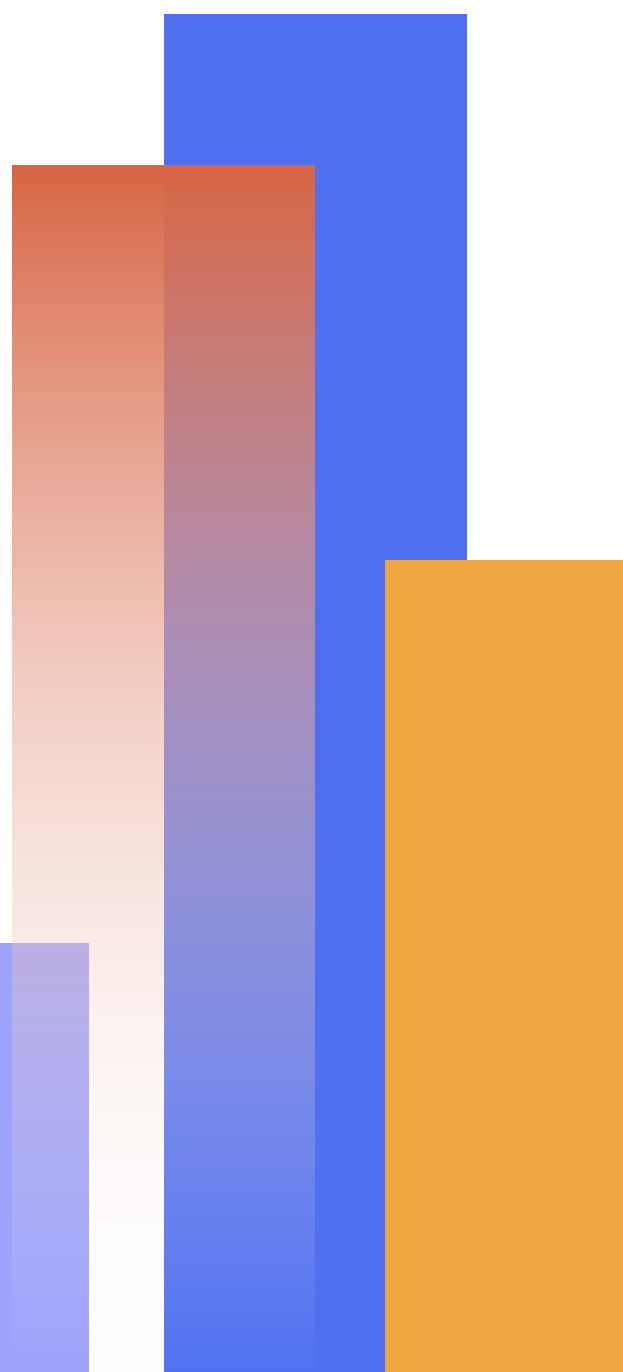
While Canadian cities are generally becoming denser over time, there is much opportunity for improvement. Urban areas in Canada are on average among the least dense in OECD countries.³⁵¹ There is also a wide range in density levels. In 2020, urban areas in Canada with more than 250,000 people were less dense on average (1,233 inhabitants per square kilometre) than in the OECD overall (1,394 per square kilometre). Density in the core areas of Canadian cities ranged from 75 inhabitants per square-kilometre in Halifax, to 2,149 inhabitants per

square-kilometre in Montreal.³⁵² All Canadian cities observed an increase in density in 2020 compared to the previous year and are generally on a trend of increased density.

Nonetheless, there is significant opportunity to improve the planning of density as well. Less than a quarter (23.2%) of those living in Canadian cities reside in the most livable neighbourhoods, meeting the criteria of a "15-minute city" in which most needs can be met within a 15-minute travel distance walking or biking.³⁵³ The movement toward "smart density," emphasizing these factors alongside proximity to public transit, can provide for a high quality of urban life for families, but requires both increased availability of affordable family-oriented units and also cultural change for Canadians oriented towards the aspiration of the single-family home.³⁵⁴ There are key efforts emerging from civil society which research and develop solutions for smart, inclusive densification, like the creation of "complete communities."³⁵⁵

The pandemic has brought awareness to public health challenges in several dense urban areas in Canada, with "hot spot" neighbourhoods that were primarily low-income or racialized.³⁵⁶ However, data indicates that overcrowded residential housing, rather than urban density, increased risk during the pandemic in these communities, driven by insufficient supply of affordable housing.³⁵⁷ To help mitigate these challenges into the future, increasing affordable housing supply must be a cornerstone of strategies to build more dense neighbourhoods.





