



HOUSING MARKET
INFORMATION

HOUSING MARKET INSIGHT CANADA

Labour Capacity Constraints
and Supply Across Large
Provinces in Canada

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Table of Contents

3 Key Findings

- 3 Housing supply gaps are large, so too are challenges to close them
- 4 Starts through to 2030 in Ontario will not keep up with household formation
- 5 Developing indicators of labour capacity
- 6 Do Canada’s largest provinces have the labour capacity to deliver forecasted housing starts?
- 7 Is there labour capacity to deliver additional housing units to reach our 2030 affordability supply targets?
- 8 Do types of units being-built affect residential labour capacity?
- 8 What are the implications of these findings?

9 Conclusion

10 Appendix



Dana Senagama
Senior Specialist
Market Insights



Inna Breidburg
Senior Analyst
Economics



David Carruthers
Senior Analyst
Economics

“We will not be able to build our way out of the housing supply problem as significant labour capacity constraints exist across most large provinces in Canada. All levels of government and industry will need to collaborate to solve this mammoth task and make housing affordable for all Canadians.”

Key Findings

- Based on a business-as-usual scenario¹, there is insufficient labour capacity to address significant housing supply gaps that will exist mainly in Ontario and British Columbia (BC).
- In the best-case scenario¹, there will only be enough labour capacity to increase the number of starts in all 4 major provinces (Ontario, Québec, BC and Alberta) by 30% to 50% from CMHC's baseline starts forecasts to 2030.
- Ontario, Québec & BC will have to *double* the number of starts that they can produce under best-case scenarios to reach our 2030 affordability supply target².
- Labour capacity problems are most acute in Ontario, the province with the largest population and the highest price pressures.
- The pandemic showed some evidence that the industry can manage greater construction volumes with fewer workers. However, this may lead to construction backlogs, which will create delays and postpone supplying new units to the market.

Housing supply gaps are large, so too are challenges to close them

Our recently released report *Canada's Housing Supply Shortages: Estimating what is needed to solve Canada's housing affordability crisis by 2030*^{2, 3} (hereafter referred to as ESG 2030) presented how much supply is required, beyond current trends, to restore affordability by 2030. It used new methods to look at the combination of income and population growth to determine how much housing supply is required. This gap is significant and presents equally significant challenges.

An important challenge to increasing the supply of housing is the amount of skilled labour required or labour capacity. In this report, we examine the labour capacity of Canada's 4 largest provinces — Ontario, Québec, BC and Alberta — to deliver on forecasted housing starts and starts needed to restore affordability in Canada by 2030. We interpret capacity as how much the labour force could produce if the

current wage rate stays the same and if people continue to have the same skills. For this we use 2 industry-wide measures of labour capacity:

1. **share of residential construction workers in the population** to reflect the ability of the industry to retain and attract these workers, and
2. **minimum number of workers** required for a housing unit under construction

We use the traditional method of determining how much future housing supply is needed based on household projections, rather than the method employed in ESG 2030. This is to provide a starting point on labour capacity needed and for the purpose of comparability with provincial efforts. We do so by using:

1. CMHC's housing starts forecasts to 2030
2. household projections for the 4 largest provinces⁴

We recognize that this method of forecasting housing supply is limited in scope and only considers demographic factors while ignoring economic variables. Results will likely underestimate demand, affordability concerns and ultimately the labour capacity required.

In the second part of the report, we present our analysis on the capacity of the major provinces to deliver housing supply. We assume capacity as the number of homes that can be built by the labour force.

This report focuses solely on the construction labour force component, arguably the central determinant of construction capacity. Factors such as the availability of infrastructure, materials, financing options, land, housing policies and housing market conditions all influence the capacity to supply new housing at varying degrees but aren't considered here. Therefore, our analysis projects the maximum housing starts each major province can deliver based on their projected residential construction labour force (driven by projected population growth) through to 2030⁵.

We first turn to understanding what the future of household numbers and housing starts might be for 2030.

¹ For definition go to section 'Do Canada's largest provinces have the labour capacity to deliver forecasted housing starts?'

² Housing Shortages in Canada: Solving the Affordability Crisis | CMHC (cmhc-schl.gc.ca). <https://www.cmhc-schl.gc.ca/en/professionals/housing-markets-data-and-research/housing-research/research-reports/accelerate-supply/housing-shortages-canada-solving-affordability-crisis>

³ <https://www.cmhc-schl.gc.ca/en/blog/2022/canadas-housing-supply-shortage-restoring-affordability-2030>.

⁴ For detailed explanation of the methodology please refer to [Appendix](#).

⁵ For detailed explanation of the methodology please refer to [Appendix](#).

Starts through to 2030 in Ontario will not keep up with household formation

Ontario is the only province where there are more projected households than forecasted housing starts through to 2030 (see Figure 1). These findings agree with what we have been seeing in the market in southwestern Ontario. There is a shortage of new housing supply which will only make prices rise and erode affordability.

