Insights for Tomorrow: A Cross-Sector Look at Canada’s Future and Our Next Chapter

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Speaking

Dr. Susan Black, President and Chief Executive Officer
Tony Bonen, Executive Director of Economic Research
Amanda Thompson, Lead Research Associate, Indigenous in Northern Communities
Dianne Williams, Vice President
Babatunde Olateju, Director, Sustainability
Jennifer Fane, Lead Research Associate, Education & Skills
Eddie Nason, Director, Health
Pedro Antunes, Chief Economist
Lauren Hamman, Associate Director, Immigration
Alain Francq, Director, Innovation & Technology
Austin Hracs, Strategic Partnerships and Accounts, Economic Forecasting

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Transcript

Dr. Susan Black, 00:00-02:24

Happy New Year. Thank you for joining us today. I'm Susan Black, President and CEO of The Conference Board of Canada.

As I am in Ottawa today, I'd like to respectfully acknowledge the land on which I am on that is the traditional unseated territory of the Algonquin Anishinaabe. And given that this is a virtual event with people participating across the country, I'd also like to take the opportunity to recognize and acknowledge all the nations across Turtle Island.

Now, as many of you know, since 1954, The Conference Board of Canada's research has helped Canada's leaders navigate our country's toughest challenges. Today, as one of Canada's largest independent applied research organizations, we produce more than 500 research outputs each year.

Our work is renowned for its rigor, its objectivity, and its unbiased insights. But even more importantly, as an organization, we are driven by a profound belief that we have a responsibility to provide these fact-based unbiased insights to all Canadians.

And today that responsibility that we take so seriously, it matters more than ever because let's face it, across the globe misinformation is rising and public debate is drowning in just drowning a noise. So truth is increasingly held hostage to special interests, to foreign influences.

And can I say it to the all too often uninformed?

And when truth erodes, trust collapses and bad decisions get made. And as a country, our collective well-being suffers.

That's why our research matters. We are a place where evidence leads, where facts are protected, where insides are independent and they are free from external influence. Our research integrity. It is our cornerstone. It has earned us the trust of Canada's leaders across regions, across sectors and across political lines.

Now, like the world around us, we have evolved.

But as our impact has grown, our name has not kept pace. Which is why today we are proud to announce a new name, one that reflects who we are, the work we do, and the independence that defines us.

Let's take a look.

Voice Over, 02:26-04:01
There's data and there's insight.

There are opinions and then there's facts.

There's noise and there's signal.

For over 70 years, The Conference Board of Canada has guided leaders with research, analysis and insights.

There's the past and then there's the future.

Canada stands at a moment of change. Housing, challenging affordability. Climate, testing infrastructure. Trade, redefining sovereignty. Technology, reshaping labor.

This moment needs renewed clarity. We need action more than ever. It's a new world and we have a new name. **We are Signal49 Research**. A clear signal driving decisions that shape the future. A Canadian perspective on national and global issues.

Our name has changed, but the mission remains: to master complexity through research and connection so we can build a stronger future for Canada, together.

Because there's perceptions and then there's reality. There's confusion and there's clarity. There are echoes and there's a guiding voice.

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Signal49 Research

Where knowledge inspires action.

Dr. Susan Black, 04:04-07:02

As you just saw, after more than 70 years as The Conference Board of Canada, we have a new name, Signal49 Research. This isn't just a name change, it's a statement of who we are and of where we're headed. We have evolved from the days when we would host dozens of conferences a year. Today we are an economic and Social Research powerhouse or a convener of Canadian leaders and driver of evidence based ideas and a leader in research innovation.

Our new name reflects our purpose to deliver clarity and evidence based insights in an increasingly complex world.

So how exactly does our new name, Signal49 Research, reflect that purpose? Three ways.

First, we are inspired by the story of Signal Hill in Newfoundland and Labrador. Now, as many of you no doubt remember from your history books, Signal Hill is the location where the first transatlantic wireless message was received across the ocean way back in December of 19 O1. This was a landmark achievement of global communications because it proved that signals could curve around the earth. We no longer needed physical wires or cables.

