Capital Advantage:
The Ottawa Economic Scorecard

A Benchmark for Growth, Innovation, and Shared Prosperity

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Canadian Chamber of Commerce | Chambre de Commerce du Canada

Business Data Lab | Laboratoire de données sur les entreprises

Ottawa Board of Trade

Authors

Patrick Gill
Vice President,
Business Data Lab

Anupriya Gangopadhyay
Economist,
Business Data Lab

Contributors

Sueling Ching
President and CEO,
Ottawa Board of Trade

Sacha Gera
Chief Operating Officer,
HEALWELL AI

David Coletto
Founder, Chair, CEO,
Abacus Data

About the Scorecard

The Ottawa Economic Scorecard is a flagship benchmarking initiative of the Ottawa Board of Trade, developed in partnership with the Business Data Lab (BDL) at the Canadian Chamber of Commerce, with analytical support from the Conference Board of Canada and data inputs from Environics Analytics.

Its purpose is to provide a clear, data-driven picture of Ottawa–Gatineau's economic competitiveness compared to Canada's largest urban centres. The scorecard measures performance across five key themes that together define a region's prosperity: livability, talent resources, welcoming, innovation readiness, and business enablement.

This first edition of the scorecard establishes a baseline for how the capital region performs in the context of a changing national and global economy. By grounding our collective understanding in data, it enables the business community, government, and civic partners to align efforts, set priorities, and track progress annually.

At its core, the scorecard is a tool for collaboration, helping leaders calibrate where we stand, identify key areas for investment and improvement, and establish a benchmark for long-term success. It invites every stakeholder to join in building a stronger and more inclusive and competitive capital for Canada and the world.

Acknowledgments

The Ottawa Economic Scorecard was produced under the leadership of OBOT, with research and analysis conducted by BDL. We extend sincere appreciation to the Conference Board of Canada for technical expertise, and to Environics Analytics for their essential data contributions.

This collaborative research initiative reflects a growing national movement among chambers of commerce and boards of trade to advance data-informed decision-making and build stronger regional economies. By sharing insights openly, we contribute to a broader dialogue about the future of Canada's urban competitiveness.

Special thanks to Ottawa Board of Trade board members, David Coletto and Sacha Gera, for your leadership on this initiative. The Ottawa Board of Trade thanks the many business, community and government partners who continue to support our advocacy, share their perspectives, and contribute to the city's economic evolution. Their input ensures this scorecard reflects not only data but the lived realities and aspirations of the people shaping Ottawa's future.

OTTAWA BOARD OF TRADE

Foreword

For over 168 years, the Ottawa Board of Trade has been the voice of business in Canada's capital — championing prosperity, fostering collaboration, and shaping the city we call home. Since our founding in 1857, we have stood with the business community through every era of change: From the early days of Confederation to the rise of the digital economy, from local enterprise to global innovation.

The Ottawa Economic Scorecard continues this proud legacy. It was created to calibrate our collective understanding of where we stand, to identify the areas where we must focus our efforts, and to set a benchmark from which to measure success year after year. In a world where cities compete for talent, investment, and ideas, Ottawa's ability to thrive depends on our capacity to act together — with clarity, purpose and unity.

By providing a fact-based assessment of the capital's economic competitiveness and livability, this scorecard allows us to align strategies, assess outcomes, and course-correct when necessary. It helps us focus on what matters most: Building an economy that delivers prosperity, sustainability, and opportunity for all.

The findings affirm Ottawa's strengths and reveal where our focus must deepen. We continue to lead in livability, offering abundant greenspace, housing affordability, and a quality of life that attracts and retains top talent. We excel in education and innovation readiness, driven by a world-class workforce, post-secondary institutions, and thriving technology sectors. At the same time, the data highlight areas for improvement — private sector job creation, startup activity, and immigrant retention — that will require shared action and new ambition.

