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The Moncton Region in 2040

Population growth planning document

PREPARED BY New Brunswick Multicultural Council

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INTRODUCTION

The Moncton Region in 2040

The primary objective of this report is to show the requirement for population growth in the Moncton Region in the coming years if the area wants to ensure there will be enough workers to meet local needs and to provide talent for new industries to grow. In addition, another objective is to highlight the important role of local leaders in population growth planning and the related work needed to ensure the cities of Moncton and Dieppe, the Town of Riverview and surrounding areas can grow in the years ahead.

The Moncton Region has benefited from robust population growth in recent years due to a combination of attracting people from elsewhere in New Brunswick and a substantial increase in immigration.

For the purposes of this report, population/demographic/industry data for the Moncton Census Metropolitan Area (CMA) area is used (also called the Moncton Region throughout the report). The Moncton CMA includes the cities of Moncton and Dieppe; the Town of Riverview; the villages of Dorchester, Hillsborough, Memramcook and Salisbury; and the parishes of Dorchester, Elgin, Hillsborough, Hopewell, Moncton and Saint-Paul.

Covid-19 Considerations

The Covid-19 pandemic has impacted the economy and population in New Brunswick in a variety of ways. Some of these implications are temporary such as a reduction in demand for certain local goods and services and the impact on public transportation, and some could be more permanent such as working from home. However, the pandemic has not changed the fundamental demographic situation in New Brunswick. Without a significant increase in population attraction, there will not be enough workers to meet workforce demand now and in the future.

The need for a population growth plan

Historically, not much has been done to deliberately grow the population of New Brunswick. The natural population growth rate was strong (far more births than deaths), and more people moved out of the province in a typical year than moved in. Because of this, it was assumed there was no need to proactively attempt to convince people to move to New Brunswick.

For decades almost all of the economic development efforts in New Brunswick involved trying to convince local firms as well as national and international firms to invest in the province. Increasingly, the focus is shifting to addressing growing workforce gaps around the province as a precondition to industry investment.

The municipalities of Moncton, Dieppe and Riverview have been focused on population growth for a number of years. It was among the first regions in Canada to develop a broad-based immigration strategy in 2014 and a follow-up again in 2019. The results have been impressive as the Moncton CMA has been the second fastest growing metropolitan area east of Oshawa for more than two decades.

Sustaining our high-quality health care system and public services

What is the relationship between population growth and the quality of public services in New Brunswick? The answer is simple. We need enough workers paying taxes to ensure there is a large enough tax base to sustainably fund health care and other public services. As shown in Figure 1, people are in the top 'taxpaying' years when they are between the ages of 45 and 54. The average taxpayer aged 65 and older pays 46 percent less income tax than the average taxpayer aged 45-54. This is not a criticism of older New Brunswickers. When they were in their prime taxpaying years, they were making an above-average contribution to tax revenue. As more and more people retire each year, there are not enough young people to take their place in the workforce or to provide the talent for growing industries.

The province needs its urban centres such as the Moncton Region to grow so we can sustainably fund public services and public infrastructure in the years ahead.