It was that moment where the impossible became reality, enabling instant connectivity between continents and Canada. We played a key role in this global innovation that reshaped how the world connects. That signal in our name is a nod to this history.

Canada's role in Signal Hill captures the spirit of innovation and connection that drives everything our organization does today.

Second, as applied researchers, we aspire for our work to illuminate the best way forward and to service really critical intelligence for decision makers. In other words, to provide them with the signals they need.

And finally, the reference to 49. This reference is a nod to the 49th parallel, a symbol of our deeply Canadian perspective and the pride we have in our country.

So to sum up, Signal49 Research stands for clarity, trust and forward momentum.

Our name, our name is a promise that we will be a guiding force in times of uncertainty, a signal our leaders can rely on. And our tagline, our tagline which you saw in the video, it really says it best, where knowledge inspires action.

Now, over the next 50 minutes, you're going to hear from several of my colleagues from across our research areas of focus. They're going to share highlights and practical recommendations from some of our latest research that's having an impact across Canada.

The showcase is designed to give you a snapshot of the breadth of research conducted by Signal49, as well as insights into what you can do as leaders to help Canada and all Canadians prosper in the years ahead.

You can find the links to the full research reports for all the presentations in your Resources tab on this event console.

Please enjoy.

Tony Bonen, 07:17-11:36

Hello, Bonjour. I'm Tony Bonen, Executive Director of Economic Research at Signal49.

Generative AI has exploded on the scene in recent years, creating a mix of excitement but also fear about what AI and other automation technologies mean for our jobs, career prospects and the future work.

We don't yet have the full picture of how these new technologies will impact the economy, but we do know that the focus on AI alone is far too narrow.

Well, the changes it will bring will be widespread.

AI combined with other automation technologies such as robotics, autonomous vehicles, virtual and augmented reality will change how we work, collaborate, and grow together in ways that we are just beginning to see.

But we need that understanding. We need that for sites that we can start planning and investing wisely today for a rapidly changing world.

So how do we even go about measuring these impacts?

Well, we've developed a comprehensive framework linking together three key concepts, task level, exposure to automation, potential productivity gains, were these technologies implemented and the expected adoption rate by businesses.

You can think about these three concepts as basically the feasibility, potential benefits and real world barriers facing technology adoption.

That's the complete picture that gets us beyond the initial question of whether technology can do a human task to the real question of will the machine be made to do the task in the years to come, and of course, what that means for our jobs and livelihood.

Our initial findings suggest we'll see widespread impacts across the economy as automation shifts how businesses operate, altering the types of jobs and skills that they require, with demand for some jobs and skills shrinking and others are going to be transformed.

Overall, we estimate that new automation technologies, including generative AI, have the potential to boost Canadian productivity by nearly 14 percentage points over the coming 15 years over above and above our baseline forecast.

Those potential gains are greatest in our transportation and our goods producing sectors, which could see productivity growth increase by as much as 1.2 percentage points per year above our baseline forecast. That's huge.

This is particularly encouraging because it is these sectors that have seen the most sluggish growth or even declines in productivity in recent years.

So, in other words, there's good reason for optimism.

Clearly, not everyone will be impacted equally.

For example, analytical and manual jobs show the highest likelihood of change, while those roles relying on social and emotional skills with lower exposure to to technology are likely to grow in importance in the years to come.

For leaders and workers alike, the stakes are clear.

Understanding where the impacts will be highest and where human skills will remain essential helps us prepare for the displacement risks, role transformation, and the opportunities to deploy technology to support a stronger and more resilient economy.

Our work on this topic is the first of its kind, but we need to advance it further by incorporating even more real world insights are the barriers and risks that businesses foresee in adopting these technologies, and secondly, by applying our analysis to a variety of sectors across the economy.

Ultimately, we will need to collaborate with those in the education and training space to build pathways for young people, students and workers alike to adapt to the new technological and economic landscape.

To that end, our next step is to develop a holistic macroeconomic forecast of these changes, where we'll be estimating how exposure to and the productivity gains from these emerging automation technologies will affect the investment, growth and employment trends over the next 15 years.

This will generate short and long term labor market projections driven by those real world perspectives from leaders on how technology adoption is unfolding across key sectors.

