



DEMOGRAPHICS

Report and Outlook 2022 | 2023

MAP OF THE QUÉBEC CITY CMA



THE PUBLICATION: REPORT AND OUTLOOK

Each year, Québec International's Economic Studies team sheds light on various important economic indicators in a publication called "Report and Outlook." In addition to analyzing the previous year's data, the economists consider the current context and medium- and long-term forecast scenarios in order to form a solid opinion of the changes to be expected. Québec International is therefore pleased to unveil the Demographics section of this document, which looks at the evolution of the population.

NOTE TO READERS

This study was produced by Québec International's Department of Economic Studies and Strategic Monitoring. The professionals on this team have a mandate to ensure the availability of quality economic information. To that end, they monitor changes in the economic and business environment at the regional, national and international levels and conduct various types of research and analysis in order to identify opportunities, guide development strategies, and define actions to be taken in support of regional economic growth. To learn more about the services offered by Québec International, please visit our website at www.quebecinternational.ca/en.

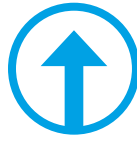
2022 HIGHLIGHTS

The population growth rate almost tripled since 2021

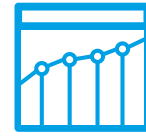


Total population in 2022:

848,800
residents



12,200
more residents



Population growth
rate of
14.5 per mille

The population growth rate was closely linked to net international and intraprovincial migration



10.2%
of total population increase
in 2022 came from
natural increase
(births minus deaths)



19.6%
came from net
intraprovincial
migration



70.3%
came from net
external
migration

Net intraprovincial migration: the CMA attracts a lot of youths aged 15 to 24 and registers no losses in other age categories



1,369
youths aged
15 to 24
attracted



Net migration
completely
recovered in 2022
among people aged 25 to 64



775
people aged
65 and over
attracted



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SUMMARY

Here are some highlights regarding the Québec City CMA's demographic situation in 2022 compared to 2021:

		2022	2021
Population growth rate	Tripled	14.5 per mille (12,200 people)	5.5 per mille (4,600 people)
Natural increase	Stable	1,236 people	1,177 people
Net intraprovincial migration	Quadrupled	2,400 people	538 people
International immigrants	Doubled	5,473 people	2,256 people
Non-permanent residents	Tripled	2,790 people	968 people
Net migration of people aged 25 to 64	Recovered	Increase of 30 people	Loss of 1,180 people

POPULATION IN THE QUÉBEC CITY CMA AND CANADA

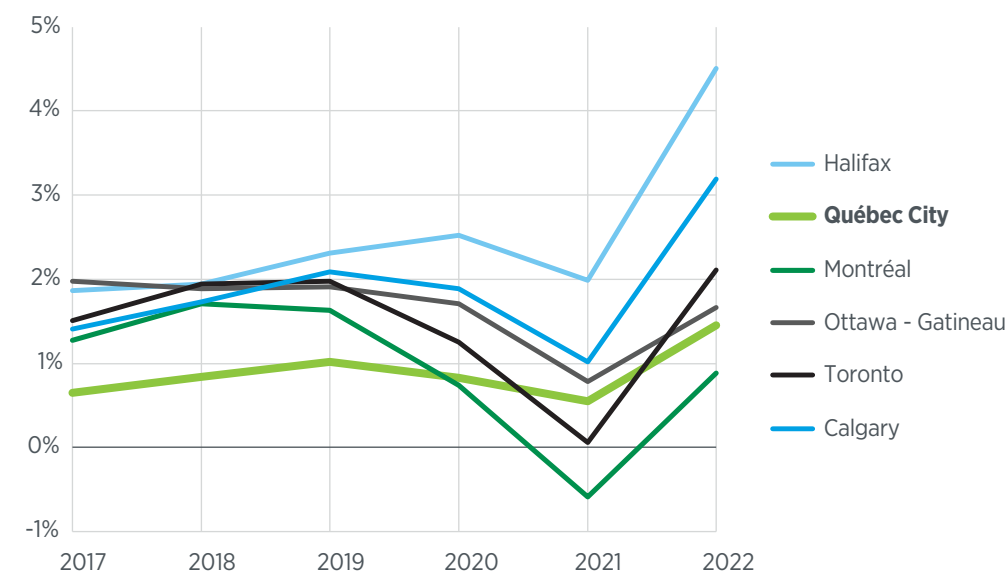
Table 1 – Evolution of the population in the main Canadian CMAs from 2019 to 2022

