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## The Upper Saint John River Valley in 2030

The Role of Immigration to Support a Sustainable Regional Economy

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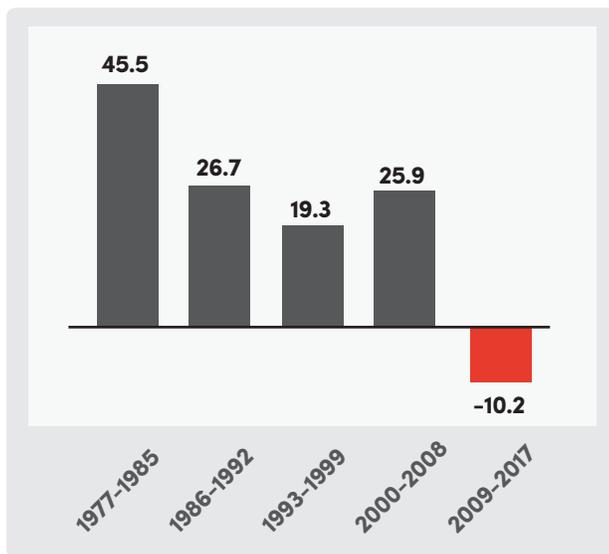
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# Introduction: New Brunswick's Biggest Challenge

Arguably the largest barrier to New Brunswick's future economic growth is the currently declining labour force. The number of people in the province working or looking for work is less now than it was a decade ago.

From the 1970s through to the early 2000s, the provincial labour force expanded, on average, by thousands of people every year.<sup>1</sup> Entrepreneurs and businesses were able to use this expanding pool of workers to create new jobs and expand industries across the province. Despite several recessions along the way, the New Brunswick economy could be counted on to grow, on average, by at least two to three percent per year.

FIGURE 1: TOTAL LABOUR FORCE GROWTH/DECLINE (000S) - NEW BRUNSWICK



Source: Statistics Canada CANSIM Tables 282-0002.

Something changed around 2007. The provincial workforce stopped growing and started to decline for the first time in history.<sup>2</sup> There is no doubt this is a main reason why the average annual economic growth rate has dropped to only 0.5 percent over the past decade.

The factors contributing to this decline in the workforce include the fact we are getting older as a province and more of us are retiring from work and we have fewer students in our primary and secondary schools. As a consequence, employers are finding it harder to attract qualified workers. Addressing the challenge of a declining workforce means the difference between a province that is stagnant and struggling to fund high quality public services and one that is growing and adapting to a rapidly changing, global economy.

## The Upper Saint John River Valley: A Unique and Important Role in the New Brunswick Economy

The Upper Saint John River Valley (defined herein as Carleton and Victoria counties) plays a central role in the New Brunswick economy. Proportionately, the region has more than four times as many people employed in agriculture compared to Canada as a whole. It features above-average manufacturing and transportation sectors and it plays an important role in the province's tourism sector.

Without Carleton and Victoria counties, New Brunswick's agricultural output would be much smaller. Carleton County farmers account for 71 percent of total acres across the province for wheat production, 47 percent for corn, 75 percent for soybeans, and nearly 50 percent of the acres planted with potatoes. Victoria County farmers plant potatoes, oats and barley.

1. Net growth in the labour market - the difference between those joining the workforce and those leaving through migration, retirement, etc.  
2. Since accurate labour market data has been collected.

The region also has an established forest products sector with 50 forestry and logging companies and a number of wood products manufacturing operations. Carleton County has more than twice as many people employed in the transportation sector compared to the country as a whole.

But like the rest of the province, Carleton and Victoria counties are both aging fast. The median age<sup>3</sup> is rising and the number of young people is declining, and this is starting to negatively impact the region. In order to ensure this important part of New Brunswick continues to thrive, there will need to be a robust “talent pipeline” to support the region’s important industries. Otherwise business investment will slowly leave the region and dampen key sectors such as agriculture, food production, transportation and tourism.