Imagine a Canada where automation, productivity potential and on the ground adoption insights come together so that decisions about technology, work design and skills training are evidence based and tailored to the specific regional needs and opportunities.

Look, there's a lot of noise out there around AI and we're working to cut through that static and identify those true signals of change.

Thank you.

Amanda Thompson, 11:47-16:33

Hi, I'm Amanda Thompson, Lead Research Associate in Signal49's Indigenous in Northern Communities knowledge area.

Imagine running a hospital, a mine or a hotel in the north and watching set staff fly in for two weeks, then fly right back out with their paycheck. Those wages aren't spent locally and the job vacancies just keep piling up. Aging populations, out migration and limited access to post secondary training are stocking the deck against northern employers.

Immigration has helped.

Yet Canada's north has some of the biggest labor shortages seen across Canada.

Here's the big idea.

Immigration is essential for northern labor markets when it's aligned with local demand and backed by community capacity. Federal worker programs and provincial nominee programs have been key to attracting skilled workers across the territories and provincial N.

But recent policy changes, including cuts to permanent resident levels in 2025, new non permanent resident targets and further reductions confirmed for 2026 to 2028 signal a shift towards sustainable immigration.

Northern leaders warned that A1 size fits all approach won't work for northern rural and remote labor markets.

And they're right.

Success depends on matching skills to local needs and investing in housing, infrastructure and services so communities can support growth. So why does this matter now?

For one, demographics. Except for none of it. Most regions in The North Face declining birth rates, aging populations, and working age cohorts that are shrinking even faster than the rest of Canada. This intensifies labor demand and reliance on labor from outside the region.

In addition, the retention of immigrants in most northern region is below the Canadian average and the retention of immigrants has been declining across the North over the last 10 to 15 years.

Plan reductions to provincial nominee programs risk work worsening retention because nominees are required to settle in the province or territory that sponsored them.

The availability and affordability of housing are also real barriers for immigration in Canada's north.

In most regions across the north, non permanent residents are more likely to live in crowded housing than residents, and if more non permanent residents transition to permanent status consistent with new policy changes, housing pressures must be addressed.

Finally, newcomers to the North are filling roles in healthcare, education, natural and applied sciences and business, often requiring post secondary education.

Yet recognition of foreign credentials lags in Canada's north, and overqualification is common, particularly in the fields of engineering, education and math, computer and information sciences.

So what can we do?

Recruit to the demand. Align attraction with the occupation and training levels each region actually needs. National and regional label market data and robust forecasting models already exist across most of Canada's north. Jurisdictions can use them to plan hiring, training and partnerships that match the real demand, but investments are also needed to keep labor market data and forecasting models current and consistently available.

Another thing that can be done is strengthening community driven immigration programs.

Newcomers to Canada tend to cluster in hub communities, while many northern, rural and remote communities struggle to attract skilled workers. Community driven immigration programs targeting northern rural and remote communities can spread growth across Canada more evenly.

Finally, we can invest in retention of newcomers to the North by developing partnerships to accelerate housing solutions and working with regulators to recognize foreign earned credentials and experience so newcomers can work to their full potential.

We can have sustainable immigration in the North, a northern economy where employers don't rely on flying fly labor to fill gaps, where newcomers are welcomed into communities with the housing, infrastructure and services they need, where their skills are recognized, and where immigration policy is calibrated to local realities rather than national averages.

That's sustainable immigration, balancing economic needs with community capacity and turning persistent job vacancies into lasting prosperity across Canada's North.

Thank you.

Dianne Williams, 16:41-17:52

Did you know that our foray into Canada's executive peer-to-peer learning started with one bold move back in 1975?

That's when we established the Council of Human Resource Executives, strengthening collaboration and learning among HR leaders nationwide and laying the foundation for the leadership councils that we're known for today.

Over the next 5 decades, that foundation expanded and by the 2000s, we were leading more than 30 executive councils across the country and ours.

Our focus began to sharpen.

We concentrated on the areas that were most connected to our research and in greatest demand.

Today, we operate 16 Executive councils representing just under 500 members from leading private sector organizations, not for profits and public institutions across the country.