Population (number)					Population growth rate (sort key)
Name of the CMA	2019	2020	2021	2022	2021-2022
Halifax	439,835	450,910	459,869	480,582	4.5%
Calgary	1,514,426	1,542,956	1,558,588	1,608,342	3.2%
Vancouver	2,709,277	2,743,765	2,764,932	2,842,730	2.8%
Edmonton	1,442,835	1,467,219	1,480,159	1,516,719	2.5%
Toronto	6,462,898	6,543,886	6,547,381	6,685,621	2.1%
Ottawa-Gatineau	1,438,015	1,462,582	1,474,077	1,498,610	1.7%
Québec City	825,234	832,021	836,615	848,776	1.5%
Winnipeg	844,331	850,558	858,848	871,778	1.5%
Montréal	4,334,308	4,366,487	4,340,642	4,378,796	0.9%

Source: Statistics Canada, Table: 17-10-0135-01: Population estimates, July 1, by census metropolitan area and census agglomeration (release date: 2022-01-13). Adapted by Québec International.

Based on data from Statistics Canada, the Québec City CMA had around 848,800 residents in 2022, 12,200 more than in 2021. The annual population growth rate reached 14.5 per mille (‰), more than double the 5 per mille (‰) population growth rate registered in 2020-2021.

Graph 1 – Evolution of the population growth rate in some of the main Canadian CMAs from 2017 to 2022



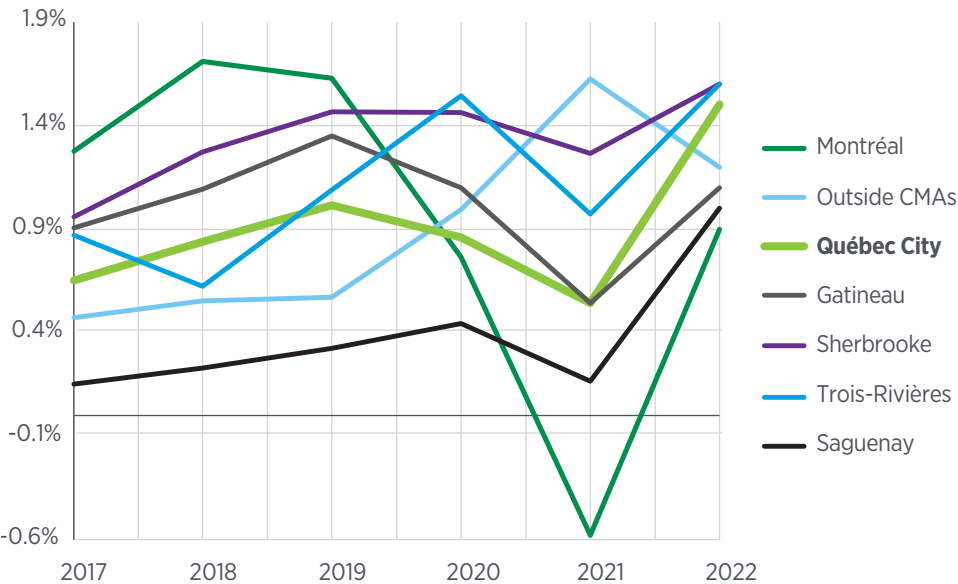
Source: Statistics Canada, Table: 17-10-0135-01: Population estimates, July 1, by census metropolitan area and census agglomeration (release date: 2022-01-13). Adapted by Québec International.