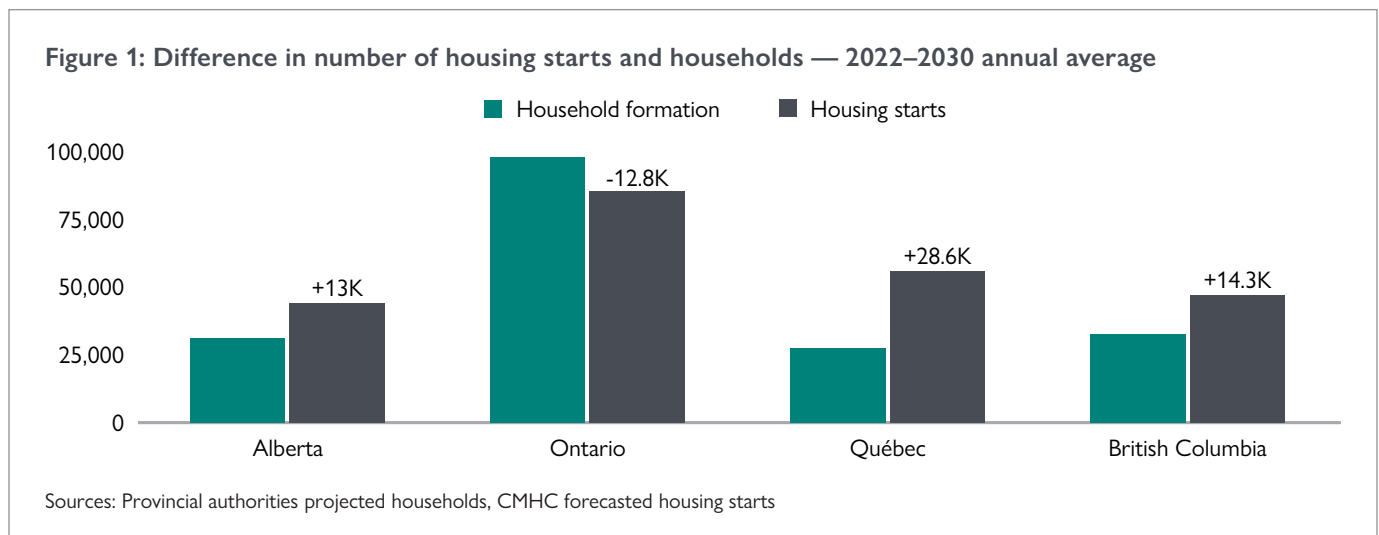
The forecast for Québec suggests that there will be more starts than the projected number of households (see Figure 1). So far, a lot of people in Québec have been renting, which has kept the housing market more stable. This has stopped prices from increasing as much as they could have.

Our forecasts suggest that starts will outpace the number of projected new households in BC over the 2022 to 2030 period. A phenomenon more prevalent in BC is that some housing starts will be offset by demolitions to make way for more newer units. So, there will be less new housing units than the number of starts that were predicted.

Forecasts for Alberta also show a level of starts above projected levels of household growth. Currently, Alberta is not experiencing tight market conditions unlike BC or Ontario. These balanced market conditions look to prevail into 2030 in Alberta.

In summary, using the traditional approach of matching provincial household formation projections to CMHC housing starts forecasts shows that Ontario will likely have the largest housing supply shortfall. However, even though it looks like there is enough housing being built in BC, this doesn't consider homes that are being demolished or converted to other uses. So, this approach may underestimate the number of homes that are needed in BC. This is something that was mentioned in the ESG 2030 report.

There are many obstacles to alleviating supply shortages, particularly in terms of attracting construction labour to complete large-scale projects.



Developing indicators of labour capacity

Let's analyze how much housing the major provinces could deliver, based on the number of people currently working in construction. To determine the labour capacity of Canada's largest provinces to deliver forecasted housing starts, we use 2 simple measures of labour capacity⁶:

1. share of residential construction workers in the population (residential construction industry's ability to attract workers to the labour force)

2. residential construction worker per housing unit under construction (a lower number is assumed to imply greater labour capacity with fewer residential construction workers handling more units)

These are simple measures that we will use to examine the scale of the challenge. Table 1 provides these historical ratios by provinces.

Table 1: 25-Year measures of construction labour capacity (1997–2021)

Province	Highest share of workers in residential construction to population (%)	Average share of workers in residential construction to population (%)	Lowest number of workers in residential construction per unit under construction	Average number of workers in residential construction per unit under construction
Ontario	1.70	1.37	1.58	2.48
British Columbia	2.37	1.74	1.39	2.42
Alberta	1.74	1.44	1.41	2.26
Québec	1.50	1.23	1.88	4.23

Source: Statistics Canada, Canadian Productivity Accounts (CPA), CMHC

While both measures have their limitations⁷, they provide indicators of the labour capacity that exists or could exist over long periods of time. We use the ratio of residential construction worker per number of units under construction to proxy for labour capacity for the entire process from start to completion of a housing unit.

These indicators don't consider wage pressures to retain this population in construction. We don't have data on construction labour force by task to make absolute projections for each stage of the construction process. Construction workers are employed at different stages of the residential construction process.

During periods of construction backlogs (where the number of units under construction increases):

- more construction workers may be allocated to work on existing projects
- fewer workers may be available to start new projects

We assume that a lower ratio means that there is more work to be done per worker. A lower ratio does not always mean that this is the most efficient way to do things. It might mean that there are not enough workers, and so they are overstretched. This could also mean that the pace of work is unsustainable.

⁶ For detailed explanation of the methodology please refer to [Appendix](#).

⁷ We considered alternative methods of calculating labour capacity including using the number of workers per housing start. Each method had its merits and drawbacks. The results were similar using other methods and the decision was made to use the number of workers per unit under construction as a component of measuring labour capacity in this report.