This scorecard tells the story of a city transforming. Ottawa is evolving beyond its traditional government identity into a diverse, resilient, and globally connected economy, one that celebrates its creative industries, embraces sustainability, and welcomes talent from every corner of the world.

The Ottawa Board of Trade remains committed to leading with purpose, building through partnerships, and advocating for policies that strengthen our competitiveness. This scorecard is not a conclusion, it is a beginning. A foundation for continued dialogue, strategy, and action toward our shared vision of a thriving, world-class capital city.

By Sueling Ching,
President and CEO,
Ottawa Board of Trade

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Executive Summary

Ottawa–Gatineau stands at a defining moment in its economic evolution. Long recognized as the seat of Canada's government, the region is increasingly emerging as a centre of innovation, talent and sustainable growth. With a solid foundation of public sector stability and a thriving private sector in technology, education and tourism, Ottawa's economy is well-positioned for long-term success.

The Ottawa Economic Scorecard offers an evidence-based view of how the region performs relative to 20 other census metropolitan areas (CMAs) across five core dimensions. Ottawa earns an overall "B" grade, a strong and balanced performance that places the capital among the top-performing city-regions in the country.

Highlights of the 2025 Scorecard

1 Livability B

Ottawa ranks in the top quartile nationally for livability, with affordable housing, generous greenspace, and sustainable commuting patterns. However, longer commute times and lower downtown foot traffic signal the need for continued investment in transit, housing, and downtown revitalization.

2 Talent resources B

With nearly 65% of residents holding post-secondary education, Ottawa boasts one of Canada's most educated workforces. Low unemployment and strong health and tech sector employment reinforce this strength. However, education capacity requires renewed focus to support talent pipelines.

3 Welcoming B

Ottawa is increasingly seen as a destination for visitors and newcomers, ranking high for international connectivity and tourism volume. The city's next opportunity lies in enhancing immigrant retention and visitor experience to strengthen its reputation as a globally attractive capital.

4 Innovation readiness B

Ottawa remains a national leader in technology and professional services, with high private investment and research intensity. To fully capitalize on this, the region must expand startup density and commercialization capacity, turning innovation potential into tangible economic growth.

5 Business enablement B

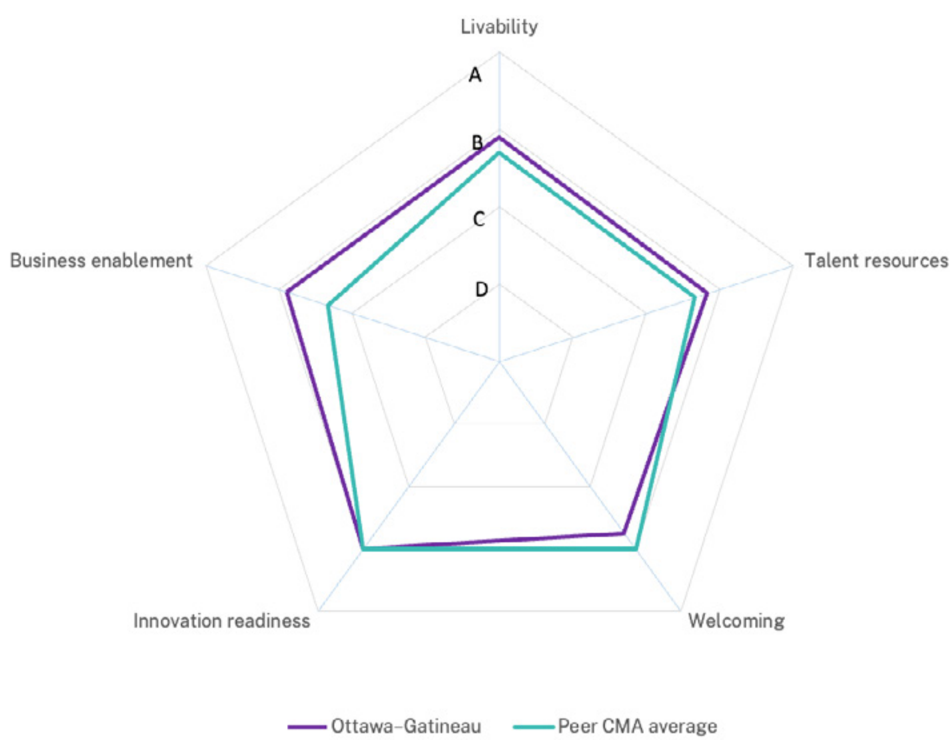
Ottawa households have seen strong growth in disposable income (29.2%) alongside a healthy GDP per capita ($55,800). The region also earns top marks for employment growth over the past five years. To strengthen long-term competitiveness, continued progress on productivity, tax competitiveness, and private-sector job creation will be essential.

