

Economic Development Winnipeg

WEEKLY ECONOMIC DIGEST



MANITOBA'S POPULATION DYNAMICS

COVID-19 HAS CAUSED SHORT-TERM DISRUPTIONS

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Bottom Line

The long-term effect of Manitoba's Provincial Nominee Program has been to smooth out Manitoba's population pyramid. COVID-19 has caused some short-term distortions to our population dynamics.

Population growth in Canada, Manitoba and Saskatchewan fell during the pandemic. Manitoba and Saskatchewan both saw population growth decline more than the national average.

Manitoba's population statistics show that: **natural increase** fell due to a higher death rate and lower birth rate. Higher deaths were in part, a result of COVID-19. The lower births were likely due to a few reasons:

- the difficulty of dating under COVID-19 restrictions, limiting the formation of new couples and new households, and
- existing households were concerned about possible complications of pregnancy during a pandemic, also reducing the number of births.

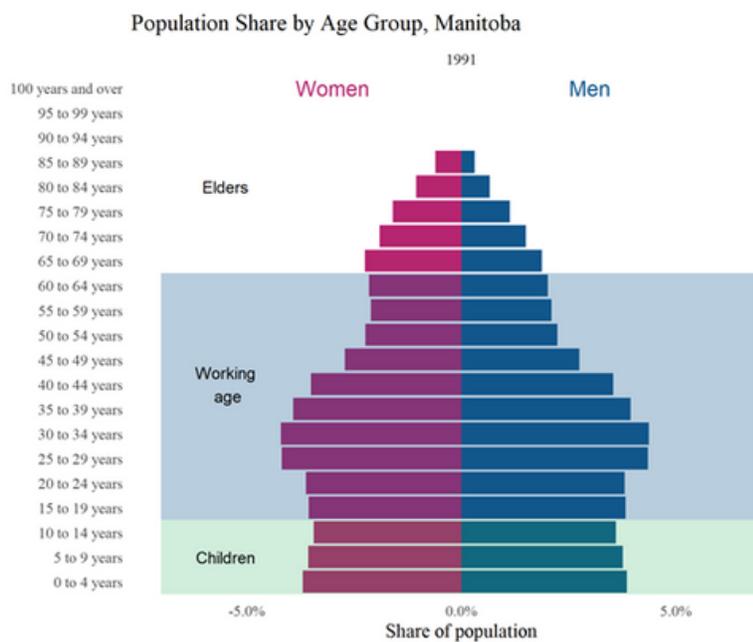
Bottom Line Continued

Manitoba's **Net inter-provincial migration (IPM)** continued to decline between July 1, 2020, and July 1, 2021. Nearly 20,000 Manitobans moving to other provinces, while just under 10,000 Canadians moved to Manitoba from other provinces.

Due to travel restrictions and lower availability of flights: **net immigration, net temporary emigration, and net non-permanent residents** all fell. As flight restrictions ease and the number of flights increase, we should see these categories begin to bounce back.

Interprovincial migration dynamics to and from Manitoba mainly involve population flows with **British Columbia, Alberta, and Ontario**. These three provinces have remained attractive for Manitoban's, driving out-migration for economic and other reasons. Conversely, they are Manitoba's main origins for in-migration.

ANALYSIS OF POPULATION DYNAMICS



Changes in Manitoba's Population Share by Age Group and Gender

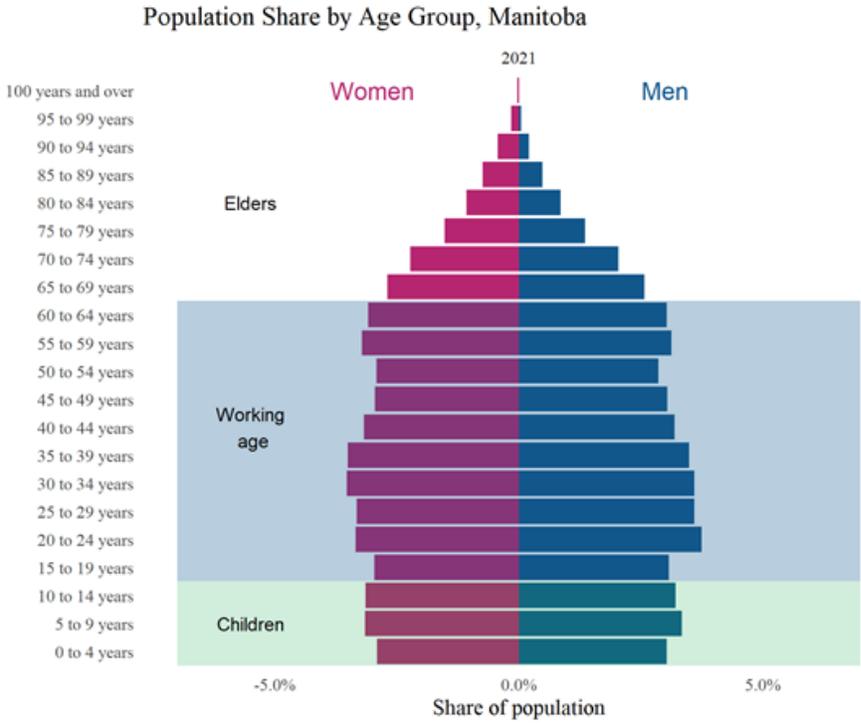
Prior to the **Manitoba Provincial Nominee Program (MPNP)**, Manitoba's population pyramid had a large bulge for the Baby Boomers, followed by the smaller Gen X cohort.

