



EA CONNECT

19th Annual User Conference

ENVIRONICS
ANALYTICS

Population Growth Trends: One Year After Changes in Policies on International Migration and Waning COVID



Dr. Doug Norris

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With the assistance of Gillian Cross, Matthew Senyshen,
and Amanda Manning

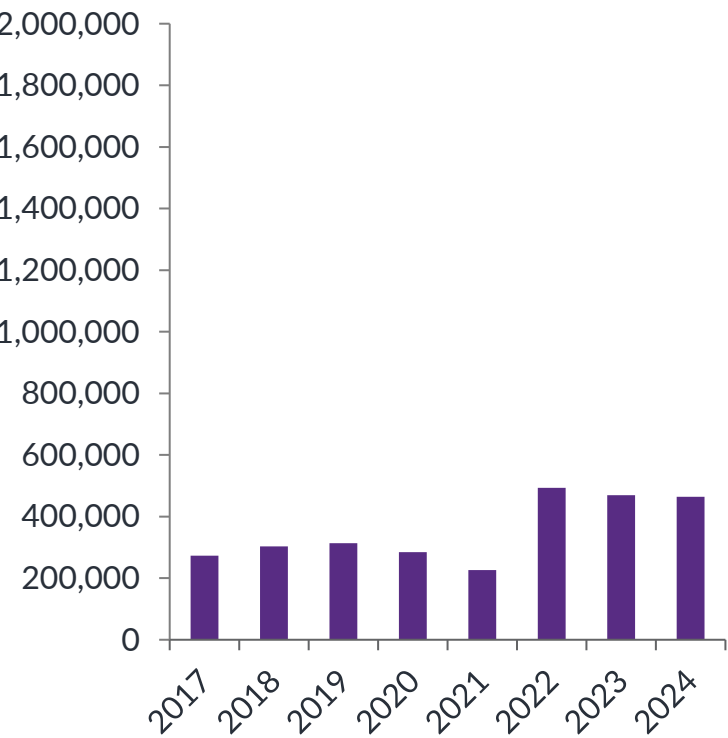
Concert Hall
12:40 PM– 1:10 PM

Outline

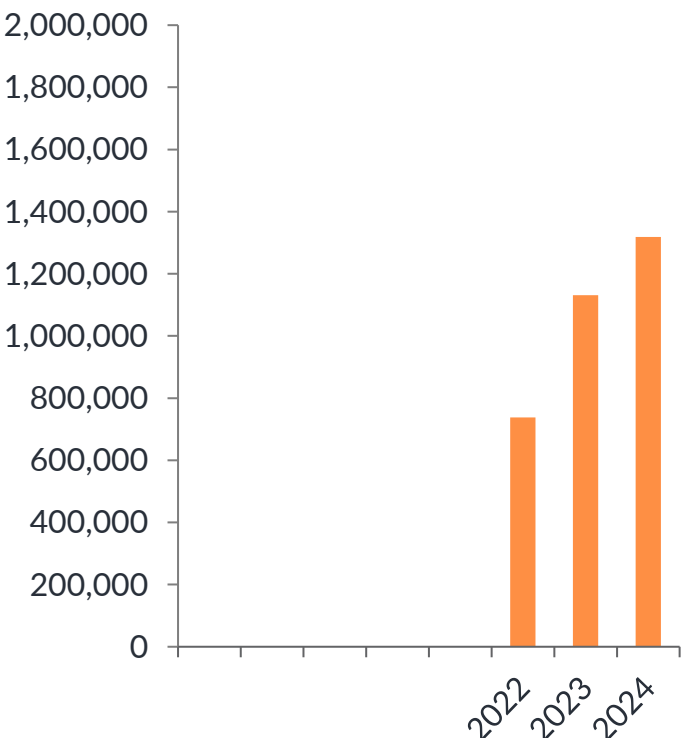
- ✓ Background on international migration trends and policy changes
- ✓ The impact of new policies on international migration
- ✓ Internal Migration

Recent International Migration

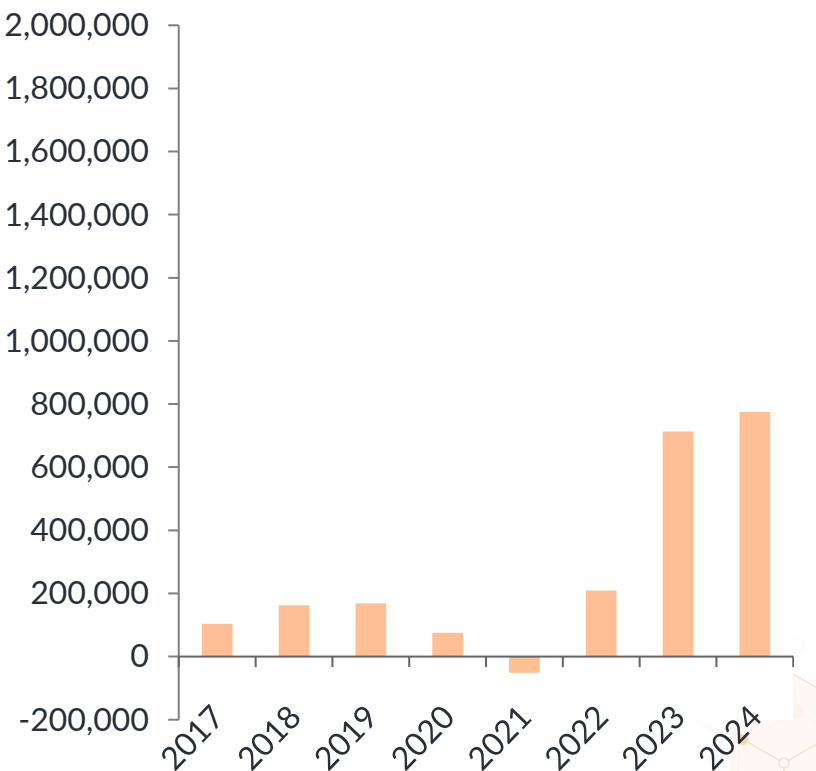
Immigrants



New non-permanent residents*



Net non-permanent residents



Note: Years are 12 months ending June;

* New non-permanent residents only available since 2022

Source: Statistics Canada

Federal Government policy changes on international migration

Immigrants (Permanent Residents)

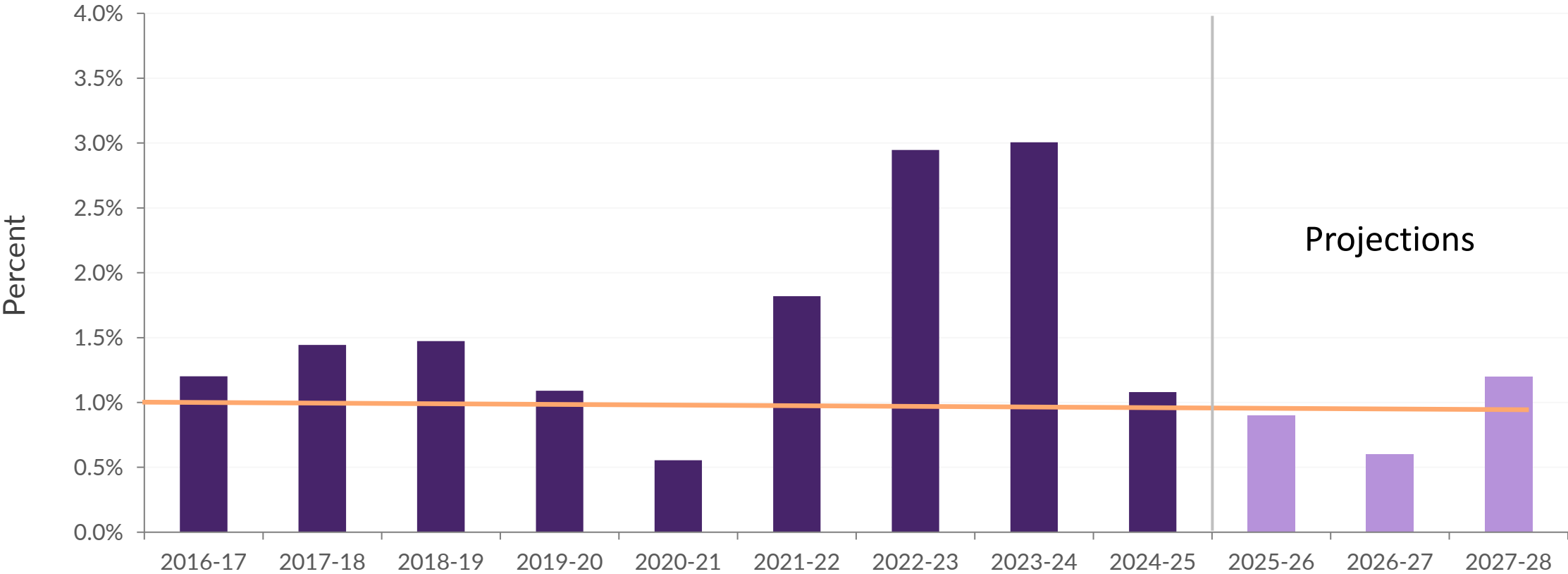
- ✓ Immigration averaged 475,000 over the recent three-year period 2022-2024 and the annual target was to be 500,000 in 2025. In comparison immigration averaged 260,000 over the 20-year period 2001-2021.
- ✓ In November 2024 new lower annual targets were set at 395,000 in 2025, 380,000 in 2026 and 365,000 in 2027

Non-permanent Residents

- ✓ In March 2024, the number of non-permanent residents in Canada was about 3M or 7% of the total population up from 5% in March 2023 and 3.1% in July 2021.
- ✓ In the spring of 2024, a new policy was announced to reduce the number of non-permanent residents to 5% of total population (approximately 2.1 million) by 2027.