Canada's poor *climate change performance* could turn a corner if commitments are followed by robust action

Addressing climate change is essential to our collective futures and is closely linked to the ability to sustain a prosperous economy and healthy people as Canada grows.³⁵⁸ The direct costs of climate change for Canada's economy and society are becoming much more apparent. For example, severe weather in 2020 resulted in an estimated \$2.4 billion in insured damages.³⁵⁹ Challenges escalated in 2021, with floods, wildfires and heat waves that impacted Western Canada underscoring the depth of climate impact on people's homes, livelihoods and well-being.

Canada faces geographic, economic, and structural factors that heighten the challenge of reducing emissions, including its large scale, climate, and resource intensive economy. Canada's performance on climate change needs significant improvement to reach a target of net zero. In the 2022 Climate Change Performance Index (CCPI),^{vi} Canada ranked 61st out of 64.³⁶⁰ The CCPI analyzes and ranks the performance of countries in protecting the climate (see Appendix A for more information). Canada's performance was rated as "very low" overall, very low on GHG emissions (overall and per capita), very low on renewable energy and energy use, and low on its climate policy. The CCPI symbolically leaves the first three places of its ranking empty as "no country is doing enough."

Canada has committed to achieving a net-zero economy by 2050 through the Canadian Net Zero

Emissions Accountability Act, which received Royal Assent in 2021. It is joined by 120 other countries that have made this commitment. Canada's GHG reduction targets for 2030 were recently enhanced, now standing at a reduction of 40% to 45% below 2005 levels.³⁶¹ Emerging from COP26, it is clear that making progress to achieve net zero emissions and adapting to a climate that is already changing is essential to avoid devastating effects for the future.

However, Canada's greenhouse gas emissions have generally been increasing over the last decade. In 2019, Canada's level of greenhouse gas emissions was 730 Mt CO₂ equivalent, a slight increase from the previous year. The 2019 figure represents only a 1% reduction in emissions since 2005.³⁶² Canada's emissions vary by city as well, with particularly high per capita emissions among cities with a strong oil and gas industry.³⁶³ It will take significant work for Canada to meet its 2030 target.³⁶⁴ In an October 2021 report, Clean Prosperity found that while it would be "no easy feat," Canada has a "reasonable chance" of hitting its targets if it moves quickly and intelligently to implement government policies, with a particular focus on clean electricity standards, oil and gas sector emissions, and road and off-road transportation emissions.³⁶⁵