Data for 2022 also shows that the Québec City CMA, just like other major Canadian CMAs, is starting to attract more residents again, breaking away from the pandemic period, when people were moving out of big cities. However, like in 2021, Québec City's population growth rate remains less significant than in comparable Canadian CMAs like Calgary, Edmonton, Vancouver, Halifax, Winnipeg, etc.

POPULATION IN THE QUÉBEC CITY CMA AND THE PROVINCE OF QUEBEC IN 2022

All seems to indicate that the demographic consequences of the COVID-19 pandemic on metropolitan regions are also behind us in the province of Quebec. The main metropolises like Québec City and Montréal started to attract more people again in 2022 as they did before the pandemic.

Graph 2 – Evolution of the population growth rate in select CMAs in the province of Quebec from 2017 to 2022

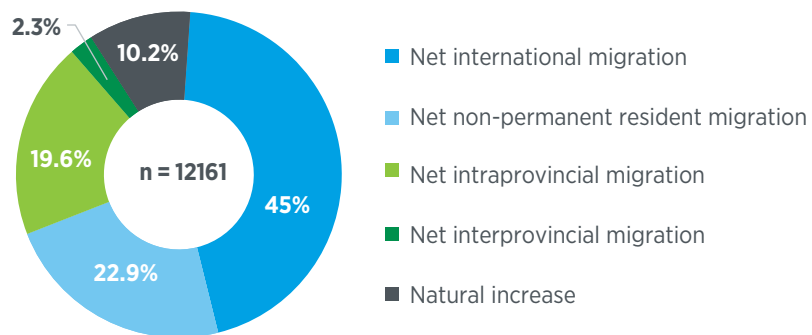


Source: Statistics Canada, Annual Demographic Estimates (Subprovincial Areas, January 2023). Adapted by the Institut de la statistique du Québec and Québec International.



COMPONENTS OF THE QUÉBEC CITY CMA'S POPULATION GROWTH IN 2022

Graph 3 – Proportion of each demographic component in the Québec City CMA's population increase in 2022



Source: Statistics Canada, Annual Demographic Estimates (Subprovincial Areas, January 2022). Adapted by the Institut de la statistique du Québec and Québec International.

A large part of the total increase attributed to net external migration

For 2022, just like for the previous year, the data shows that the population increase in the CMA was essentially attributed to net external migration, which includes international migration, interprovincial migration, and non-permanent resident migration. In total, 70% of the population increase (slightly more than 8,500 people) came from external migration. International immigration accounted for almost half of the population increase (45%) in 2022, while over 1 in 5 newcomers (22.9%) came from the pool of non-permanent residents.

Natural increase remained stable in 2022, but its relative proportion continues to decrease

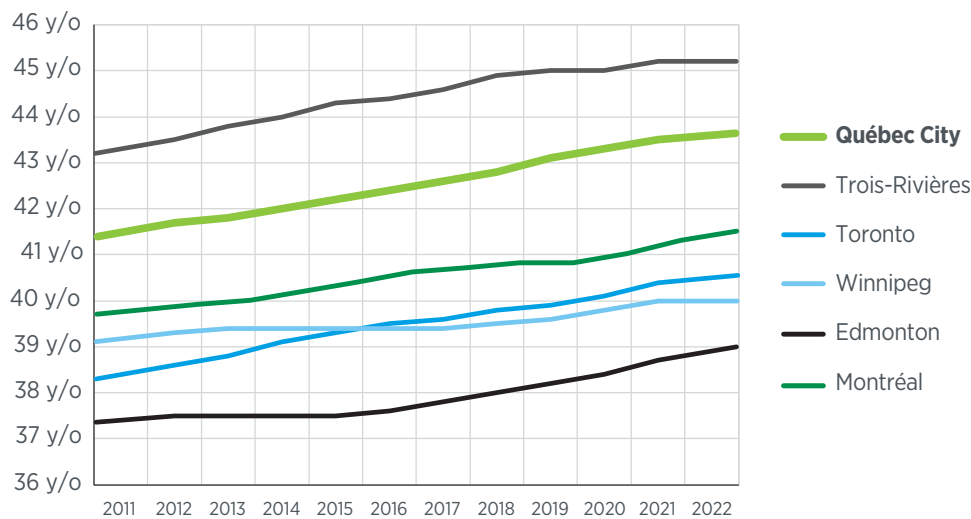
The proportion of the total population growth attributed to natural increase (births minus deaths) went down from 16.3% in 2021 to 10.3% in 2022. However, in absolute numbers, natural increase remained almost stable compared to 2021.