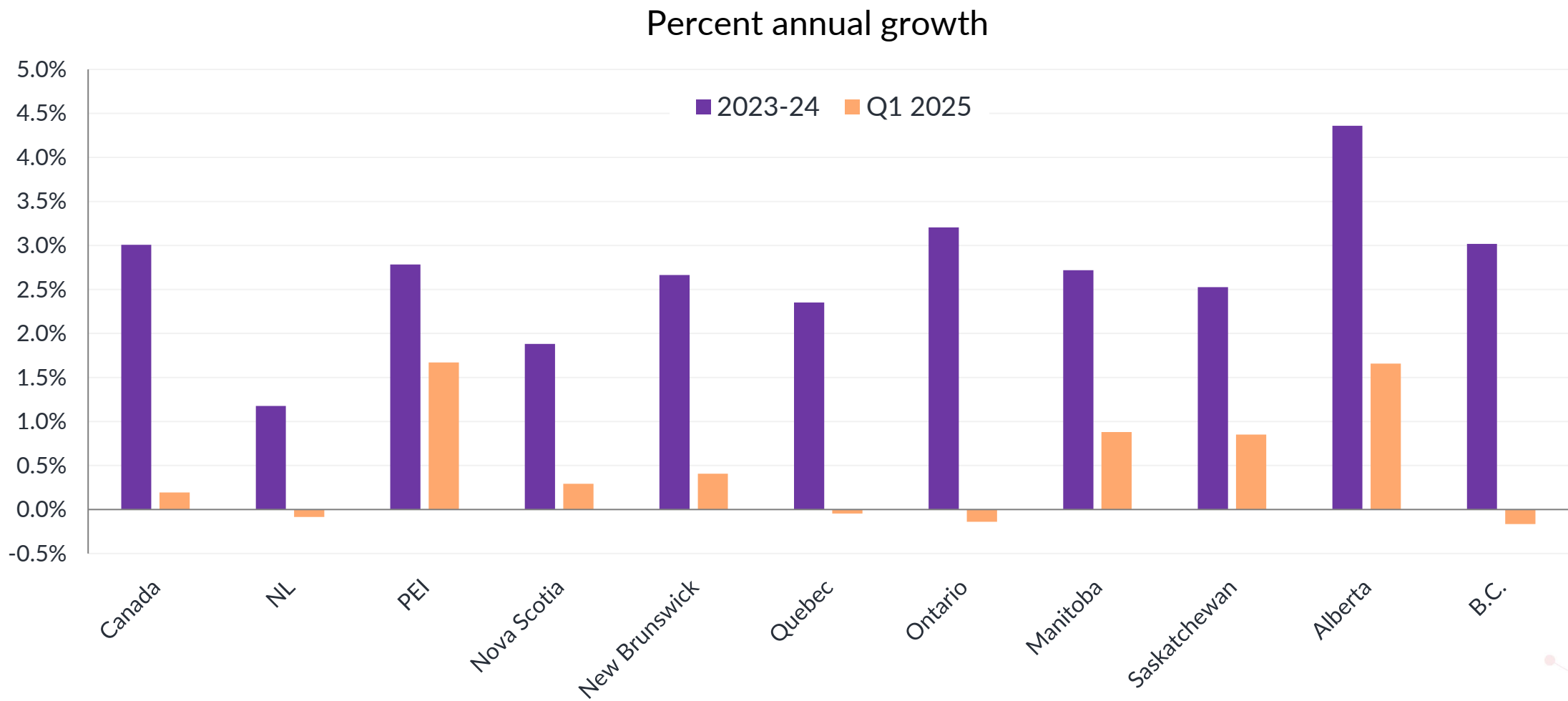
EA projections show real dampening of growth before returning to pre-COVID levels

Annual estimated and projected percent population growth, Canada



Source: Statistics Canada, Population Estimates; 2016-2024; EA DemoStats projections for 2024-28

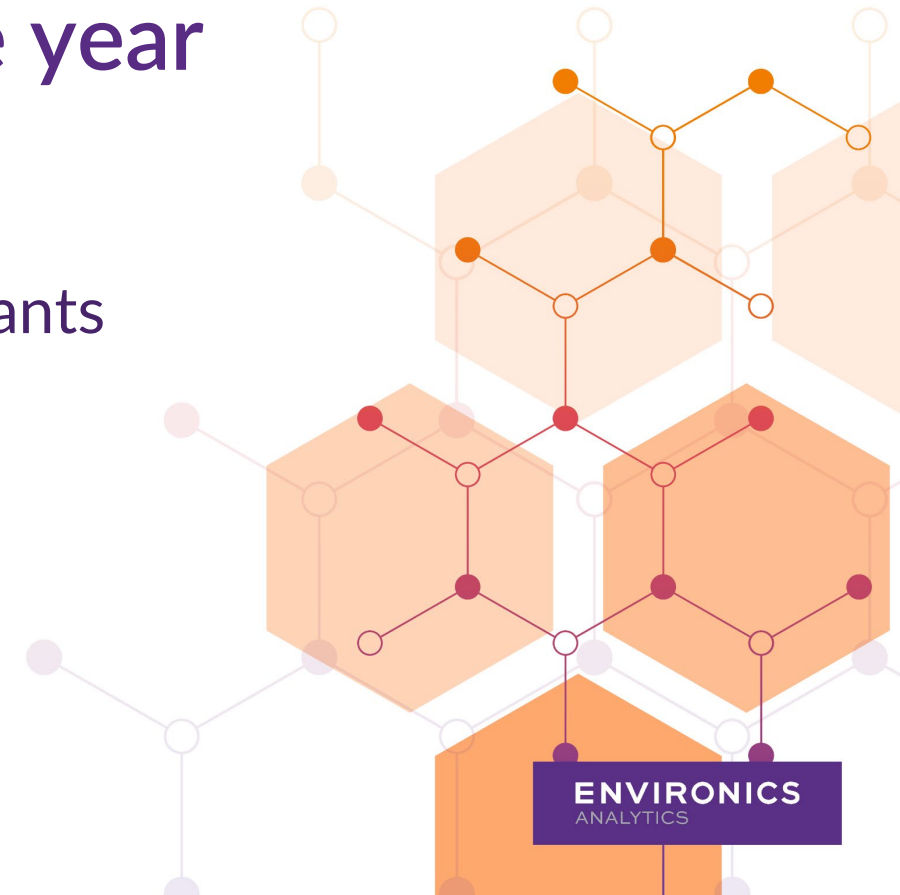
Growth rates are down in all regions but there continues to be variations; In Q1 2025, four provinces had population declines