Canada can counter the risks of climate change by building its *resilience*

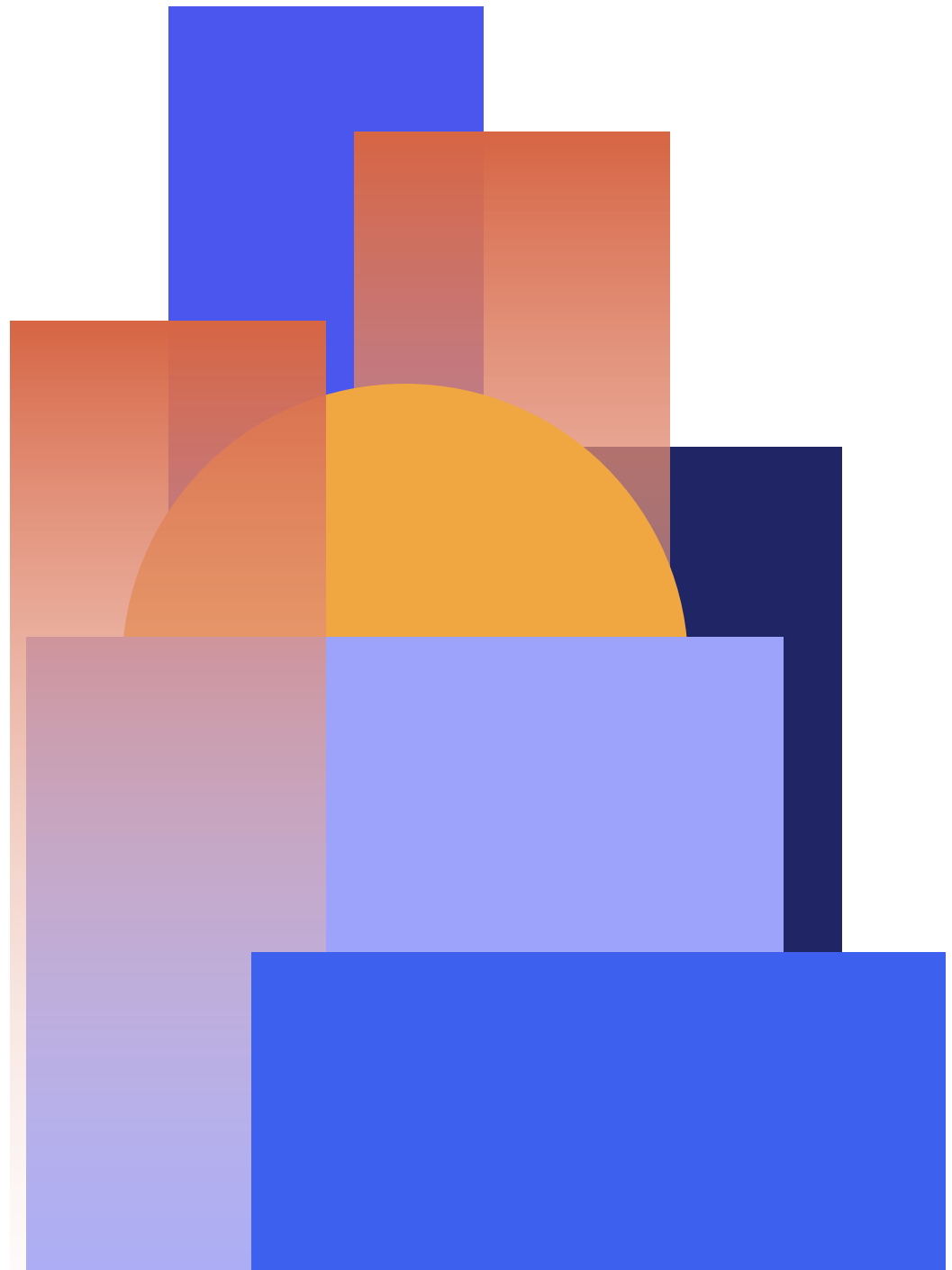
As Canada grows into the future, its resilience to external shocks is of paramount importance to maintaining the safety of living spaces, food systems, and transportation networks, among other key systems. Canada's resilience overall needs attention.

vi. 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 holds the 58th spot out of 61 (including 60 countries and the EU) in the index, due to the top three blank positions.

The Notre Dame Global Adaptation Initiative (ND-GAIN) index covers a holistic set of indicators that assess vulnerabilities to climate change and other global challenges, as well as readiness to implement adaptation strategies (see Appendix A for more information). These include natural geographic factors, infrastructure readiness for adaptation, and the ability of government, the economy and society to respond to deep challenges. In the 2019 index, Canada ranked 14th out of 45 countries in the upper income group.³⁶⁶ Canada ranked lower in terms of its readiness (19th) compared to its level of vulnerability (12th) in 2019.

Key vulnerabilities highlighted by the index include a high projected change in flood hazard and high projected change of annual run-off, factors that are underscored by extreme flooding in B.C. in the fall of 2021. Another review found that damage to infrastructure such as buildings, roads, railways and electricity systems can threaten access to critical services,³⁶⁷ as has been demonstrated by the extreme weather in Canada's west.

The federal government has taken some action to support infrastructure adaptation, including support for climate-resilient infrastructure projects, capacity-building initiatives and the development of new guidance, standards and codes.³⁶⁸ In 2021, nearly \$4 billion in new investments were announced by the federal government to support climate change adaptation and resilience.³⁶⁹ Nonetheless, more is needed to combat the challenge including significant levels of investment to ensure Canada's infrastructure is resilient to changing weather patterns. Some estimates indicate \$250 billion is needed to make repairs and upgrades to address these climate-related challenges.³⁷⁰ In Indigenous communities, in which essential infrastructure is often lacking, the impact of climate change is likely to be even more pronounced, and particularly so in the North.



The way forward

Major benefits can flow from the steady and strategic growth of Canada's population in the decades ahead. The unique value of Century Initiative's *National Scorecard on Canada's Growth and Prosperity* is its focus on Canada's progress as a country on growing well: achieving population growth that builds sustainable, shared prosperity toward the goal of 100 million Canadians by 2100.

In many senses, the last year has been a stress test of Canada's resilience in the face of a storm. With deep challenges at our doorstep, it is remarkable that Canada has not turned inward, but rather has continued on a path of openness to the world by expanding immigration levels. This is critically important for Canada's future and is a foundation that can be built upon to achieve the aspirational goal of 100 million Canadians by 2100.