Ottawa's Overall Rankings (2025)

Theme	Grade	What's working	Where to improve
Livability	B	Housing affordability, greenspace, non-car commutes	Commute times, downtown foot traffic
Talent resources	B	High post-secondary attainment	Student-teacher ratios
Welcoming	B	Visitor trips, airport connectivity	Immigrant retention, length of tourist visits
Innovation readiness	B	Tech talent concentration	Startup activity, tech business density
Business enablement	B	Disposable income growth, GDP per capita	Productivity growth, tax competitiveness, commercial rents

How Ottawa Compares

Ottawa performs well among peer city-regions in livability, welcoming, and innovation readiness, but gaps remain in talent development and business enablement.



Note: Radar chart displaying Ottawa's performance across all five themes (A to D scale).

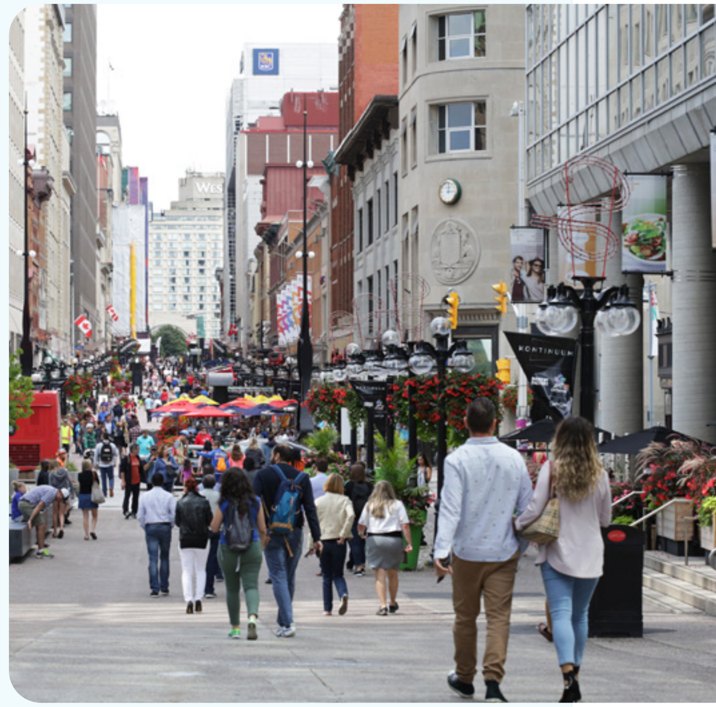
National Scores by Theme

How Ottawa's performance compares to 20 other Canadian city-regions across five themes of economic competitiveness.

Census metropolitan area (CMA)	Livability	Talent resource	Welcoming	Innovation readiness	Business enablement
Ottawa–Gatineau	B	B	B	B	B
Calgary, AB	C	C	B	A	C
Edmonton, AB	C	C	B	B	C
Halifax, NS	B	B	C	B	B
Hamilton, ON	C	C	B	C	C
Kelowna, BC	B	B	C	B	C
Kitchener-Cambridge-Waterloo, ON	C	B	C	B	B
London, ON	C	C	B	C	B
Montréal, QC	C	B	A	B	B
Oshawa, ON	B	C	B	C	C
Québec, QC	B	C	C	C	C
Regina, SK	B	C	C	D	B
Saskatoon, SK	B	B	C	B	A
Sherbrooke, QC	B	B	C	C	B
St. Catharines-Niagara, ON	B	C	C	D	B
St. John's, NL	B	C	C	C	C
Toronto, ON	C	B	A	A	B
Vancouver, BC	C	B	B	A	B
Victoria, BC	B	B	B	B	C
Windsor, ON	C	C	B	D	C
Winnipeg, MB	B	B	B	C	C
Peer CMA average	B	B	B	B	C