Source: Statistics Canada, Population Estimates

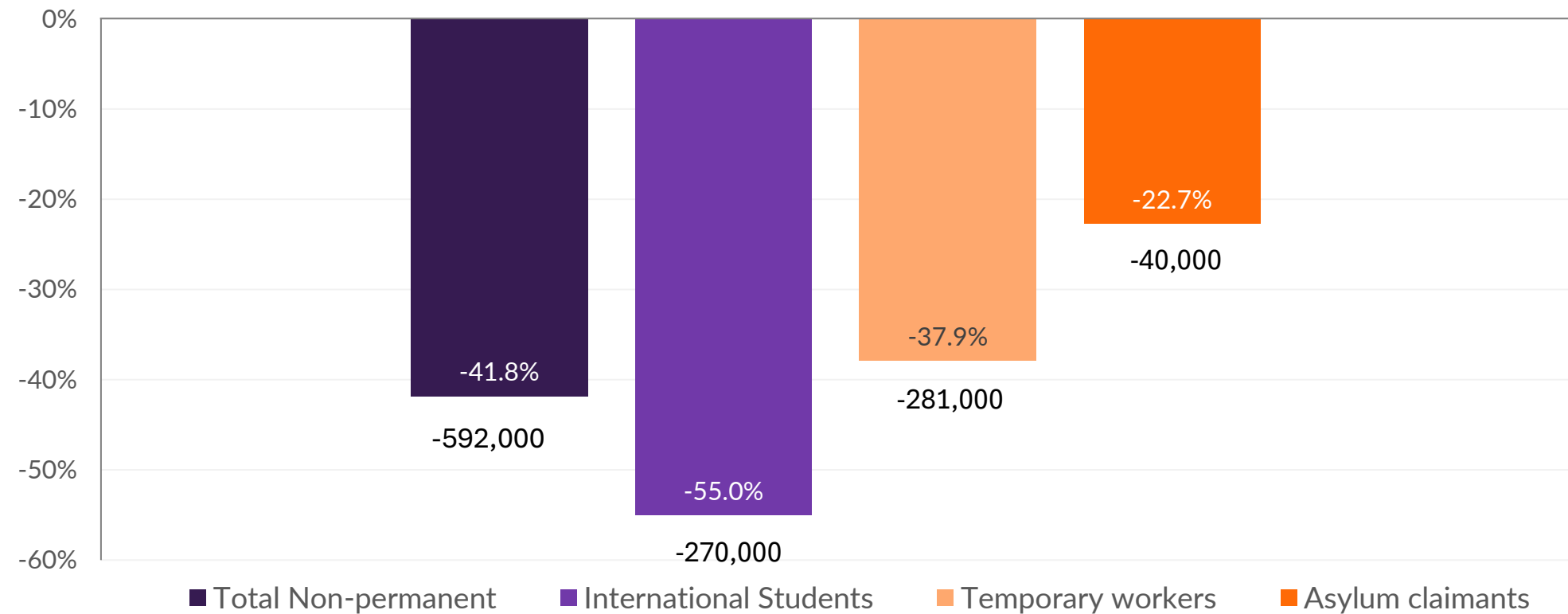
A look at non-permanent residents one year after policy changes

Foreign students, temporary workers and asylum claimants



There was a 42% drop in new non-permanent residents last year

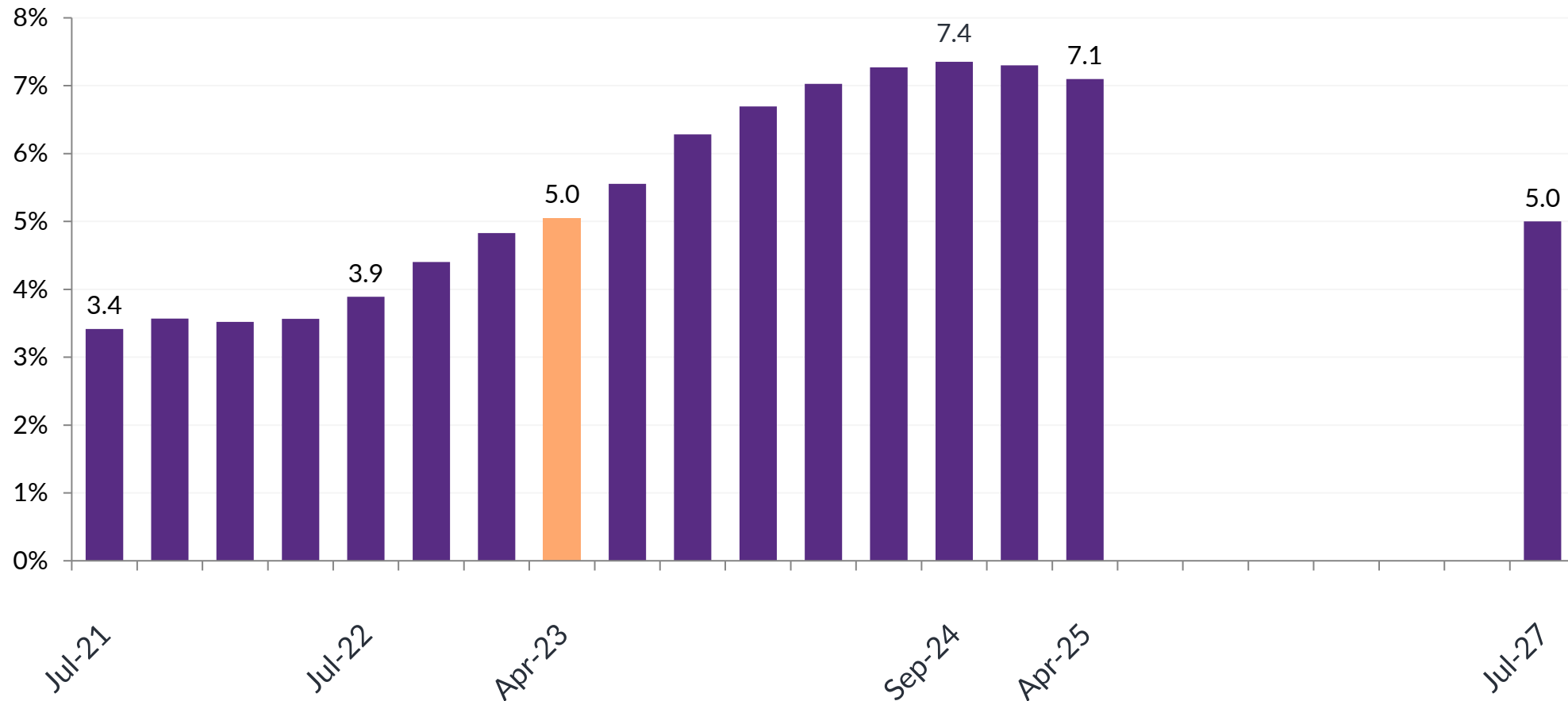
Change in number of new non-permanent residents (July 2024-June 2025)
compared to a year earlier



Source: Environics Analytics based on IRCC data

The declines in new non-permanent residents resulted in a small decline in percent of non-permanent residents living in Canada

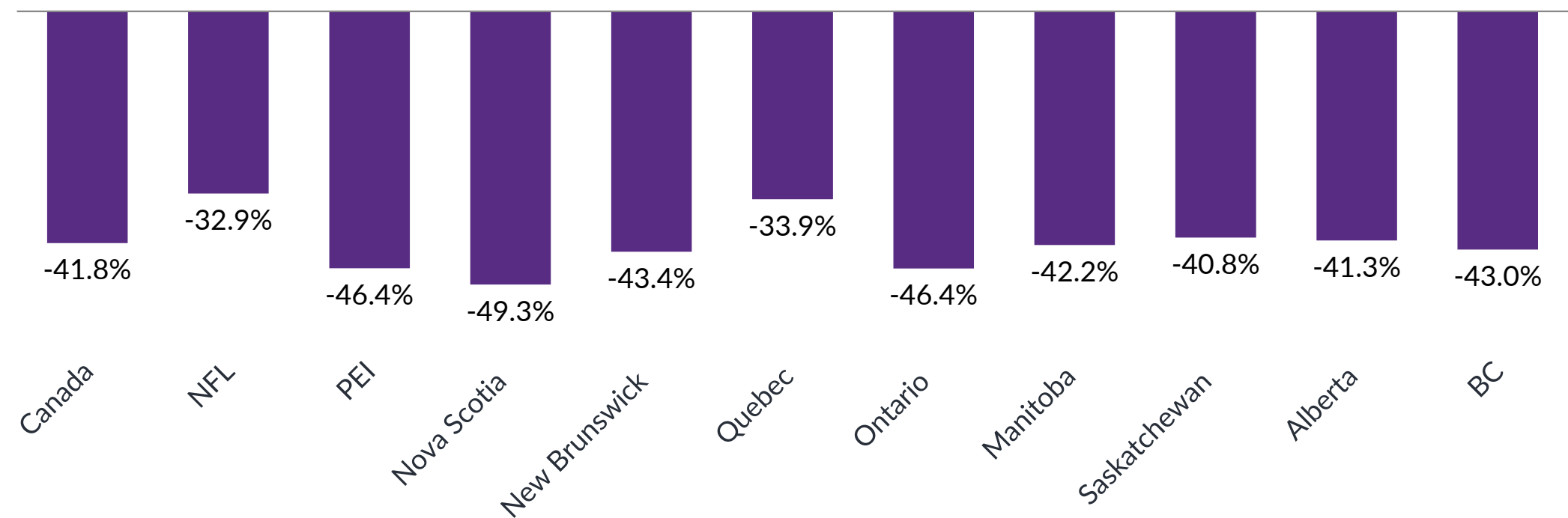
Non-permanent residents as a percent of total population, Canada