The population age structure did not change in 2022 compared to 2021

The median age was 43.4 years old in 2022, compared to 43.3 years old in 2021, while the average age was 43.6 years old in 2022, compared to 43.5 years old in 2021. Age categories also remained mostly unchanged. Those aged 25 to 64 made up 52.7% of the population in 2022, compared to 53.2% in 2021. The proportion of people aged 15 to 24 remained the same as in 2021 (10%).

IN 2022, POPULATION AGING REMAINED MORE SIGNIFICANT IN QUÉBEC CITY THAN IN COMPARABLE CANADIAN CMAS

Graph 4 – Average age variation in the main Canadian CMAs



Source: Statistics Canada, Table 17-10-0135-01: Population estimates, July 1, by census metropolitan area and census agglomeration, 2016 boundaries. Adapted by Québec International.

In 2022, like in 2021, the Québec City CMA still had the lowest proportion of working-age people (15 to 64 years old) among all Canadian CMAs, at 62.7%, as well as the highest proportion of people aged 65 and over (22.2%). This also has an effect on the median age, which is between two and five years older in Québec City than in other CMAs, as shown in the graph above.

THE QUÉBEC CITY CMA HAS MORE THAN QUADRUPLED ITS NET INTRAPROVINCIAL MIGRATION IN 2022

In 2022, the Québec City CMA registered a positive net migration of 2,378 people. This is 4.4 times more than in 2021, when the CMA had registered a positive net migration of 538 people. This performance is even better than before the COVID-19 pandemic. In 2019-2020, the CMA had experienced a positive net migration of 1,573 people.

Table 2 – Net migration exchanges between the Québec City CMA and other CMAs in 2022

Name of the CMA	Total	Saguenay	Québec City	Sherbrooke	Trois-Rivières	Montréal	Gatineau	Outside CMAs
Saguenay	641	...	-71	11	-32	330	26	377
Québec City	2,378	71	...	119	75	1,722	159	232
Sherbrooke	1,704	-11	-119	...	29	1,397	62	346
Trois-Rivières	1,397	32	-75	-29	...	1,065	88	316
Montréal	-29,214	-330	-1,722	-1,397	-1,065	...	-296	-24,403
Ottawa-Gatineau	-1,216	-26	-159	-62	-88	296	...	-1,178
Outside CMAs	24,309	-377	-232	-346	-316	24,403	1,178	...