Our councils span the areas that matter most to you, from technology and innovation to higher education, sustainability, corporate, Indigenous relations, and of course, human resources, all built on a milestone that began in 1975.

Babatunde Olateju, 17:58-23:36

Hi, I'm Babatunde. Director of Signal49 Research’s Sustainability Knowledge Area.

In 2023, Canada recorded 6843 wildfires that burned more than 15,000,000 hectares and the area larger than over 7000 personnel were deployed, more than double any year in the last four years, and 185,000 Canadians were displaced, the highest number since they became available in 2000.

Both Natural Resources Canada and the United Nations call the season one word president.

But here's what's complex.

The social impacts of the wildfires in 2023 were not the highest Canada experience. More Canadians with high socioeconomic vulnerability were exposed to wildfires in 2020 and 2020.

Canada excels measuring physical wildfire. For instance, detectors, burn suppression resources faulty net.

But we under report social impacts like evacuation frequency, duration on miss social needs and health effects.

As a result, agencies struggle to allocate resources for holistic disaster.

One of our research respondents captured it perfectly characterizing how to bear a wildfire season is tends to be numbers of fires here burn and we know the numbers aren't a really useful picture. The broader reverberating effects across the larger system are in local.

In our research carried out in partnership with the Canadian Red Horse, we propose the Canadian Wildfire Impact Assessment Rate place based approach to standardize national indicators to share database and clear reporting templates so Canada can track both physical and social impacts.

Consistent wildfires do not just scorch landscapes the open lives.

They can displace communities, cause homelessness, disrupt livelihoods and affect local systems. Children lose regular schooling, social bonds weaken mid dislocation public health system. Strain on the smoke related illness and trauma increases the prevalence of anxiety, depression and PTSD among residents, wildland firefighters alike with documented long term health risks.

These impacts are in mental social markets, including age, income, disability, ingenuity, shape, exposure and recovery outcome.

Recovery programs that consider social impacts are more responsive to socioeconomic and demographic realities and lead to more equitable outcomes.

Our Community Vulnerability Index, developed using 2021 census data, found that almost 30% of Canadians live in areas with high to very high socioeconomic communities likely to experience more severe social impact disaster.

And today, Canada's wildfire data ecosystem is frightening.

Multiple databases track risks, parameters, suppression resources and insured losses with no national indicators consistently capture social impacts, and ownership remains clear.

This leaves institutions operating in silos, limiting comparability and timely decision making.

So what do we do about this?

With Public City Canada's leadership and collaboration with federal agencies, as well as provincial territorial governments, municipalities, Indigenous communities and NGOs, our proposed Canadian Wildfire Impact Assessment Framework can be implemented in four steps.

First, build a national database of disaster impacts, physical and social, that integrates the existing data sources. Second, define standardized social impact indicators and measurement procedures including health and well-being, education, employment, cultural factory. Third, identify agencies and their responsibilities to record, share and review impact data. 4th, collect and integrate place based data consistently into the National Disaster Impact Database.

To this end, empowering municipalities and communities.

Learning from Australia's example, municipalities should track social impacts through on the ground surveys and outreach to support and incentives on provincial, territorial, federal partners.

This ensures psychosocial needs and vulnerabilities are captured accurately and consistently, including with Indigenous communities by appropriate channels. Our public discourse on the impacts of wildfires in Canada needs to evolve.

Omagine a Canada where every wildfire season is assessed not only by Heckersburg, but by health.

Families, schools, businesses and cultural life are effective now.

Quickly, we recover.

With standardizing indicators, clear ownership and place based reporting that flows from communities, provinces and into a national database, recovery becomes more targeted and more equitable, more importantly, more easily.

By integrating Canada's capacity to report large scale fiscal impacts and consistent place based social impact reporting, communities are more likely to see better recovery season after season across regions.

For those most well, that's the Canada we can build if we choose to measure what truly does.

Thank you.

Jennifer Fane, 23:45-28:29

Hi, I'm Jennifer Fane, Lead Research Associate in Signal49's education skills knowledge area.