Source: Statistics Canada

There was a decline in new non-permanent residents in all provinces

Change in number of new non-permanent residents (July 2024-June 2025) compared to a year earlier

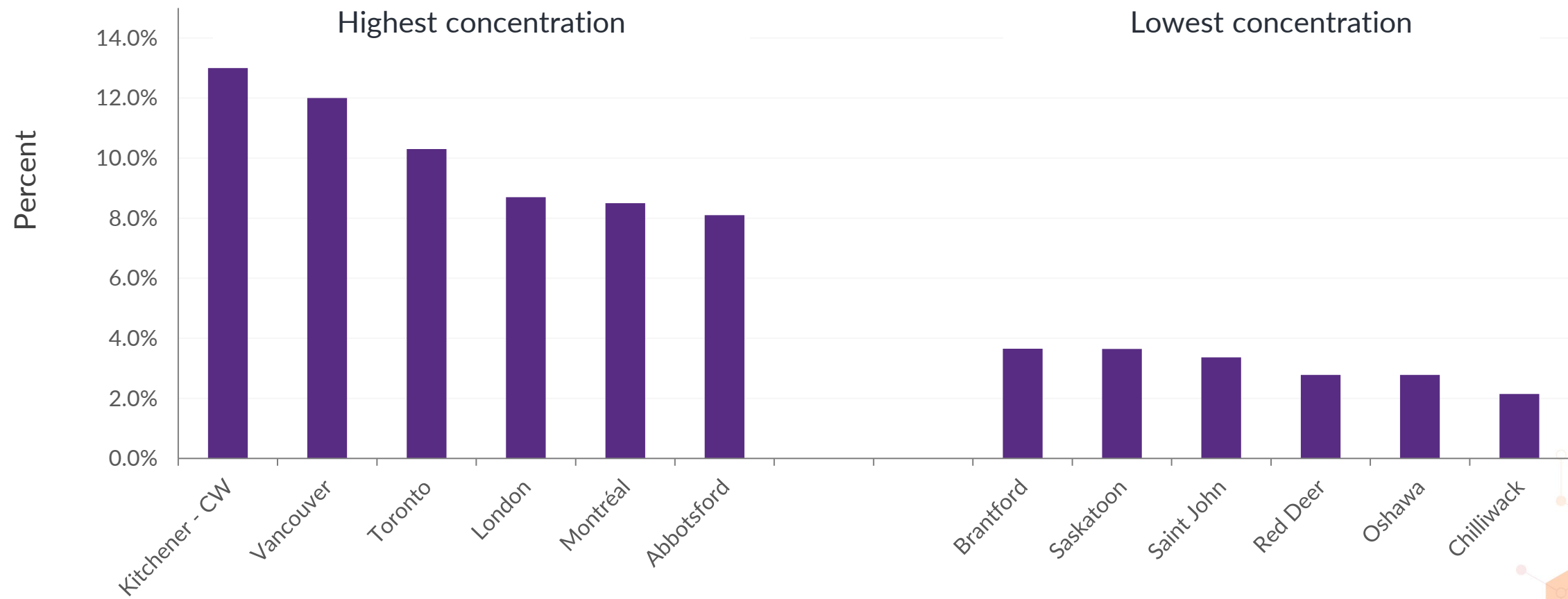


Source: Environics Analytics based on IRCC data





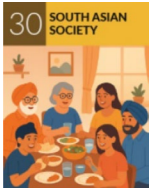

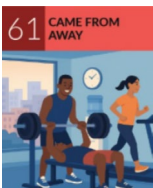
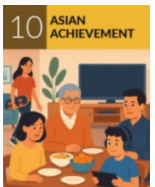


Concentration of non-permanent residents varies across CMAs

Non-permanent residents as percent of total population, 2025, Highest and Lowest CMAs



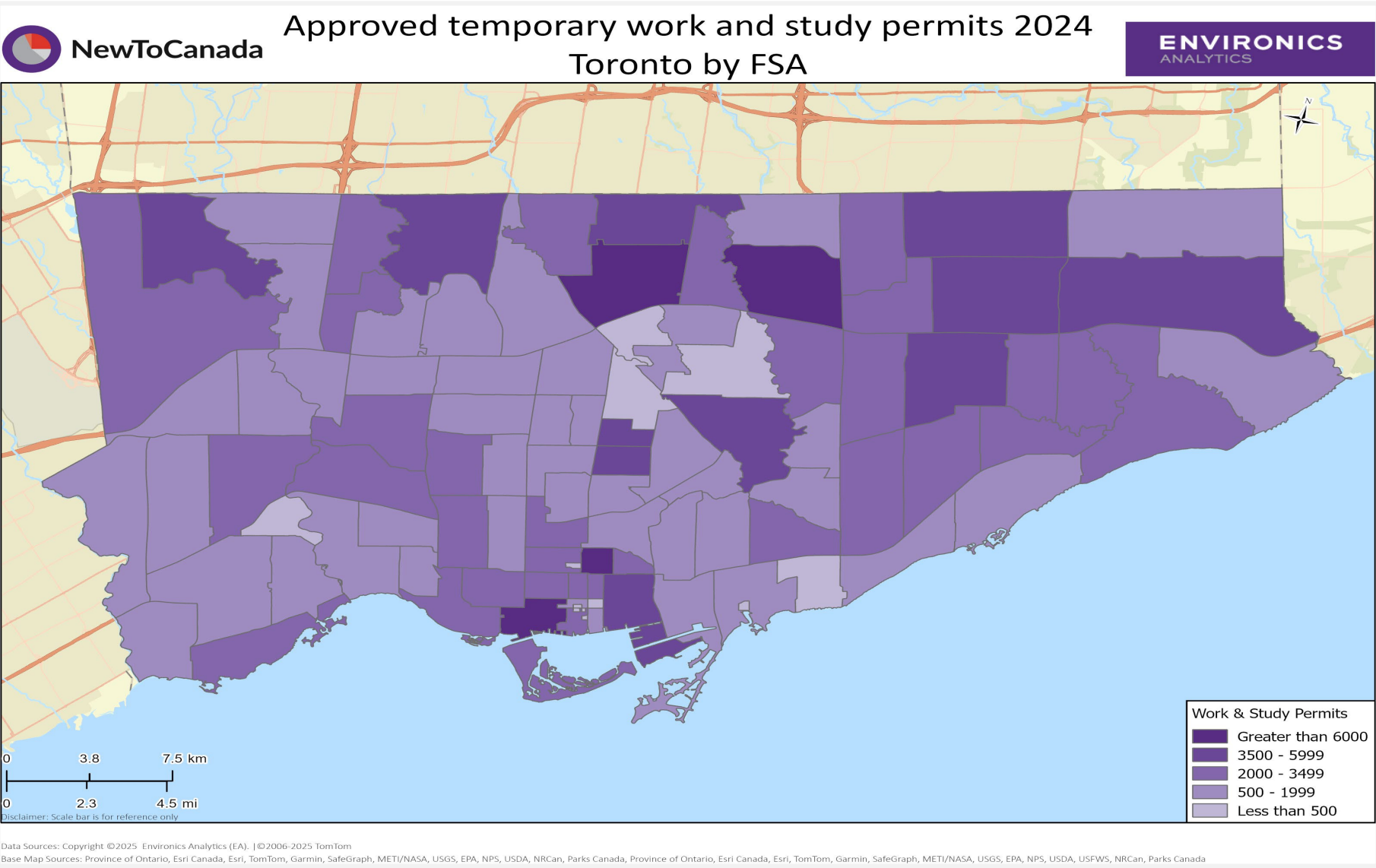
Source: Environics Analytics, 2025 DemoStats

Non-permanent residents are spread across Toronto neighbourhoods, not always concentrated in ethnic dominated areas