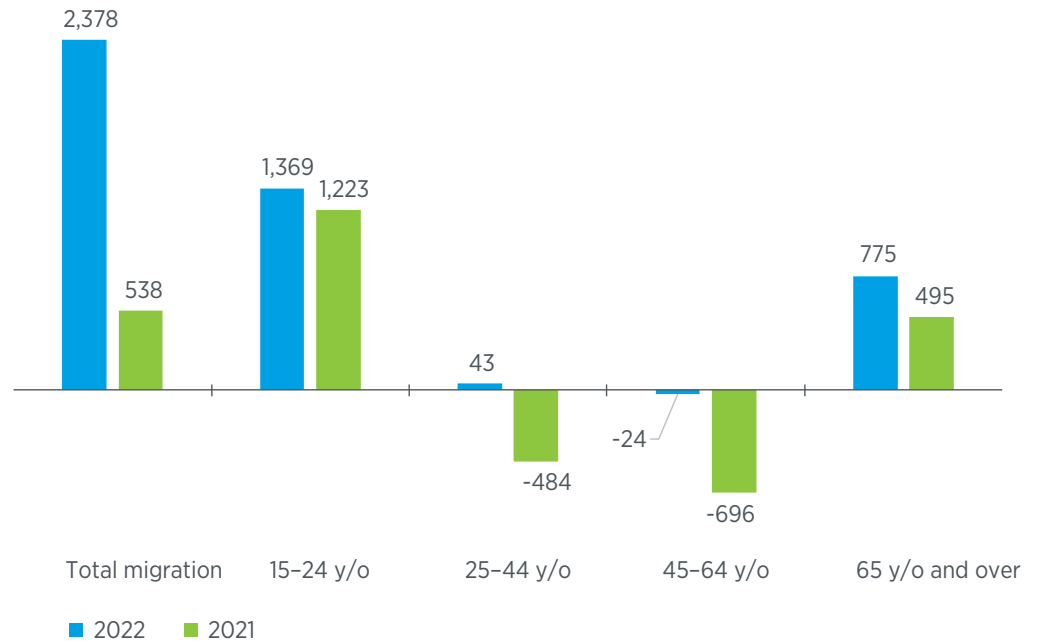
Source: Institut de la statistique du Québec (ISQ). Based on the insured persons registration file of the Régie de l'assurance maladie du Québec (RAMQ).





In 2022, the Québec City CMA made its most significant gain from Montréal (+1,573 people). Most notably, it is the only CMA to have made gains from migration exchanges with every CMA in the province of Quebec, including the “outside CMAs” category.

Graph 5 – Distribution of net intraprovincial migration in the Québec City CMA across age categories in 2022 compared to 2021



Source: Institut de la statistique du Québec (ISQ). Based on the insured persons registration file of the Régie de l'assurance maladie du Québec (RAMQ). Adapted by Québec International.

In 2022, the CMA recovered the major losses recorded in 2021 in the working-age category (25 to 64 years old), registering a gain of 20 people in this age category, compared to a loss of almost 1,200 (-1,180) in 2020. However, more efforts are needed with those aged 30 to 44 and 45 to 64, two categories where the CMA continues to register losses in its migration exchanges with other regions.

WHAT DOES THE 2021 CENSUS TELL US ABOUT THE QUÉBEC CITY CMA?

The 2021 census established that there were 839,300 people living in the Québec City CMA, 14,700 of which were Indigenous (First Nations, Inuit and Métis people). This is a 4.1% increase in the CMA's total population compared to the 2016 census. Within that population, 97% spoke French as their first language, and 2.8% had either English or English and French as their first language.

Among the 2021 census population, 54,855 were immigrants,¹ and 15,395 were non-permanent residents. This is the result of relatively recent immigration, as almost half (47.6%) arrived between 2011 and 2021. Furthermore, immigrants arrive at a relatively young age: 52.8% were between 25 and 44 years old upon their arrival, and 13.6% were between 15 and 24 years old.