Do Canada’s largest provinces have the labour capacity to deliver forecasted housing starts?

Using these 2 measures, we look at 2 scenarios across the 4 largest provinces in Canada and compare those against our baseline CMHC forecast for housing starts until 2030:

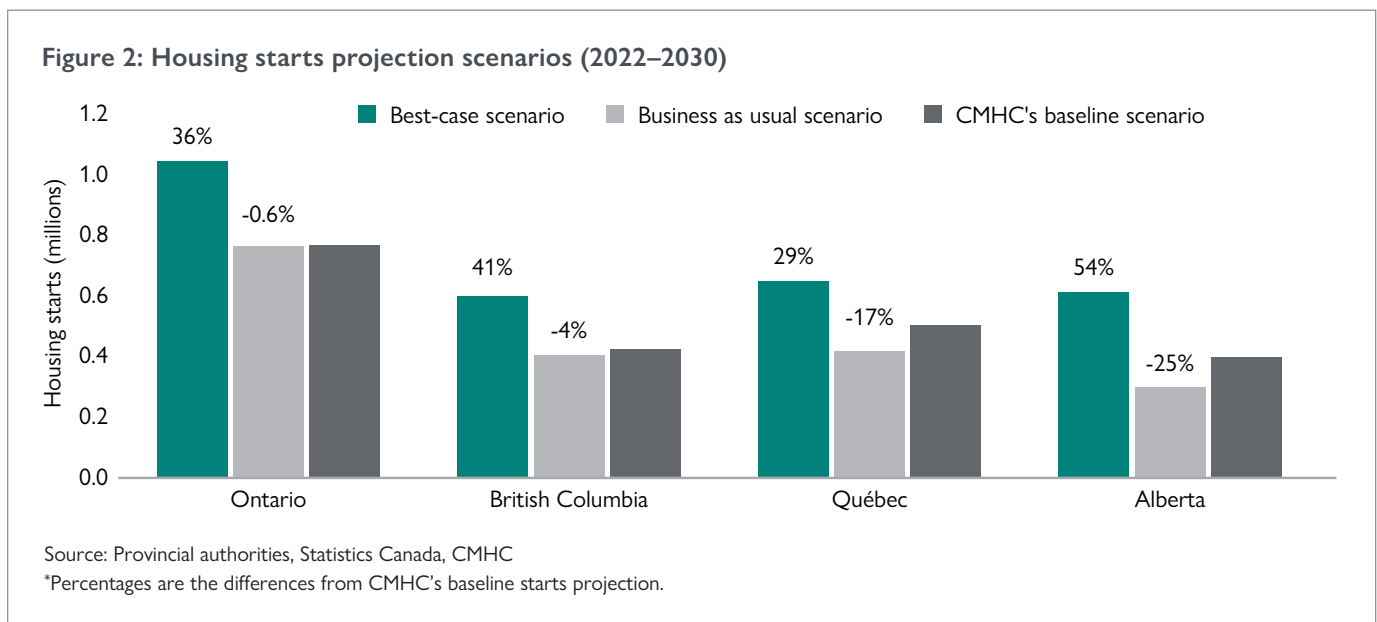
- 1. Projected housing starts with ‘maximum’ labour capacity or best-case scenario** – This is based on the highest percentage of people in our population who work in residential construction and the lowest number of residential construction workers per unit under construction in the past 25 years.
- 2. Projected housing starts with historical labour capacity or business-as-usual scenario** – This is based on the average percentage of people in our population who work in residential construction during the 5-years preceding the pandemic (2015–2019) and the average number of residential construction workers per unit under construction between 2015 and 2019.

Figure 2 shows the results. The dark grey bars show projected housing starts by province. The light grey bars represent a business-as-usual scenario, which seems to be more realistic. However, if the construction industry relies on its typical or ‘business as usual’ labour-capacity ratios, it may not be able to achieve baseline level of forecasted housing starts in all provinces.

Under a best-case scenario, each province will have the capacity to increase housing starts by 30% to 55% relative to CMHC baseline forecasts (dark grey bars). We assume maximum capacity is achieved when more people are available to work in residential construction and fewer people are required to build 1 unit of housing. In all provinces, except Alberta, labour capacity is at its maximum in 2021⁸. In Alberta, it maximizes in 2007, a year when its housing market peaked as well.

While the picture under a best-case scenario shows what the industry stretching looks like, it may come at the cost of construction backlogs, since the time of construction for each structure type has been increasing in most provinces. If the construction industry can improve its capacity in line with a best-case scenario — by attracting and training new workers and reducing construction times (reaching completion stages faster) — then there is scope for significant action to increase housing supply.

The years 2020 and 2021 have been unprecedented for the Canadian residential construction market. Lockdowns, supply chain delays, and workers falling ill because of the pandemic, meant that companies have been forced to innovate. In some cases, the pandemic also coincided with substantial (seemingly temporary) reductions in the construction labour force, impacting the measure of capacity used in this analysis.



⁸ In 2021, the ratio of worker per residential unit is at its lowest, though this is not necessarily the same period where the residential construction labour force is its largest share of the population.

Additional production delays also means that developers must push through and work at a breakneck speed to get projects to completion to avoid penalties. Such practices are unlikely to be sustainable in a post-pandemic world where more typical rates of capacity are likely to prevail.

Is there labour capacity to deliver additional housing units to reach our 2030 affordability supply targets?