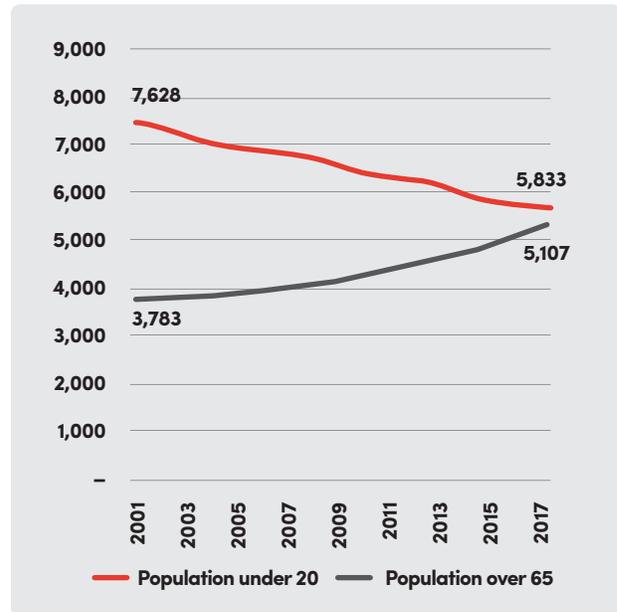
## The Upper Saint John River Valley’s Shrinking Talent Pipeline

In 2001 there were over 200 young people (under the age of 20) living in Carleton County for every 100 people over the age of 65. That year there were over 7,600 people living in Carleton County under the age of 20. This provided a pool of young talent that businesses could draw upon to grow. Now that number has declined to 5,800 (in 2017) – this represents a drop of 24 percent. There are now 114 young people in Carleton County for every 100 people over the age of 65. This is better than many other New Brunswick regions, which have seen a much sharper decline in the number of young people.

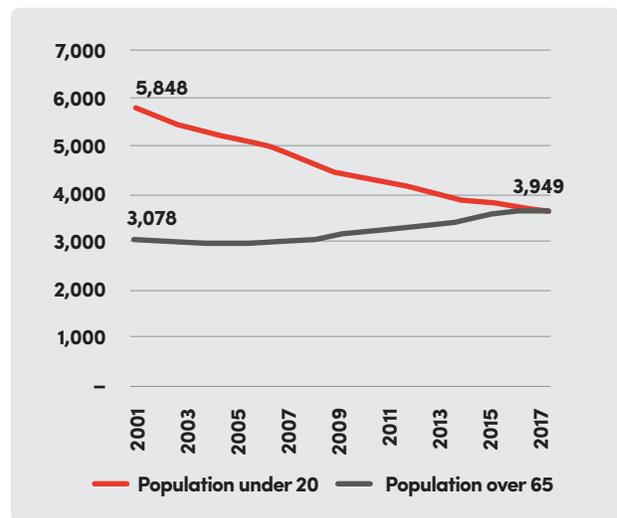
Victoria County has seen a 32 percent decline in its population under the age of 20 over the same time frame. Figure 2 shows the population trend for those under the age of 20 and those over the age of 65 across Carleton and Victoria counties.

**FIGURE 2: POPULATION TREND IN CARLETON AND VICTORIA COUNTIES BY SELECTED AGE GROUP (2001 TO 2017)**

### Carleton County



### Victoria County



Source: Statistics Canada annual population estimates.

3. The age at which one half of the population is younger and the other half is older.

As shown in Table 1, both the two counties and the main municipalities in the region saw their populations decline between 2011 and 2016. Woodstock’s population remained at a similar level in 2016 compared to 2011. The town benefitted from a strong inward migration rate and the attraction of a significant number of immigrants relative to its population size. In 2016 there were 210 immigrants living in the town that were not residents of Canada in 2011. This has helped keep Woodstock’s median age below many of its peer communities in the region.

**TABLE 1: RECENT POPULATION TRENDS – CARLETON AND VICTORIA COUNTY MUNICIPALITIES**

Jurisdiction:	Population, 2016	% change since 2011	Median age
Woodstock	5,228	-0.5%	45.1
Nackawic	941	-10.3%	48.5
Perth-Andover	1,590	-10.6%	51.4
Plaster Rock	1,023	-9.9%	53.4
Carleton	26,220	-3.0%	45.1
Victoria	18,617	-6.5%	48.7
New Brunswick	747,101	-0.5%	45.7
Canada	35,151,728	+5.0%	41.2

Source: Statistics Canada 2016 Census.