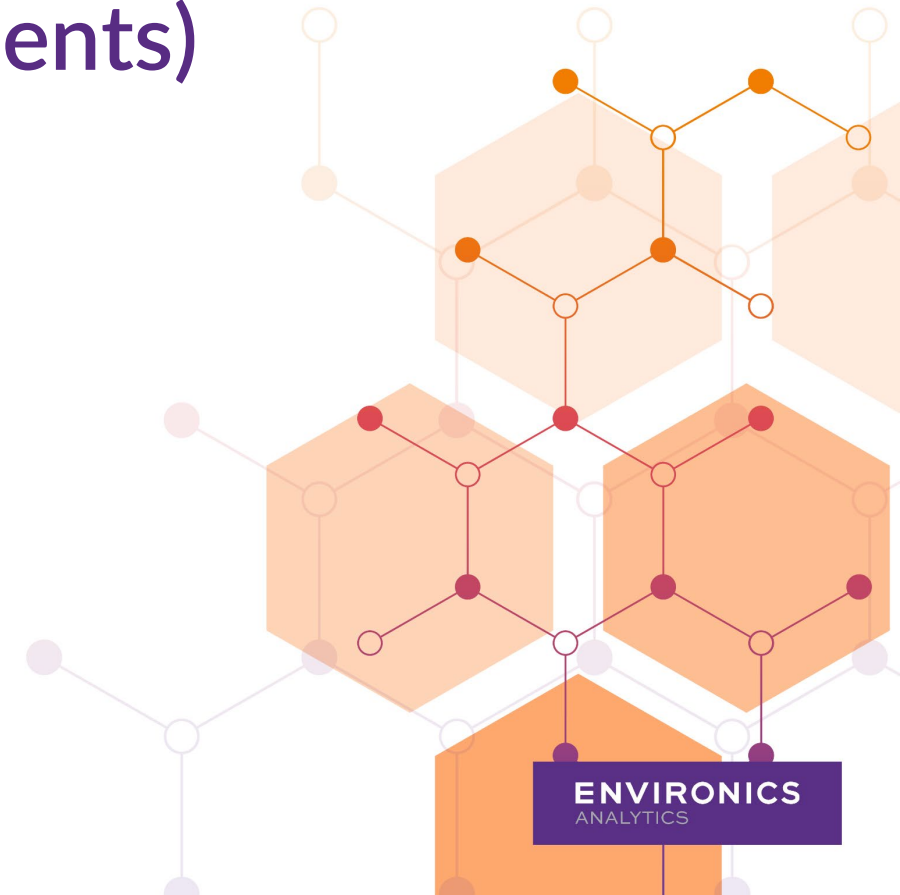
	EA's PRIZM Neighbourhood Type	Lifestage	Non-permanent Residents	Percent of total Population
	20 New Asian Heights	Younger singles & couples	18,213	28.3%
	47 Social Networkers	Very young singles & couples	18,342	15.9%
	30 South Asian Society	Younger and middle-aged families	5,801	14.5%
	12 Eat, Play, Love	Younger, urban singles & couples	50,134	13.6%
	61 Came From Away	Middle-aged families	42,920	9.8%
	10 Asian Achievement	Middle-aged & older families	9,556	8.3%
	31 Metro Melting Pot	Middle-aged families	32,673	7.0%
	22 Indieville	Younger singles & couples	16,847	6.0%

Source: Environics Analytics PRIZM segments based on DemoStats estimates

Non-permanent residents in Toronto are more concentrated in certain neighbourhoods

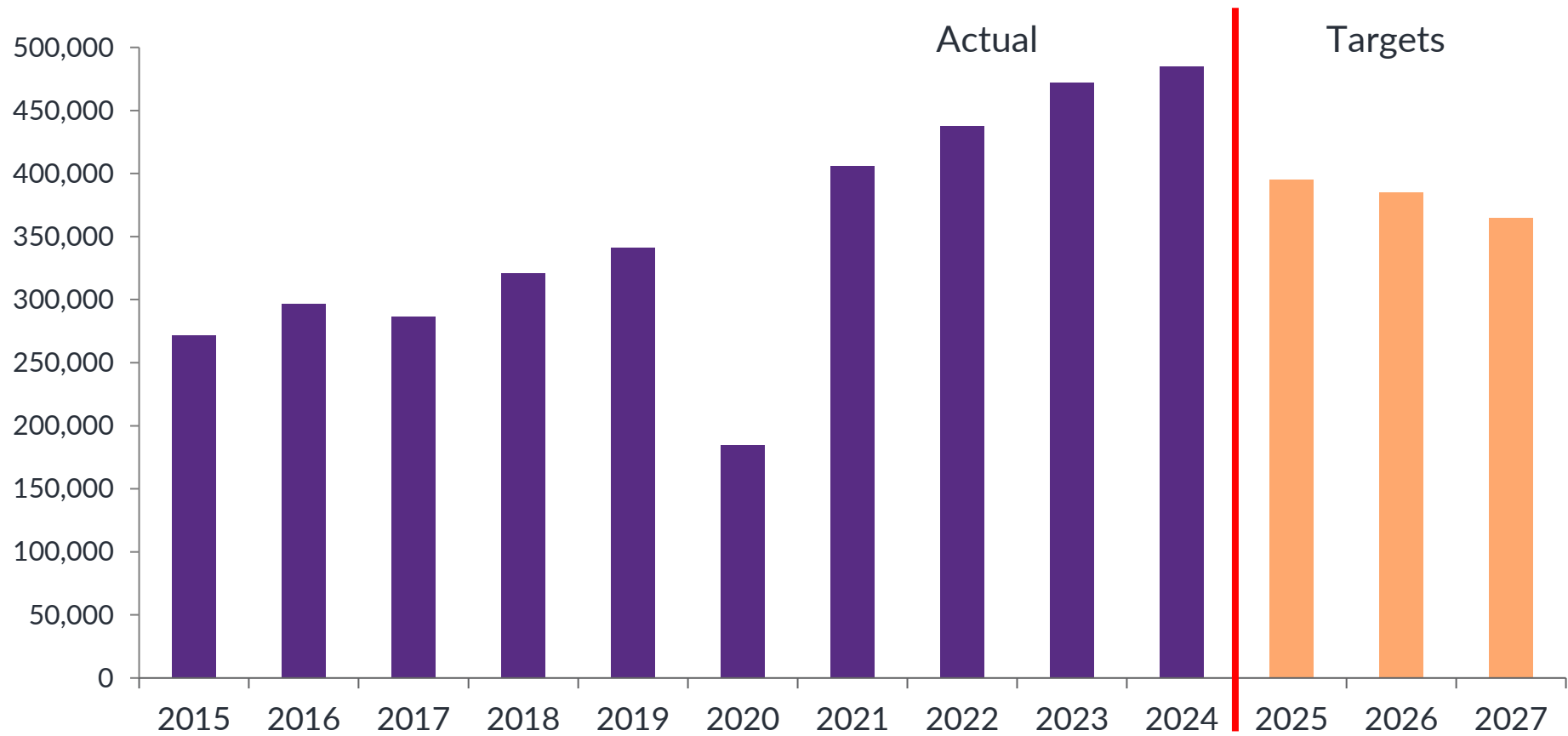


A look at immigration (permanent residents) six months after policy changes



Annual targets for new immigrants have been reduced by 20-25%

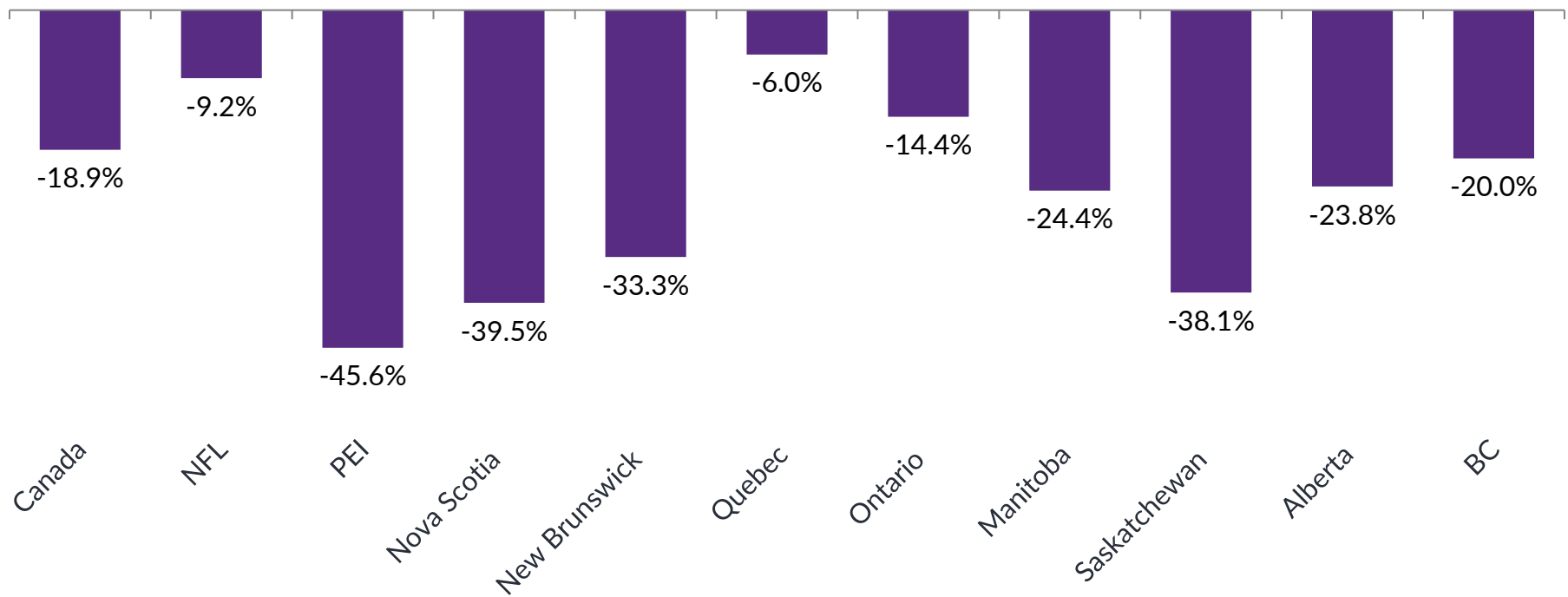
Annual number of new immigrants, Canada



Source: IRCC

First six months of 2025 showed a decline in immigration, but decline varies by province