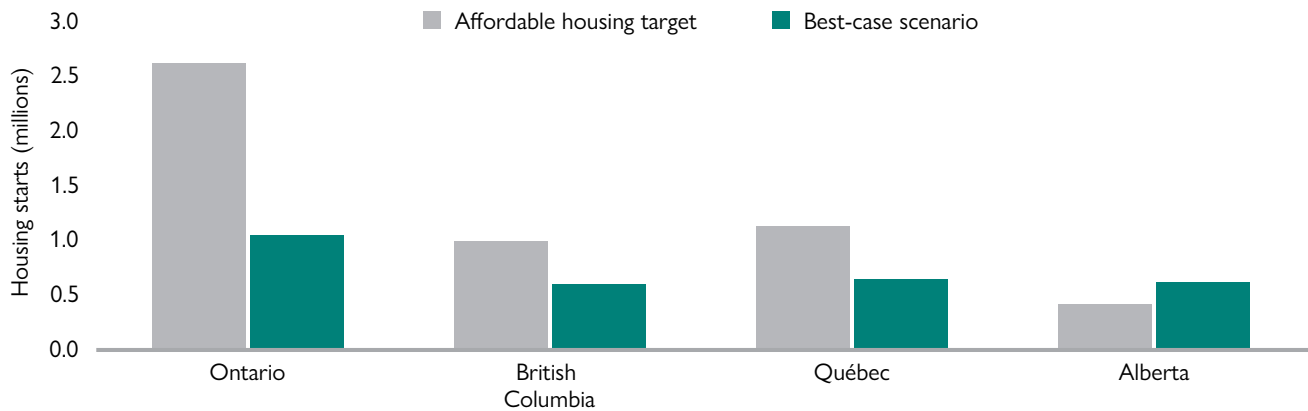
We have shown how much labour capacity is available to build, but is that enough to restore affordability? For this analysis, we assume that all required additional housing supply as set out in the ESG 2030 report to be in the form of housing starts.

Even if the labour force operates under best-case scenarios, housing starts will fall well below the 2030 affordable targets in all major provinces except Alberta (see Figure 3). Alberta

will be able to achieve its affordable housing supply target by 2030 whereas Ontario, Québec and BC will have to *double* the number of starts that they can produce under best-case scenarios.

Under *any* scenario, capacity problems are most acute in Ontario, the province with the largest population and the highest price pressures. Québec and BC will also not have the labour capacity to increase housing supply through housing starts but to a lesser extent than Ontario. This also suggests that improvements in labour supply and efficiency may be in reach, unlike in Ontario where the gaps are too large. Alberta appears to have no issues related to increasing housing supply and should operate well under ‘maximum’ capacity conditions. Its balanced housing market with fewer supply pressures and steady population growth appear to create sufficient capacity in its market.

Figure 3: Housing supply affordability targets vs. best-case housing starts projections (2022–2030)



Source: Provincial authorities, Statistics Canada, CMHC

Do types of units being-built affect residential labour capacity?

The number of workers per residential unit under construction has been decreasing in recent years in Ontario, Québec and BC. This means that each worker is doing more work. It is also true that the share of apartment starts has been increasing across Canada's largest provinces (see Figure 4). This suggests that a worker can handle working on multiple apartment units at the same time, within the same building, while sharing material and equipment.

However, it is less likely that a worker can handle working on multiple single-detached homes at the same time given greater logistical constraints of moving labour material and equipment among structures.

It is much easier to move heavy equipment and materials around in an apartment building than it is among houses in a low-rise sub-division. If the housing industry expands the range of housing options (e.g., by adding more "missing middle" housing in cities or building more ground-oriented homes which appear to be more labour intensive), then the low number of workers per residential unit under construction or the 'maximum' capacity scenario is unlikely to persist.

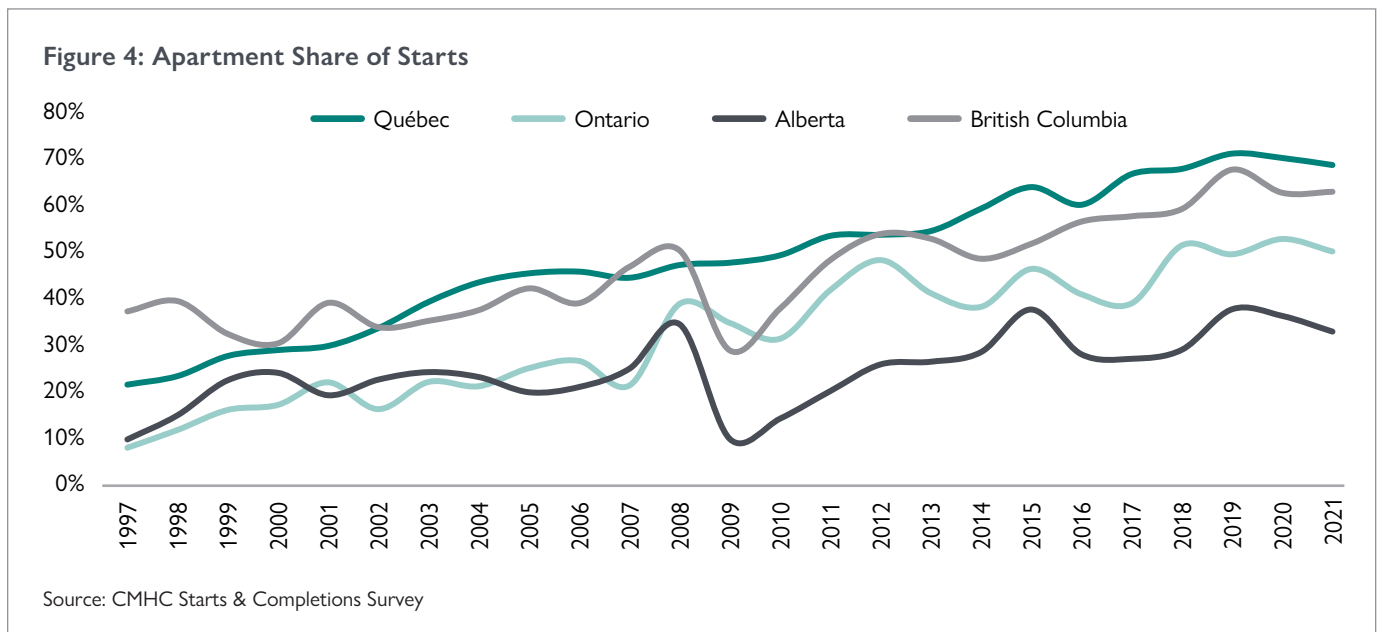
What are the implications of these findings?