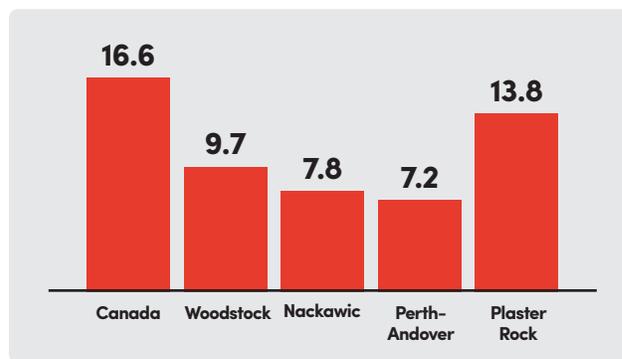
### The Opportunity: Refocusing on Growth

The population trend actually represents a great opportunity. Carleton and Victoria counties feature small, uncongested communities with a lower cost of living. The Town of Woodstock features a cluster of retail, recreation, personal and business services that service the broader region.

Among people who own their home, only 8.8 percent across Carleton County spend 30 percent or more of their income on shelter costs (mortgage, home insurance, etc.) – 47 percent less than the country as a whole (shown in Figure 3). The average cost of an owned dwelling in Woodstock is 63 percent lower than the average across the country.

Attracting people to live and work in Carleton and Victoria counties should be an important focus in the coming years.

**FIGURE 3: % OF OWNER HOUSEHOLDS SPENDING 30% OR MORE OF INCOME ON SHELTER COSTS**



Source: Statistics Canada 2016 Census.

## If the Workforce Starts to Decline in Earnest, What’s at Risk?

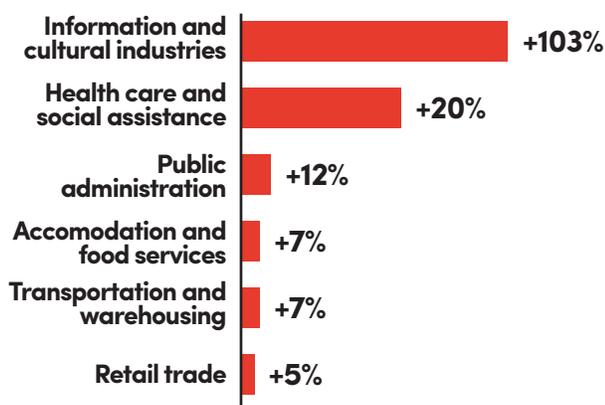
The workforce in the region is starting to tighten. According to Statistics Canada’s Labour Force Survey, Carleton County’s labour force (either working or seeking employment) dropped by four percent between 2006 and 2016. The Victoria County labour force declined by 13 percent. A number of employers are increasingly finding it hard to find qualified workers. The “tightening” of the labour market will directly impact the ability of employers to recruit and retain workers who have the interest and skills to work the jobs on offer.

Tables 2 and 3 show something called the “location quotients” for Carleton and Victoria counties. A location quotient (LQ) provides a simple representation of the industries for which the area has higher or lower concentrations of workers compared to the national economy. Any number above 1.00 means the area has a higher concentration of workers. For example, the manufacturing sector in Carleton County has an LQ value of 1.60 meaning there are proportionally 60 percent more people working in manufacturing in the county compared to Canada as a whole. Carleton County has a higher concentration of workers in agriculture, manufacturing, transportation and warehousing and other services.

Over the past decade, the county has witnessed employment decline in several sectors, including manufacturing, wholesale trade and other services. Manufacturing saw the largest decline shedding 980 jobs between 2006 and 2016. There were several growth sectors as well including information and cultural industries, transportation and warehousing, health care and accommodation and food services.

Carleton County added net jobs between 2006 and 2016 in several sectors, including mining, information and cultural industries, and finance and insurance. Health care had the largest increase by the number of new jobs added, as nearly 500 more people are working in that sector now compared to 2006. Figure 4 shows the percentage change in total employment by growth sector over the decade.

**FIGURE 4: INDUSTRIES RISING IN IMPORTANCE IN CARLETON COUNTY – INCREASE IN TOTAL EMPLOYMENT FROM 2006 TO 2016**



Source: Statistics Canada 2011, 2016 Censuses.