Detailed Insights by Theme

Theme 1: Livability – Grade B



Ottawa ranks in the top quartile nationally for livability, with strong scores for housing affordability, greenspace per capita, and a high share of commuters who do not use a car. However, the region's average commute time still falls in the bottom quartile relative to peers, despite appearing close to the national average — a reflection of how tightly grouped city commute times are. Ottawa also trails on workplace foot traffic recovery, pointing to ongoing impacts from hybrid work and a slower downtown resurgence. These results suggest that while Ottawa remains a desirable place to live, there are opportunities to improve urban mobility and post-pandemic vibrancy.

Indicator	Definition	Value	Score
Housing affordability	Proportion of households spending 30% or more of their income on shelter costs.	18.4%	A
Commute time	Average commute times among those who drive and use public transit to get to work.	26.2 mins	D
Travel to work by non-car	Proportion of population travelling to work that does not use a car.	20.7%	A
Healthcare access	Proportion of population with a regular healthcare provider.	84.4%	B
Crime rate	CAP (Crimes Against Persons/Property) Crime Index	84.8	B
Greenspace per capita	Km^2 of greenspace per 100,000 people (greenspace includes parks/gardens, nature reserve grounds, camping site grounds, recreation area grounds, and rest areas).	38.8 km^2	A
Gini coefficient	Prevailing measure of income inequality.	0.3	B
Population growth	Average annual growth rate from 2019–2024.	10.4%	B
Cultural occupations	Proportion of employed workforce employed in cultural, art, recreation, or sport.	3.2%	B
Workplace foot traffic	Percentage change in days spent at usual workplace in 2024 compared to 2019.	-29.6	D

Theme 2: Talent Resources – Grade B

Ottawa boasts a highly educated workforce, a key asset for regional competitiveness, with a top-quartile score in post-secondary attainment. The region also performs well on labour market indicators such as unemployment, job vacancies and youth population growth. However, Ottawa receives a "D" on below-average student-teacher ratios. These factors underscore the importance of continually strengthening local talent pipelines and expanding education capacity to meet the region's future labour market demands.

Indicator	Definition	Value	Score
Education level	Proportion of the population (aged 15+) with post-secondary education.	64.9%	A
Youth population growth	Change in proportion of population aged 25–34, 2024 vs. 2019.	16.6%	B
Teachers per pupils	Number of teachers and counsellors per 1,000 students aged 5–19.	42.2	D
Unemployment rate	Proportion of labour force not currently employed.	7.9%	B
Vacancy rate health sector	Skilled labour vacancy rate in healthcare sectors.	11.6%	B
Vacancy rate tech sector	Skilled labour vacancy rate in tech sectors.	3.3%	B

Theme 3: Welcoming – Grade B

Ottawa performs above average in attracting visitors and connecting internationally, with top-quartile scores for visitor volumes and a strong B grade for international flight connectivity. However, the region lags behind its peers on immigrant retention and average length of stay, pointing to challenges in longer integration and engagement. These findings highlight the importance of targeted strategies to support newcomers and enhance Ottawa's global appeal as a welcoming city.