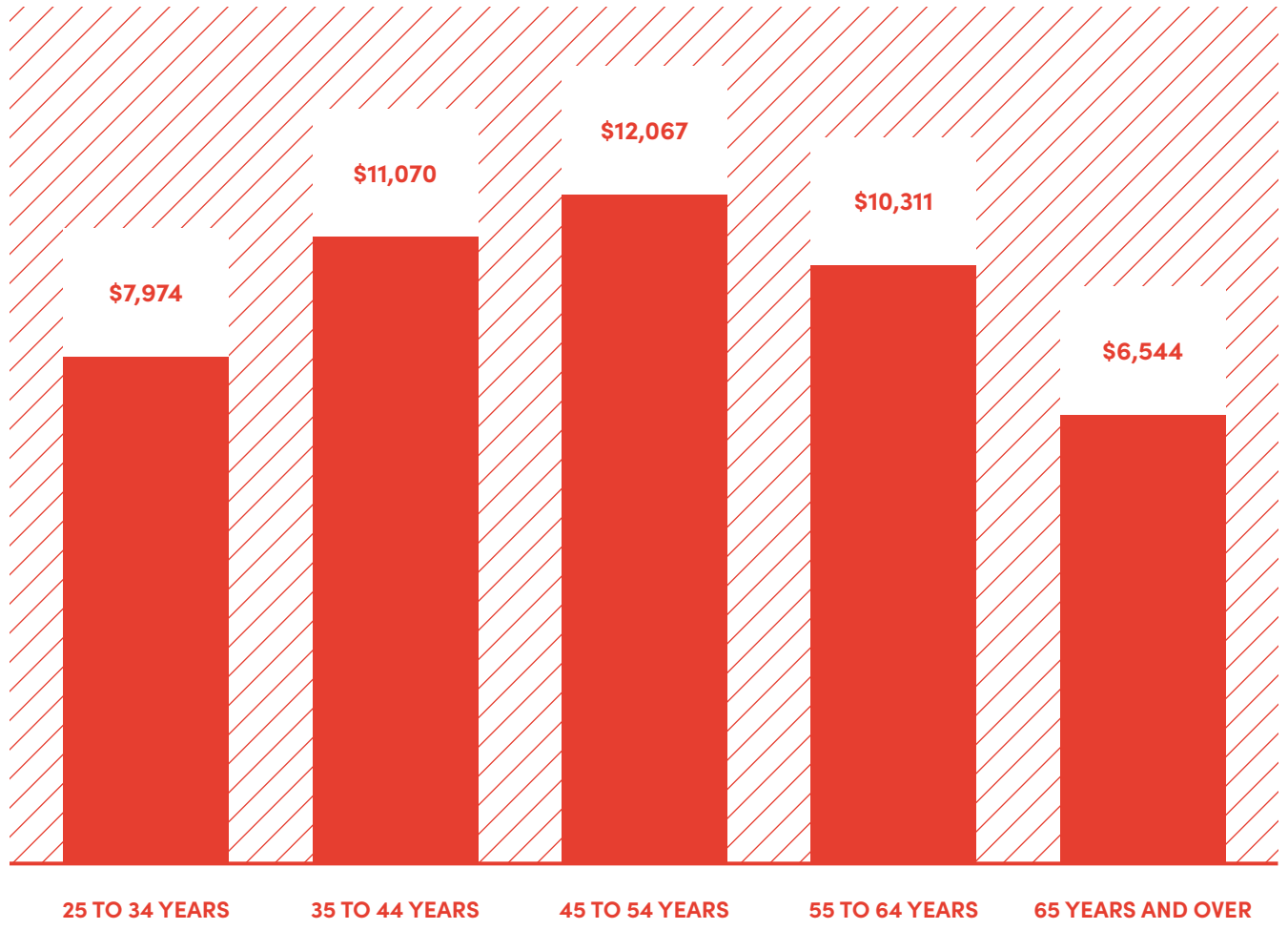


Figure 1: Average income taxes paid by age cohort, New Brunswick (2017)

*New Brunswick (2017). Statistics Canada Table: 11-10-0051-01

THE HEALTH CARE EXAMPLE

The New Brunswick government spent \$3.2 billion on health care and seniors' long-term care in 2016. Just from the impact of aging through 2034, health care and seniors' long-term care spending is likely to push the costs to \$4.4 billion, a \$1.2 billion increase. This does not include the impact of inflation or other upward cost pressures related to prescription drugs, etc.

As a result, the cost of population aging on the health care system could result in provincial government spending on health care and seniors' long-term care rising from 35 percent of the budget in 2016 to 49 percent by 2034.

To put this in perspective, \$1.2 billion is more than the New Brunswick government spends each year on the entire K-12 education budget. It is equivalent to nearly double the amount the government spends on post-secondary education and training and five times as much as we spend on public safety. It is also equivalent to 3.5 times as much as the annual Transportation and Infrastructure department budget.

Growing the population in New Brunswick and ensuring we have a growing workforce alone will not solve this issue, but it will go a long way to help. Attracting young migrants to New Brunswick:

- Will ensure there are enough workers to meet the demands of the economy around the province and provide workers for future growth.
- Will not significantly burden the health care system.
- Will help ensure there is enough tax revenue to sustainably fund public services and public infrastructure investment.

Sustaining our K-12 school system

The primary purpose of the current focus on population growth around New Brunswick is to ensure workforce demand can be addressed for the foreseeable future to support both 'replacement' workforce demand as people retire and 'new' demand as industries and companies grow.

However, there are many secondary benefits to attracting people to the region. More population means more demand for local business owners. It means more tax revenue for local governments. It also means more young people to populate the province's K-12 education system to ensure workforce needs can be addressed for future generations.

As shown in Figure 2, all counties around the province have seen a reduction in the population between 0 and 19 years of age in the past 30 years, with the exception of Westmorland County. Most counties have seen a substantial reduction, with 10 counties witnessing a 30 percent decline or more. This has led to school closures, consolidations and a number of additional challenges related to the provision of public education around the province.

In other words, just as we need a larger K-12 talent pipeline to address the increasing retirements from the workforce, the local K-12 system is turning out ever fewer graduates. And, according to Statistics Canada, the population under the age of 20 across New Brunswick is forecast to decline by 11 percent more by 2034.