**TABLE 2: EMPLOYMENT BY INDUSTRY AND LOCATION QUOTIENT**

Carleton County

	2016 Labour Force	% Change Since 2006	LQ 2016 CAN = 1.00*
<b>All Industries</b>	<b>13,500</b>	<b>-4%</b>	
11 Agriculture, forestry, fishing and hunting	1,400	-4%	4.32
21 Mining and oil and gas extraction	25	+150%	0.13
22 Utilities	70	-13%	0.70
23 Construction	825	-2%	0.83
31-33 Manufacturing	1,865	-34%	1.60
41 Wholesale trade	430	-24%	0.89

44-45 Retail trade	1,465	+5%	0.95
48-49 Transportation and warehousing	1,375	+7%	2.15
51 Information and cultural industries	305	+103%	1.00
52 Finance and insurance	265	-13%	0.46
53 Real estate and rental and leasing	75	+7%	0.31
54 Professional, scientific and technical services	320	+5%	0.33
56 Administrative and support**	400	-2%	0.68
61 Educational services	805	-1%	0.82
62 Health care and social assistance	1,545	+20%	0.99
71 Arts, entertainment and recreation	105	+5%	0.38
72 Accommodation and food services	735	+7%	0.79
81 Other services (except public administration)	625	-16%	1.05
91 Public administration	655	+12%	0.80

\* Any number above 1.00 means the region has a larger concentration of workers in this sector compared to Canada as a whole.  
 \*\*Includes waste management and remediation services.

Source: Statistics Canada 2016 Census.

Victoria County's economy has struggled more than Carleton County in recent years. Agriculture, forestry, manufacturing, retail trade, transportation and warehousing, educational services, health care and social assistance, accommodation and food services, and other services (except public administration) all shed jobs over the decade between 2006 and 2016. Meanwhile, there was some employment growth in construction, finance and insurance and public administration.

In the years ahead, the main export-focused industries – agriculture, forest products, manufacturing, transportation and tourism – will all face increased challenges recruiting qualified staff. Unless solutions are advanced, the region's economic potential will be held back.

A tightening labour market will also make it harder for the Upper Saint John River Valley to take advantage of new economic opportunities. An aging population will create new employment opportunities in many sectors such as home care, assisted living, recreation and other targeted personal services.

**TABLE 3: EMPLOYMENT BY INDUSTRY AND LOCATION QUOTIENT**

Victoria County

	2016 Labour Force	% Change Since 2006	LQ 2016 CAN = 1.00*
<b>All Industries</b>	<b>8,825</b>	<b>-13%</b>	
11 Agriculture, forestry, fishing and hunting	770	-17%	3.68
21 Mining, quarrying, and oil and gas extraction	65	+117%	0.51
22 Utilities	75	-6%	1.17
23 Construction	815	+5%	1.27
31-33 Manufacturing	955	-35%	1.27
41 Wholesale trade	235	+15%	0.75
44-45 Retail trade	1,055	-19%	1.06
48-49 Transportation and warehousing	575	-9%	1.39
51 Information and cultural industries	70	+100%	0.35
52 Finance and insurance	225	+45%	0.60
53 Real estate and rental and leasing	65	+8%	0.41
54 Professional, scientific and technical services	225	-21%	0.36
56 Administrative and support**	205	-9%	0.54
61 Educational services	590	-15%	0.93
62 Health care and social assistance	1,200	-4%	1.19
71 Arts, entertainment and recreation	110	-15%	0.61
72 Accommodation and food services	475	-32%	0.79
81 Other services (except public administration)	375	-40%	0.98
91 Public administration	515	+37%	0.97

\* Any number above 1.00 means the region has a larger concentration of workers in this sector compared to Canada as a whole.

\*\*Includes waste management and remediation services.

Source: Statistics Canada 2016 Census.

