

NATIONAL
SCORECARD ON

Canada's Growth and Prosperity

| 4th Edition
2024



Century
Initiative

| Initiative
du Siècle

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LETTER FROM THE CEO

Canada's Wake-Up Call

A deepening affordability and housing crisis from coast to coast to coast.

A national debate around immigration of unprecedented intensity and depth.

A productivity gap with far-reaching consequences, but an absence of political will to solve.

A shifting geopolitical landscape that is testing Canada's security, resilience and democratic ideals.

Engagement on these complex and changing events represent an unqualified democratic good. It's how we understand and grasp hold of them. It's how we chart a stable and prosperous path forward for Canada. It's how we fortify ourselves for even greater change.

Right now, we need more debate. Not less.

Because, at this stage, no debate is minor. The conversations that will ignite change and shape our country for generations to come either are — *or should be* — unfolding right now.

And yet, it would be foolish and simply unhistorical not to recognize what these debates, centering on immigration and our national identity, are capable of. That they can be harbingers of anxiety and fear, that they can foment hatred, that they can lead to debates as harmful as they are unproductive.

In short, that the noise can increase while the signal gets lost.

No matter your view on these topics, one thing is perfectly clear. We need more data, more knowledge, more perspective, not less. And, bar none, the most effective

tool we provide to help achieve these goals is our annual National Scorecard on Canada's Growth and Prosperity.

The Scorecard provides a holistic look at Canada's progress across 40 indicators, comparing our performance to similar countries or against goals set nationally using reliable data, including from the OECD and Statistics Canada.

The Scorecard's indicators are not simply about looking at where we've been, but where we are going. Accordingly, this report has been crafted to reflect Century Initiative's priorities, which are critical towards ensuring Canada's future prosperity. They include:

- Long-term planning and growth:** The report examines Canada's potential for progress, not over weeks or months, but decades — to ensure we are making the policy decisions and investments that not only will allow Canada to grow but prosper for generations.
- Interconnections:** Systemic change can only happen when we identify the connections between all the factors that contribute to our nation's prosperity. This report not only underlines the interplay between economic sectors, demographic trends, and policy impacts but also emphasizes the need to plan for sustainable growth.
- Collective efforts:** The report aims to facilitate vital dialogue among stakeholders across the public, private, and non-profit sectors, serving as a nexus for these diverse actors to identify gaps and opportunities for collaboration.





This Scorecard confirms that Canada is underperforming in certain areas that require immediate attention, including housing affordability, productivity, fertility rate and spending on R&D.

Canadians no longer need to imagine the repercussions of our nation continuing to fall behind in these areas. They are living with the consequences every day.

At the same time, our internationally leading position in global reputation, post-secondary attainment and freedom reminds us that we have foundational strengths and rich resources to solve our greatest challenges and to build a more prosperous and influential Canada.

Looking at Canada's most recent history, the easy remark would be: the conversation around immigration has fundamentally changed. But it's clear to anyone paying close attention that sentiments, from the cynically negative and overly-optimistic, have been part of our national discourse for many years. The truth, instead, is this: the conversation has not changed, but it has grown exponentially louder.

Louder because Canadians know that decisive action cannot wait.

At Century Initiative, we embrace that fact because it means our work is more significant than ever. Consequently, we are more determined than ever to lead and shape it. To advocate for a big and bold vision for Canada. To bring forward novel and concrete policies and priorities.

To empower, drive and inform the debate.

There is a famous saying, "If you want something you have never had, you must be willing to do something you have never done." Embracing this wisdom, it is paramount for Canada to initiate bold measures — measures that are innovative, targeted, and even unconventional. Without question, this Scorecard lays bare the pressing need for these transformative policies and the war-time-like effort needed to execute them.

The time for incremental change has passed; the moment for holistic, courageous action has arrived, propelling Canada towards a future where prosperity is not a privilege but a common standard.



Lisa Lalande
Chief Executive Officer

Key Insights from the 2024 National Scorecard

Our National Scorecard is a way of cutting through the noise to pinpoint where we are leading, where we're on track, what needs attention, and where Canada is falling behind.

It is a comprehensive look at the crucial factors that contribute to responsible population growth and compares Canada's performance to similar countries or against goals set nationally. Each of the 40 indicators in the Scorecard are interconnected, spanning across many traditionally siloed sectors and areas of policymaking and practice. **Collectively, they tell a powerful story, assessing the groundwork that we must lay to secure Canada's economic and social prosperity.**

The National Scorecard has been designed to help key actors in all sectors discuss and identify the factors that will allow Canada to plan for population growth that brings shared benefits to everyone who does and will call Canada home. In other words, it provides the foundation for a plan to *grow well*.

Century Initiative encourages everyone to use the Scorecard as a shared tool to drive systems change. This direction has never been more important. As immigration and population growth have reached the top of the national agenda, there is a deep need for dialogue on the path forward. Rooted in findings of the Scorecard, Century Initiative will support key stakeholders across Canada to engage on the role of population growth in long-term prosperity.

Leading

On track

Needs attention

Falling behind

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.

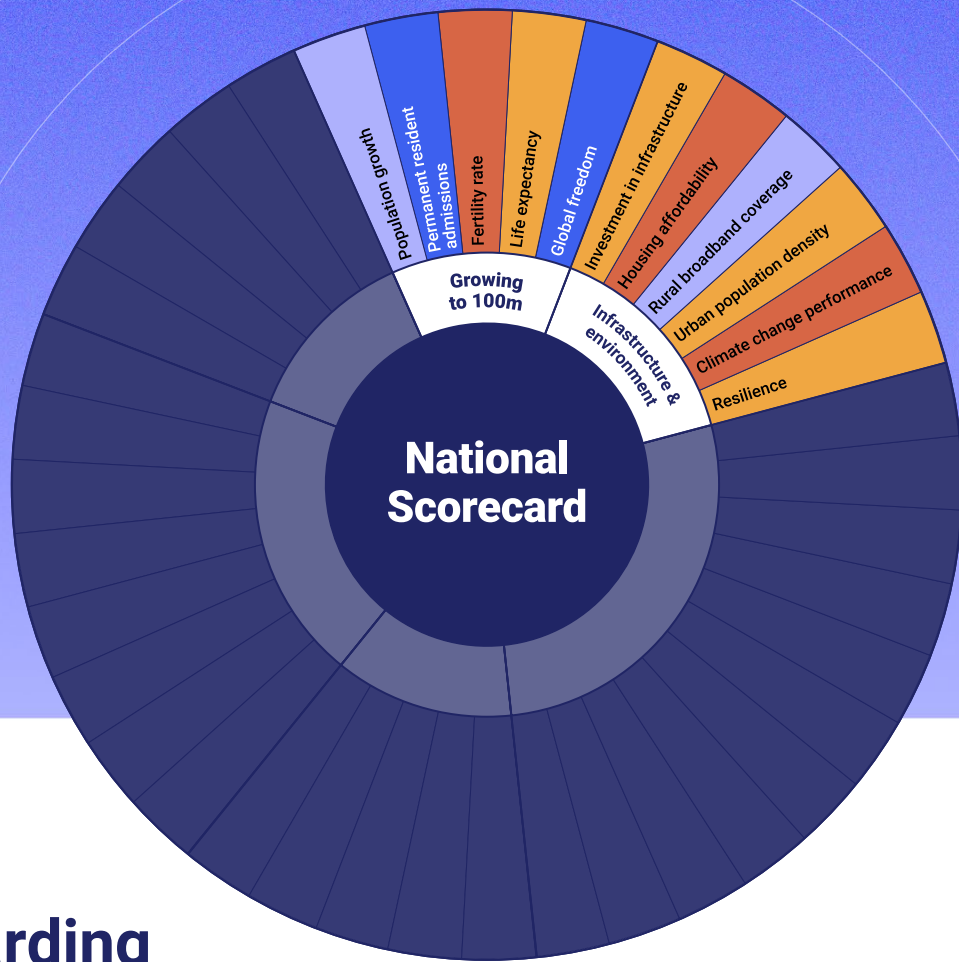
Needs attention

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.





KEY INSIGHT #1

Safeguarding our Future:

Requires a focus and a plan to grow well

Population growth, immigration and prosperity are at a pivotal stage in this country and around the world. Canada is on track to reach 100 million people by 2100 and remains a stable, democratic society. However, reaching this target will require a war-time-like effort to support both natural population growth and growth through immigration.

Efforts to safeguard Canada's future through responsible population growth could be undermined by poor performances on critical indicators like housing affordability, investment in infrastructure and climate change.

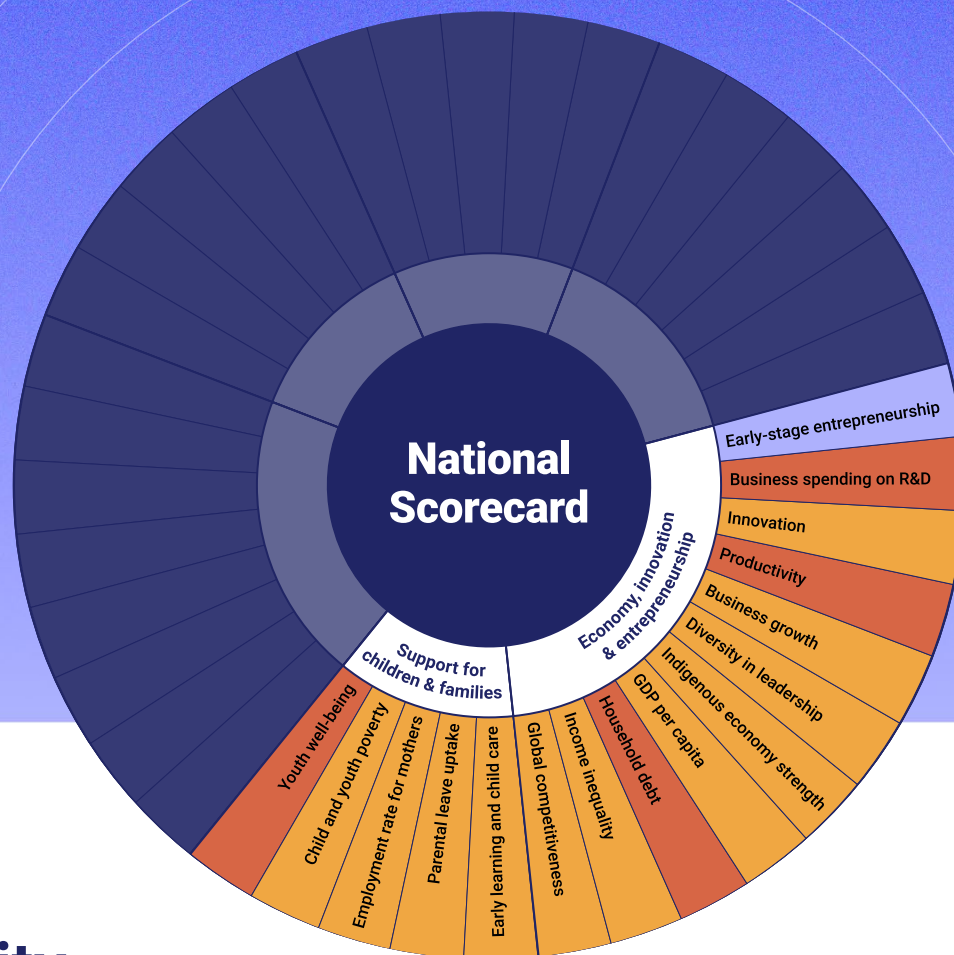
Canada's fertility rate recently fell to a record low and life expectancy fell for the second year in a row. A continued decline in fertility rates would bring far-reaching social and economic consequences in the years ahead, including on labour markets and social services. And while the decision whether or not to have children is highly personal in nature, more robust supports like affordable day care

and stronger public education are key inputs to these decisions. The government's enshrinement of a Canada-wide early learning and child-care system into legislation is an important, arguably transformational, step. But more work is needed to increase spaces and recruit and retain the workers necessary for this ambitious program.