Credit: Ottawa Tourism

Indicator	Definition	Value	Score
Immigrant retention	Percentage of immigrants remaining after five years.	83.4%	C
Visitor trips (visits)	Visitor View data on total visits to a CMA between January–November 2024.	332,959	A
Airport destinations	Number of non-stop destinations (domestic and international) served.	42	B
Average length of stay	Visitor View data on average length of stay (nights) of total visits to a CMA between January–November 2024	10.6	C

Theme 4: Innovation Readiness – Grade B

Ottawa's strength in innovation is underscored by high tech talent concentration and strong performance in business investment and ICT sector business counts. However, weaker results in startup formation and tech business density suggest that the region's innovation potential may be concentrated in larger or established firms. Improving the ecosystem for early-stage ventures could help unlock new growth and diversify Ottawa's innovation economy.

Indicator	Definition	Value	Score
Startups per capita	Number of net new businesses in 2023 and 2024 per 10,000 people.	-0.7	C
Tech Talent Concentration	Average share of total employment in the professional, scientific, and technical services; and information, cultural and recreation services industries in 2024	7.2%	B
Business investment	Estimated CMA share of annual private investments, includes investments in machinery, and equipment, averaged over 2020-2024.	$8.3 billion	A
Business count	Total number businesses in ICT and professional services.	24,854	A
Tech businesses per capita	Count of tech businesses per capita.	0.002	C

Theme 5: Business Enablement – Grade B

Ottawa scores well on several measures of business enablement, including strong disposable income growth and top-quartile employment growth between 2019 and 2024. The region also performs solidly on GDP per capita, GDP growth, and maintains competitive commercial rent levels compared to peer cities.

However, lower scores in productivity growth and a relatively high commercial-to-residential tax ratio highlight opportunities to enhance long-term business efficiency and investment. Maintaining a focus on tax competitiveness and productivity could further strengthen Ottawa's overall business environment. In addition, private sector employment represents just 51.3% of total employment, which is low compared to other peer regions. This reflects Ottawa's large public sector presence and underscores the importance of growing and scaling private-sector businesses to support economic resilience.

Indicator	Definition	Value	Score
Market size - average household income	Average household income from a 100 km range of the centroid of CMA downtown.	$132,272.30	B
Disposable income growth	Change in income left after paying taxes and receiving transfers, 2024 vs. 2019.	29.2%	A
Productivity growth	Output divided by employment, 2024 Q2 vs. 2019 Q2.	-0.4	B
Employment growth	Change in employment rate, 2024 vs. 2019, based on census data projected to 2024.	-0.33%	A
GDP per capita	Real GDP per capita, 2024 Q2.	$55,800	B
GDP growth	Average GDP growth, 2019 Q2 to 2024 Q2.	1.6%	B
Commercial rent	Rent paid for the use of property for business purposes (2019=100).	109.3	B
Tax ratio	Commercial to residential property tax ratio.	2.33	C
Private sector employment	Private sector employment as share of total employment.	51.3%	D

An Economy
in Motion

These findings reveal a capital in transition — from a stable government town to a vibrant, innovation-driven city-region. Ottawa's balance of affordability, livability, and talent gives it a unique advantage in attracting investment and retaining skilled workers. Yet, success will depend on the pace of transformation: How quickly the city can grow private enterprise, modernize infrastructure, and foster a more dynamic urban core.

A Shared Path Forward

The scorecard charts a clear path forward for Ottawa's business and civic leadership:

1. **Fuel innovation and entrepreneurship** to diversify the economy and generate new jobs.

2. **Invest in people and education**, ensuring access, inclusivity, and pathways to emerging industries.

3. **Revitalize the downtown core** to reimagine Ottawa as a world-class destination for business, culture, and community life.

4. **Enhance the welcoming economy**, supporting newcomers and global talent integration.

5. **Benchmark progress annually** to measure results, share insights, and adjust strategies as needed.

Conclusion

Ottawa's story is one of steady strength and emerging ambition. With the right investments and partnerships, the National Capital Region can lead Canada's next era of inclusive, innovation-led growth. The Ottawa Economic Scorecard gives us a shared starting point, a clear understanding of where we stand today, and the insight and inspiration to shape where we go next.