DEMOGRAPHIC OUTLOOK FOR THE QUÉBEC CITY CMA

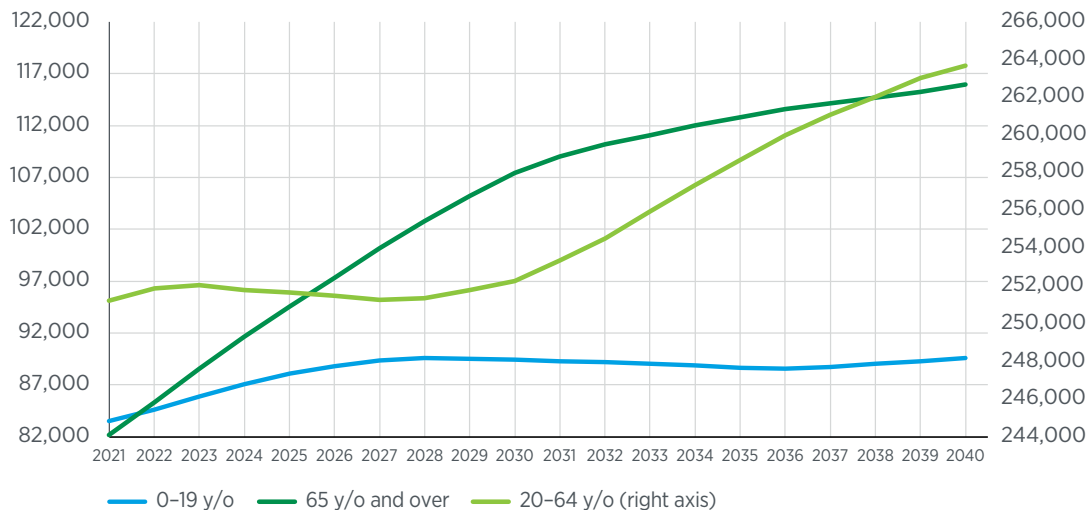
This section summarizes the growth projection scenarios from the ISQ for the province from 2019 to 2041, as revised in 2021 to take into account the changes brought about by the COVID-19 pandemic. Compared to the reference scenario of 2019, projections suggest an increase in the projected population growth leading up to 2026. This more optimistic outlook is based mainly on an expected increase in non-permanent resident and interprovincial migration.

The growth projection scenarios show that the Québec City CMA should remain in the middle of the pack, with an 11% population increase from 2022 to 2041. In terms of population growth rate, it is expected to be ahead of Montréal (9.1%) but behind Sherbrooke and Gatineau, which are expected to experience a population growth rate of 16.5% and 12.7% over the same period, respectively.

Over that period, the demographic weight of those aged 65 and over will continue to increase significantly, while that of those aged 25 to 64 will decrease, reaching a low around 2028 or 2029, as shown in the graph below.

¹ In the 2021 Census of Population, “Immigrants” include immigrants who have been admitted to Canada on or before May 11, 2021.

Graph 6 – Population growth projections based on age categories from 2021 to 2041