Investments in housing, infrastructure, and climate-resilient communities will benefit all Canadians, whether they were born here or not. Building a stronger future means more than just growing our population – it's about growing well – through immigration, infrastructure investments, economic management, support for children and families, and education.

It's about preserving Canada's position on the global stage as a beacon of freedom and opportunity.

It's about planning for a bigger, bolder, more resilient Canada and working together to get there.



KEY INSIGHT #2

Prosperity in Peril:

The urgent need for Canada's economic recharge

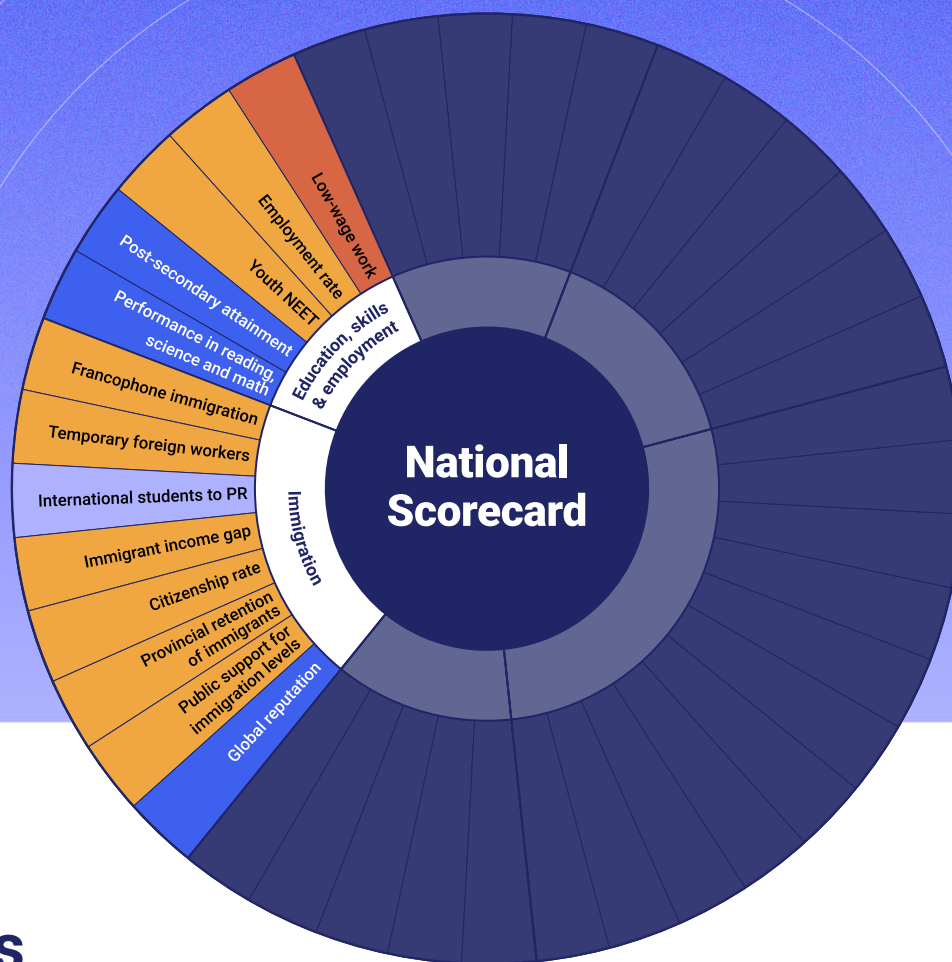
Canada continues to struggle with major economic challenges including productivity, business spending on research and development, and leveraging home-grown intellectual property. For the first time in several years, the United States is outpacing Canada on early-stage entrepreneurship. Households have also been experiencing economic challenges with cost-of-living pressures, inflation and interest rates on the rise. In order to build a sustainable, resilient 21st-century economy, Canada must focus on innovation-driven business growth and expanding the Indigenous economy.

Canada's prosperity depends on major public and private sector collaboration now more than ever. That means investments in critical infrastructure that can improve productivity, meaningful reform to our tax incentives,

which have failed to attract significant business spending on R&D, and reducing barriers to foreign investment.

The moment when the band-aids are falling off is no time to stick more on – this should be a clarion call for durable, transformative solutions. Canada needs to match its enviable natural resources and world-class talent with advanced strategies to accelerate the commercialization of Canadian ideas while attracting more R&D, innovative technology, and investment opportunities, including for the Indigenous economy, which has been a welcome source of strength.

The time for transformative action has arrived. Canada's leaders must meet it.



KEY INSIGHT #3

Canada's Immigration Reality Check:

Creating a world-class future-ready labour and talent pool

Worrying signs on the status and function of Canada's immigration system stole national headlines in 2023.

Public support for Canada's immigration levels significantly declined. New research from Statistics Canada revealed that the citizenship rate among recent immigrants has decreased significantly, dropping from 75.4% in 1996 to 45.7% in 2021, a decline of 29.7 percentage points. And the failures to ensure newcomers to Canada and visiting students had access to safe and affordable housing became painfully clear, with the federal government announcing a two-year cap on international student enrolments.

Fortunately, significant as they are, the headlines are not the full story. Canada continues to enjoy a strong global reputation. The world's best and brightest want to call this

nation home. The important work ahead lies in ensuring newcomers have access to affordable housing, stronger programs in place to ensure they choose to stay and become full citizens, and that the benefits of immigration are shared by the entire country – not just its largest cities.

The government has recently announced plans to reduce the number of temporary residents entering into Canada. It will be critical to bring these categories into the planning process so that international students, temporary workers, post-graduate work permit holders, and everyone who comes to Canada can meaningfully contribute. This work, which is essential to restoring public confidence in our immigration system, will require improved settlement services and recognition of foreign credentials in key sectors, as well as sustainable funding for our post-secondary institutions.

About the Scorecard

This is the fourth edition of Century Initiative's National Scorecard on Canada's Growth and Prosperity. The Scorecard is designed to measure Canada's progress on achieving population growth toward a goal of 100 million Canadians by 2100 in a way that is sustainable and provides prosperity for all Canadians, and in doing so, building a more prosperous, equitable, diverse and resilient Canada.

This edition of the Scorecard assesses 40 indicators across six focus areas critical for Canada to achieve long-term economic and social prosperity: 1) Growing to 100 million, 2) Infrastructure & Environment, 3) Economy, Innovation & Entrepreneurship, 4) Support for Children & Families, 5) Immigration and 6) Education, Skills & Employment.

THE 2024 SCORECARD HAS THE FOLLOWING OBJECTIVES:

- I Set a bold new economic and social vision for the country.
- I Identify key indicators of Canada's economic growth and prosperity.
- I Provide a tool for Canadian policymakers and decisionmakers to track Canada's progress toward the goal of a more prosperous Canada, and for more Canadians.
- I Build awareness of key issues impacting Canada's future with civil society, key opinion leaders and the interested public.
- I Direct Century Initiative's research, education and convening efforts.
- I Provide a platform for collaborative solutions building at local and national levels.
- I Inform policy and practice.

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

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

Other key measurement tools: Nova Scotia Quality of Life Initiative

The [Nova Scotia Quality of Life Initiative](#) is focused on assessing and reporting on well-being in Nova Scotia. The initiative was created by Engage Nova Scotia, in partnership with the University of Waterloo's Canadian Index of Wellbeing (CIW). Eight domains of well-being are tracked based on a CIW framework:

1. Community vitality
2. Environment
3. Time use
4. Democratic engagement
5. Leisure and culture
6. Healthy populations
7. Education
8. Living standards

As part of the initiative, 80,000 Nova Scotians were invited to participate in a survey measuring quality of life in the province in 2019. The next survey will take place in 2024.

This initiative connects with Century Initiative's objective to support and strengthen well-being in Canada, integrated with efforts to grow Canada's population and the economy. While covering some of the same topics as the Scorecard, the Nova Scotia Quality of Life Initiative includes other indicators of well-being that go beyond the Scorecard's focus areas. Century Initiative will continue to track efforts to assess well-being like the Nova Scotia Quality of Life Initiative, which has high potential to scale across Canada.

How to use this Scorecard

All Canadians should be at the table to build a better, more prosperous, inclusive and sustainable future. Century Initiative makes the National Scorecard public and accessible to ensure more people can join the conversation. Century Initiative's National Scorecard has been designed to be used collaboratively by different actors and sectors:

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

Grounded in evidence from this year's National Scorecard, Century Initiative will be engaging the cross-sectoral stakeholders listed above on the role of population growth and supporting Canada to grow well.

How to read this Scorecard

INDICATOR ASSESSMENT

For each indicator, a target is identified based on one of the following criteria: where Canada should be in comparison to similar countries, goals and objectives set nationally, or the direction in which Canada has trended in recent years. Canada's progress on each indicator is assessed against specific indicator targets. This assessment follows the criteria outlined in "Scoring Approach" in the executive summary.

INDICATOR SELECTION AND TARGET SETTING

The National Scorecard is designed to serve as a long-term barometer with monitoring value that will deepen over time.

All the indicators in the third edition of the National Scorecard have been carried forward to this fourth edition except for one on adult education, removed due to data quality concerns. New data sources have been used for some indicators to respond to limitations in data, improvements in data or to focus attention on new dimensions. Three new indicators were added in this edition: global freedom, citizenship rate and Francophone immigration. The indicator on global freedom was part of the first Scorecard released in 2021, brought back as the topic has become increasingly important in the last year. The indicator on citizenship rate was added to provide a key perspective on immigrant integration. The indicator on Francophone immigration was added to reflect the importance of immigration that helps support the growth and cultural vibrancy of Francophone communities across Canada. Additional information on how the Scorecard indicators have changed and evolved since the Scorecard was first developed can be found on [CI's Evolution of the National Scorecard webpage](#).



Appendix B contains further information and sourcing for each indicator and **Appendix C** contains more details on data selection and interpretation.