Across Canada, neurodivergent workers, those who are autistic or have ADHD or learning differences, are broadly underrepresented in the labor market, leaving their valuable skills underutilized.

Across our neurodiversity research, we hear many versions of the same story.

Neurodivergent workers told us they could do their work brilliantly, but the workplace demanded 1 rigid way of working, unclear expectations, unhelpful feedback, and the valuing in office presence over outcomes and quality of work experiences that made traditional workplaces inaccessible even when the work was a strong skills fit.

As Canada grapples with critical skill shortages, redesigning work so neurodivergent talent can thrive isn't just an inclusion issue, it's a misadvantage we simply can't afford.

And while Canada does not comprehensively track rates of neurodivergence, one thing is clear. It's becoming more visible. Not because neurodivergence is new, but because recognition is catching up. Awareness is growing, screening is improving. Stigma is slowly decreasing, so this isn't new and it isn't going away, which means our pathways into workforce participation have to catch up too.

So yes, it's time to rethink how workplaces are designed.

But we should also ask what's possible when neurodivergent talent designs work for themselves and what their and what role their self-employment could play in Canada's workforce.

We heard from 75 neurodivergent Canadians engage in self-employment and 70 stakeholders to understand how self-employment can work for neurodivergent Canadians and where it doesn't yet.

What did we hear?

Neurodivergent entrepreneurs work across diverse sectors, professional services, creative industries, education, mental health, and skilled trades, demonstrating their broad entrepreneurial professional capacities.

For some, self-employment was a deliberate choice to harness these strengths, yet for others, it became a necessity after exclusion in conventional workplaces.

Here's what's getting in the way of their success.

Publicly funded support and employment programs prioritize traditional jobs, rarely presenting self-employment as a viable pathway. Limiting beliefs and stigma have resulted in little guidance with

one-size-fits-all employment support models, leaving neurodivergent workers without the training and resources they need. And the financial risks are real irregular income, a lack of benefits and safety net, and social assistance clawbacks that disincentivize their efforts.

If we leave these barriers in place, we underutilize A diverse and skilled talent pool precisely when Canada needs it most. Because the question isn't whether neurodivergent workers can succeed, they already are succeeding.

The real question is what kind of workforce are we building if people have to leave it unsupported to thrive?

Building a neuro inclusive workforce and entrepreneurial ecosystem requires coordinated action across government, education, advocacy, networks, and the business community.

And if we're serious about moving from intention to impact, these are the three principles to build from #1 design systems that work with neurodivergent people, not against them.

That includes tailored training programs and business supports so success doesn't require overcoming the system.

The second is that peer networks are essential infrastructure. We heard the call from mentorship in community LED networks rooted in lived experience, where real world guidance, partnership and connections are accessible and inclusive.

And the last is that we need to make systems easier to navigate and easier to stay in.

This is an opportunity to create centralized resource hubs, training for service providers, and aligning benefits and financing to improve access and experience.

If Canada wants more talent and more innovation, we simply cannot afford systems that only work for some.

So the path forward is clear.

Design for strengths. Build community. Make pathway sustainable.

Because here's the truth, when we design A world of work to be neuro inclusive, we don't just support neurodivergent workers, We build a world of work that works better for everyone.

Thank you.

Eddie Nason, 28:41-32:49

Hello, Bonjour. I'm Eddie Nason, director of Signal49's Health Knowledge Area.

Migraine is more than a headache. It's a debilitating neurological condition and one of the world's leading causes of disability. It affects around 5 million Canadians, including me.

In fact, its prevalence is estimated at 10 to 20% and that's higher than diabetes or asthma. But migraine remains under diagnosed and under treated with fragmented care that harms individuals in society.

We pay for this in pain, lost moments and lost productivity. One recent estimate was the annual productivity cost in Canada at near $15 billion. Canadian workplaces feel it presenteeism, absenteeism, where migraine is the third highest cause and stigma that can push people out of the workforce.

Health systems feel it too, with the overuse of emergency departments, inappropriate opioid prescribing, poor access to primary care and to neurology, and weak continuity across care settings.

Let's aim higher with a person centered pan Canadian model of care focused on what matters most, relief, functionality and calm.