Together, we can build a capital of confidence — one that reflects the best of Canada: prosperous, inclusive, and prepared for the future.

Methodology

The Ottawa Economic Scorecard evaluates the performance of Ottawa–Gatineau and 20 other CMAs across five themes of economic competitiveness and attractiveness. Each theme consists of a set of indicators selected based on a combination of literature review, local stakeholder feedback, and data availability assessments.

To ensure consistency and comparability, data was sourced from reputable sources, such as Environics Analytics (EA), Statistics Canada (STC), and the Conference Board of Canada (CBoC). (Note: Consistent, high-quality data at the CMA level is often difficult to obtain, as many economic indicators are only reported at the provincial or national level, or vary in availability across municipalities.)

Each indicator is graded using a report card-style scale based on performance quartiles:

- **A**: Top 25% (best quartile)
- **B**: Second 25%
- **C**: Third 25%
- **D**: Bottom 25%
- **N/A**: Data not available

To support cross-metric comparison, all indicators are normalized to a 0–1 scale using the following formula:

(City Value – Minimum Value) / (Maximum Value – Minimum Value)

For indicators where lower values signify better performance, such as crime rates or average commute times, the grading scale is reversed so that better performance still receives a higher grade. Each theme's composite score is calculated by averaging the normalized values of its component indicators. These scores determine Ottawa's rank relative to other CMAs for that theme.

The scorecard's analysis is conducted at the CMA level, the most appropriate unit for reflecting urban economic footprints. Ottawa–Gatineau's CMA includes both Ontario and Quebec communities, providing a realistic lens for city-region planning.

Data and Sources

This collaborative research initiative marks the beginning of a broader discussion about the future of the Ottawa–Gatineau region. In line with its mission to democratize business data and insights for decision-making, BDL is also making the curated dataset from this project publicly available on its GitHub repository. This open-data release will allow researchers, municipal officials, chambers of commerce and boards of trade to access, build upon and benefit from the data.

1. GDP per capita: CBoC Metro Forecast Model
2. Productivity growth: CBoC Metro Forecast Model
3. GDP growth: CBoC Metro Forecast Model
4. Airport connections: Compiled from www.flightsfrom.com
5. Business investment: STC tables 34-10-0037-01 and 33-10-0766-01
6. Teachers per 1,000 pupils: Combined National Occupational Classification (NOC) level 5 LFS data and Census data retrieved from STC
7. Vacancy rate health sector: Combined vicinity jobs and NOC level 5 LFS data retrieved from STC
8. Vacancy rate tech sector: Combined vicinity jobs and NOC level 5 LFS data retrieved from STC
9. Housing affordability: STC table 98-10-0255-01, supplied by EA
10. Travel to work: Supplied by EA
11. Healthcare access: Supplied by EA
12. Crime rate: Supplied by EA
13. Parks and recreation: Supplied by EA
14. Gini coefficient: Supplied by EA
15. Average population growth: Supplied by EA
16. Cultural occupations: Supplied by EA
17. Foot traffic: Supplied by EA
18. Education level: Supplied by EA
19. Youth population growth: Supplied by EA
20. Unemployment rate: STC table 14-10-0459-01
21. Immigrant retention: Supplied by EA
22. Tourism capacity: Supplied by EA
23. Startups per capita: Supplied by EA
24. Tech talent concentration: STC Table 14-1-0384-01
25. Number of tech businesses: Supplied by EA

28. Disposable income growth: Supplied by EA
29. Employment growth: STC table 14-10-0467-01
30. Commercial rent: STC table 18-10-0255-01
31. Business counts: STC custom data request
32. Commercial to residential tax ratio: Altus Group 2024 Canadian Property Tax Rate Benchmark; and Municipal Operating Budgets for Largest Municipality within CMA

32. Commute times: STC, *Average Commute Times for 15 Largest CMAs*; EA, Opticks Numeris Survey
33. Average length of stay nights: Supplied by EA
34. Private sector employment: STC table 14-10-0468-01

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