The path of population growth is about a hopeful and expansive vision for Canada founded in the goal of becoming a bigger, bolder country. We have the capacity to grow in a way that builds a future that is shared and sustainable, that closes critical outcome gaps, and that enables people to contribute and fulfill their full potential. Canada is pursuing a path of population growth with immigration as the driver — it is now a matter of how quickly the country will move and how well it will manage growth.

The Scorecard highlights the critical building blocks and where we must act. The number of indicators in the Scorecard signals how complex the issues are — we cannot grow well into the future toward the goal of 100 million Canadians without ensuring that all indicators are moving in the right direction. While Canada is leading or on track on several indicators in Immigration and Education, Skills & Employment, there are deeper challenges in Economy, Innovation, & Entrepreneurship, Support for Children & Families, and Infrastructure & Environment.

Canada's growth can be a catalyst for fostering an innovative economy, building a healthy and inclusive labour market, implementing ambitious supports for children and families, investing in robust climate-resilient infrastructure, and much more. Action from all sectors, including governments, the business sector, the non-profit sector, labour, the academic and research community, and all Canadians is needed to drive the agenda forward for a bigger, bolder Canada. With long-term thinking and planning, and a willingness to act and invest proactively, Canada can set the stage to fulfill its full potential over the remainder of this century, improve quality of life for those who call Canada home, and grow its role on the world stage.

Appendix A: Data sources

Focus Area	Indicator	Description of indicator data source
Growing to 100 million	Population growth	Statistics Canada – Represents the annual changes in population resulting from births, deaths and net migration during the year. 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 based on assumptions such as Canada's fertility rate.
	Immigrant admissions	Statistics Canada – 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 announcements for target immigration levels in coming years and based on assumptions on Canada's fertility rate.
	Fertility rate	Statistics Canada – Represents 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 population model.
	Life expectancy	OECD – Measures life expectancy at birth based on how long on average a newborn can expect to live if current death rates remain unchanged.
Immigration	Global reputation	The Anholt Ipsos National Brands Index (NBI) (2021 index) – Examines the images of around 50 nations through online interviews with more than 20,000 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 and governance.
	Public support for immigration	Environics Institute Focus Canada Survey (2021 report) – Measures Canadian views of immigration, based on a question on whether respondents think immigration levels are too high.
	Regional retention of immigrants	Statistics Canada - Measures retention rate of immigrants 5 years after they arrived in Canada, comparing overall Canadian retention rate with the five provinces that had the lowest retention rates.
	Migrant integration policy	Migrant Integration Policy Index – Measures policies to integrate migrants in 52 countries across five continents.
	Immigrant income gap	Statistics Canada – Measures the gap in median total income levels between immigrants 5 years after arrival (2018 data) and the overall Canadian population (2018 data).
	International students transitioning to permanent residence	IRCC – Represents the number of annual permanent residents admitted who previously held a study permit (Data provided by IRCC).

Focus Area	Indicator	Description of indicator data source
Economy, innovation, & entrepreneurship	Early-stage entrepreneurship	Global Entrepreneurship Monitor (2020/2021 report) – Measures 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.
	Business spending on R&D	OECD – Based on OECD data, measures business enterprise expenditure on research and development as a percentage of GDP (BERD as a percentage of GDP).
	Innovation	Global Innovation Index (2021 report) – Measures global innovation through 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.
	Productivity	OECD – Based on OECD data, this indicator measures labour productivity through GDP per hour worked.
	Business growth	Statistics Canada – 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 (Data provided by Statistics Canada).
	Diversity in leadership	Corporations Canada (2020 report) – Based on Corporations Canada annual report on Diversity of Boards of Directors and Senior Management of Federal Distributing Corporations, measures 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.
	Strength of Indigenous economy	Indigenomics – Based on TD Economics forecasts from 2011 and 2015 in the book Indigenomics, on the combined income of Indigenous households, businesses and government sectors.
	GDP per capita	OECD – Reflects the average standard of living as assessed by average income per person.
	Household debt	OECD – Represents the liabilities of households requiring payments of interest or principal to creditors and is measured as a percentage of net household disposable income.
	Income inequality	OECD – 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.
	Global competitiveness	World Economic Forum Global Competitiveness Report (2019 report) – Assesses 141 countries across 12 pillars in 2019: institutions, infrastructure, ICT adoption, macro-economic stability, health, skills, product market, labour market, financial system, market size, business dynamism and innovation capability.