Our model has three interacting components.

First, the healthcare system with evidence informed acute and preventative care including management of Co occurring physical and mental health conditions.

2nd, through self management and advocacy where people are supported to navigate their care, manage their triggers and their treatments and set goals that reflect their life needs.

And 3rd, through societal supports, workplace accommodations, insurance coverage and public understanding that helps to reduce stigma.

All of this model rests on a strong foundation, one of education, a learning health system and team based care. And this isn't theory, this is practical.

So for policymakers, providers, insurers, and employers, there are 6 steps that can accelerate implementation of this kind of model.

Make transfers of care seamless through standardized guidance and referral processes, through electronic medical records that embed decision supports, and through improved navigation tools. Align your funding models by removing those administrative barriers that block team based care.

Supporting patients. Modernize coverage to ensure that new migraine treatments and supports are available, affordable, and coordinated. Empower patients with education.

Education that lets people better understand and manage their own condition will provide a capacity so that all the points of contact on a patient's migraine care journey. Have the knowledge and skills to collaboratively support those living with migraine and create engaged workplaces with benefits that cover treatments, flexible schedules and reducing stigma experienced by employees.

Picture a Canada where migraine care works seamlessly, where robust primary care meets most needs, specialty support is timely and transitions are smooth, where employers provide flexibility and benefits, and where people living with migraine have the tools to manage their condition confidently.

That's the promise of a person centred model. Less pain and disruption, more stability and participation, and better outcomes for people, society and the economy.

We can build it, and we're already seeing interest and uptake across provinces. Moving on. This now allows millions of Canadians to feel the difference in their everyday lives.

Thank you, Merci.

Pedro Antunes, 32:54-33:55

Did you know that our economics work has directly shaped some of Canada's most important economic decisions?

Back in 1989, we released one of the first comprehensive evaluations of the proposed goods and services tax.

Our analysis showed that increasing Canada's GST rate too quickly would lead to diminishing economic returns, evidence that contributed to the federal government's reducing the proposed tax rate from 9 to 7%.

And our impact didn't stop there.

Between 2005 and 2007, our economics team built some of the most robust long term fiscal forecasting models in the country, tools that help governments plan for future health and education spending.

These models supported key federal decisions, including raising the Canada Health Transfer by 6% a year and establishing a 3% annual escalator for the Canada Social Transfer.

From tax policy to long term fiscal planning, our work has helped shape Canada's economic landscape.

Lauren Hamman, 34:03-38:57

Hi, I'm Lauren Hamman, Associate Director of Signal49's immigration knowledge area.

For years, Canada's population growth has been driven by immigration. And for years this growth has fueled new economic opportunities, diverse communities and a robust workforce.

But in the last year, we've seen this shift.

No longer is Canada's population growing, our birth rate is among the lowest of OECD countries, and our workforce continues to age. Immigration still plays a critical role, but we are not relying anymore on the numbers of people coming in.

Instead, we need to do more with those that are here to better utilize their talents, to better integrate them into our communities, and to better retain the benefit they offer Canada over the long term.

That is the question that we've explored through our Leaky bucket research. We look at immigrant onward migration, that is, immigrants leaving Canada, and consider which immigrants are leaving and when. And what we discovered is simple. Onward migration is a persistent trend.

One in five immigrants will leave Canada within 25 years of landing, and the highest likelihood of an immigrant leaving is five years after arrival.

What's more, higher skilled immigrants are more likely to leave than lower skilled immigrants, and immigrants with higher levels of education are more likely to leave than those with lower levels.

And the drain is concentrated where Canada needs talent most. Occupations with higher projected employment growth over the next 10 years tend to have higher onward migration rates.

These are skilled professionals like managers in finance and business, software engineers and senior managers in critical sectors like healthcare, construction and the trades. And earnings dynamics matter too.

Simply put, immigrants who experience some earnings growth whilst in Canada tend to stay. Those who don't tend to leave.

The results are also striking when we break this down by education level.

The higher the level of education an immigrant has, the more likely it is that they will leave if they experience no or declining earnings growth whilst in Canada.

So what does all this mean?