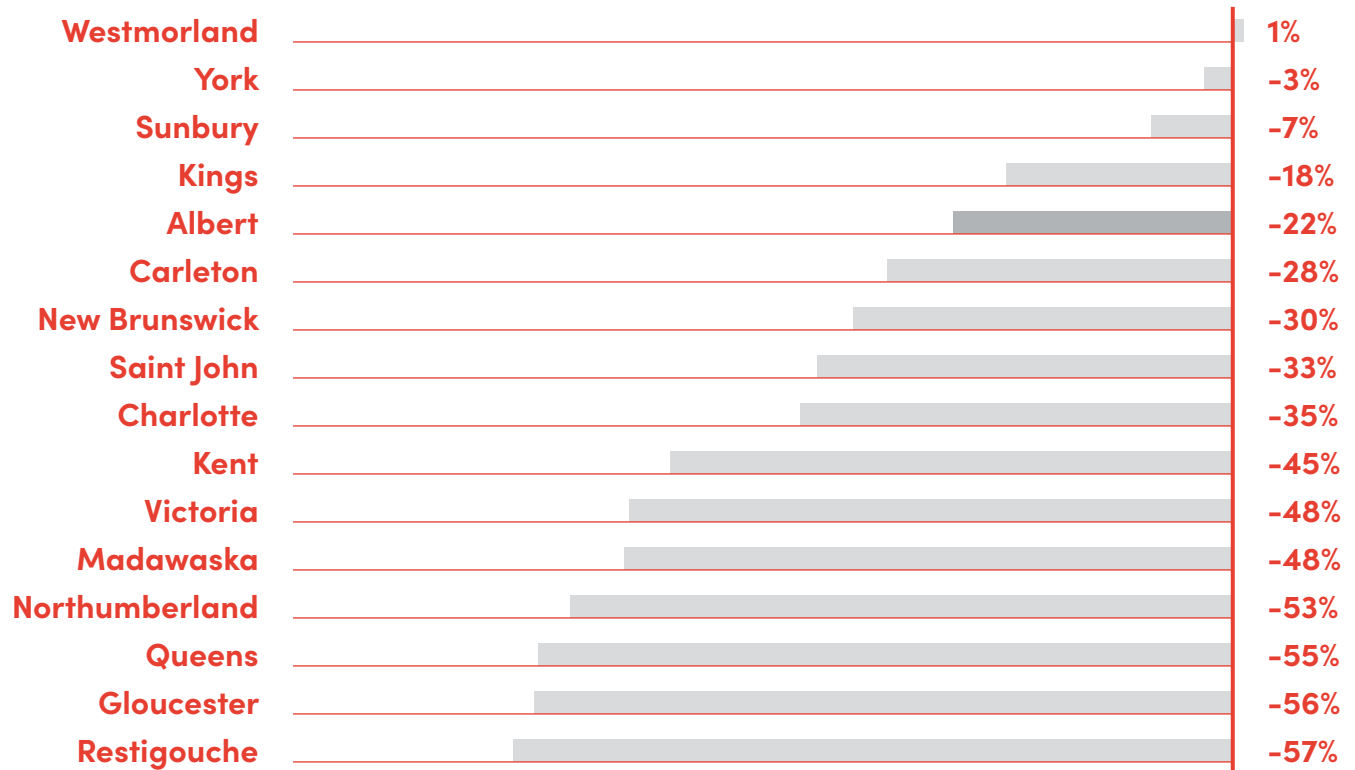


Figure 2: Percentage change in the 0-19 population (1988 – 2018), by county

Source: Statistics Canada.

Immigration and the New Brunswick K-12 student population: A model

If New Brunswick continues to attract young immigrants to the province, it will help address the decline in the K-12 student population and, indeed, lead to an increase in that population. We could see a repopulation of schools across the province ensuring we have a large potential workforce in the 2030s and 2040s.

The example below is based on a significant increase in immigration in the coming years which would boost the number of immigrant students (and international students¹) in 2019-20 from 6,700 to more than 19,800 by 2030-31.

Model assumptions:

- The baseline immigrant/international student enrolment K-12 is 6,700 (in 2019/2020).
- New immigrants (all age groups): 5,000 in 2019-20 rising to 7,500 by 2023-24 and 10 percent per year afterward.
- The immigrant retention rate will be 85%.

¹ New Brunswick attracts hundreds of international students into its K-12 system each year through Atlantic Education International and other initiatives.

- 22 percent of all new immigrants will be K-12 aged (this is consistent with current levels).
- Immigrant female fertility rate: 2.0 children per female.

Based on these assumptions, the impact of attracting immigrants on the K-12 education system is shown in Figure 3. The number of born-in-Canada (excluding immigrants) K-12 students continues to decline from 90,500 in 2019-2020 to 83,900 by 2029-30, but this decline is more than offset by the newcomer population. Immigrants and international student numbers rise to more than 13,800 by 2024-25 and to 19,840 by 2029-30. This is just one growth scenario, but it is a realistic vision for immigration and how it will impact the K-12 education system.

It is important to note that in the Moncton Region, the significant growth in immigration has helped renew the K-12 student population.