SECTION 1

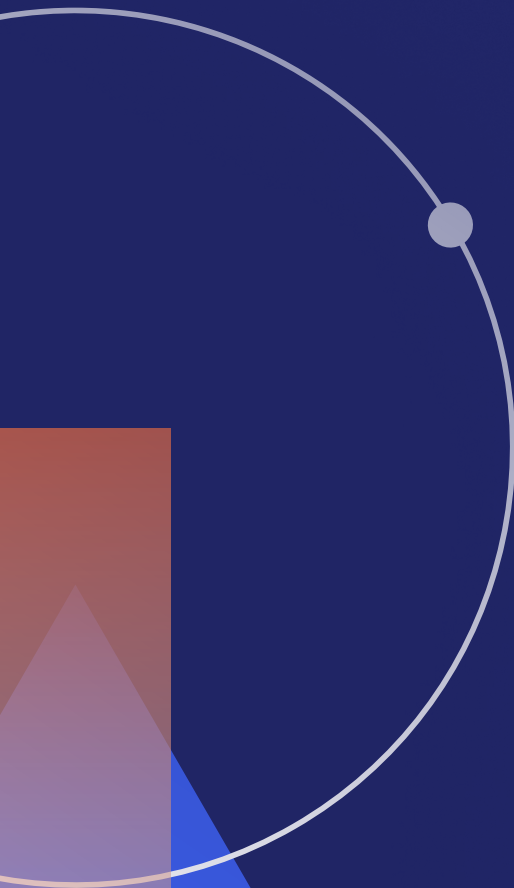
Safeguarding our Future

Requires a focus and
a plan to grow well





Growing to 100 million



OVERVIEW

Canada continues to significantly rely on immigration to grow its population and will do so in the years ahead as the population ages and as fertility rates have reached a record low. In the face of increasing economic and political turbulence, population growth through immigration is a key component of efforts to bolster Canada's position on the world stage, complemented by efforts to ensure Canadians who wish to have bigger families have the supports they need. However, significant challenges need to be addressed in the immigration system and broader policy landscape to ensure Canada is prepared for a growing population – including building up needed infrastructure and housing. While the number of permanent residents arriving relative to the population is comparable to levels seen at other times in Canada's history, temporary resident arrivals have outpaced the number of new permanent residents (697,701 compared to 468,817 in 2022/23). As a result, pressures of growth have increased, and the federal government has responded by announcing that temporary resident admissions will be factored into immigration levels planning. Declining life expectancy also highlights the struggles of many Canadians since the onset of the pandemic as Canada's healthcare systems face mounting challenges.

AT A GLANCE

- | Canada recently hit a new population milestone as **population growth** remains high
- | The number of **permanent resident admissions** to Canada continues to grow
- | Canada's **fertility rate** recently fell to a record low
- | Canada's **life expectancy** fell for the second year in a row
- | Canada ranks among the top countries in the world on **global freedom**

Canada recently hit a new population milestone as **population growth** remains high

Why it matters

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

Where Canada is at

Canada's average annual population growth rate was **1.34% over the last 10 years** and **1.59% over the last 5 years**.

Target

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

Direction Canada is trending

Canada's population has grown significantly over the past several years and in June 2023 a new milestone was hit – a population of 40 million.¹ There was a 2.9% increase in Canada's population in 2022/23 compared to the previous year. International migration was connected to approximately 98% of this growth. This included significant increases in new temporary residents which outpaced the number of new permanent residents in 2022/23 (697,701 compared to 468,817).² From the previous year, there was a 46% increase in non-permanent residents living in Canada. Canada continues to lead G7 countries in population growth.³

The number of **permanent resident admissions** to Canada continues to grow

Why it matters

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

Where Canada is at

There were **468,817 permanent residents admitted** to Canada in 2022/23. Annual immigration represented an **average of 0.94% of Canada's population** over the last 5 years.

Target

Permanent resident admissions that represent **1.15% to 1.25% of the population** annually over the next decade.

Direction Canada is trending

In 2022/23, new permanent resident admissions represented 1.20% of the population, which is aligned with CI's target for permanent resident admissions.⁴ This proportion represents growth in recent years but is comparable to levels seen at other times in Canada's history, such as in the post-war period.⁵ The federal government remains committed to maintaining its targets for new permanent residents and introduced a strategy in 2023 that aims to take into account supports and services such as housing and health care for both immigrants and Canadians as part of immigration levels planning going forward.⁶ This planning process hasn't typically included temporary residents but that is expected to change in the years ahead, with the addition of targets for temporary residents starting in fall 2024.⁷ As Canada welcomes greater levels of temporary and permanent immigrants, it is increasingly important to help newcomers integrate and succeed in Canada.⁸ Addressing the challenges faced by newcomers, such as finding employment relevant to their skills and accessing affordable housing, will help support them to not only come to Canada but to stay long-term.

Canada's **fertility rate** recently fell to a record low

Why it matters

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

Where Canada is at

A fertility rate of **1.33 children per woman** in 2022.

Target

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

Direction Canada is trending

Canada's fertility rate fell to a low of 1.33 children per woman in 2022 – the lowest rate in more than a century of data.⁹ The number of births recorded decreased by 5% compared to the previous year.¹⁰ Escalating concerns about costs of living and housing affordability are key factors influencing choices to have fewer or no children, with lower-income Canadians less likely to report having as many children as they wanted. A continued decline would position Canada among countries with the lowest fertility rates, which would have far-reaching social and economic impacts in the years ahead, including on labour markets and social services.¹¹

Falling behind

Canada's **life expectancy** fell for the second year in a row

Why it matters

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

Where Canada is at

Canada **ranked 17th out of 36 OECD countries** for its life expectancy in 2021. Canada's life expectancy at birth was **81.6 years** in 2021.

Target

Top 10 of OECD countries for life expectancy.
Threshold: 10th in the OECD in 2021 had a **life expectancy of 82.7 years**.

Direction Canada is trending

Canada's life expectancy decreased for the second year in a row in 2021, falling 0.7 years between 2019 and 2021. In comparison, some peer countries saw life expectancy rebound in 2021.¹² The pandemic resulted in a drop in life expectancy in 2020 and challenges have continued in subsequent years. The opioid crisis has continued to have a negative impact, with growing concerns about increasing mortality among young people.¹³ There are inequities among key population groups as well, as life expectancy can range from five to 11 years shorter for Indigenous populations compared to non-Indigenous populations.¹⁴

Needs attention

Canada ranks among the top countries in the world on **global freedom**

Why it matters

High levels of freedom, including a strong democratic system that respects rule of law and people's rights, are important to growing well and to making Canada an attractive place to live.

Where Canada is at

Canada **ranked 5th** with a score of 98 out of 100 in global freedom in the 2023 Freedom in the World Index.

Target

Top 5 countries in Freedom House's Freedom in the World Index.

Direction Canada is trending

Canada consistently ranks among the top countries in the world on global freedom with a strong track record of supporting political rights and civil liberties. However, not all Canadians have the same experiences. Groups including Indigenous people and Black Canadians face discrimination and inequities related to education, employment and essential services. Some recent initiatives in response include legislation on creating a National Council for Reconciliation and the introduction of the 2SLGBTQI+ Action Plan.¹⁵ At the same time, global freedom declined around the world overall in 2023 with major threats to democracy as a result of war, coups and attacks on democratic institutions.¹⁶



Infrastructure & environment

OVERVIEW

Investment in Canadian infrastructure has remained flat compared to a decade ago, a deepening problem as assets age. At the same time, unaffordable housing has become a crisis across Canada, fueled in part by restrictive urban land use and lagging public investment. Direct federal funding and policy work with municipalities launched in 2023 have the potential to unlock regulatory and zoning changes that have stood in the way of densification in Canadian cities for decades. Climate-related weather events in 2023, which included a record number of wildfires, also highlight the importance of making progress on reducing emissions and building resilient infrastructure. While Canada remains a poor performer in addressing climate change, plans announced in 2023 to cap emissions in the oil and gas sector along with a new national strategy for adaptation will be important to monitor for future progress.

AT A GLANCE

- | Canada's rate of **investment in infrastructure** has improved but needs to go further in future years
- | **Housing affordability** remains a significant concern among a majority of Canadians as cost-of-living pressures rise
- | **Rural broadband coverage** has improved but a significant gap persists and work will be needed to provide access to all Canadians
- | **Population density in metropolitan areas** has increased in recent years but opportunities remain to increase density
- | Canada continues to be among the lowest-ranking countries on **climate change performance**
- | Canada's **resilience** is stable but must improve amid increasing weather-related challenges

Canada's rate of **investment in infrastructure** has improved but needs to go further in future years

Why it matters

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

Where Canada is at

Investment in infrastructure represented **4.0% of GDP** in 2022.

Target

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

Direction Canada is trending

Canada's infrastructure investment rate increased in 2022 but has remained flat compared to a decade earlier.¹⁷ Challenges with uncertain funding in 2023 resulted in cost pressures on projects, sparking calls for the next generation of infrastructure investments through collaboration across all levels of government.¹⁸ Current rates of investment are below levels needed as public infrastructure ages and requires maintenance, as well as to adapt to changing weather patterns. It would cost an estimated \$265 billion to replace infrastructure found to be in poor or very poor condition.¹⁹ Population growth will add to stresses on existing infrastructure without greater levels of investment.²⁰ Infrastructure challenges can also be more pronounced in rural and remote areas and Indigenous communities.²¹

Needs attention

Housing affordability remains a significant concern among a majority of Canadians as cost-of-living pressures rise

Why it matters

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

Where Canada is at

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

Target

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

Direction Canada is trending

Housing affordability remains a challenge across Canada, especially as the population grows. While Canada's level of "core housing need"²² improved in 2021, this was largely due to pandemic supports.²³ Many people in low-income households are increasingly unable to affordably live in Canadian cities,²⁴ as rent on the Consumer Price Index continues to rise.²⁵ Canadians identified housing affordability as one of the most important problems they faced in 2023 and concerns about a lack of housing have impacted public support for immigration levels in Canada.²⁶ While an increased number of newcomers can exacerbate housing pressures, other issues have to be solved to address challenges. Reducing immigration is not a strategy to solve Canada's housing problems. Across the country, recent declines in housing starts have been driven by factors including high interest rates and increased building costs.²⁷ Increases in housing investment and reduction of zoning barriers are critical to addressing these challenges. It is estimated that 3.5 million additional new housing units are required in order to hit the target of housing affordability for everyone by the end of the decade.²⁸

Falling behind

Rural broadband coverage has improved but a significant gap persists and work will be needed to provide access to all Canadians

Why it matters

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

Where Canada is at

Coverage of 50/10 unlimited broadband was **67.4% in Canada's rural areas** in 2022.

Target

Coverage of 50/10 unlimited broadband in Canada's rural areas that is comparable to overall access in Canada **toward a federal government goal of 100% access** by 2030.