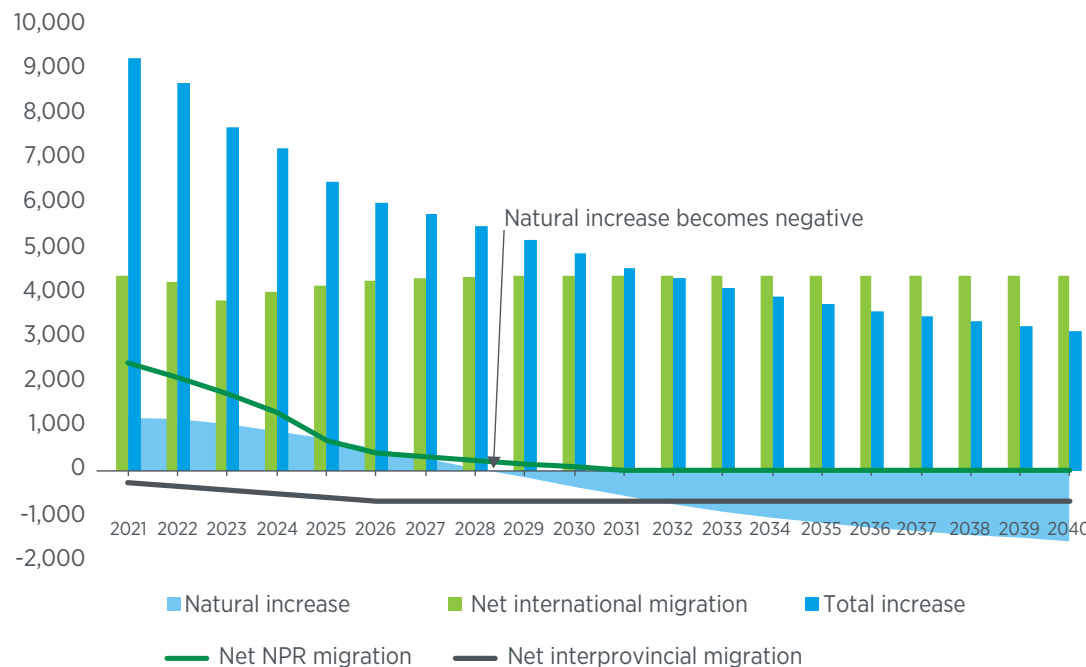


Source: Institut de la statistique du Québec (ISQ), *Mise à jour 2021 des perspectives démographiques du Québec et des régions, 2020-2066* (based on the reference scenario A2021). Adapted by Québec International.

Population aging is real, and the proportion of people aged 65 and over will increase gradually. In 2022, this age category represented slightly more than one fifth of the population (22%). It is expected to represent one quarter of the population (24.7%) around 2027. Its demographic weight will then increase starting in 2030 to reach between 26% and 27% of the total population.

COMPONENTS OF THE CMA'S POPULATION GROWTH PROJECTIONS FROM 2022 TO 2040

Graph 7 – Proportion of the various demographic components in the projected population increase from 2021 to 2041 (reference scenario A2021)



Source: Institut de la statistique du Québec (ISQ), *Mise à jour 2022 des perspectives démographiques du Québec et des régions, 2021-2066*. Adapted by Québec International.





International migration will become more and more important in the CMA's population increase ...

In the medium and long term, international migration and internal migration (intraprovincial) will continue to be the main sources of population increase in the Québec City CMA. From 2028 on, it could become the only source of population growth, as natural increase and interprovincial migration will negatively impact demographic outcomes in the CMA.

The natural increase component will decline gradually ...

Around 2028, natural increase (births minus deaths) will become negative, with more deaths than births. This trend is explained by population aging exposing a larger portion of the population to mortality.

The CMA will continue to experience losses in interprovincial migration ...

Following the existing trend, the Québec City CMA will continue to register deficits in its migration exchanges with other provinces throughout this period, reaching a low point around 2026. Note that this trend is nothing new.

CONCLUSION

This demographic report shows that the Québec City CMA has performed well in 2022 compared to 2021 in many aspects. The population growth rate almost tripled, reaching 14.5 per mille in 2022, compared to 5 per mille in 2021. The CMA also doubled the number of both international migrants and non-permanent residents it received.

Data also shows that the CMA fared better in 2022 in terms of intraprovincial migration, with results more than four times (+2,400) higher than in 2021 (+538). This remarkable performance is explained in part by the fact that the CMA broke away from its poor performance in the 25 to 64 age category, where it previously registered negative results. In 2021, significant gains in the 15 to 24 age category (+1,223) had been completely outweighed by losses in the 24 to 64 age category (-1,180). Although it did not make any significant gains in that category (+30) in 2022, the CMA registered no losses. Moreover, Québec City is the only CMA to have made gains in its migration exchanges with every other CMA in the province in 2022.

Despite these results, data shows that the population aging persists in the CMA. Among comparable Canadian CMAs, Québec City remains the CMA with the lowest proportion of working-age people (15 to 64 years old), as well as the highest proportion of people aged 65 years and over. This situation, combined with the labour market creating many jobs, highlights more than ever the need for labour. On this matter, the CMA continues to improve its net intraprovincial migration as well as its attractiveness to international immigrants and non-permanent residents, although significant improvements are still to be made.

As the economic development agency for the Québec City region, Québec International takes this challenge as a priority and promotes collaboration with economic, political and social stakeholders in the region.

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