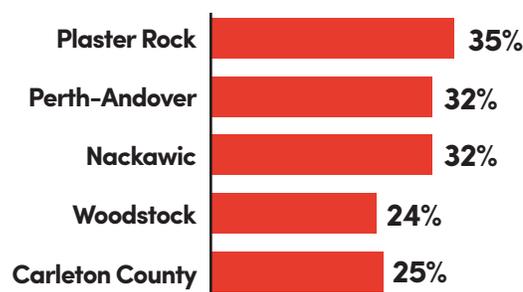
**Woodstock: Regional Services Hub**

The Town of Woodstock has become an important services hub for the Upper Saint John River Valley. There are nearly 300 businesses in the town (with employees), including 59 in retail trade, 22 in accommodation and food services, 22 in personal services, 32 providing professional services, and 18 in finance and insurance. The town is also an employment hub for the wider region. Only 36 percent of people working in the town actually live in Woodstock.<sup>4</sup> The rest commute in from other communities in the broader region.

**A Significant Number of Workers are Heading towards Retirement**

The pace of workers heading into retirement in Carleton and Victoria counties is quickening. Across Carleton County there are over 3,400 workers over the age of 55. In Victoria County, 28 percent of all workers are over the age of 55 (Figure 5). This wave of potential retirees points to an even tighter labour market in the coming years. Plaster Rock has one of the largest shares of its workforce over the age of 55, at 35 percent of all workers.

**FIGURE 5: SHARE OF THE WORKFORCE AGED 55 AND OLDER**



Source: Statistics Canada 2016 Census.

4. Among those with a usual place of work. Source: Statistics Canada 2016 Census.

## Why are Young People Still Leaving?

As discussed above, the number of young people in Carleton and Victoria counties has been in decline. Each year a number of young people from the region move to other parts of Canada. Why do young people leave, even as employers in many industries including tourism, manufacturing and retail services, are struggling to find workers? Young people leave for a variety of reasons. Some leave to pursue post-secondary education. Others leave for a career opportunity not available in their home town. Some just want to see more of the world and experience other places.

### The Opportunity: Focus on Retaining and Attracting Young Workers

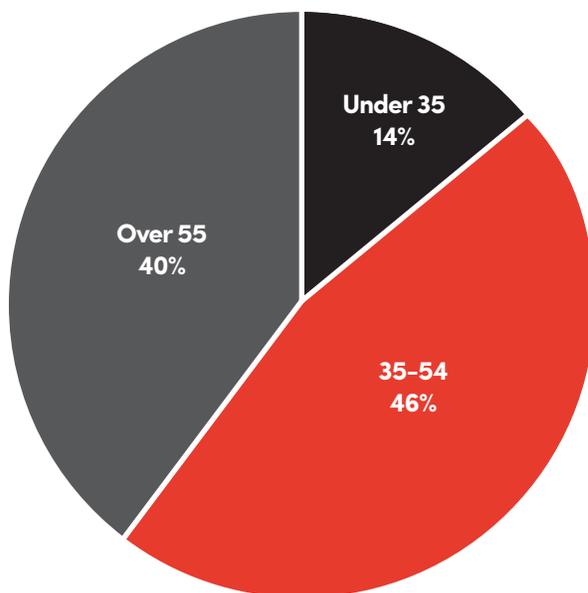
We need to ensure that young people understand the career opportunities on offer at home in the Upper Saint John River Valley and make informed choices about training and/or post-secondary education. We also need to attract some of them back once they have left to pursue education or other opportunities, as well as attract young workers from other parts of Canada and around the world to fill gaps in the local labour market.

## The Upper Saint John River Valley's Aging Entrepreneurs

New Brunswick's entrepreneurs and small business owners are also getting older. In Carleton County, 40 percent of everyone self-employed is over the age of 55 (Figure 6). Over 1,000 self-employed persons in Carleton and Victoria counties are over the age of 55 and heading towards retirement.

This could be a serious challenge for the economy in the Carleton and Victoria counties. As these small business owners look to retire, and if there is no one to take their place, the business could close and the economic value from that business could shift to another jurisdiction. It could also impact the province's export-oriented industries such as forestry, agriculture, tourism and other natural resources development, where many of these small businesses are active.

FIGURE 6: SELF-EMPLOYED BY AGE GROUP  
Carleton County



Source: Statistics Canada 2016 Census.

### The Opportunity: Incubating a New Generation of Entrepreneurs

This challenge represents a very good opportunity. If we can attract young people and newcomers into entrepreneurial ventures, it will provide a new generation of entrepreneurs for the future in Carleton and Victoria counties.