In 1991:

- Baby Boomers were aged 27 to 45.
- Generation X were aged 11 to 26.

Source: Statistics Canada, Table 17-10-0005-01

ANALYSIS OF POPULATION DYNAMICS



The effect of the MPNP has filled out the Generation X cohort more and added to the following working age cohorts (**Millennials** and the start of **Generation Z**). This can be seen in the 2021 population pyramid.

- In 2021:
- Baby Boomers were aged 57 to 75, and
 - Generation X were aged 41 to 56.

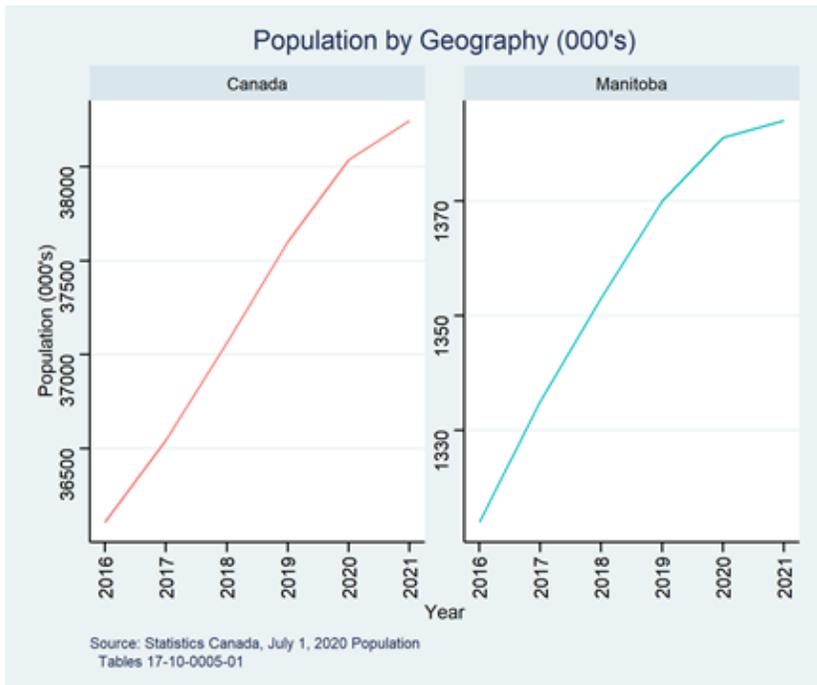
Generation	Ages in 1991		Ages in 2021	
	Youngest	Oldest	Youngest	Oldest
Baby Boomers (1946 – 1964)	27	45	57	75
Generation X (1965 – 1980)	11	26	41	56
Millennials (1981 – 1996)	NA	10	25	40
Generation Z (1997 – 2012)	NA	NA	9	24
Generation Alpha (2013 – 2028)	NA	NA	NA	8

We used a 2020 [MacLean's](#) article as a definition of these five different generations. /1

/1 While **Generation Alpha** did not have a cut-off date in the article, we simply used the 15-year period used for Generation X, Millennials, and Gen Z and so set it to 2028. The exact year cutoffs and names of these generations occasionally shift. My view is that they can be useful placeholders at times, but they are not a substitute for analysis.