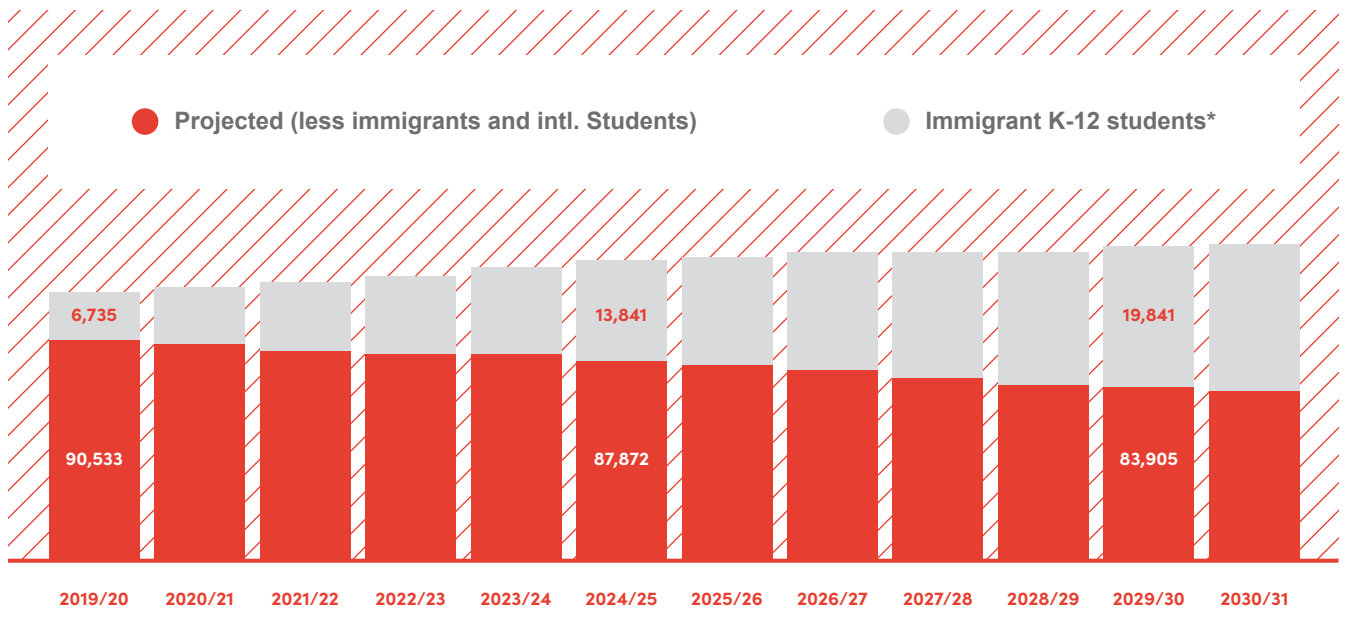


Figure 3: Forecasted impact of immigrants on K-12 student population in New Brunswick
Sources: Baseline numbers for 2019-20 provided by GNB. Forecast model based on the assumptions shown in Appendix A.

Strong local communities = strong provincial economy

If the Moncton Region continues to grow and support workforce demand (replacement and future growth demand), it will help boost the provincial economy and support the goal of sustainable public services.

The provincial goal should be for all regions of the province to have an economic growth strategy and corresponding population growth plan. Not all regions have the same growth potential, but all should be proactively working to ensure there is enough population to meet workforce demand in the years ahead.

All communities around New Brunswick should be asking the question Moncton, Dieppe and Riverview asked a number of years ago: What do we want to be as a community in 10 years, or 15 or 20?

The decisions made now will impact the province for decades to come.

The business plan for New Brunswick and local communities

Population growth should not be the only focus of municipal and regional government as there are many other related actions that will be needed to ensure the region can thrive over the next 20 years. This includes efforts to exploit economic development opportunities, attract more entrepreneurs and ensure there is enough housing to meet the needs of a younger, growing population as well as the increasing number of retirees.

THE CASE: LOCAL COMMUNITIES NEED TO GET ENGAGED

Historically, the role of municipal government in New Brunswick was fairly limited to services such as water/sewerage, waste management and public safety. Today, there is a demand for them to get involved in a much wider range of activities including economic development, tourism promotion, people attraction/retention efforts, community marketing and activities meant to boost quality of life (Figure 4).

We need all communities/regions to take more control over their destinies and not just wait for the inevitable population decline and the implications of that decline. There needs to be local/regional population growth as well as economic sustainability plans.