Direction Canada is trending

Upgraded from **Needs attention** in 2023 National Scorecard 

Most Canadian households now have access and can subscribe to broadband at speeds of 50/10 Mbps. Progress has been made in recent years in rural parts of Canada with coverage growing from 37% to 67% over a five-year period. However, rural and remote parts of Canada continue to experience significantly lower levels of broadband coverage compared to urban Canada. Across Canada in 2022, 1.1 million households lacked 50/10 unlimited coverage in rural areas, Northern and First Nations communities.²⁹ A lack of broadband coverage can lead to barriers in accessing the digital economy and virtual services such as health care or education. In the absence of fibre optic or fixed wireless services in some rural areas, high-speed satellite internet options like Starlink have become increasingly common and have attracted some federal and provincial investments.³⁰ Challenges to closing the access and quality gap include slow approval processes for connectivity projects, as well as higher costs to service rural areas.³¹ Coordination will be required to enable all households in Canada to have access to high-speed broadband by the end of the decade.³²

On track

Population density in metropolitan areas has increased in recent years but opportunities remain to increase density

Why it matters

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

Where Canada is at

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

Target

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

Direction Canada is trending

Canada's level of urban density has increased in recent years but remains lower than in some peer countries.³³ Across many Canadian cities, lower levels of density contribute to ongoing challenges including housing affordability. Increasing density will help to address urban sprawl which has increased faster than population growth in recent years – resulting in costs to the economy, environment and society.³⁴ Density in Canadian cities is not evenly distributed, with growth in some areas but stagnation or declines in others.³⁵ There is potential for Canadian cities to build more in existing neighbourhoods with a focus on quality of life. Recent government activities focused on increasing density include stimulating zoning changes through the federal Housing Accelerator Fund.³⁶

Needs attention

Canada continues to be among the lowest-ranking countries on **climate change performance**

Why it matters

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

Where Canada is at

Canada **ranked 62nd out of 67** on the 2024 Climate Change Performance Index.³⁷

Target

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

Direction Canada is trending

Canada continues to rank among the worst-performing countries in the world on climate change. While Canada has introduced an emissions reduction plan, including a target of net-zero emissions by 2050, there has been slow progress. Canada will continue to fall behind without efforts such as a strong cap on emissions and plans to phase out fossil fuels.³⁸ Changes in Canada’s regulatory processes have also been identified as needed to build the infrastructure to meet climate targets.³⁹ In December 2023, the federal government announced plans to cap emissions in the oil and gas sector through a regulatory framework.⁴⁰ Canadians observed the impacts of climate change first-hand in 2023 with a record high number of wildfires, which are projected to become increasingly common with changing weather patterns.⁴¹

Falling behind

Canada’s **resilience** is stable but must improve amid increasing weather-related challenges

Why it matters

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

Where Canada is at

Canada **ranked 14th out of 46 upper income countries** in the 2021 Notre Dame Global Adaptation Initiative (ND-GAIN) Index.

Target

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

Direction Canada is trending

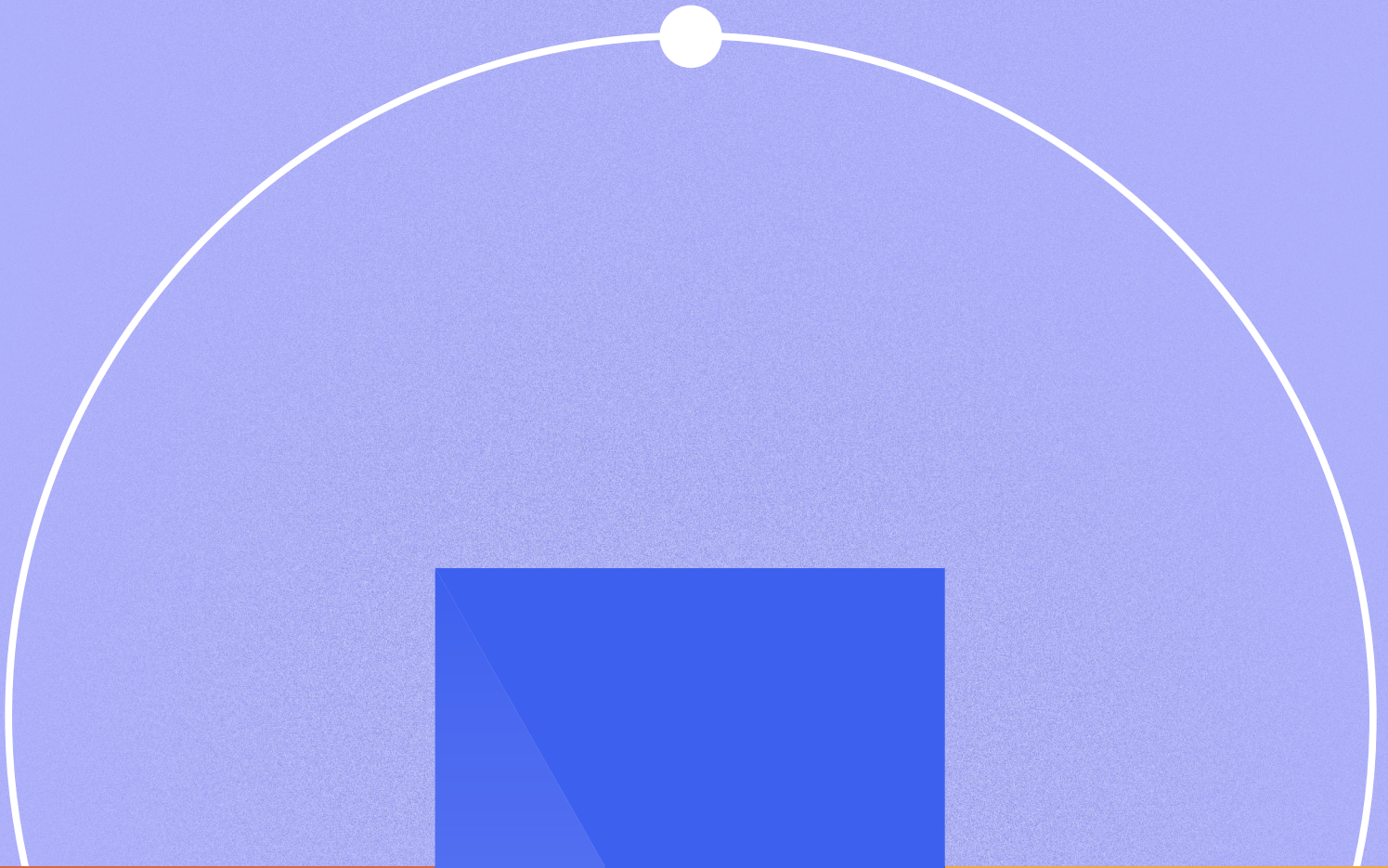
In 2021, Canada’s ranking on the ND-GAIN Index – assessing countries’ vulnerability to climate change and other global challenges, in combination with their readiness to adapt – remained similar to previous years.⁴² Extreme weather events in 2023 highlighted the detrimental impacts of climate change across the country.⁴³ At the same time, the federal government released its National Adaptation Strategy in 2023 designed to improve the country’s resilience to climate change, providing direction on measures to protect buildings and infrastructure facing risks such as floods and fires.⁴⁴ An average annual investment of \$5.3 billion in municipal infrastructure has been projected as needed to adapt to the impacts of climate change, which will require cost-sharing across governments.⁴⁵

Needs attention

SECTION 2

Prosperity in Peril

The urgent need for Canada's
economic recharge





Economy, innovation & entrepreneurship

OVERVIEW

Canada continues to fall short on key economic indicators including productivity and business investment in research and development. As cost-of-living pressures rise, household debt remains a major challenge compounded in 2023 by an environment of high inflation, slow growth and increasing levels of public debt. Nonetheless, there have been some recent important areas of improvement, including an increasing number of high-growth firms and growing Indigenous economic strength. It will be critical to leverage these positive signals with a focus on Canadian commercialization of Canadian ideas as the world transitions to net-zero and businesses transform to leverage artificial intelligence. Canada's innovation and entrepreneurship environment are central pillars of the country's future growth and prosperity, and key drivers of global competitiveness. Scaling companies and growing the market share in advanced technology can help to support Canada's future national security in a shifting geopolitical landscape.

AT A GLANCE

- | Canada's **early-stage entrepreneurship activity** recently declined with increasing economic uncertainty
- | **Business spending on R&D** remains low in Canada
- | Canada has improved in some areas of **innovation** but still lags many advanced economies
- | Declining levels of **productivity** continue to be a significant challenge
- | Canada could improve on key metrics of **global competitiveness**
- | An increasing number of high-growth firms signals **business growth** but progress remains slow
- | Canadian institutions have room for improvement on **diversity in leadership**
- | The **Indigenous economy** has been increasing in strength but opportunities remain for further growth with the right supports
- | Canada's **GDP per capita** continues to trail many peer countries with negative impacts on standards of living
- | Canada has growing levels of **household debt** that have been exacerbated by cost-of-living pressures
- | **Income inequality** improved with pandemic-era supports but inflation challenges progress

Canada's **early-stage entrepreneurship activity** recently declined with increasing economic uncertainty

Why it matters

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

Where Canada is at

Canada **ranked 13th** in total early-stage entrepreneurial activity out of 49 countries assessed by the 2022/23 Global Entrepreneurship Monitor.

Target

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

Direction Canada is trending

Downgraded from **Leading** in 2023 National Scorecard ▼

Canada's ranking on total early-stage entrepreneurial activity (TEA) fell in 2022 compared to the previous year, though it still has one of the highest rates of adults starting or running early-stage businesses.⁴⁶ Immigrants are more likely to start a business in Canada but face unique barriers such as access to financing and challenges with navigating the regulatory landscape.⁴⁷ Entrepreneurs have become increasingly uncertain about starting a new business given an unaffordable housing market, rising interest rates and constraints in the labour markets.⁴⁸ While Canada saw declines in TEA in 2022, some other countries surged ahead – with the United States outpacing Canada in 2022 for the first time in several years.⁴⁹

On track

Business spending on R&D remains low in Canada

Why it matters

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

Where Canada is at

Canada **ranked 22nd out of 34 OECD countries** on business spending on research and development in 2021.

Canada's business spending on research and development was **0.93% of GDP** in 2021.

Target

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

Threshold: OECD average for business spending on research and development was **1.99% of GDP** in 2021.

Direction Canada is trending

Canada's level of business spending on research and development declined in 2021 and it is expected to continue to decline in future years.⁵⁰ At the same time, less than 2% of Canadian businesses recently reported incorporating research and development in their business strategies.⁵¹ Canada has been identified as an outlier in the OECD in its significant dependence on tax credits to incentivize business spending on research and development.⁵² The early 2024 launch of a federal review of the Scientific Research and Experimental Development Tax Credit, one of Canada's central supports for the innovation economy, could lead to positive change.⁵³ Declining business investment in research and development has a detrimental impact on productivity and competitiveness, as such investments can help to enable more efficient and innovative processes.

Falling behind

Canada has improved in some areas of **innovation** but still lags many advanced economies

Why it matters

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

Where Canada is at

Canada **ranked 15th of 132 countries** in the Global Innovation Index in 2023.

Target

Top 10 countries in the Global Innovation Index.

Direction Canada is trending

Canada's ranking on the Global Innovation Index remained the same compared to the previous year, though it improved in some areas including turning investments in innovation into tangible outputs.⁵⁴ Canada has generally lagged other advanced economies on innovation which has wide-reaching impacts. Limited support and scaling of domestic firms remain key challenges with intellectual property produced in Canada often going to foreign firms.⁵⁵ Canada has also fallen short on leveraging its diverse talent pool to unlock innovation in an inclusive way, with women and racialized Canadians facing barriers to success.⁵⁶ Additionally, innovation is closely connected to national security, as scaling companies and growing the market share in advanced technology can help to support Canada's future security.⁵⁷

Needs attention

Declining levels of **productivity** continue to be a significant challenge

Why it matters

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

Where Canada is at

Canada **ranked 18th out of 38 OECD countries** on productivity in 2022. Canada's **GDP per hour worked was \$53.31 USD** in 2022.