## Looking Towards the Future: Sustaining High Quality Public Services

There is a direct relationship between economic growth and provincial and local government capacity to provide high quality public services and public infrastructure such as roads, schools and hospitals. In the past decade, provincial government debt has more than doubled and is now more than \$43,000 for every household in New Brunswick.<sup>5</sup> One of the reasons the debt has grown so fast is the lack of economic growth and the shrinking labour force.

5. Source: RBC Economics Provincial Fiscal Tables (November 2017).

A growing economy and population leads to a virtuous cycle of public investment in services and infrastructure. A declining economy can lead to a reduction in public spending and exacerbate an already weak situation.

## Retirement Communities: A Viable Economic Development Strategy?

The community of Elliot Lake in Ontario provides a warning for those who believe that transforming their municipality into essentially a retirement community is a viable economic development strategy. Elliot Lake is located in northern Ontario between the cities of Sudbury and Sault Ste. Marie. The community was established in the 1950s to support uranium mining. In the 1990s, the last mine in the area closed and the local government decided its new economic development strategy would be to promote the area as a great place to retire. Elliot Lake is facing one of the most uncertain futures among municipalities across Canada. Its population has declined from a high of more than 25,000 to just over 10,000 in 2016. From 2011 to 2016 it suffered the steepest population decline of any municipality in Ontario.

The median age in Elliot Lake is 59 and it has the lowest median income of any municipality in the province.<sup>6</sup> It is struggling to attract workers into its mostly service industries. These economic challenges are spilling over into the quality and sustainability of government services.

### Older New Brunswickers are Not the Problem!

New Brunswickers of all ages contribute to the wellbeing of their communities and their province by working hard, paying taxes and giving back through volunteer and charitable activities.

As New Brunswickers retire and move into a new stage in life it creates economic opportunities in health care, personal services, recreation, food services and tourism industries. But these industries should not be considered a replacement for the Upper Saint John River Valley's core economic activity in agriculture, natural resources development, manufacturing and other export-oriented industries.

6. Among municipalities with a minimum of 5,000 residents.

7. Periodically, some firms use the Temporary Foreign Worker program, but these individuals are not considered immigrants.

8. At the time of the Census there were 210 people living in Woodstock who arrived in Canada between 2011 and 2016.

## The Role of Immigration

What will be the role of economic immigration to support the Upper Saint John River Valley in the years ahead? In general, the region has not attracted many immigrants in recent years.<sup>7</sup> As mentioned above, the Town of Woodstock is an exception as it has attracted more than 200 to live in the community between 2011 and 2016.<sup>8</sup>

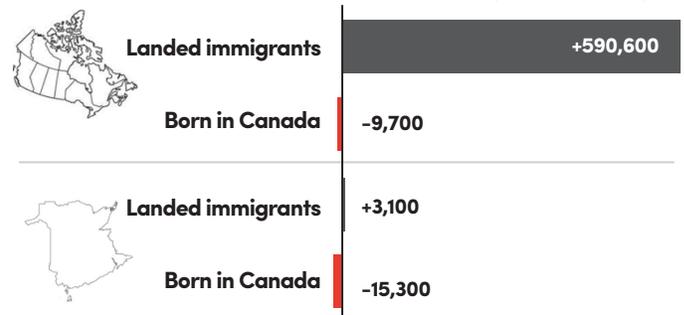
Boosting the number of immigrants to Carleton and Victoria counties will: 1) ensure important industries have the workers they need; 2) help rebuild the K-12 student population in the region; and 3) boost the local economy through increased household spending.

### Ensuring Important Industries have the Workers They Need

Immigrants have become the primary source of new workers for the Canadian economy. As shown in Figure 7, the number of people across Canada that were born in this country and active in the labour force declined between 2013 and 2017 (by 9,700). This means more Canadian-born people exited the workforce (mostly through retirement) than joined it. At the same time, the national labour force expanded by 590,600 immigrants.

Canada's labour force and economic growth over the past five years has been a story of immigration. New Brunswick has yet to benefit from this story in any significant way (Figure 7) but there has been growth in the last few years. The province needs to grow its labour force and boosting immigration will be a key way to accomplish this goal.