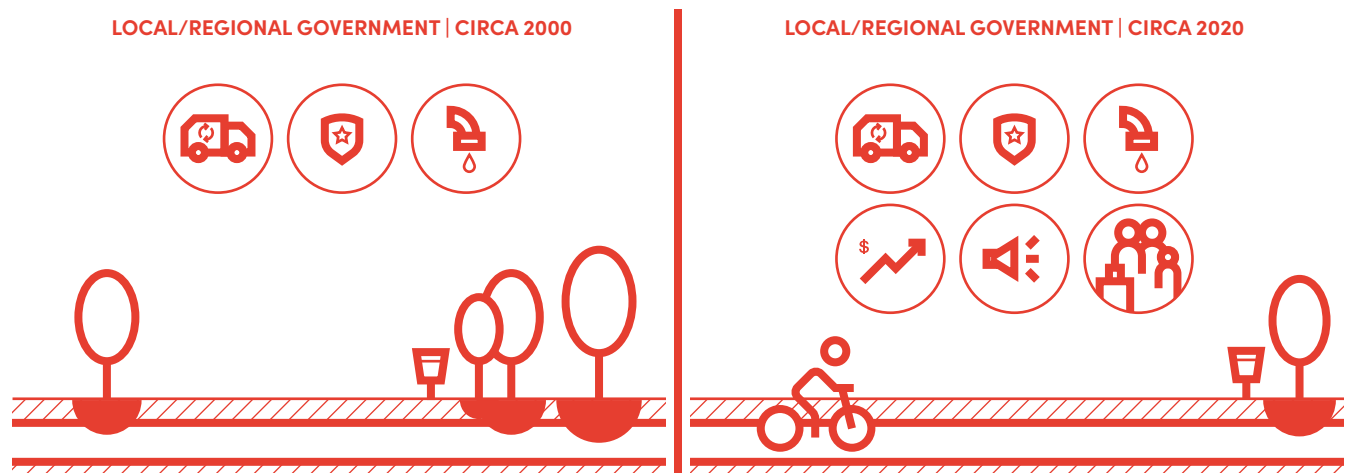


Figure 4: The changing demands on local/regional government

THE GOAL: A STRONGER PARTNERSHIP BETWEEN LOCAL AND PROVINCIAL GOVERNMENT

Empowering local/regional government does not mean less of a role for the provincial government. It does mean a stronger partnership model moving forward. An effective partnership where government partners with local community and business leaders to develop plans to foster economic growth, attract population, ensure there is adequate housing and work collaboratively on other issues that boost quality of life and opportunity.

WHAT DOES A LOCAL 'BUSINESS PLAN' LOOK LIKE?

The municipalities of Moncton, Riverview and Dieppe have a 'business plan' focus. They are focused on economic development, people attraction and on investments in the municipalities that will support growth in the years ahead. The components of a 'business plan' for municipalities include:

- A clear understanding of labour market needs to support workforce exits and accommodate new growth.
- What industries have potential to grow in the future in the region?
- What level of inward population migration do we need to support economic development?
- What are the barriers to attracting new population? (e.g. housing, local support infrastructure, language training, etc.)

Most of all the 'business plan' should be aspirational. It might not be easy to grow a regional economy, but we should make the effort. It is fair to say Moncton, Riverview and Dieppe have an aspirational plan for the future.

Why focus on 2040?

The next two decades represent a critical period in the history of New Brunswick. Since the 1950s, the province has made significant economic progress. The income gap between New Brunswick and the rest of Canada has narrowed. The share of the population below the poverty line has declined significantly. Structural unemployment has dropped to the point that many industries are struggling to find workers. Public infrastructure such as highways, bridges, airports, schools and hospitals are much improved compared to 40-50 years ago.

But the province is at a crossroads. Since 2007 the economy has only grown by 0.5 percent per year after several decades of 2.5 percent growth². It has become clear that a significant demographic shift is the top reason for this weak economic performance.

The year 2040 will be a good year of reflection. If after 20 years we have addressed our demographic issues, grown new industries and made the shift to green energy, we will emerge as a stronger, more prosperous New Brunswick. If we cannot, the next two decades will be a challenging time for the people of New Brunswick as governments are forced to decide which schools to close, which health care services to consolidate or which roads and bridges cannot be serviced anymore.

We are not disconnected from what is happening elsewhere in Canada. Western Canada, particularly Alberta and Saskatchewan, will be dealing with the transition away from oil and gas production. Other provinces will face their own sets of challenges. The ability of the federal government to provide even more funding to pay for public services in New Brunswick will likely be diminished. All of this means now is the time for us to step up and take more control over our destiny.

² Real gross domestic product (GDP) growth.

Where will the new population come from?

The Moncton Region has demonstrated an ability to attract population from elsewhere in the province and, to some extent, elsewhere in Canada although more have been moving out than in over the past few years (negative interprovincial migration).

However, the growing workforce shortage has impacted the rest of New Brunswick and Canada and as a result there will be increasing competition for interprovincial and intraprovincial migration among cities and towns across the country.

Immigration will be key to population growth in the region and across the country in the years ahead.

Across Canada, since 2013, all net growth in the workforce has come from new immigrants. Among those born in Canada, the number participating in the workforce in 2019 was 14.5 million, the same as the 14.5 million back in 2013. The number of landed immigrants participating in the workforce increased by over a million over the same timeframe (a 25 percent growth rate). If New Brunswick had attracted its 'share' of these immigrant workers over the same period, the provincial workforce would have grown rather than decline as it did between 2013 and 2019.

Immigrants will need to be a main focus of any population growth plan for the Moncton Region moving forward.