When we couple these findings with the way our immigration system is designed, there's a fundamental disconnect. Our system is designed to support economic prosperity. Around 65% of all permanent immigration into Canada is through economic streams, meaning the majority of immigrants who arrive in Canada are hand selected for the purpose of boosting our economy.

Those selected have the high human capital capability to contribute to Canada consistently over the long term. They also have the skills needed to feel the critical demand Canada in Canada for the next 10 years. These are intellectuals, professionals, senior leaders, innovators and experts in their field.

These are immigrants who chose to come to Canada amidst A globally competitive market for talent. When we attract them but don't retain them, we're only doing half the job.

So what do we need to do?

Well, the first thing is to establish a national retention policy framework. We can't control what we can't measure. A national framework would set measurable retention targets, track progress, and align immigration with long term integration goals, especially during the critical first five years.

The second thing we need to do is target support for highly skilled, highly educated immigrants. There is one theory that these individuals don't need as much support. They're more likely to speak the language to find jobs quicker, to navigate the system more capably.

But actually, our findings show that this isn't the whole picture. If it were, then we wouldn't see the higher rates of onward migration among these groups, particularly in the first five years. What is needed are different types of support, better access to bridging programs, more help breaking down credential barriers and availability of personalized settlement plans. The same can be said for those who plan careers in critical sectors.

The needs are different and the support should be targeted to the need.

Finally, we need to leverage employers in this. In this picture, employers are on the front lines of developing, training and retaining talent in Canada. Employers can strengthen retention by creating welcoming workplaces and providing in house support such as mentorship and career development programs. These initiatives are especially effective in smaller communities where retention of talent is critical.

So if there's one thing that I want you to take away from this presentation, it's that we need to pay attention to retention.

For this research, we're shifting the conversation from a focus on who's coming to Canada to who's already landed in Canada.

We have some of the best talent in the world, and to be able to harness it effectively, we need to notice it, nurture it and do what we can to keep it.

Thank you.

Alain Francq, 39:06-44:19

Good afternoon.

I'm Alain Francq, Director of Innovation Technology at Signal49.

Our focus recently has been making sure that Canada doesn't just invent the future, but owns it. So imagine a world where ideas are your currency and patents are the gold standard for protecting your economic wealth.

If that were the case, Canada's fault is currently pretty wide open because the innovation economy is shifting from traditional tangible goods to an intangibles economy.

So intangible assets protected by intellectual property like software and data and algorithms now make up over 90% of the value of major stock indices. You just have to look at your phone and think about the most innovative companies in the world, because innovation isn't just about creativity or discovering new innovations.

It's about capturing the economic impact of them rather than letting them slip away.

So there are many types of intellectual property, from copyrights and trademarks to industrial designs and trade secrets. But patents send the strongest signal of protection and capacity to commercialize and charge for your intangible assets.

So the big idea today is that as researchers, we can do a deep dive into Canada's patent landscape to reveal where we have the most protected ideas and true inventive capacity to compete with the rest of the world.

In a way, it sends a signal where we're strong, where we lag, where we can benefit most economically. And Canada's patent landscape tells a really fascinating story.

You know, there's 35 technology classes and Canada has 10 that show both specialization and world class competitiveness.

I'll give you a second to guess what the top three are in terms of most specialization. Well, it should come as no surprise civil engineering tops the list with our strength in oil and gas and mining. But number 2 is pharmaceuticals and #3 is biotechnology. So life sciences, all well above global averages in terms of concentration of patents.

But what about growth? Like where are we outpacing the rest of the world in at #1 is advanced engines and turbines #2 is thermal processes, and #3 interestingly, is nanotechnology. So when you combine specialization or concentration with high growth and competitiveness, you actually get a picture.

You get insight into where Canada should be funding its technologies, the types of policies it develops and support, the type of companies that harness the greatest economic impact.

There's also a flip side of this research.

You find out that patent ownership is really fragmented in Canada. Canada averages only four patents per owner and which is really half the global norm and very few large portfolios or very few companies have large portfolios. I think there's only 49 entities in all of Canada that hold 100 or more patent families. That really limits the scale of commercialization potential. It's actually really acute in fast moving sectors like semiconductors and optics and digital communications.