There are not enough people who can build homes and address the housing supply gaps that exist mainly in Ontario, BC and Québec. Labour capacity will be a big problem and it might make housing less affordable.

Some solutions may include but are not likely limited:

Focus on building up — Labour capacity appears to be higher in apartment construction. However, apartments tend to experience construction backlogs and take longer to complete. Focusing on high density construction may also mean that provinces can't provide the right mix and number of housing options for the different types of people who need them.

Emphasis on more conversions — It may be costly but converting existing structures into residential units can be a quick way to use the labour capabilities we have. This is especially true for commercial structures that have become vacant because of people working remotely because of the pandemic. However, we need to look at whether these structures are suitable for people to live in and figure out how



many buildings could be converted instead of demolished and rebuilt. If more companies start embracing remote working, we could see more new housing supply come from existing structures, where people can upgrade or renovate them to create new homes.

Education and incentives — The 2016 Census shows that while more older people are working in construction, attracting younger people (15–24 years) to work in construction is an even bigger issue⁹. In all major provinces, the share of younger workers in residential construction is lower than in the total workforce. To encourage greater youth participation in residential construction and ensure continuity, financial support for learning skilled trades and enhanced vocational training facilities across Canada are needed.

Immigration — We need more targeted immigration programs to bring in foreign workers who are skilled and have the qualifications needed for housing construction. This is because there is a shortage of labor in this area, especially in Ontario and BC. However, it will take some time to adjust to the increased demand for labor. Even if we bring in more workers quickly through an express entry program, the industry will take some time to absorb increases in the labour force.

Compensation — Workers need to be paid a fair wage with good benefits for working full-time, part-time, casually, or seasonally in the construction industry. This will help to keep employees and ensure that work runs smoothly with fewer disruptions.

Conclusion

The COVID-19 pandemic has shown that the construction industries in the major provinces are able to get more work done with fewer workers. If we can continue at that pace, without compromising turnaround time, housing construction can increase and help alleviate some of the housing supply challenges faced by most provinces. However, it is important to acknowledge that this still won't be enough to generate the needed housing supply to restore affordability as set out in the ESG 2030 report.

The task of increasing housing construction to reach our 2030 affordability supply targets are huge. The federal government, through CMHC, has initiated programs such as the Housing Accelerator Fund and the Rapid Housing Initiative, as part of a National Housing Strategy that aims to identify and address solutions to the housing supply challenges faced by many urban centres in Canada. Ultimately, the private sector in collaboration with municipal, provincial, and federal governments will need to continue to work together to find solutions.

⁹ See [Appendix](#) for detailed breakdown of share of employment by age distribution.

Additional Resources

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Appendix

1. Households

We pair CMHC’s baseline headship rate¹ projections with population projections provided by provinces to project the future number of households in Ontario, British Columbia (BC) and Alberta. We use Québec’s own household projections².