POPULATION GROWTH IN THE MONCTON REGION THROUGH 2040:

Three Scenarios

The Moncton region is already growing its young population

As of 2020, Statistics Canada estimates there are about 32,500 people aged 0 to 19 living in the Moncton CMA. Unlike most areas of New Brunswick, the number of people under the age of 20 living in the region has increased over the past decade (up 10%). This represents essentially the maximum number of persons currently living in the region who could join the workforce within the next 20 years. However, the current population profile indicates that only around 85 percent of people aged 15-30 are active in the workforce, so the likely maximum number is closer to 27,500. Based on the 2020 workforce estimates for the region, it is likely around 34,000 people will leave the workforce over the next 20 years through retirements.

As shown in Table 1, this leaves a potential workforce shortage of 6,500 before accounting for any migration. This reiterates the important role that attracting population to the Moncton Region will have if the region is to achieve strong population growth.

TABLE 1: POTENTIAL WORKFORCE SHORTFALL BY 2040, CLOSED LABOUR MARKET, MONCTON CMA

Maximum potential entrants (excluding migration)	+27,500
Forecasted exits	<u>-34,000</u>
Shortfall (before any migration)	-6,500

Summarizing three population growth scenarios

The following table provides three different scenarios for population growth/decline over the next 20 years in the Moncton Region. They are based on assumptions detailed below. The assumption for both growth scenarios is that the incoming population would be predominantly working age. There is a scenario where the Moncton Region attracts considerably more retirees, but that would do nothing to address future workforce needs.

SCENARIO	PROJECTED OUTCOME	IMPLICATIONS
1. Current trajectory	<ul style="list-style-type: none"> Population forecast to increase from 158,700 today to 201,200 by 2040 (a 27% increase). The workforce will increase from 87,700 today to 106,200 by 2040 (an 21% increase). 	<ul style="list-style-type: none"> The local economy will be able to meet workforce demand in the years ahead (both replacement and growth demand). This will strengthen the local economy and tax base.
2. To maintain the current workforce size	<ul style="list-style-type: none"> The population needs to grow to 174,500 by 2040 (+9.9%) – an addition of 15,800. The workforce stays at 87,700. 	<ul style="list-style-type: none"> Only maintaining the current size of the workforce over the next 20 years will likely lead to fewer workers for important export-focused industries as more workers will be required in service industries such as health care, home care and personal care.
3. To grow the workforce by 0.5% per year	<ul style="list-style-type: none"> The population needs to grow to 187,800 by 2040 (+18.3%). The workforce grows to 96,400. 	<ul style="list-style-type: none"> The population will need to grow by a 29,100. This would represent a significant decline in the current trajectory but still a solid growth rate. It would provide additional workforce to meet some level of growth demand.

Methodology: Forecasting population growth

It is challenging to forecast population growth at the local/regional level. The change in population is impacted by several factors including natural population growth (births less deaths), net intraprovincial migration (to and from within the province), net interprovincial migration (to and from other provinces), immigration (from other countries) and emigration (people moving to other countries).

To develop the three population scenarios a model was developed using the following parameters and methodology:

- **Baseline population and workforce data:** 2020 population and workforce levels estimated using Statistics Canada population and workforce tables.
- **Baseline labour market participation:** The labour market participation rate by five-year age cohort from the Census was considered to remain consistent through 2040. The participation rate is the share of the population active in the workforce. In the Moncton Region it ranges from 81 percent of the population aged 20-24 to 87 percent among those aged 35-44 and back down to 21 percent of the population aged 65-69.

- **Baseline population growth forecast:** Statistics Canada prepares population growth forecasts at the provincial level through 2068 for a variety of scenarios. The ‘high growth’ scenario for New Brunswick was used for the 2020-2040 period. However, it was adjusted to reflect the current population breakdown by age group and growth rate in the Moncton CMA.
- It was assumed that most inward population movement over the next 20 years would be people of working age.

Scenario 1: Current population and workforce trend

The Moncton CMA population has been growing at a rate of 1.7 percent per year for the past five years. If that growth rate continues it will lead to both substantial population and workforce growth in the years ahead.

Statistics Canada provides population growth forecasts through 2040, but only at the provincial level. Using the statistics agency’s ‘high-growth’ scenario for the province and adjusting it to align with trends in the Moncton CMA results in an estimate of the baseline population trend over the next 20 years assuming similar rates of intra-migration, interprovincial migration and immigration.

Based on this forecast, the population in the Moncton CMA is expected to increase by 27 percent between 2020 and 2040. This is a growth rate slightly below the past five years rate of 1.7 percent, but it accounts for other factors such as an increasing death rate and interprovincial migration.

Even though the population over the age of 70 will increase by 52 percent, there will be enough growth in the younger population to boost the workforce significantly over the 20-year period. The number of people in the workforce is projected to rise by 18,500 or a 23% increase.

TABLE 2: BASELINE, CURRENT TRAJECTORY OF THE MONCTON REGION POPULATION AND WORKFORCE

	2020	2040	CUMULATIVE % CHANGE	AVG. ANNUAL % CHANGE	# CHANGE
Population	158,700	201,200	+27%	+1.3%	+42,500
Workforce	87,700	106,200	+21%	+1.1%	+18,500

See Appendix A for sources and methodology.