Target

Top 10 OECD countries on productivity. Threshold: 10th in the OECD was **GDP per hour worked of \$69.66 USD** in 2022.

Direction Canada is trending

Canada's productivity declined slightly in 2022, with GDP per hour worked falling below the OECD average.⁵⁸ The trend of declining productivity continued at the start of 2023.⁵⁹ There remain concerns that these trends will endure due to factors such as low use of technology by Canadian firms and limited innovation. Additionally, Canada continues to fall behind on investment in research and development, which is needed to increase technology adoption, innovation and productivity.⁶⁰ Improvements in business productivity would help grow fiscal revenue and economic capacity, key to enhancing the standard of living in Canada in the years ahead.⁶¹

Falling behind

Canada could improve on key metrics of **global competitiveness**

Why it matters

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

Where Canada is at

Canada **ranked 15th out of 64 countries** in the 2023 IMD World Competitiveness Ranking.

Target

Top 10 countries in IMD World Competitiveness Ranking.

Direction Canada is trending

Canada's ranking on global competitiveness has slightly declined in recent years. Canada fell short in 2023 in particular on international trade, as well as government and business efficiency. Challenges to competitiveness identified in 2023 included continuing inflation, geopolitical tensions alongside a global energy crisis, severe weather events and constraints in labour markets.⁶² Canada has generally done well on some metrics of competitiveness, such as ease of starting a business and likelihood of attracting investment.⁶³ However, Canada has also performed poorly in areas such as barriers to foreign investment and entry into the domestic market.⁶⁴

Needs attention

An increasing number of high-growth firms signals **business growth** but progress remains slow

Why it matters

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

Where Canada is at

There were **14,070 high-growth firms** in Canada in 2021.

Target

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

Direction Canada is trending

There was an increase in the number of high-growth firms in 2021 compared to the previous year but growth remains slow overall.⁶⁵ Nonetheless, there have been notable increases in the number of Canadian unicorn companies (which are private companies with a valuation of more than \$1 billion) over the past few years – from three in 2020 to 19 in 2022.⁶⁶ Challenges to scaling can be connected to broader obstacles facing businesses of all sizes. In 2023, these included increases in inflation, costs of inputs, interest rates and debt costs.⁶⁷

Needs attention

Canadian institutions have room for improvement on **diversity in leadership**

Why it matters

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

Where Canada is at

Among public companies that disclosed diversity information, in 2022:

- **Women held 19%** of board seats;
- **Racialized individuals held 6%** of board seats;
- **Indigenous peoples held 0.6%** of board seats; and
- **Persons with disabilities held 0.4%** of board seats.

Target

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

Direction Canada is trending

There was a slight decline in the proportion of women and racialized individuals holding board seats in 2022 compared to the previous year. However, the proportion of board seats held by Indigenous peoples slightly increased.⁶⁸ If current trends hold it could take almost a century for equal representation of women in management positions to be achieved.⁶⁹ It is encouraging that a growing number of organizations have committed to increasing diversity, such as through the Black North Initiative which involves a pledge to grow representation of Black Canadians in leadership positions and on boards. However, more needs to be done to take action to effectively create change and cultivate diverse leadership in Canadian companies.⁷⁰

Needs attention

The **Indigenous economy** has been increasing in strength but opportunities remain for further growth with the right supports

Why it matters

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

Where Canada is at

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

Target

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

Direction Canada is trending

GDP attributable to Indigenous peoples in Canada has grown steadily over the past decade, making up 2.2% of Canadian GDP in 2020.⁷¹ There have been a growing number of ambitious Indigenous-led economic development projects in Canada in recent years, including resource projects in the Prairies and major residential development projects in Vancouver constituting fully new neighbourhoods.⁷² However, there is still significant room for the Indigenous economy to grow with the right supports. Challenges such as inadequate infrastructure and barriers to access financing can slow progress,⁷³ though advancements are being made including through a new Canada Infrastructure Bank \$1 billion equity loan program.⁷⁴ The First Nations Financial Authority recently reached \$2 billion in loans issued, another positive signal for Indigenous business growth.⁷⁵

Needs attention

Canada's **GDP per capita** continues to trail many peer countries with negative impacts on standards of living

Why it matters

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

Where Canada is at

Canada **ranked 15th out of 38 OECD countries** on GDP per capita in 2022. Canada had a GDP per capita of **\$61,380.60 USD** in 2022.

Target

Top 10 OECD countries on GDP per capita. Threshold: 10th in the OECD was GDP per capita of **\$70,889.72 USD** in 2022.

Direction Canada is trending

Canada's GDP per capita increased in 2022 but the country still trails many in the OECD.⁷⁶ It is projected that Canada will underperform in future years due to lagging productivity, with concerns that standards of living will not be sustained.⁷⁷ Significant concerns have been raised about the effects of rapid population growth on GDP per capita.⁷⁸ However, immigration can have a positive impact when the talent and skills of immigrants are fully leveraged through effective support for labour market integration. An increased proportion of immigrants in the labour market has been positive for GDP per capita in some provinces by helping to offset aging populations.⁷⁹

Needs attention

Canada has growing levels of **household debt** that have been exacerbated by cost-of-living pressures

Why it matters

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

Where Canada is at

Canada **ranked 25th out of 33 OECD countries** on household debt in 2021. Canada's level of household debt was **185.2% of net household disposable income** in 2021.

Target

OECD average on household debt levels. Threshold: OECD average level of household debt was **125.4% of net household disposable income** in 2021.

Direction Canada is trending

Canada's level of household debt grew in 2021, even before more recent increases in inflation and interest rates. Canada continues to have one of the highest levels of household debt among OECD countries.⁸⁰ Canadians' household debt recently exceeded the size of the country's entire economy, which puts Canada's economy at risk.⁸¹ However, not all debt is the same. The majority of household debt in Canada is tied to mortgages, which can help build wealth. Nonetheless, household debt was a major source of stress for many Canadians with a mortgage in 2023. Amid rising interest rates, the Environics Institute found that almost two in five Canadians with a mortgage were concerned about their ability to pay.⁸² There are signs that increasing numbers of Canadian consumers are encountering financial difficulties.⁸³

Falling behind

Income inequality improved with pandemic-era supports but inflation challenges progress

Why it matters

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

Where Canada is at

Canada **ranked 11th out of 34 OECD countries (tied)** on income inequality in 2020.

Canada's level of **income inequality using the Gini coefficient was 0.28** in 2020 (0 represents perfect equality and 1 represents perfect inequality).

Target

Top 10 most equal OECD countries. Threshold: 10th in the OECD had a **Gini coefficient of 0.278** in 2020.

Direction Canada is trending

Canada's level of income inequality improved in 2020, decreasing to levels not seen in several decades.⁸⁴ However, this change was largely due to pandemic benefits that were provided at the time and that are no longer active. Income inequality has since fluctuated.⁸⁵ In early 2023, income inequality grew due to factors such as pressures related to inflation and high interest rates, which had a particularly negative impact on disposable income among low-income earners. Increasing cost of living has also placed pressures on low-income households.⁸⁶



Support for children & families

OVERVIEW

Canada continues to implement the Canada-Wide Early Learning and Child Care system and has made important progress in the past year, including significant fee reductions. However, parents face barriers to accessing licensed child care which are connected with child care workforce shortages and low compensation. Recent improvements in child care are supporting more mothers to enter the labour market. Nonetheless, Canada's children and youth continue to face challenges coming out of the pandemic including reduced well-being and increased poverty. There is likewise room to strengthen approaches to parental benefits across Canada, aligned to Québec's more robust system. Parental leave that connects seamlessly with child care will help support families to have the number of children that they choose. Support for the youngest Canadians and their parents will pay dividends for the country in the years and decades ahead.

AT A GLANCE

- | Progress has been made in implementing an **early learning and child care** system across Canada but access needs to improve
- | **Parental leave uptake** across Canada remains consistent but falls behind Québec's more generous system
- | The **employment rate for mothers** has improved in recent years but there is potential to grow further with improved supports
- | **Child and youth poverty** in Canada is on the rise and has surpassed 2019 pre-pandemic rate
- | **Youth well-being** remains low with Canada well below peer countries on sense of belonging among students

Progress has been made in implementing an **early learning and child care** system across Canada but access still needs improvement

Why it matters

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

Where Canada is at

There were regulated full- or part-time child care centre spaces for **28.4% of children** aged 0 to 5 in 2021.

Target

Increased regulated spaces for children aged 0 to 5.

Direction Canada is trending

The proportion of full- or part-time regulated child care centre spaces for children 0 to 5 slightly increased in recent years but remains well below levels needed.⁸⁷ Canada is now in the midst of moving forward on a commitment to build a Canada-wide early learning and child care system. In early 2024, the federal commitment was enshrined in law.⁸⁸ Many provinces have recently made progress in substantially reducing fees for child care which is a positive sign.⁸⁹ However, the reduction in parent fees has pushed up demand for child care, with challenges finding a space increasing across the country.⁹⁰ Barriers remain to expanding regulated spaces including a lack of qualified educators to meet the demand.⁹¹ Challenges accessing regulated child care are even greater for newcomers, populations with disabilities, low-income families, racialized populations and Indigenous people.⁹²

Needs attention

Parental leave uptake across Canada remains consistent but falls behind Québec's more generous system

Why it matters

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

Where Canada is at

Among new parents (outside of Québec) with insurable employment, **89.3% received maternity or parental benefits** and **29.9% of spouses or partners** reported receiving or planning to claim benefits in 2021.

Target

Increasing trend in uptake of parental leave for new parents outside of Québec.

Direction Canada is trending

Similar to previous years, close to 90% of new parents with insurable employment (which was 82.9% of new parents in 2021) reported they received maternity or parental benefits in Canada (outside of Québec). Uptake is close to 100% in Québec, which has a separate system with lower eligibility requirements and mandatory participation by self-employed individuals. There was also a notable increase in spouses and partners taking parental leave across Canada in 2021, related to an increase in the number of weeks available to new parents sharing benefits.⁹³ However, considering all parents – not only those with insurable employment – parental leave uptake rates are lower across Canada. For example, mothers who are immigrants or Indigenous are less likely to take leave, as well as those who are self-employed.⁹⁴ Other factors that can influence uptake of parental leave include wage replacement levels and whether benefits are dependent on use by a partner. With low wage replacement rates compared to other OECD countries, Canada's approach falls short.⁹⁵

Needs attention

The **employment rate for mothers** has improved in recent years but there is potential to grow further with improved supports

Why it matters

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

Where Canada is at

Canada **ranked 12th out of 36 OECD countries** on maternal employment rate in 2021. Canada had a **maternal employment rate of 76.8%** in 2021.

Target

Top 10 OECD countries on maternal employment rate.
Threshold: 10th in the OECD had a **maternal employment rate of 77.1%**.

Direction Canada is trending

The employment rate for mothers with children has increased over the past few years but is still below many peer countries.⁹⁶ In 2022, the employment rate for women between the ages of 25 and 54 hit record highs, largely due to an increase among women with young children.⁹⁷ However, the employment rate of mothers in one-parent families is typically lower than among mothers with a spouse or partner. There is the potential for this rate to increase as the Canada-wide early learning and child care system continues to be implemented, as participation of mothers in the labour market has been linked to recent improvements in early learning and child care.⁹⁸

Child and youth poverty in Canada is on the rise surpassing 2019 pre-pandemic rate

Why it matters

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

Where Canada is at

9.9% of Canadians under the age of 18 were in poverty in 2022.