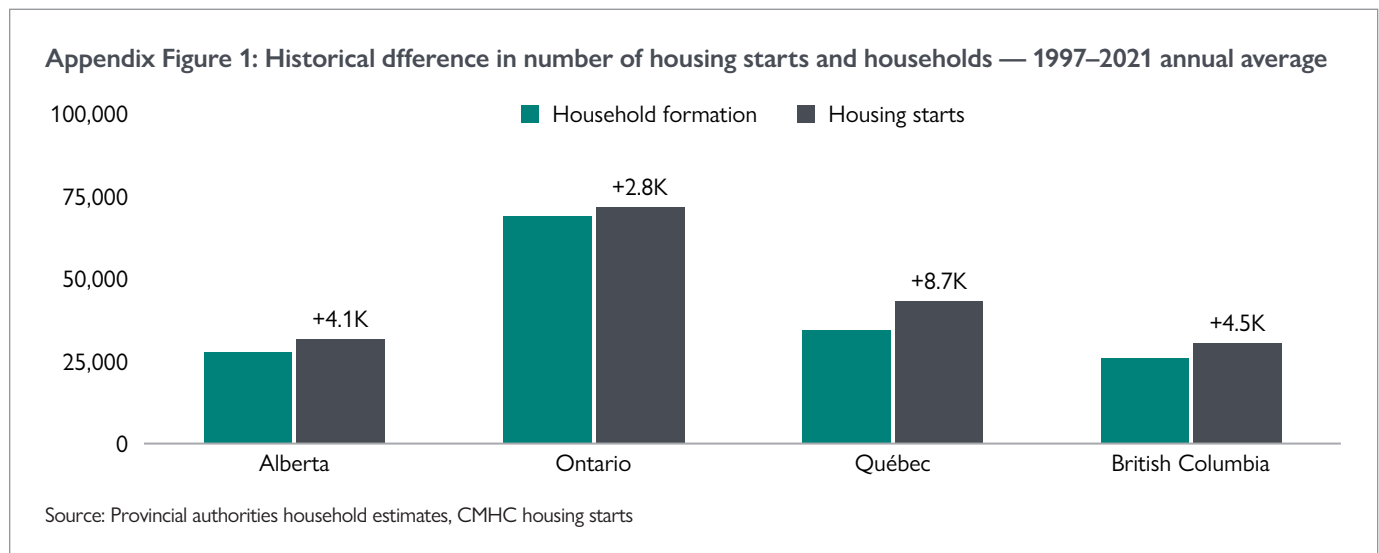
Household projections are based on historical demographic patterns, which rely on historical rates of fertility, mortality, and migration, as well as historical propensities of household formation. These projections describe what household growth might look like, assuming that growth is accommodated in a similar manner as it has been in the past. A housing unit is needed to even form a household, and so ultimately growth in the number of households will be constrained by the availability of additional housing units. However, historically there have been departures from this pattern (see Appendix Figure 1).

To examine these relationships, we first track the changes to housing stock. It changes due to various inflows and outflows – housing can be added through construction and/or conversion, and conversely removed through demolition and/or conversion.

$$\Delta \text{housing stock} = \text{completions} - \text{demolitions} + \text{net conversions}$$

Completions are by far the largest source of change but are not of the same magnitude from province to province. A comparison of the change in the number of private housing units added between 2016 and 2021 and the number of completions over a similar period shows that for every 100 completions in Ontario there were 98 additional housing units, while in BC for every 100 completions there were only 82 new housing units. This pattern may vary because houses are torn down on some lots and are replaced with a new larger house that requires a new foundation (and is hence counted as a housing start) but does not add to the stock of housing.

Additionally, starts and completions are tightly correlated—a start generally leads to a completion, though there is a lag. In our supply gap analysis, we focus on housing starts because 1) there is limited availability of comparable time-series data on demolitions and conversions, and 2) CMHC produces long range starts forecasts that can be compared with projected households. There are variations by provinces between the amount of housing added and the number of starts over a given period.



¹ Headship rates refer to the proportion of individuals within a population group that “head” a household.

² Source: Ontario Ministry of Finance, Institut de la statistique du Québec, Alberta Treasury Board and Finance, BC Stats - Province of British Columbia

2. Residential construction labour force

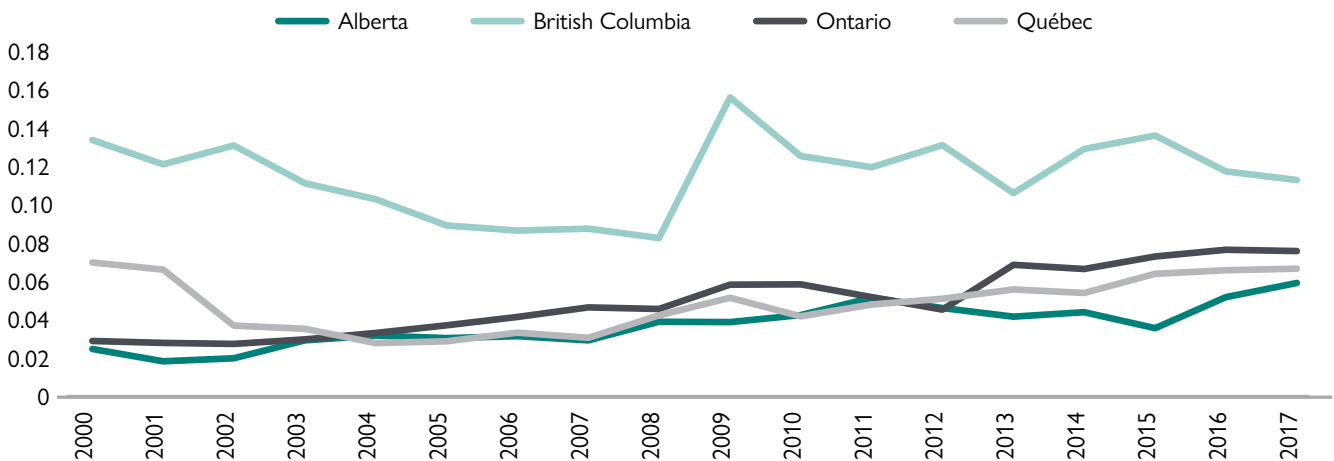
- A. Over the 25-year period (1997–2021) we track the ratio between the number of persons in construction labour force and total population in each of the four major provinces. We use the monthly Labour Force Survey (LFS) and the Annual Demographic Estimates Survey conducted by Statistics Canada.
- B. The provincial program of Canadian Productivity Accounts (CPA) produces annual data on jobs, hours worked, labour compensation and a variety of related variables, such as labour productivity and unit labour cost by province and territory. The program produces labour statistics consistent with the System of National Accounts (SNA), by job category and industry, which allows us to differentiate between workers in residential and non-residential construction and calculate their ratios relative to total population. Note when the study was conducted, CPA data were not available for 2021, and therefore the breakdown between residential and non-residential construction labour force was estimated by assuming a three-year average (2018–2020).
- C. We do not consider the share or role of renovations in construction in our analysis. We are assuming that the entire residential labour force is available to work

on new construction. Construction workers may not be fully devoted to new construction but may also be working on renovations at any given time.