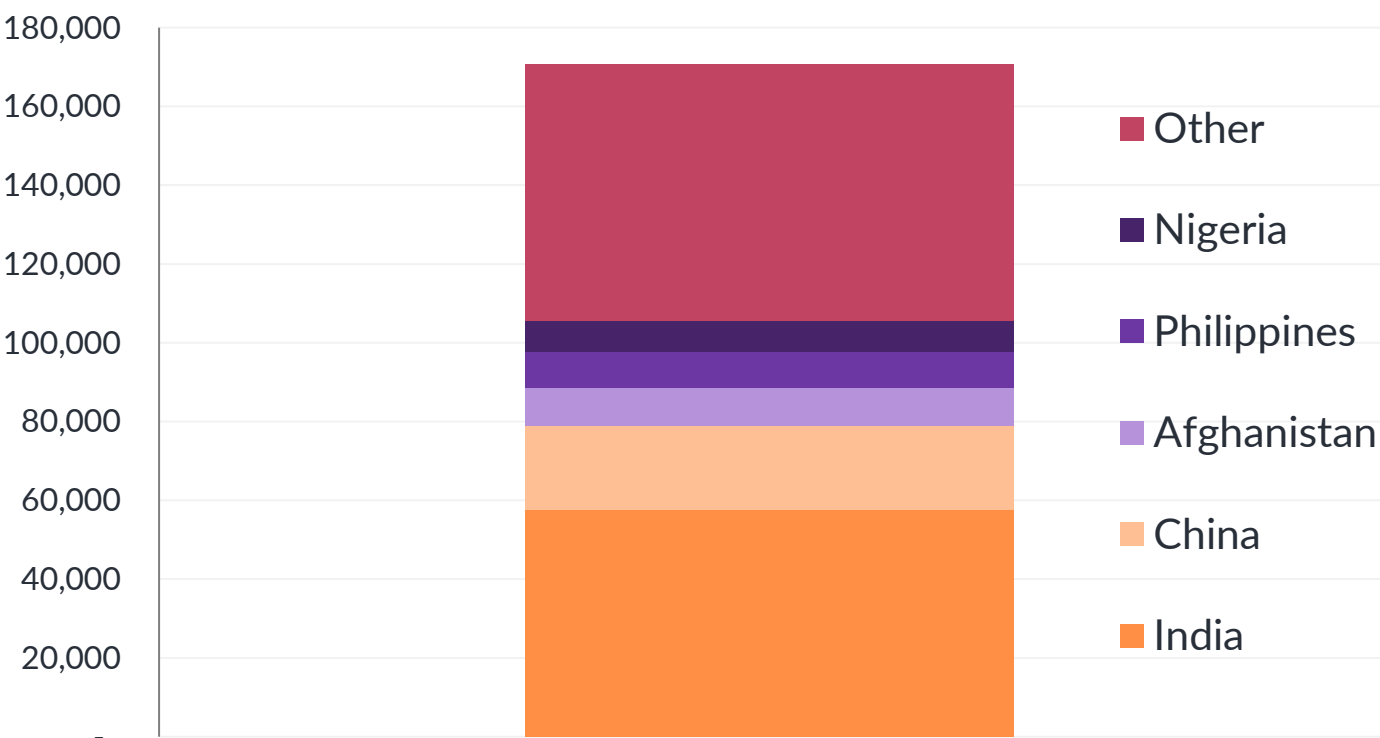
Change in number of permanent residents January-June 2025 compared to a year earlier



Source: Environics Analytics based on IRCC data

For the CMA of Vancouver, India accounted for 58,000 of the 170,000 (34%) recent immigrants, but immigrants came from many different countries.

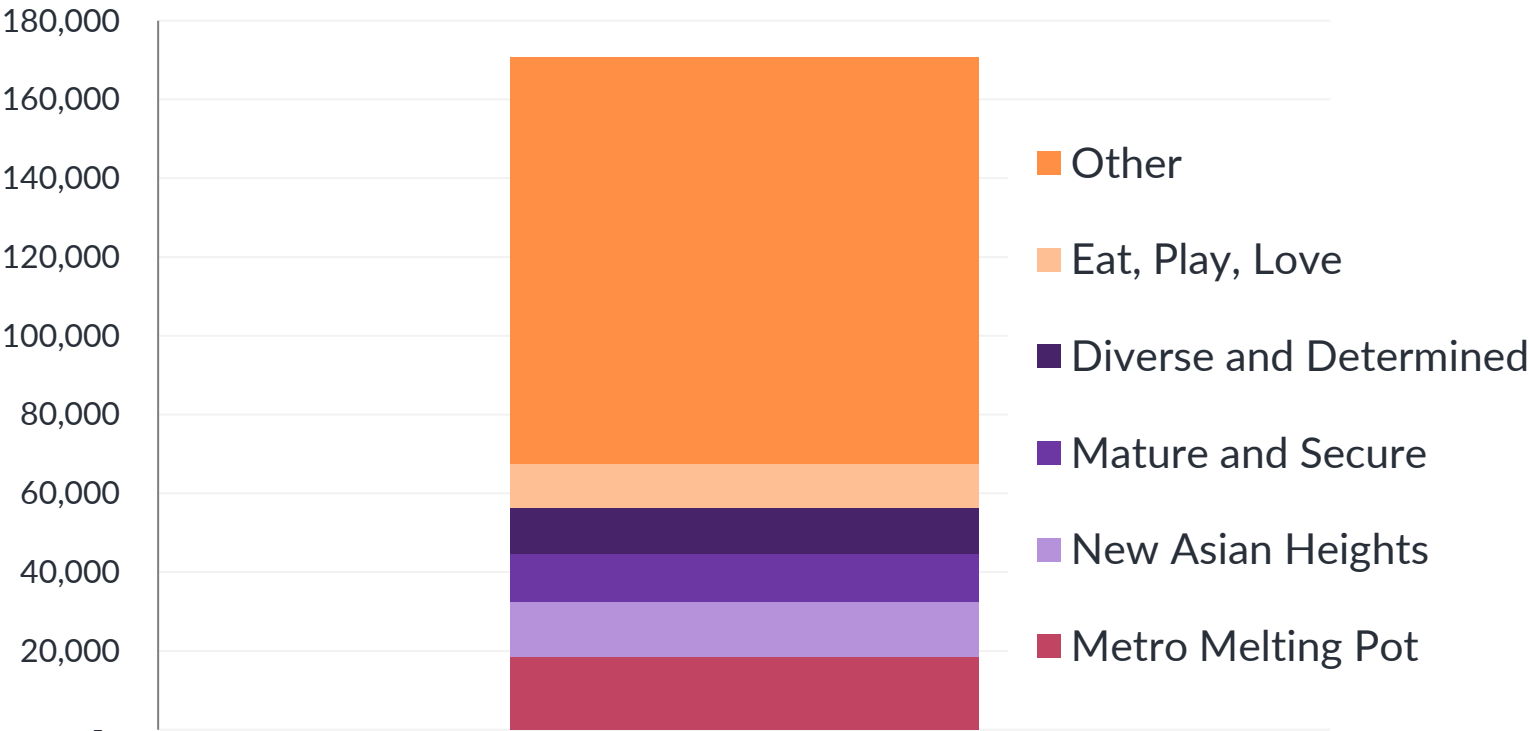
Country of birth of recent immigrants (2020-2025) to Metro Vancouver



Source: Environics Analytics 2025 DemoStats

Recent immigrants to Metro Vancouver settled in many different types of neighbourhoods. Total of 2021-2024