FIGURE 7: GROWTH IN THE CANADIAN AND NEW BRUNSWICK LABOUR FORCE BY SOURCE (2013 TO 2017)



Source: Statistics Canada CANSIM Table 282-0102.

Using Census data we can estimate how immigration has impacted national, provincial and local labour markets. Figure 7 shows that immigrants account for all net labour market growth since 2013. Table 4 below shows this trend extends back to the mid 2000s. Census data also demonstrates that between 2006 and 2016 new immigrants accounted for 88 percent of net labour force growth across Canada.

The impact is starting to be felt in New Brunswick. Over the decade, nearly 7,200 immigrants were added to the New Brunswick labour force<sup>9</sup> even as the overall labour force across the province declined by 1,170. In Moncton and Fredericton, immigrants accounted for 27 percent of net labour force growth between 2006 and 2016. The Edmundston CA's labour force increased slightly between 2006 and 2016 (although according to the annual Labour Force Survey it has been declining since 2010). The 170 immigrants added to Edmundston's labour force was equivalent to 59 percent of net growth over the decade.

**TABLE 4: CONTRIBUTION OF IMMIGRATION TO LABOUR FORCE GROWTH – 2006 TO 2016**

Jurisdiction:*	# Change in Labour Force (2006 to 2016)	# Immigrants Added to the Labour Force (2006 to 2016)	% Share of Net Growth
Canada	+1,526,340	1,340,010	88%
New Brunswick	-1,170	7,195	n/a
Moncton	+8,275	2,270	27%
Saint John	+770	1,260	n/a
Fredericton	+6,365	1,740	27%
Bathurst	-1,370	175	n/a
Miramichi	+1,085	100	n/a
Campbellton (N.B. part)	-1,200	65	n/a
Edmundston	+290	170	59%

\*CMA and CA areas.

Source: 2006, 2016 Census. Statistics Canada.

Economic immigration will be an important way that we can bring people that have the skills, education, language capacity and interest to permanently work the job opportunities in the Upper Saint John River Valley. This will boost the regional economy and create even more demand for high value services and the careers in health care, business and professional services that are of interest to many young people in the region.

### Rebuilding Regional Student Populations

Since 1991, the number of students enrolled in K-12 education in New Brunswick has been in decline. This has particularly been a challenge in rural areas of the province. Between the early 1990s and today the number of young people enrolled in school dropped by more than 30 percent (Figure 8).

New immigrants to New Brunswick and international students are already boosting primary education enrolment across the province. According to information provided by the Department of Education and Early Childhood Learning, in the current student year there are nearly 3,500 students enrolled in kindergarten, primary and secondary schools around the province who are the children of recent immigrants or current international/exchange students.

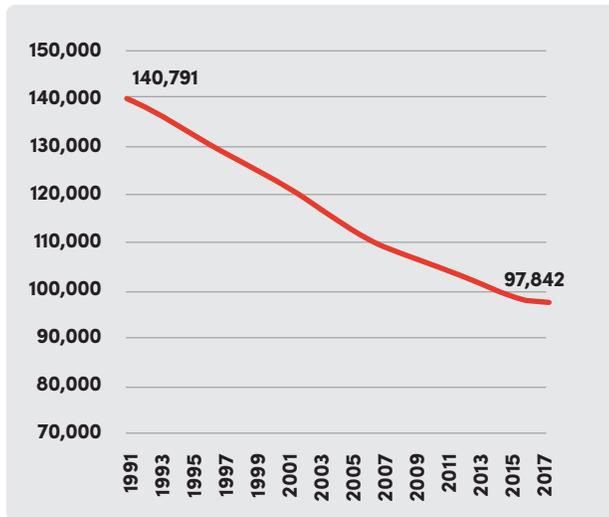
As we look to the future, young immigrant families will help repopulate many of our primary and secondary schools around the province.

This is also a challenge for the province's colleges and universities. The number of students attending New Brunswick post-secondary colleges and universities who were born in Canada peaked in 2004 and has declined by 20 percent since then. This can be a particular challenge for smaller urban centres.