3. Construction capacity

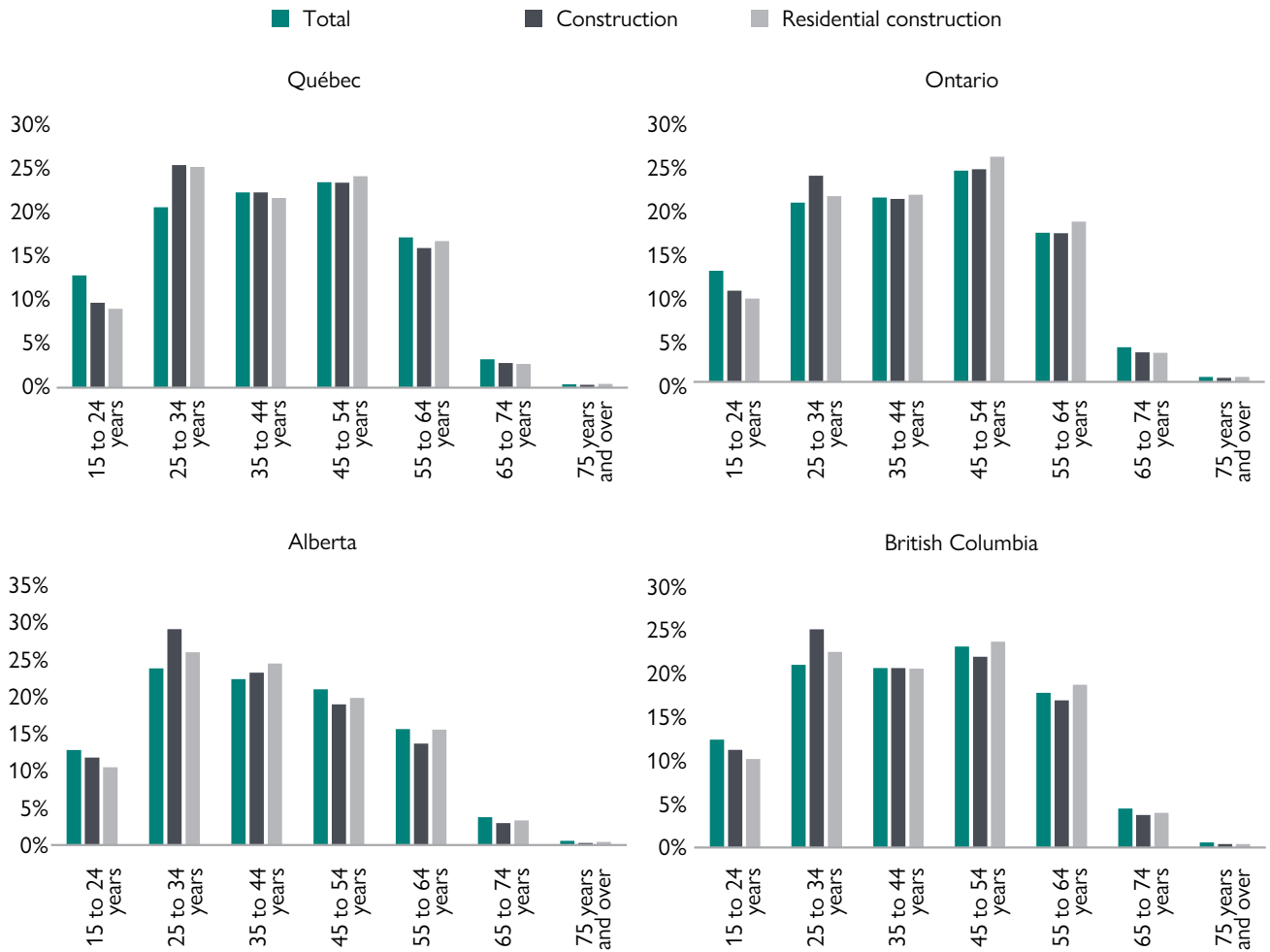
- A. We track the ratio of the residential construction labour force to the number of housing units under-construction at the end of each calendar year. We interpret this ratio as indicating the number of available workers to handle housing starts, completions and units that remain under construction, while excluding the projects (in units) which are cancelled or put on hold. This metric approximates the workload per worker across all stages of construction. Critically, the data for units under construction is available on an annual data while starts or completions data indicate a commitment of labour that last more than a year.
- B. To estimate the highest number of units under-construction that could be achieved in 2022–2030, we use Statistics Canada’s population projections for this period. We assume the highest 25-year share of population working in residential construction in combination with the highest 25-year level of labour capacity (achieved in 1997–2021). We then look at the most productive years to determine the number of housing units that could be started and completed based on the number of units which are already under-construction.