So what is the practical application of all of this?

Well, we now have a way to strengthen Canada's economic success by sort of aligning innovation programs with our proven protected technological strengths.

So when you look at Canada's innovation strategy, it has success sectors, clean tech, resources and life sciences have very strong alignment with our innovation priorities and funding. But there's only partial alignment or misalignment with other areas such as Agri, food, advanced manufacturing and digital, all areas where we can punch above our weight.

So how do we strengthen Canada's innovation capacity?

Well, obviously you've got to double down on your strengths. That’s a natural strategy. So scale support in aligned sectors. So boost funding and policy tools for clean tech and resource based sectors and life sciences, but don't forget you also have to invest in building the talent in those areas. So attracting talk to your researchers and address those infrastructure gaps, especially if you're going to get into wet labs for biotech.

But also maybe play some bets, advanced nanotechnology and advanced materials, which in fact underpin quantum computing by the way. So build on that really strong patent growth through research partnerships, maybe some commercialization support, but also don't forget to diagnose where we need support. So go beyond patents, include algorithms, data, industrial designs for areas like agriculture and digital and advanced manufacturing.

But at the end of the day, you need to strengthen the the domestic patent portfolio for the entire country. So prioritize those partnerships, support for those organizations that are helping Canadian companies license.

So in closing, what do we learn today? You know, we have the ideas. Canada has the ideas. We've developed some of the greatest inventions in history, from penicillin to aerospace and from AI to quantum computing. We have the talent, one of the most educated populations in the world.

But what we need now is the ability to turn our inventive strengths into economic prosperity because you know in the intangibles economy, Canada should not just be the source of ideas, We should be able to compete on them and extract the economic impact of our innovation for the benefit of all Canadians.

Thank you.

Austin Hracs, 44:27-45:08

In early 2025 we made a major acquisition of Vicinity Jobs to significantly enhance our big data labor market capabilities. Vicinity Jobs is the Canadian made leader in real time labor market analytics. This acquisition brought Vicinity's entire team and capabilities in house and has added AI powered analytics to our research portfolio.

So what does this mean?

Well, we can now draw on Vicinity's data to inform workforce policy and enhance our labor market insights for leaders across the country. This data is critical to dive deeper into those occupations and skills that will support Canada's economic prosperity for decades to come.

Dr. Susan Black, 46:13-48:47

Apologies folks.

I went part way through my remarks and realized my camera, my microphone on so, so sorry. Let me start again.

I'm going to say I hope you enjoyed those highlights from my colleagues.

They are just a few of the research studies that we have underway right now at Signal49 Research.

We are really excited about continuing to provide, continuing to provide these evidence based truths and these insights that you can't get anywhere else.

Now, although we've shared our name with you today, we are not going to be officially operating under it until January 26th. And at that time, we invite you to come and explore our new name and visit our new website which will be signal49.ca.

In the meantime, of course, you can read more about our name change on our existing website, which is conferenceboard.ca.

I'm going to close with a bit of a personal observation.

I'd like to remind all of us that we are living in a time when the tenants of democracy are being tested and are being challenged. And by tenants of democracy, I'm referring to principles like evidence based truths, public transparency, things like that.

As all of us, as citizens of democracy, I know we value informed public debate. We place a premium on wise decisions and effective policies being enacted. And those things are only going to succeed when they are grounded in facts and objective analysis that cuts through all the noise.

I'm going to something you heard in the video at the beginning of this session, and that is that Signal49's purpose has always been and continues to be producing bulletproof research and insights that cut through this noise.

Our new name charts a bold path for it, not just for our organization, but for Canada.

We chose this name deliberately as a signal that evidence matters, as a signal that truth matters, as a signal that Canada matters.

I'm going to end by extending a special thanks to all my colleagues at Signal 49, to the team for their insights, for their commitment, and for their dedication to the work that we do. And a special thanks

to all of you for joining us today and for joining us on our journey as we provide Canada and Canada's leaders with the evidence and the insights that we need to navigate the world we are in and to secure a prosperous future for all Canadians.

Thank you.