Focus Area	Indicator	Description of indicator data source
Education, skills & employment	Performance in reading, science and math among 15-year-olds	OECD – Measures average test scores on science, math and literacy for 15-year-olds based on the Programme for International Student Assessment.
	Post-secondary attainment	OECD – Represents the percentage of the population with tertiary education ages 25 to 34.
	Youth not in employment, education or training (NEET)	OECD – 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 – Measures the percentage of 25-to-65 year-olds who report 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 available as of 2019 reported in 2021 report on skills).
	Employment rate	OECD – Measures the percentage of working-age people who are employed.
	Incidence of low-wage work	OECD – The incidence of low pay refers to the share of workers earning less than two-thirds of median earnings. Data represents full-time employees.
Support for children & families	Child care participation	Statistics Canada (2020 survey) – Measures participation in early learning and child care for children aged 0 to 5 years based on the Survey on Early Learning and Child Care Arrangements.
	Parental leave uptake	Employment Insurance Monitoring and Assessment Report (2019/2020 report) – Measures the share of recent mothers with insurable employment who received maternity or parental benefits through EI.
	Employment rate for mothers	OECD (2019 data) – Measures employment rate (%) for women 15 to 64 years of age with at least one child aged 0-17 years of age. (Canada data is for mothers of children 0-17 years of age, most other OECD countries reported data on mothers of children 0-14 years of age)
	Child poverty	Statistics Canada – Measures low income using Canada's official poverty measure (market basket measure) for persons under the age of 18.
	Youth well-being	OECD (2018 data) – Measures percentage of students 15 years of age who reported always feeling sad based on the Programme for International Student Assessment.

Focus Area	Indicator	Description of indicator data source
Infrastructure & environment	Investment in Infrastructure	Statistics Canada – Based on Statistics Canada data on infrastructure spending (2020 data) divided by GDP (2020 data).
	Housing affordability	Canadian Mortgage and Housing Corporation – Measures housing affordability in urban households in Canada based on incidence of core housing need. The core housing need metric assesses whether housing is below standards of adequacy, suitability, and affordability based on household income and composition.
	Broadband uptake	OECD – Measures fixed internet subscriptions per 100 inhabitants.
	Population density of metropolitan areas	OECD – 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.
	Climate change performance	Climate Change Performance Index (2022 report) – Tracks the climate protection performance of 57 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.
	Resilience	Notre Dame Global Adaptive Country Index – Identifies at a country level vulnerability to climate change and other global challenges in combination with readiness to improve resilience. The index uses 20 years of data across 45 indicators to rank 181 countries annually.

Appendix B: Detailed methodology

In most cases, Century Initiative selected indicators based on their ability to facilitate international comparisons as well as to track over time. The general target for Canada was to rank in the top 10 of the OECD or a relevant internationally comparative group. In a few cases, the top 5 for indicators was chosen in areas in which it was particularly important for Canada to lead. There were also instances where the OECD average was determined to be most appropriate. The *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 (Note: Data was accessed in Fall 2021 and Winter 2022. In some cases, data may have been updated or adjusted since it was retrieved.)

For indicators in the Growing to 100 Million focus area on population growth, immigrant admissions and fertility rate 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 announced increases to 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 as required to reflect current circumstances or unforeseen events.

The 2022 *National Scorecard* generally leverages publicly available data for the 38 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 is 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, some key topics relied on Census data which is only updated every five years. In other instances, international data sources like the OECD reported on a topic every few years and therefore the most up-to-date data is not always readily available. There are also important topics in which data reliability must improve. For instance, better data is needed to understand the growing strength of the Indigenous economy. In the *Scorecard*, gaps in indicator data are addressed through a deeper narrative on topics in the indicator analysis sections.

Covid-19 impacts

Covid-19 had a dramatic impact across most of the indicators in the 2022 *National Scorecard*. Covid-19 impacts are evident in many of the data points for indicators in this year's *Scorecard* but not all of them. In cases when the most recent data was before 2020, pandemic impacts related to the indicator were discussed in the analysis section of the indicator. When international data had not yet shown a Covid-19 impact, but domestic data did, we have supplemented the headline indicator with additional domestic data analysis and factored

this data into the assessment. For example, in the case of the employment rate, there were indications that the labour market bounced back in 2021 after impacts from Covid-19 in 2020.

Equity dimensions

In most cases, the indicators in the *Scorecard* provided 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 status, 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 specific indicators including Indigenous market strength, employment rate for mothers, and diversity in leadership focus on specific equity dimensions.

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