IMPLICATIONS OF SCENARIO #1

It will be challenging to sustain a 1.3 percent annual growth rate for the next two decades but the region has proven its ability to sustain population growth. Between 2007 and 2020, the Moncton CMA population increased by an annual average 1.4 percent. The implications of Scenario #1 are clear. At current growth rates, the Moncton Region will continue to be one of the fastest growing urban centres east of Toronto.

Scenario 2: Population growth to maintain the current workforce size

Unlike most regions of New Brunswick, to maintain the current workforce size in the Moncton Region through 2040 will require a decrease in the annual population growth rate to around 0.5 percent per year. It will still require considerable population growth (+15,800 over the 20 years) but well below the historical growth rate in the Moncton CMA for over three decades.

TABLE 3: POPULATION GROWTH TO MAINTAIN THE CURRENT WORKFORCE SIZE

	2020	2040	CUMULATIVE % CHANGE	AVG. ANNUAL % CHANGE	# CHANGE
Population	158,700	174,500	+9.9%	+0.5%	+15,800
Workforce	87,700	87,700	0.0%	0.0%	0

See Appendix A for sources and methodology.

IMPLICATIONS OF SCENARIO #2

Maintaining the workforce at the current level over the next 20 years could lead to fewer workers for important export-focused industries as more workers would be needed in industries such as health care, home care and personal services. It would still require a 9.9 percent population growth.

Scenario 3: Population growth to expand the workforce by 0.5% per year

The third scenario involves only modest workforce growth of an average 0.5 percent per year. This would be below the baseline current trajectory growth rate of 1.1 percent per year.

TABLE 4: POPULATION GROWTH REQUIRED TO EXPAND THE WORKFORCE

	2020	2040	CUMULATIVE % CHANGE	AVG. ANNUAL % CHANGE	# CHANGE
Population	158,700	187,800	+18.3%	+0.9%	+29,100
Workforce	87,700	96,400	+10.0%	+0.5%	+8,700

See Appendix A for sources and methodology.

IMPLICATIONS OF SCENARIO #3

A growing pool of workers in the Moncton Region would mean more potential entrepreneurs and the workforce needed to take advantage of new opportunities in tourism, information technologies and business services. However, it would represent a step down from the current workforce growth trajectory.

The Moncton region growth plan



There are a few considerations for Moncton, Dieppe and Riverview as they look to sustain a strong growth rate into the future.

Attracting and retaining population

The Moncton CMA has been attracting immigrants at a rate well above-average for urban centres in Atlantic Canada for most of the decade. In the past five years, the region has averaged 1,400 immigrants per year according to Statistics Canada. This represents an immigration rate of around 90 per 10,000 population.

The Moncton CMA has been attracting considerably less population from elsewhere in New Brunswick over the past 20 years. Between 2010/2011 and 2019/2020 the annual net inflow dropped from 1,140 to 430. Over the same period the natural population growth rate (births minus deaths) dropped from 147 births per 100 deaths to just 105 births per 100 deaths. If these two trends continue, it will mean the Moncton CMA will be more reliant on immigration and net interprovincial migration to grow its population in the years ahead.

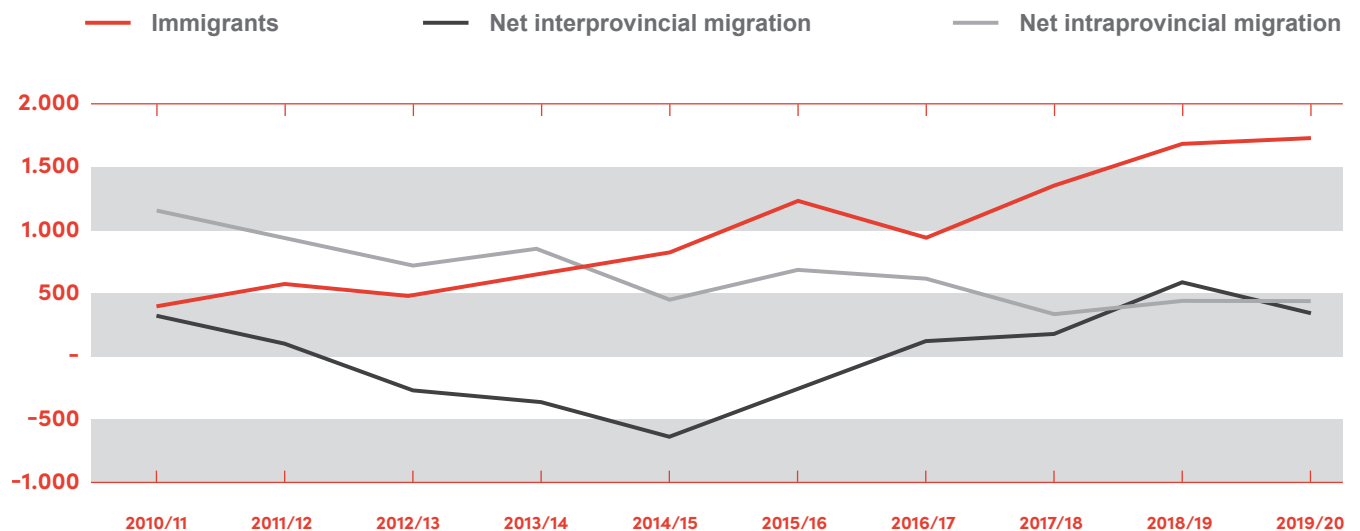


Figure 5: Population attraction by component and year, Moncton CMA

Source: Statistics Canada Table: 17-10-0136-01.