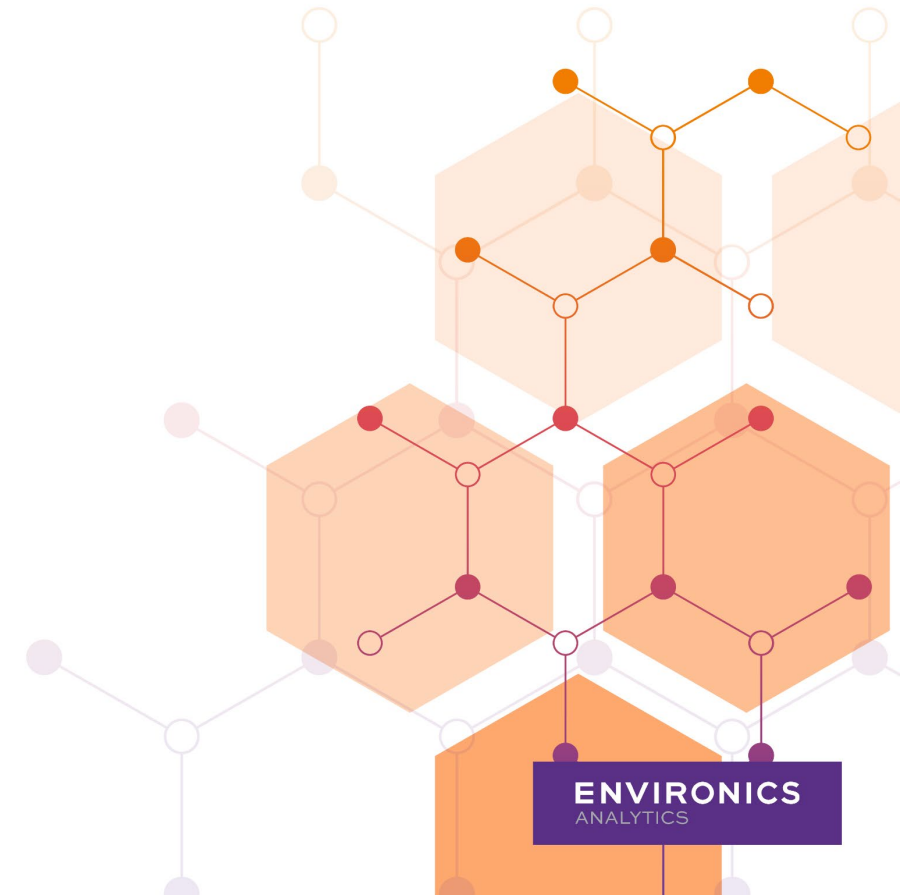
PRIZM segment where recent immigrants settled in Metro Vancouver



* Immigrants who arrived in past 5 years

Source: Environics Analytics 2025 DemoStats

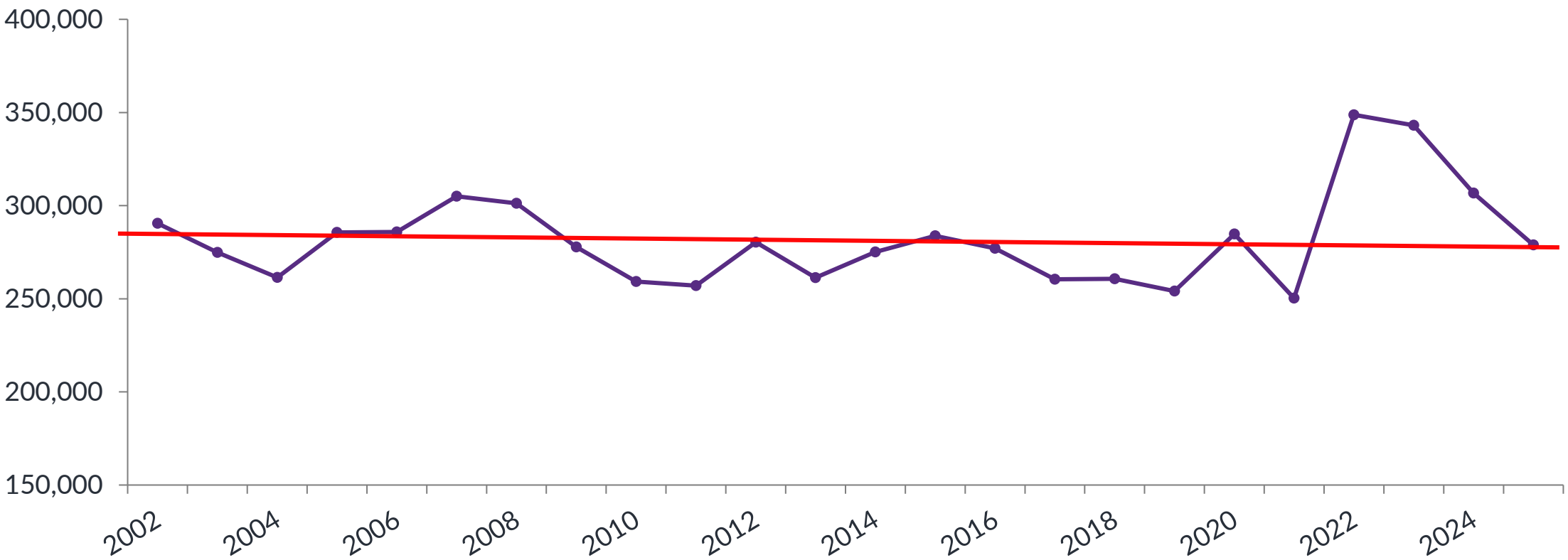
Migration within Canada



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Interprovincial migration has returned to pre-COVID levels