Appendix Figure 2: Demolitions Per Start



Source: CMHC Starts and Completions Survey, CMHC demolition permit data

Appendix Figure 3: Age Distribution of Employment in 2016



Source: Census 2016-Statistics Canada, CMHC

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Alternative text and data for figures

Figure 1: Difference in number of housing starts and households — 2022–2030 annual average

Province	Change in the number of households	Housing starts	Difference
Alberta	31,233	44,252	13,020
Ontario	98,040	85,272	-12,767
Québec	27,424	56,038	28,614
British Columbia	32,783	47,050	14,267

Source: Provincial authorities projected households, CMHC projected housing starts

Figure 2: Housing starts projection scenarios (2022–2030)

Province	Best-case scenario	Business as usual scenario	2022–2030 CMHC Housing Starts Projection
Ontario	1,045,159	762,713	767,449
British Columbia	598,459	404,829	423,450
Québec	649,206	417,087	504,344
Alberta	612,501	297,422	398,272

Source: Provincial authorities, Statistics Canada, CMHC

*Percentages are the differences from CMHC's baseline starts projection

Figure 3: Housing supply affordability targets vs. best-case housing starts projections (2022–2030)

Province	Affordable housing target	Best-case scenario
Ontario	2,617,449	1,045,159
British Columbia	993,450	598,459
Québec	1,124,344	649,206
Alberta	418,272	612,501

Source: Provincial authorities, Statistics Canada, CMHC

Figure 4: Apartment Share of Starts

Year	Canada	Québec	Ontario	Alberta	British Columbia
1997	17%	22%	8%	10%	37%
1998	19%	24%	12%	15%	40%
1999	21%	28%	16%	23%	33%
2000	22%	29%	17%	24%	31%
2001	24%	30%	22%	19%	39%
2002	23%	34%	16%	23%	34%
2003	28%	39%	22%	24%	35%
2004	29%	44%	21%	23%	38%
2005	31%	46%	25%	20%	42%
2006	31%	46%	27%	21%	39%
2007	31%	45%	22%	25%	47%
2008	40%	47%	39%	35%	51%
2009	32%	48%	35%	10%	29%
2010	34%	50%	32%	14%	38%
2011	41%	54%	42%	20%	49%
2012	45%	54%	48%	26%	54%
2013	42%	55%	41%	27%	53%
2014	42%	60%	38%	29%	49%
2015	48%	64%	47%	38%	52%
2016	46%	60%	41%	28%	57%
2017	47%	67%	39%	27%	58%
2018	53%	68%	52%	29%	59%
2019	56%	71%	50%	38%	68%
2020	56%	70%	53%	36%	63%
2021	54%	69%	50%	33%	63%

Source: CMHC Starts & Completions Survey

Appendix Figure 1: Historical difference in number of housing starts and households: 1997–2021 annual average

Province	Household formation	Housing starts	Difference
Alberta	27,695	31,755	4,060
Ontario	69,175	71,884	2,709
Québec	34,481	43,202	8,721
British Columbia	26,019	30,507	4,488

Source: Provincial authorities estimated households, CMHC housing starts

Appendix Figure 2: Demolitions Per Start

Year	Alberta	British Columbia	Ontario	Québec
2000	0.025	0.134	0.029	0.070
2001	0.019	0.121	0.028	0.067
2002	0.020	0.131	0.028	0.037
2003	0.030	0.112	0.030	0.036
2004	0.032	0.103	0.033	0.028
2005	0.031	0.090	0.037	0.029
2006	0.032	0.087	0.042	0.034
2007	0.030	0.088	0.047	0.031
2008	0.039	0.083	0.046	0.043
2009	0.039	0.156	0.059	0.052
2010	0.043	0.126	0.059	0.042
2011	0.052	0.120	0.052	0.048
2012	0.046	0.132	0.046	0.051
2013	0.042	0.106	0.069	0.056
2014	0.044	0.129	0.067	0.054
2015	0.036	0.136	0.073	0.064
2016	0.052	0.118	0.077	0.066
2017	0.060	0.113	0.076	0.067

Source: CMHC Starts and Completions Survey, CMHC demolition permit data

Appendix Figure 3: Age Distribution of Employment in 2016

Québec

Age	Total	Construction	Residential construction
15 to 24 years	13%	10%	9%
25 to 34 years	21%	25%	25%
35 to 44 years	22%	22%	22%
45 to 54 years	23%	23%	24%
55 to 64 years	17%	16%	17%
65 to 74 years	3%	3%	3%
75 years and over	0%	0%	0%

Ontario

Age	Total	Construction	Residential construction
15 to 24 years	13%	10%	10%
25 to 34 years	20%	24%	21%
35 to 44 years	21%	21%	21%
45 to 54 years	24%	24%	26%
55 to 64 years	17%	17%	18%
65 to 74 years	4%	3%	3%
75 years and over	1%	0%	1%

Alberta

Age	Total	Construction	Residential construction
15 to 24 years	13%	12%	10%
25 to 34 years	24%	29%	26%
35 to 44 years	22%	23%	24%
45 to 54 years	21%	19%	20%
55 to 64 years	16%	14%	16%
65 to 74 years	4%	3%	3%
75 years and over	1%	0%	0%

British Columbia

Age	Total	Construction	Residential construction
15 to 24 years	12%	11%	10%
25 to 34 years	21%	25%	22%
35 to 44 years	21%	21%	21%
45 to 54 years	23%	22%	24%
55 to 64 years	18%	17%	19%
65 to 74 years	4%	4%	4%
75 years and over	1%	0%	0%

Source: Census 2016- Statistics Canada, CMHC