Ensuring there is a focused effort at retention

In the long run, the goal is to retain as many newcomers as possible in the community. This means integration into business and social networks, local schools, churches, sports and recreation organizations. Ultimately, newcomers that build these relationships and develop personal networks and friendships are far more likely to

stay in the community long term. This can be facilitated by settlement agencies as well as a host of other organizations in the region. The Moncton Region has a strong ecosystem of service providers to support immigrants.

Ensuring there is adequate housing

If the region wants to increase its population, it will need far more housing. The reality is that more people are retiring – they are not moving out of the region. Therefore, new population attraction will require more housing options. This new housing will need to be priced at a reasonable level as many of the available jobs are not high-wage jobs. The standard of no more than 30 percent of household income going towards shelter costs should be the objective.

In addition, more rental housing options are important. Many newcomers prefer to rent rather than buy when they first settle in the community. This puts smaller communities at a disadvantage compared to larger urban centres, and it needs to be a focus.

The Moncton Region has a good track record of adapting its housing construction based on changes in the structure of the economy. In the late 1980s and 1990s as the economy shifted more towards younger families and workers in services industries, the housing market shifted to more duplexes and modestly priced single-family dwellings. Now as the area is attracting more immigration, the shift is towards more rental housing – which is ideal for immigrants as many do not want to purchase a house when they first settle here. However, it is important new housing developments are aligned with demand relative to income levels and family structure.

Conclusion

This is an exciting time for New Brunswick and for the Moncton Region. The coming years represent a great opportunity for communities across the province to reinvent themselves by developing new industries and attracting new population.

There are no fundamental reasons why the Moncton Region cannot maintain a strong population growth rate through 2040. The three municipalities are well positioned but need to ensure there is adequate housing and support systems in place to support the newcomer population.

After more than a decade of virtually no population growth, since 2016, the overall population in New Brunswick has started to grow again adding 26,000 people in the past five years. This is good but as a province we need to do better. If the Moncton Region continues to do its part, it will help bolster the outlook for the province overall through 2040.

APPENDIX A:

Sources and Methodology

Population projections for New Brunswick

Source: Statistics Canada. Population Projections for Canada, Provinces and Territories, 2018 to 2068

Population values: Table 17-10-0057-01

Components of growth: Table 17-10-0058-01

Recent population trends

Source: Statistics Canada Table: 17-10-0139-01

Components of population growth, annual

Source: Statistics Canada Tables 17-10-0140-01 and 17-10-0136-01.

New Brunswick K-12 education enrolment forecast

Model assumptions:

- The immigrant/international student baseline population (2018-2019): According to Statistics Canada there were approximately 4,500 immigrants and non-permanent residents enrolled in New Brunswick K-12 education in 2015-2016 (or 4.6 percent of the total student population). This number likely understates the impact of immigration on K-12 enrolment as students born to immigrant parents after arriving here are not included in the total. The timing of the Census could also impact the non-permanent resident numbers. Since the 2015-2016 school year, another 3,900 K-12 age students have arrived in New Brunswick. The model assumes grade 10, 11 and 12 immigrant students since the 2015-2016 school year have graduated by the first projection year (2020-2021).
- Immigrant retention: It was assumed that 85 percent of annual immigrants would be retained in New Brunswick.
- Age at arrival: 21 percent of all new immigrants each year arrive school aged (K-12). This is consistent with existing immigration patterns (New Brunswick).
- The immigrant female fertility rate: 2.0 children per female.
- Distribution pattern of new births after arrival: Equal annual distribution of additional births (beyond those arriving as children) over a six-year period after arrival (i.e. assumes some women will start having additional children right away but it will take six years from the year of immigration for all children of the women arriving during the year to be born).

- Age at school entrance: All children will attend school starting at age 5.
- The baseline K-12 student projection:
 - Base - 2018-2019 enrolment numbers (Source: Department of Education and Early Childhood Development)
 - Project future enrolment in subsequent years using Statistics Canada Projection Scenario LG: low-growth forecasts of population growth by age through the forecast period.
 - Excludes the forecasted new immigrant student population starting in 2020-2021. It was assumed that the age distribution (aged 5 to 17) would be the same each year for new immigrant cohorts each year through the forecast period.
- The model includes an estimate of 700 international students per year.

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