Source: Statistics Canada, Table 17-10-0005-01

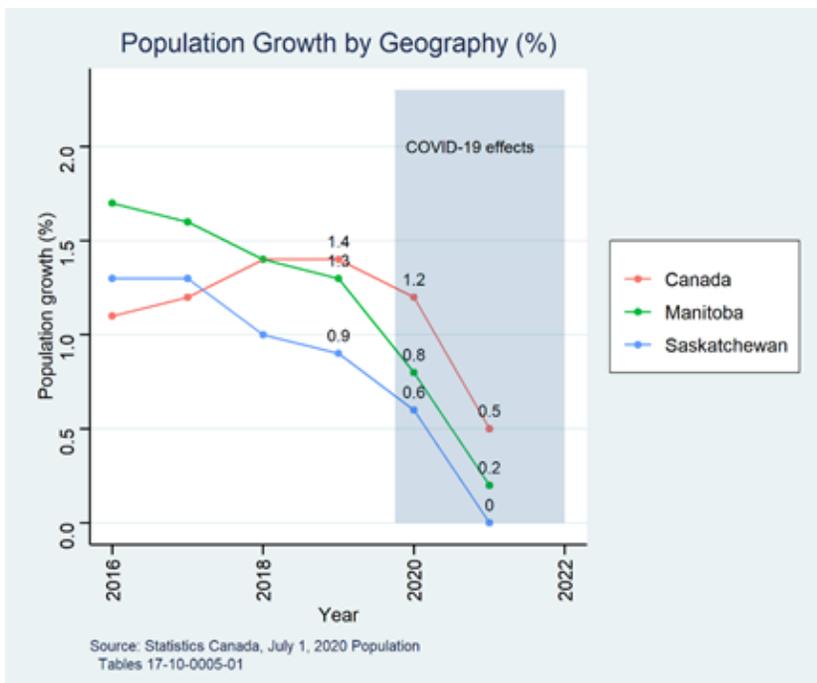
ANALYSIS OF POPULATION DYNAMICS



Population and Population Growth Rates

Statistics Canada released its July 1, 2021, population estimates on September 29, 2021.

We can see that the pandemic put a serious kink in the population growth of Canada and Manitoba.



The year-over-year population growth rates of Canada, Manitoba and Saskatchewan fell in both 2020 and 2021, corresponding with the COVID-19 pandemic.

- Canada's population growth rate fell to 0.5 per cent in 2021.
- Manitoba's population growth rate fell to 0.2 per cent in 2021.
- Saskatchewan's population growth rate fell to 0 per cent in 2021.

Source: Statistics Canada, Table 17-10-0005-01

ANALYSIS OF POPULATION DYNAMICS

Table: Estimates of the components of demographic growth for Manitoba (Table 17-10-0008-01)

Y/Y Change	Natural Increase (A)	Net Immigration (B)	Net temporary emigration (C)	Net Inter-Prov Migration (D)	Net non-perm residents (E)	Residual (F)	Net effect $\Sigma(A - F)$
2002 - 2003	3,913	4,532	(790)	(2,875)	940	(1,196)	4,524
2003 - 2004	4,087	7,011	(788)	(2,565)	697	(1,200)	7,242
2004 - 2005	4,016	7,270	(787)	(7,227)	558	(1,196)	2,634
2005 - 2006	4,636	7,930	(787)	(7,881)	897	(503)	4,292
2006 - 2007	4,880	10,166	(420)	(5,500)	1,059	4,296	14,481
2007 - 2008	5,333	10,223	(421)	(3,703)	1,201	4,309	16,942
2008 - 2009	5,757	12,642	(420)	(3,111)	210	4,297	19,375
2009 - 2010	6,044	13,499	(421)	(2,412)	(190)	4,296	20,816
2010 - 2011	5,349	15,482	(423)	(3,517)	(233)	3,789	20,447
2011 - 2012	5,894	14,945	(349)	(4,212)	778	730	17,786
2012 - 2013	6,293	12,670	(348)	(5,006)	1,764	728	16,101
2013 - 2014	6,034	15,245	(349)	(6,851)	1,043	728	15,850
2014 - 2015	5,792	14,098	(349)	(6,678)	1,078	728	14,669
2015 - 2016	6,323	16,861	(350)	(4,881)	4,585	626	23,164
2016 - 2017	5,934	15,300	(352)	(5,124)	4,893	0	20,651
2017 - 2018	6,196	13,771	(356)	(7,148)	5,572	0	18,035
2018 - 2019	5,866	15,915	(363)	(7,351)	3,062	0	17,129
2019 - 2020	4,993	15,530	(203)	(8,297)	(1,329)	0	10,694
2020 - 2021	2,888	9,733	(71)	(9,685)	252	0	3,117

Estimates of Components of Manitoba Demographic Growth

The components of population growth have been affected by the pandemic. **Natural increase** fell in 2020/19 and 2021/20, with more deaths and fewer births. **Net immigration** fell in 2021/20, as did **temporary emigration**. /2 The values that are negative reduced the Manitoba population.