Total Interprovincial Migrants

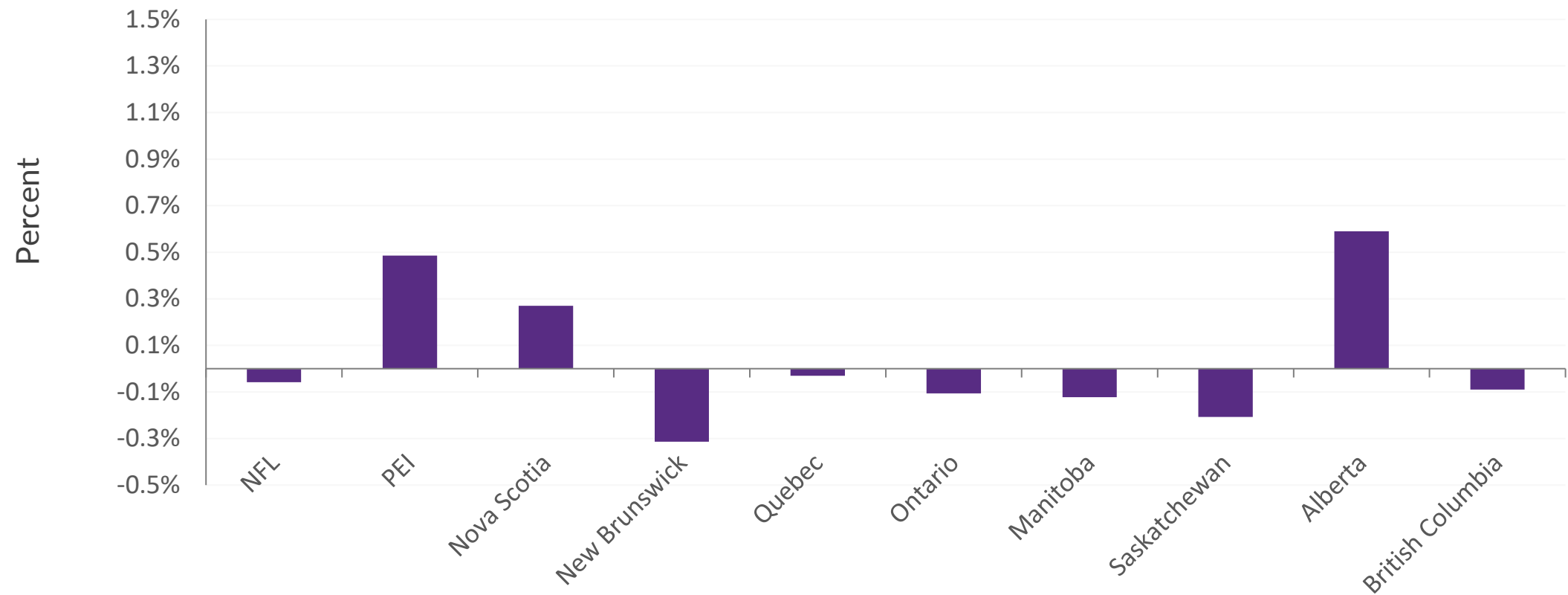


Note: Years refer to 12months ending June; 2025 is an EA estimate

Source: Statistics Canada

Three provinces had positive net interprovincial migration 2024-2025

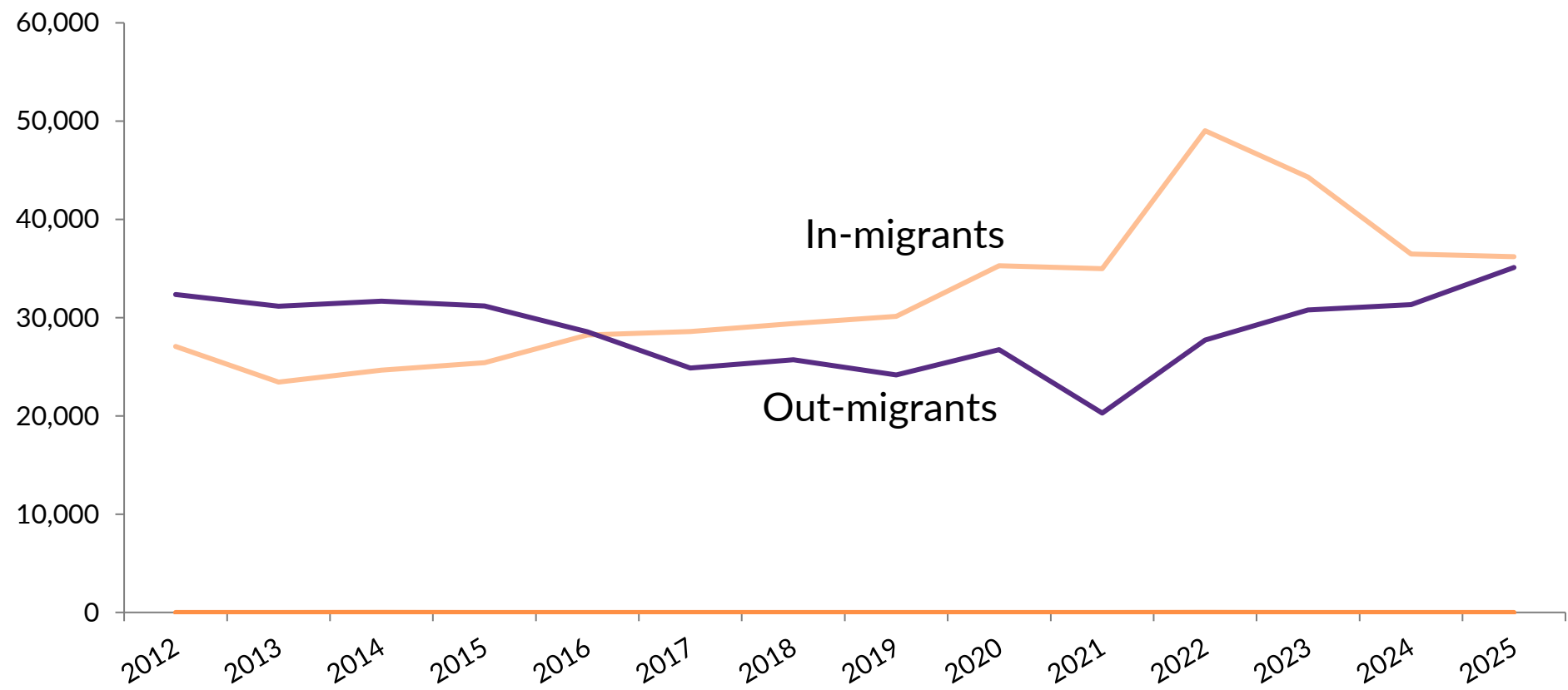
Estimated rate of net interprovincial migration, 2024-2025



Source: Environics Analytics based on first three quarters of Statistics Canada's quarterly population estimates

Interprovincial migration to the Maritimes is reverting to pre-COVID levels

In and out interprovincial migration, Maritime provinces

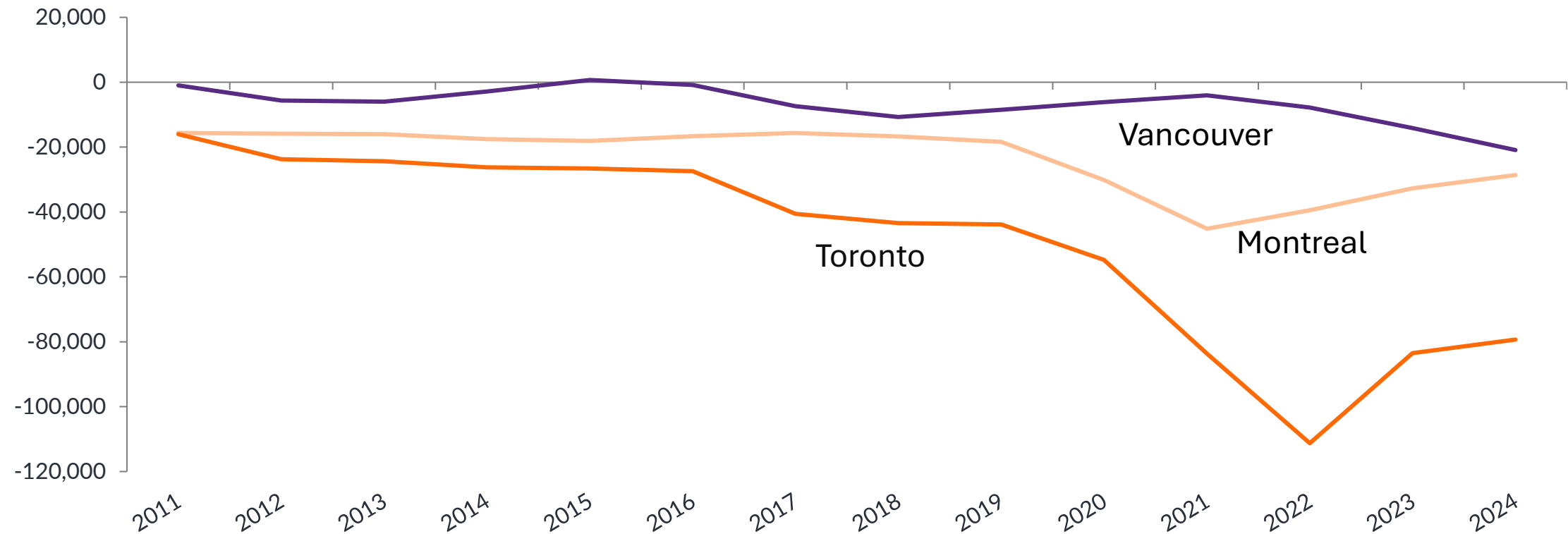


Source: Statistics Canada



Largest urban areas continue to have negative internal migration

Net Internal Migration, 2010 to 2024, CMAs



Source: Statistics Canada

Where Are Out-Migrants Going?

Top 5 destinations for out-migration from Toronto, Montreal and Vancouver CMAs, 2021-23

Toronto CMA	Montreal CMA	Vancouver CMA
Oshawa	Non CMA-CA (Quebec)	Non CMA-CA (British Columbia)
Hamilton	Ottawa--Gatineau	Abbotsford--Mission
Non CMA-CA (Ontario)	Québec	Toronto
Kitchener—Cambridge – Waterloo	Sherbrooke	Calgary
Barrie	Granby	Victoria

Source: Statistics Canada



MoverStats shows who is moving out of Toronto



Top 5 PRIZM segments of those moving out of Toronto CMA, 2024

31	Metro melting Pot	Middle-aged families
15	South Asian Entrepreneurs	Large diverse families
61	Came from Away	Middle-aged families
18	Multicultural Corners	Large diverse families
12	Eat, play, love	Very young singles and couples

Source: Environics Analytics, Custom data from MoverStats



Fastest growth smaller centres differ in age and wealth

20 fastest growing smaller urban areas, 2023-24

Younger In-Migrants		Medium Age In-Migrants		Older In-migrants	
(under 35% aged 45+)		(35-39% aged 45+)		(40% or more aged 45+)	
Liquid Asset Index		Liquid Asset Index		Liquid Asset Index	
Centre Wellington	129	High River	125	Collingwood	171
Sylvan Lake	112	Owen Sound	109	Parksville	169
Tillsonburg	110	Strathmore	93	Courtenay	128
Cranbrook	102	Powell River	90	Wasaga Beach	89
Port Alberni	76	Joliette	75	Midland	88
Salaberry-de-Valleyfield	60	Cowansville	64	Sainte-Agathe-des-Monts	85

Index Colours:
At least 10% over/under average (100)

Source: Statistics Canada migration data and Environics Analytics WealthScapes



Summary

- ✓ The changes in government policies on international migration are starting to be reflected in declines in the number of immigrants and non-permanent residents
- ✓ Low growth, and possible small declines, in population are expected in most large and medium sized urban areas for the next 2-3 years before growth returns to pre-COVID levels
- ✓ The impact of lower population growth will vary across regions and neighbourhoods
- ✓ Alberta is expected to continue to lead in population growth and growth in the Maritimes is expected to return to pre-COVID levels
- ✓ Growth is expected to continue in some smaller urban areas, much of it a result of movement out of large urban areas, in part due to retirement patterns and the costs of housing



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