Target

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

Direction Canada is trending

The poverty rate for Canadians under the age of 18 increased in 2021 (6.4%) and 2022 (9.9%), following a low of 4.7% in 2020 related to temporary pandemic-related supports. The poverty rate was significantly higher for children and youth in a female single-parent household (26.9%).⁹⁹ The poverty rate will continue to rise without sustained action to make progress on income security, quality of employment, child care access and affordable housing.¹⁰⁰ Poverty is one of the top threats to children and youth with challenges such as food insecurity exacerbated by rising inflation.¹⁰¹

Youth well-being remains low with Canada well below peer countries on sense of belonging among students

Why it matters

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

Where Canada is at

Canada **ranked 25th out of 36 OECD countries** in 2022 on the PISA sense of belonging index.

Target

Top 10 OECD countries on the PISA sense of belonging index

Direction Canada is trending

Canada was well below the OECD average on the PISA sense of belonging index in 2022, which tracks how students report on a series of questions related to feelings of belonging at school. While Canada slightly improved on its ranking compared to 2018, students still reported low levels of belonging at school compared to many peer countries. There was significant variation across the provinces with Québec reporting the highest levels of belonging and Alberta the lowest.¹⁰² Students who report a stronger sense of belonging typically perform better on standardized tests on reading. Disadvantaged students are on average more likely to feel lower levels of belonging.¹⁰³ Since the pandemic, there have been growing concerns about mental health issues including anxiety and depression among children and youth.¹⁰⁴

SECTION 3

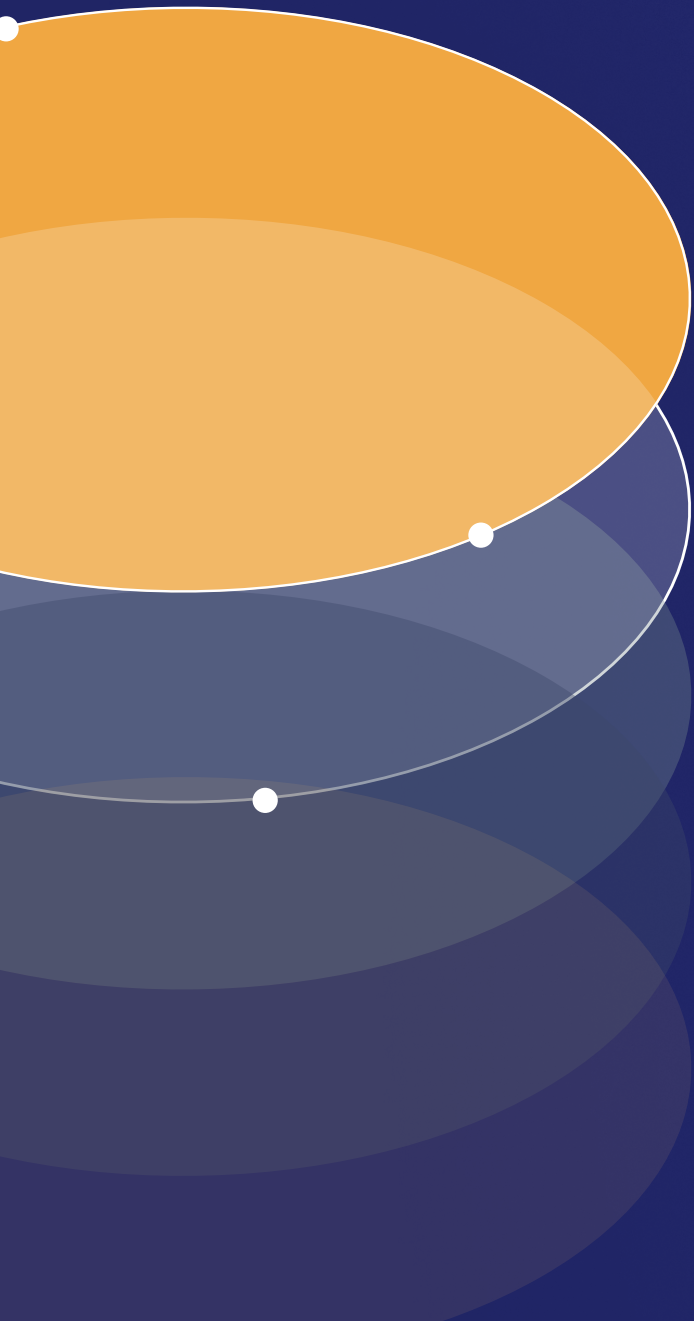
Canada's Immigration Reality Check

Creating a world-class future-ready
labour and talent pool





Immigration



OVERVIEW

Public dialogue about population growth and immigration is at a pivotal stage in the country. Canadians are now significantly more likely than a year ago to say there is too much immigration, dramatically reversing a trend dating back decades. There is an increased focus on immigration levels – and specifically temporary resident admissions – with perceived impacts on GDP per capita, housing affordability and wages. The country's ambition to grow sustainably is possible, but threatened by factors that must be confronted with evidence-informed policy. This climate increases the importance of effective leadership on immigration. Recent federal actions – including a commitment to explore integration of housing, health care and infrastructure within immigration levels planning, and a decision to cap international student and temporary foreign worker admissions, and explore a sustainable path forward – are important steps on this path.

AT A GLANCE

- | Canada has a consistently strong **global reputation** but will need to address challenges to remain on top
- | **Public support for immigration levels** declined sharply over the past year
- | **Provincial retention of immigrants** has improved but rates remain lower in Atlantic provinces
- | Canada's **citizenship rate** by naturalization declined in recent years among new permanent residents
- | The **immigrant income gap** has improved in recent years but challenges grow as cost-of-living rises
- | There are high numbers of **international students transitioning to permanent residence** but increasing concerns about the international student program and student experiences
- | Significant recent growth in the number of **temporary foreign workers** underscores challenges with increased employer reliance on temporary workers
- | **Francophone immigration** is increasing in some provinces outside Québec but the proportion has declined overall

Canada has a consistently strong **global reputation** but will need to address challenges to remain on top

Why it matters

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

Where Canada is at

Canada **ranked 3rd** in the 2023 Anholt-Ipsos Nation Brand Index

Target

Top 5 countries in the Anholt-Ipsos Nation Brand Index.

Direction Canada is trending

Canada's third-place ranking on the Nation Brand Index in 2023 remained consistent with the previous year. Canada continues to be perceived in a positive way internationally and is considered among the most trustworthy, generous and safe countries. Canada ranked at the top on its ability to attract talent and capital, with immigration continuing to help Canada build its strong reputation.¹⁰⁵ However, tense international relations such as with India in 2023 are a potential threat to Canada's reputation.¹⁰⁶ Additional challenges include increasing cost of living and housing unaffordability which can impact perceptions of Canada abroad by prospective newcomers. Likewise, policy shifts on international student admissions may affect Canada's attractiveness as a study destination.¹⁰⁷

Leading

Public support for immigration levels declined sharply over the past year

Why it matters

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

Where Canada is at

In 2023, **51% of Canadians** disagreed with the view that there is too much immigration in Canada.

Target

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

Direction Canada is trending

Downgraded from **On track** in 2023 National Scorecard 

There was a significant drop in public support for immigration levels in 2023 by 18 percentage points compared to the previous year. The proportion of Canadians who agreed with the view that there is too much immigration hit a level not seen for two decades, with concerns connected to a lack of affordable housing. However, most Canadians still view immigration – and immigrants – as positive for the country and an important part of Canadian society.¹⁰⁸ Some economists are raising concerns about the impact of immigration on economic indicators such as productivity and GDP per capita. There are mixed views on the degree to which immigration impacts these indicators.¹⁰⁹ However, concerns raised among experts about the impacts of immigration on the economy can impact public sentiment. Changing public and expert views on immigration highlight the importance of having the infrastructure in place to support a growing population in Canada and strong leadership on national immigration policies, as well as the importance of a long-term lens on the impacts of immigration.

Needs attention

Provincial retention of immigrants has improved but rates remain lower in Atlantic provinces

Why it matters

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

Where Canada is at

The average retention rate for immigrants who arrived five years earlier was **51.2% in 2021** in the five provinces with the lowest retention rates.

Target

More even retention across Canada for immigrants five years after they arrive, with lowest retention rate provinces increasing rates to better align to the most recent average for all provinces of **66.6% (2021)**.

Direction Canada is trending

Provincial retention slightly increased in 2021 compared to the previous year. However, there remains significant variability in immigrant retention rates across Canada, with provinces in Atlantic Canada continuing to have some of the lowest rates.¹¹⁰ The Provincial Nominee Program has helped to address retention challenges, with recent data indicating retention remains high a year after arrival through the program at 89% across the provinces. However, though there have been some improvements, gaps in retention rates persist – with Prince Edward Island, Newfoundland and Labrador, and New Brunswick having the lowest retention levels. Retention rates have been impacted by factors such as differences in unemployment across provinces.¹¹¹ While the retention rate for Canada overall remains high, there are increasing concerns about recent immigrants leaving Canada. Providing immigrants with positive experiences early in their arrival can help improve retention in future years.¹¹²

Needs attention

Canada's citizenship rate by naturalization has declined in recent years among new permanent residents

Why it matters

Transitions to citizenship reflect Canada's ability to integrate immigrants, maintain a strong reputation, and grow well.

Where Canada is at

45.7% of permanent residents who arrived within the previous 10 years became citizens in 2021.

Target

Increasing rate of citizenship acquisition among permanent residents.

Direction Canada is trending

Canada's citizenship rate has declined in recent years, with the percentage of permanent residents obtaining citizenship within 10 years in 2021 down 14 percentage points since 2016 and nearly 30 percentage points since 2001. While pandemic-related restrictions played a role in lower citizenship rates between 2016 and 2021, the citizenship rate still declined more quickly within that period even when taking into account that context.¹¹³ Naturalization rates are lower among immigrants with low levels of income, proficiency with official languages and educational attainment.¹¹⁴ Changes to citizenship tests, increases in language requirements, and fees to apply for citizenship may have also impacted naturalization, presenting a challenge among low-income immigrant families and refugees.¹¹⁵ Citizenship rates tend to be higher among those who have been in Canada for longer periods of time.

Needs attention

The **immigrant income gap** has improved in recent years but challenges grow as cost-of-living rises

Why it matters

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

Where Canada is at

There was a **difference of \$4,150 in 2021 in the median total income** between immigrants five years after arrival and for all Canadians (\$37,500 compared to \$41,650).