An increase in younger immigrant families will mean more students to feed into the education system in Carleton and Victoria counties in the coming years.

9. Immigrants who settled in Canada between 2006 and 2016 and were counted in the New Brunswick labour force in 2016.

**FIGURE 8: K-12 STUDENT ENROLMENT IN NEW BRUNSWICK**



Source: NB Dept. of Education and Early Childhood Learning.

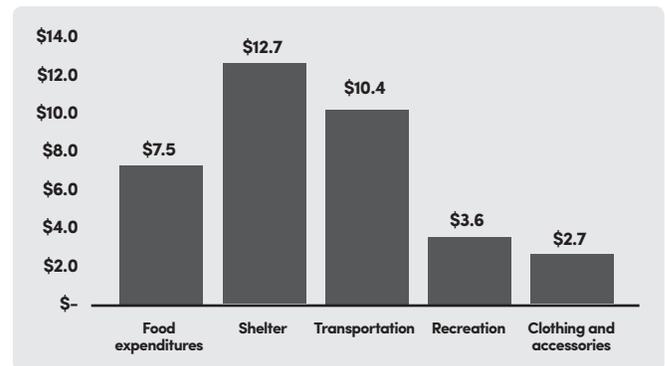
### Boosting Local Economies

Attracting more immigrants will create new demand for local products and services. Adding 1,000 immigrant families with an average household income profile will directly generate \$68 million worth of new household expenditures – much of this spending in the local community<sup>10</sup>. These 1,000 immigrant families will spend \$12.7 million per year on housing costs such as mortgage payments, electricity and property taxes. They will also spend \$10.4 million each year on transportation costs, such as vehicle purchases and maintenance, and \$7.5 million on food expenditures at local grocery stores and restaurants.

These 1,000 new families will also generate approximately \$20 million worth of taxes per year for local, provincial and federal governments. Figure 9 shows the expected spending from the new families for a few specific categories.

**FIGURE 9: ANNUAL HOUSEHOLD SPENDING IMPACT IN NEW BRUNSWICK FROM 1,000 NEW FAMILIES (\$MILLIONS)\***

Selected Spending Categories



Source: Derived using Statistics Canada CANSIM Table 203–0021.

### Other Positive Effects

Attracting more immigrants to Carleton and Victoria counties will help support a vibrant economic and social life in many other ways. There are already stories around the province of immigrants boosting church attendance and allowing local churches to remain open. Civic and business groups such as Rotary International are looking to new immigrants to help support their activities in New Brunswick. Chambers of Commerce are welcoming new immigrant entrepreneurs as a source of growth. Youth sports clubs and leagues around the province will benefit from an increasing population of young New Brunswickers.

## The Upper Saint John River Valley in 2030

So, what will the Upper Saint John River Valley Region’s economy look like in 2030? Will Woodstock continue to thrive as a services hub for the wider region? Will it be able to attract and retain more immigrants? Will the Upper Saint John River Valley’s key industries, including agriculture, forestry, manufacturing, transportation and tourism continue to thrive? Will new industries emerge building on the region’s assets?

10. Assumes the new household spending conforms to the current spending pattern in New Brunswick.

Carleton and Victoria counties have the potential to continue their important economic role within the province. The region can grow its economy and it can develop a new generation of entrepreneurs and small businesses. But it will need to attract and retain more young families and workers to ensure its future prosperity.

And yes, the region will continue to be a great place to retire. The vision of the area as a vibrant economy that is attracting people from around the world is complementary to the vision of attracting and retaining people who want to retire in appealing rural communities with a low cost of living. The strength of the core economy will support the region's ability to be a great place to live into old age.

Decline is not inevitable. Let's work together to find solutions. We can identify businesses succession needs. We can determine growing gaps in the labour market and we can find workers here and abroad who want to do the jobs. We can also do a better job of promoting our industries and the opportunities to young people across the Upper Saint John River Valley.

If we are to attract more immigrants, we need to figure out how to better infuse them into our social and community life. In Carleton County, 85 percent of all residents are at least third-generation Canadians meaning they were born in Canada, as were their parents and their grandparents. This has created a strong social cohesion that contributes to the high quality of life in the region. We need to ensure that newcomers will be welcomed into our social life and can become a productive part of our future.

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