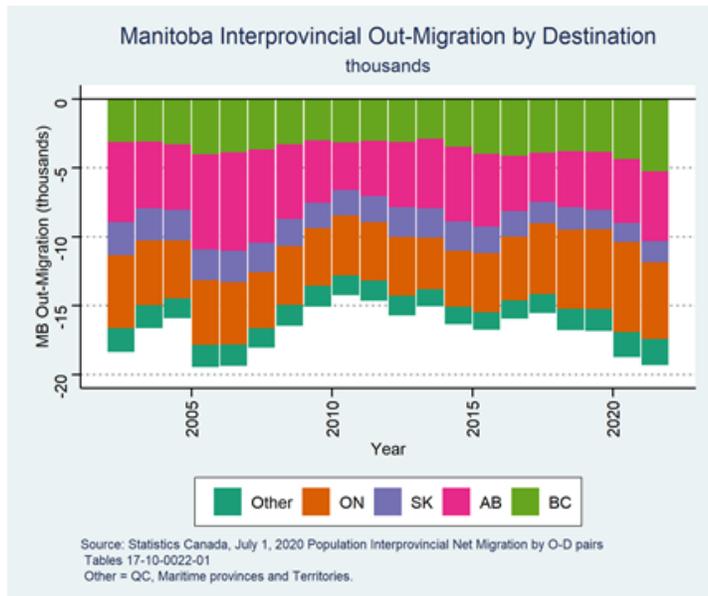
We can see that the net effect is the sum of all the categories (A through F). The COVID-19 pandemic sharply reduced the net effect on Manitoba's population. Much of this was due to sharply reduced air passenger flights for Net immigration, Net temporary emigration, and Net non-permanent residents.

As flights resume and vaccination rates in other countries ramp up, we should see net immigration and net non-permanent residents (including University students) begin to bounceback.

/2 **Natural Increase** = Births - Deaths. **Net immigration** = immigration + returning emigrants - emigrants.

Source: Statistics Canada, Table 17-10-0008-01

ANALYSIS OF POPULATION DYNAMICS

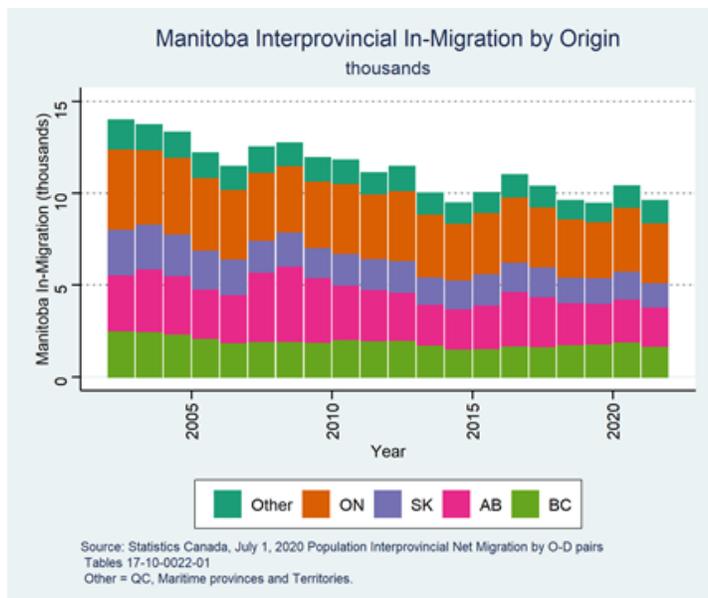


Manitoba Inter-Provincial Migration (IPM) by Origin and Destination

The number of Manitoban's migrating to other provinces has been rising since 2018. The estimate as of July 1, 2021, is just shy of 20,000 people.

The largest destination provinces from Manitoba are:

- **Ontario,**
- **Alberta,** and
- **British Columbia.**



The number of Canadian's migrating to Manitoba has been trending downward since 2002.

The estimate as of July 1, 2021, is just shy of 10,000 people.

The largest origin provinces are:

- **Ontario,**
- **Alberta,** and
- **British Columbia.**

The net effect on Manitoba of IPM in 2021 was a decline of 9,685 people.

INQUIRIES AND CONTACTS

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