Target

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

Direction Canada is trending

The income gap between immigrants five years after arrival and all Canadians increased in 2021, following some improvements in closing the gap in recent years.¹¹⁶ Increases in immigrant income are connected to more immigrants arriving with Canadian work experience.¹¹⁷ Pandemic supports helped improve incomes in 2020 but these were temporary in nature. The income gap has since increased and immigrant wages remain lower than the overall population. This is a challenge as Canada's cost-of-living has risen, which has a more significant impact on those with lower incomes. Language barriers, lack of recognition of foreign credentials and discrimination are among the factors that can lead to the talents of newcomers being unrecognized in the labour market.¹¹⁸ There have been some recent steps to address barriers such as efforts in Ontario to remove Canadian work experience requirements for foreign-trained professionals, beginning with the engineering field.¹¹⁹ Temporary foreign workers tend to have lower incomes and may face a more significant income gap.

Needs attention

There are high numbers of **international students transitioning to permanent residence** but increasing concerns about the international student program and student experiences

Why it matters

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

Where Canada is at

Canada accepted **94,555 permanent residents in 2022** who had previously held a study permit.

Target

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

Direction Canada is trending

Canada continues to accept high numbers of permanent residents who previously held a study permit.¹²⁰ While there was a decrease in the number compared to the previous year in 2022, this was due to a temporary federal initiative which made it easier for international students to transition to permanent status (designed to make up for declines in immigration during the pandemic in 2021). In recent years, the number of international students in Canada has grown significantly. With this growth has come increasing concerns about the supports available to students and the quality of education offered by some institutions. Housing and income security challenges for international students have also deepened as housing pressures on communities have grown.¹²¹ In January 2024, the federal government announced major reforms designed to address these issues including a two-year cap on international study permits.¹²² Efforts at reform open opportunity for long-term planning focused on student experience, community readiness, and transitions to permanent residence.

On track

Significant recent growth in the number of **temporary foreign workers** underscores challenges with increased employer reliance on temporary workers

Why it matters

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

Where Canada is at

Temporary foreign workers made up **4.0%** of Canada's employed workforce in 2022, representing a **78% increase** compared to five years earlier.

Target

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

Direction Canada is trending

There was significant growth in the number of temporary foreign workers in Canada in 2022, continuing a trend from previous years.¹²³ Approvals under the temporary foreign worker programs increased 68% between 2021 and 2022, as the government broadened the ability for employers to access low-wage temporary workers. Canada has increasingly relied on temporary foreign workers to address labour challenges and temporary immigration has become a key driver of population growth.¹²⁴ Temporary foreign workers are more likely to have precarious work arrangements and they typically lack the same types of supports available to permanent residents. Greater opportunities for temporary workers to transition to permanent residence will have long-term benefits. In addition, more stringent criteria for employers to access low-wage temporary foreign workers may incentivize them to invest in increased wages and better working conditions for Canadians and permanent residents.

Needs attention

Francophone immigration is increasing in some provinces outside Québec but the proportion has declined overall

Why it matters

An important part of responsible population growth is welcoming greater numbers of French-speaking immigrants who can help support the growth of vibrant cultural Francophone communities across Canada.

Where Canada is at

In 2021, **10.1% of recent immigrants** (within the previous five years) had French as their first official language spoken.

Target

Trending toward **increased proportion of recent immigrants with French as their first official language spoken**.

Direction Canada is trending

The proportion of recent immigrants with French as their first official language spoken declined across Canada in 2021 compared to five years earlier.¹²⁵ Nonetheless, there has been growth in the proportion of Francophone immigrants in some provinces outside Québec. IRCC reported in 2022 that a federal government target – that at least 4.4% of immigrants that settle outside Québec speak French – was reached a year early, with positive implications for minority Francophone communities. Provinces such as officially-bilingual New Brunswick have targets for Francophone immigration that are even more ambitious.¹²⁶ The federal government also took steps in 2023 to increase attraction and recruitment of French-speaking immigrants.¹²⁷

Need attention



Education, skills & employment



OVERVIEW

While Canada continues to rank well in secondary school performance, scores have recently declined, highlighting the effects of the pandemic on young people. Canada also has strong educational attainment, with immigrants contributing significantly to the country's educated population. However, challenges continue with some equity-seeking groups facing persistent barriers to education including at the post-secondary level. At the same time, colleges and universities are increasingly facing financial pressures impacting their operations, and without action, this could deepen as a result of new caps on admissions of international students paying high fees. Across Canada's employment landscape, low pay is more common than in peer countries and employment rates have fluctuated. Public and private training support for Canadians, permanent residents and temporary workers on a path to permanent residency is needed in order to fill jobs of the future.

AT A GLANCE

- | Canada ranks high on **performance in reading, science and math among 15-year-olds** but scores are on a downward trajectory
- | Canada has high levels of **post-secondary attainment** but barriers to access persist
- | Canada's rate of **youth not in employment, education or training (NEET)** showed signs of improvement but young Canadians continue to face challenges amid difficult economic conditions
- | The **employment rate** is keeping pace with population growth but faces risks with economic uncertainty
- | **Low-wage work** in Canada continues to rise with growing inflation levels exacerbating challenges

Canada ranks high on **performance in reading, science and math among 15-year-olds** but scores are on a downward trajectory

Why it matters

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

Where Canada is at

Canada **ranked 4th out of 37 OECD countries** in 2022 on performance in reading, science and math among 15-year-olds.

Canada had an **average score of 506** in 2022 across reading, science and math.

Target

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

Threshold: 10th in the OECD had an **average score of 494** for reading, science and math in 2022.

Direction Canada is trending

Canada continues to rank among the top OECD countries on its secondary school educational performance in reading (5th), science (4th) and math (5th). At the same time, Canada's scores declined between 2018 and 2022 across all topic areas, most significantly in math. However, similar declines were observed across most OECD countries in 2022, with average student performance on a downward trajectory overall.¹²⁸

Immigrant students in Canada were found to have higher average scores compared to non-immigrants in reading and math.¹²⁹ Some provinces experienced a more significant drop compared to others, including in Atlantic Canada. While the pandemic was highlighted as a factor behind declining performance, countries including Canada were trending downward on performance even before the pandemic.¹³⁰

Canada has high levels of **post-secondary attainment** but barriers to access persist

Why it matters

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

Where Canada is at

Canada **ranked 2nd out of 38 OECD countries** on post-secondary education attainment among 25-to-34 year-olds in 2022.

67.0% of Canadians had a post-secondary education (among 25- to-34 year-olds) in 2022.

Target

Top 5 OECD countries on post-secondary education attainment.

Threshold: 5th in the OECD had **60.0% post-secondary education attainment** in 2022.

Direction Canada is trending

The proportion of Canadians with post-secondary education continued to increase in 2022, with Canada ranking among the top countries in the OECD.¹³¹ With high levels of labour demand for educated workers, post-secondary attainment is increasingly important. However, not all Canadians are able to access post-secondary education at the same level. Key groups including Indigenous people and third-generation Black Canadians had lower than average attainment levels and can experience greater barriers to access.¹³² Immigrants typically have high levels of post-secondary educational attainment as education is a key part of the selection criteria in Canada's immigration system and, as a result, immigrants have helped to boost the overall attainment rate in Canada.¹³³

Canada's rate of **youth not in employment, education or training (NEET)** showed signs of improvement but young Canadians continue to face challenges amid difficult economic conditions

Why it matters

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

Where Canada is at

Canada **ranked 17th out of 34 OECD countries** on youth NEET rate in 2022.

Canada's **youth NEET rate was 12.8%** for 20- to 24-year-olds in 2022.

Target

Top 10 OECD countries with lowest youth NEET rate. Threshold: 10th in the OECD had a **youth NEET rate of 10.8%** in 2022.

Direction Canada is trending

The NEET rate for Canadian youth between 20 and 24 years of age improved in 2022, returning to pre-pandemic levels. However, Canada still trails many peer countries in the OECD.¹³⁴ Canadian youth continued to face challenges in 2023, with increasing levels of unemployment, particularly for racialized groups, as well as increasing levels of involuntary part-time employment.¹³⁵ Recent Century Initiative research highlighted that when difficult economic conditions arise, the effects on youth are long-lasting and can exacerbate challenges that increase the youth NEET rate.¹³⁶

Needs attention

The **employment rate** is keeping pace with population growth but faces risks with economic challenges

Why it matters

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

Where Canada is at

Canada **ranked 12th out of 38 OECD countries** in 2022 on its employment rate.

Canada's **employment rate was 75.6%** in 2022.

Target

Top 10 OECD countries on employment rate. Threshold: 10th in the OECD had an **employment rate of 76.8%** in 2022.

Direction Canada is trending

Canada saw continued increases in its employment rate in 2022, growing faster than the OECD average for the previous two years.¹³⁷ Employment growth has helped to address challenges related to unmet labour demand. An employment rate that remains stable as the population grows indicates employment growth is keeping pace.¹³⁸ However, the employment rate fluctuated in 2023.¹³⁹ Additionally, equity-seeking groups are more likely to have challenges accessing employment. This includes Canadians experiencing disabilities who had employment rates much lower than those without disabilities in 2022.¹⁴⁰ Increasing employment opportunities for underrepresented groups will be critical to support future growth and prosperity.

Needs attention

Low-wage work in Canada continues to rise with growing inflation levels exacerbating challenges

Why it matters

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

Where Canada is at

Canada **ranked 19th out of 25 OECD countries** reporting data on incidence of low-wage work in 2021.

Canada's **incidence of low-wage work was 19.5%** in 2021.

Target

OECD average on incidence of low-wage work. Threshold: The OECD average for **incidence of low-wage work was 13.8%** in 2021.

Direction Canada is trending

Canada's level of low-wage work increased in 2021 and low-wage work remains more common in Canada than in peer OECD countries.¹⁴¹ Demand for low-wage work continued to grow in 2022 and 2023, with employers increasingly relying on temporary foreign workers to fill such jobs.¹⁴² With rising inflation, Canadians working in low-wage jobs are most impacted and face increasing challenges with affording essentials, including housing, and maintaining an adequate standard of living.

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Data sources

Focus Area	Indicator	Indicator data source and description
Growing to 100 million	Population growth	Statistics Canada – Estimates of the components of population growth, annual Data represents annual changes in population resulting from births, deaths, net migration and other components of population growth. (Using Statistics Canada demographic data, the Conference Board of Canada conducted modelling commissioned by Century Initiative that included suggested benchmarks on the rates of population growth needed for Canada to reach 100 million by 2100 incorporating recent federal Immigration Levels Plans and assumptions such as Canada's fertility rate.)
	Permanent resident admissions	Statistics Canada – Estimates of the components of population growth, annual Data represents the number of immigrants admitted to Canada on an annual basis. (Using Statistics Canada demographic data, the Conference Board of Canada conducted modelling commissioned by Century Initiative that projected the levels of immigration needed to reach 100 million by 2100 incorporating recent federal Immigration Levels Plans and assumptions such as Canada's fertility rate.)
	Fertility rate	Statistics Canada – Crude birth rate, age-specific fertility rates and total fertility rate (live births) Data represents fertility rate based on the total number of children that would be born to each woman if she lived to the end of her child-bearing years and gave birth to children in alignment with the prevailing age-specific fertility rates. (Conference Board of Canada used the fertility rate target to inform its demographic model.)
	Life expectancy	OECD – Life expectancy at birth Data represents life expectancy at birth based on how long on average a newborn can expect to live if current death rates remain unchanged.
	Global freedom	Freedom House – Freedom of the World Index 2023 Data based on annual Freedom in the World Index which assesses the condition of political rights and civil liberties around the world. Freedom in the World 2023 evaluated the state of freedom across 195 countries and 15 territories during 2022.
Infrastructure & environment	Investment in infrastructure	Statistics Canada – Infrastructure Statistics Hub: Total infrastructure assets Statistics Canada – Gross domestic product, expenditure-based, provincial and territorial, annual (x1,000,000) (Gross domestic product, current prices) Data represents investment in infrastructure divided by GDP in current prices.
	Housing affordability	Statistics Canada – Percentage of households in core housing need by tenure, 2016 and 2021 Statistics Canada – Core housing need, by tenure including first-time homebuyer and social and affordable housing status Data includes proportion of households in core housing need across Canada and proportion of households in core housing need in large urban centres.
	Rural broadband coverage	CRTC – Broadband coverage across Canada: Summary of year-end 50/10 unlimited broadband coverage – Rural areas Data represents the proportion of households and businesses in rural areas that have access to and can subscribe to services with download speeds of 50Mbps and upload speeds of 10Mbps with unlimited data transfer.

Economy, innovation, & entrepreneurship	Population density of metropolitan areas	OECD – Metropolitan areas: Population density of the core area (inhabitants per km²) Data measures population density of the core area as inhabitants per square-kilometre based on data in OECD's metropolitan database. 16 Canadian cities are in the OECD database with populations of more than 250,000.
	Climate change performance	Climate Change Performance Index – Climate Change Performance Index 2023 Data based on an index tracking the climate protection performance of 59 countries and the EU. The index is published annually by organizations focused on the environment and equity – Germanwatch, the NewClimate Institute and the Climate Action Network.
	Resilience	University of Notre Dame - Notre Dame Global Adaptation Initiative Country Index Data based on an index assessing adaptation at a country level on two dimensions: 1) vulnerability to disruptions related to climate change and 2) readiness to improve resilience and take on adaptive actions. The index uses 20 years of data across 45 indicators to rank 191 countries.
	Early-stage entrepreneurship activity	Global Entrepreneurship Monitor – GEM 2022/2023 Global Report Data based on total early-stage entrepreneurial activity (TEA), which is the percentage of adults aged 18 to 64 actively engaged in starting or running a new business. This is one of several indicators in the annual Global Entrepreneurship Monitor report.
	Business spending on R&D	OECD – Main Science and Technology Indicators: BERD as a percentage of GDP Data represents business enterprise expenditure on research and development as a percentage of GDP.
	Innovation	Global Innovation Index – Global Innovation Index 2023: Innovation in the face of uncertainty Data based on an index and provides a ranking of countries by their capacity for and success in innovation. The index looks at innovation from the following lenses: science and innovation investments, technological progress and socioeconomic impact.
	Productivity	OECD – GDP per hour worked Data represents labour productivity measured through GDP per hour worked.
	Business growth	Statistics Canada – High growth enterprises (growth based on revenue) (Data provided by Statistics Canada Centre for Special Business Projects) Data represents the number of high-growth enterprises in Canada measured by revenue. Statistics Canada defines high-growth enterprises as those with average annualized growth greater than 20% per annum over a three-year period.
	Diversity in leadership	Innovation, Science and Economic Development Canada – Diversity of Boards of Directors and Senior Management of Federal Distributing Corporations – 2022 annual report Data based on federal government annual report measuring representation among boards of directors and among senior management of women, visible minorities, Indigenous peoples and persons with disabilities at distributing corporations (public companies) governed by the Canada Business Corporations Act.
	Strength of Indigenous economy	Statistics Canada – Indigenous Peoples Economic Indicators, Gross Domestic Product by industry, Canada Data represents the levels of GDP attributable to Indigenous peoples in Canada, based on a pilot project by Statistics Canada to develop economic indicators measuring the economic contribution of Indigenous peoples to the Canadian economy.
	GDP per capita	OECD – Gross domestic product (US dollars/capita) Data measures standard of living as assessed by dividing GDP by population.

	Household debt	OECD – Household debt (% of net disposable income) Data represents the liabilities of households requiring payments of interest or principal to creditors and is measured as a percentage of net household disposable income.
	Income inequality	OECD – Income inequality (Gini coefficient) Data measures how income is distributed across a population through the Gini coefficient, ranging between 0 in the case of perfect equality and 1 in the case of perfect inequality, based on a comparison of cumulative proportions of the population against cumulative proportions of income they receive.
	Global competitiveness	International Institute for Management Development – IMD World Competitiveness Booklet 2023 Data based on the 2023 IMD World Competitiveness Ranking, which analyzes and ranks the capacity of countries to create and maintain an environment which sustains the competitiveness of enterprises and their ability to compete domestically or internationally. IMD assesses four dimensions of competitiveness: economic performance, government efficiency, business efficiency and infrastructure.
Support for children & families	Early learning and child care	Childcare Resource and Research Unit – Early Childhood Education and Care in Canada 2021 Data on proportion of children aged 0 to 5 years for whom there was a regulated full- or part-time child care centre space.
	Parental leave uptake	Canada Employment Insurance Commission – 2021/2022 Employment Insurance and Monitoring and Assessment Report Data measures the share of recent mothers with insurable employment who received maternity or parental benefits through EI.
	Employment rate for mothers	OECD – Maternal employment rates, 2021 or latest available year Data on maternal employment based on most recent available data in the OECD Family Database, represents employment rates for women aged 15 to 64 with at least one child.
	Child and youth poverty	Statistics Canada – Low income statistics by age, sex and economic family type (Persons under 18 years of age) Data represents percentage of people in low income using Canada's official poverty measure (market basket measure) for persons under the age of 18.
	Youth well-being	OECD – PISA 2022 Results (Volume II): Learning During And From – Disruption Data based on index of sense of belonging as measured through PISA survey responses to students on the degree to which they agree or disagree with statements including "I feel like an outsider at school," "I feel like I belong at school" and "I feel lonely at school." Responses to these statements were combined to form the index to track student belonging and well-being.
Immigration	Global reputation	Ipsos – Anholt-Ipsos Nation Brands Index 2023 Data based on an annual study on perceptions of 60 countries through online interviews with more than 60,000 adults aged 18 and over in 20 core panel countries. Countries are assessed across a number of categories related to reputation including: exports, immigration and investment, culture, people, tourism and governance.
	Public support for immigration levels	EnviroNics Institute for Survey Research – Focus Canada Fall 2023: Canadian Public Opinion About Immigration & Refugees Data based on annual public opinion research on Canadian views of immigration from interviews with 2,000 Canadians, focused on the question of whether respondents think immigration levels are too high.
	Provincial retention of immigrants	Statistics Canada – Interprovincial migration of immigrant taxfilers, by pre-admission experience and tax year, for Canada and provinces Data represents 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.

	Citizenship rate	Statistics Canada – The decline in citizenship rate among recent immigrants: Update to 2021 Data reported by Statistics Canada from the Census, measuring proportion of permanent residents who became citizens through naturalization within 10 years.
	Immigrant income gap	Statistics Canada – Income of Immigrant tax-filers, by immigrant admission category and tax year, for Canada and provinces, 2021 constant dollars; Tax filers and dependants with income by total income, sex and age Data based on measuring the gap in median total income levels between immigrants 5 years after arrival and the overall Canadian population.
	International students transitioning to permanent residence	IRCC – Admissions of Permanent Residents Who Ever Had a Study Permit by Immigration Category, 2015 – August 31, 2023 (Data provided by IRCC Chief Data Office) Data represents the number of annual permanent residents admitted who previously held a study permit.
	Temporary foreign workers	IRCC – International Mobility Program (IMP) work permit holders on December 31st by country of citizenship; Temporary Foreign Worker Program (TFWP) work permit holders on December 31st by country of citizenship Statistics Canada – Labour force characteristics by industry, annual (x 1000) Data represents the proportion of temporary foreign workers in the employed labour force. The number of annual temporary foreign workers is based on IRCC data collected on work permit holders through the Temporary Foreign Worker Program and the International Mobility Program.
	Francophone immigration	Statistics Canada – Languages spoken at home by mother tongue, immigrant status and period of immigration and first official language spoken: Canada, provinces and territories and census metropolitan areas with parts Data represents the proportion of immigrants in 2021 who arrived in Canada between 2016 and 2021 with French as their First Official Language Spoken compared to the total number of immigrants who arrived within the same period.
Education, skills & employment	Performance in reading, science and math among 15-year-olds	OECD – PISA 2022 Results (Volume I): The State of Learning and Equity in Education Data based on average of test scores on science, math and literacy for 15-year-olds based on the Programme for International Student Assessment.
	Post-secondary attainment	OECD – Population with tertiary education Data represents the percentage of the population with tertiary education ages 25 to 34. Tertiary education is defined as those having completed the highest level of education, including theoretical programs leading to advanced research or high skill professions such as medicine and vocational programs leading to the labour market.
	Youth not in employment, education or training (NEET)	OECD – Youth not in employment, education or training (NEET) Data represents the share of young people who are not in employment, education or training (NEET), as a percentage of the total number of young people ages 20 to 24.
	Employment rate	OECD – Employment rate Data represents the percentage of working-age people who are employed.
	Incidence of low-wage work	OECD – Wage levels (Low pay) Data measures incidence of low pay, which is the share of full-time workers earning less than two-thirds of median earnings.

Data selection and interpretation

Century Initiative has aimed to select data sources for indicators based on their ability to facilitate international comparisons as well as to track changes over time. The general target for Canada was to rank in the top 10 of the OECD or a relevant internationally comparative group. In a few cases, the top 5 was chosen in areas in which it was particularly important for Canada to lead. There were also instances where an average among peer countries was determined to be most appropriate. The *National Scorecard* diverges 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 2020 or later. In some instances, data with international comparisons lagged data focused only on Canada. As a result, the indicator assessment may focus on less recent data than that which is found in the analysis incorporating more recent national data. (Note: All data was accessed in Fall 2023. In some cases, data may have been updated or adjusted since it was retrieved.) The date format presented in the Scorecard (such as 2022/23) can have multiple meanings depending on how data is reported by sources. This format may refer to an April to March fiscal year or other time periods spanning more than one calendar year depending on the source.

The assumptions and methodologies behind some indicators are public to a greater degree than others. In some cases, Century Initiative selected indicators to serve as proxies for a wider range of issues covering complex topics. For example, the indicator on investment in infrastructure also tells a story about the state of infrastructure.

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

The 2024 *National Scorecard* generally leverages publicly available data for the 40 indicators and for analysis surrounding each indicator. Key priorities for indicator data sources were to select data that is reported annually, consistently and can be compared internationally. However, in many cases, it can be challenging to identify regularly updated data, both from Canadian and international sources, to assess topics that were identified as important to Canada's future prosperity. For instance, on some key topics international organizations like the OECD report data on a topic every few years and therefore the most up-to-date data is not always readily available. There are also important topics on which data availability and reliability must improve. In most cases, the indicators in the *National Scorecard* provide a summary-level picture of the status or trend of issues in Canada at an overall population level. However, assessments also factor in differential experiences including based on race, gender, Indigenous identity, income, disability status, and/or immigration status or arrival class. Several indicators including Indigenous market strength, employment rate for mothers, and diversity in leadership focus on specific equity dimensions.

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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