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Immigration into Greater Moncton: A Background

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Executive Summary

Greater Moncton has been among the fastest growing mid-sized urban centres in Canada over the past decade adding 20,000 people to its population. This population growth came primarily from intra-provincial migration (other parts of New Brunswick) but in recent years immigration has filled a larger share of the population increase.

Report Highlights:

- ⇒ There were 735 new immigrants in the Moncton CMA in 2011 up from between 100 and 200 per year in the early to middle of the previous decade (Figure 1 below). This has been the fastest increase in the level of immigration among any Canadian CMA (Figure 8). However, Moncton's 37.5 immigrants per 10,000 population in 2011 still ranked only 19th out of Canada's 33 CMAs (Section 2.1).
- ⇒ Immigration still only makes up 30 percent of net population increase (2011) in Greater Moncton compared to 70 percent in Saint John and 85 percent in Toronto (Figure 2).
- ⇒ Greater Moncton's new immigrants are younger than the population as a whole. Eighty percent are under the age of 39 (Section 2.2).
- ⇒ Economic immigrants represent the bulk of all new immigrants accounting for 81 percent in 2010 compared to family class immigrants (10 percent) and refugees (seven percent) (Table 2).
- ⇒ As of 2010, the Moncton region had fewer temporary foreign workers (15 percent of the provincial total) – 227 in total – but there is anecdotal evidence the numbers have increased in 2011 and 2012 (Table 3).
- ⇒ There are over 1,000 foreign students enrolled in post-secondary institutions in the Greater Moncton region (including Mount Allison in Sackville). This doesn't include students in private institutions such as the Moncton Flight College (Table 4).
- ⇒ There are relatively few Francophone immigrants to New Brunswick (only 11 percent of new immigrants in 2010 spoke French). This will pose a particular challenge for Greater Moncton and its commitment to fostering both English and French language services and institutions (Section 2.4 for the data and Section 4 for more on the potential implications).
- ⇒ Most new immigrants into Greater Moncton are coming from Asia and Africa. This is a big shift from immigration into the province in the 1970s, 1980s and 1990s when the United States and the United Kingdom were the principal sources of new immigrants (Section 2.5).
- ⇒ A projection model of immigration needs in Greater Moncton reveals the region will need to continue a sustained level of immigration through 2026. In a moderate growth scenario, by 2017 the region will need to reach and sustain nearly 1,700 new immigrants per year. In a high growth scenario - *which is based on the observed population growth rate between 2009-2011* – the Moncton CMA will need more than 1,200 immigrants in 2014 rising to more than 2,400 per year in 2026 (Section 3).
- ⇒ Section 4 provides some key issues facing the region including the role of the education system as a conduit for new immigrants, the potential of immigrant entrepreneurs and integration. It also covers the new thinking required from the federal government now that immigration is becoming critical across the country and not just in Toronto-Montreal-Vancouver.

1. Introduction

In recent years, the Greater Moncton region has been among the fastest growing urban centres in Canada. Between 2001 and 2011, the Moncton Census Metropolitan Area (CMA) witnessed a robust population growth of 17 percent. The population grew by 20,000 people over the decade.

Fostering this population growth has been the strength of the regional economy which features a growing finance and insurance sector, a dynamic information and communication technologies (ICT) sector and a new entrepreneurial class. The region has consolidated its position as a regional services hub with strong retail, health care, education and professional services sectors.

The positive business environment has been a main driver of Moncton's economic success over the past two decades. The KPMG Competitive Alternatives report (2012) again confirmed Moncton's cost advantages and its low tax environment. MoneySense magazine named Moncton the "best place to buy a house" in Canada in 2012 and ranked the community 4th best place to live in Canada.

On the heels of being named one of the New York-based ICF intelligent communities, this year Google named Moncton as one of only five eTowns across Canada. Google gave the award to the Hub City because it "demonstrated strong engagement and potential for growth in the digital economy".

One of the less talked about secrets to Moncton's success has been its ability to attract skilled talent. The community has featured one of the fastest growing labour markets in eastern Canada and its expansion has been driven primarily by inward migration from other parts of New Brunswick, Canada and, increasingly the world.

In just the past few years, immigration into Moncton has increased substantially. This has been a critical part of the region's ability to support its growing workforce needs.

Greater Moncton is now at a fork in the road. If the community wants to continue to grow and play a large role in a revived New Brunswick economy, it will need to increasingly rely on immigrants to fuel its workforce needs.

This will require greater support from the provincial and federal governments. Even as the need for immigration is increasing, the federal government is looking to cut provincial immigration levels. Government needs to view immigration to mid-sized urban centres such as Moncton as more than just a source of filling small gaps in the workforce and as part of a broader growth and prosperity strategy for the region. This has been the case in Canada's large urban centres for decades. Now that same approach must be taken in mid-sized urban centres such as Moncton.

Businesses need to be more willing to hire and help integrate new immigrants in the workforce. As will be shown below, there are some sectors that are eagerly engaging immigrant workers and other that are not.

1. Introduction (cont.)

We need our universities and community colleges to increase their role as incubators for new, skilled immigrants into the region. They can play a critical role in ensuring we attract our share of French-speaking immigrants.

Most of all, we need to embrace immigration at an institutional level and in our neighbourhoods. Our hospitals, schools and other service providers need to be immigrant friendly.

Moncton has a long history of attracting people from outside its borders - but not from outside the country. The last time the Moncton region saw a sustained wave of new immigration was in the middle of the 19th Century. Over 90 percent of us are third generation Canadians.

The Moncton Immigration Summit is a time for key stakeholders to tackle these issues. Its outcome will support a new immigration strategy for the region that will:

- Develop and clearly communicate the need for immigration in the years ahead.
- Recommend ways to foster the institutional changes needed to make us a welcoming community.
- Engage the business community in the attraction and integration of immigrants into the workforce.
- Encourage governments to view immigration into mid-sized urban centres such as Moncton in a different way.
- Ensure we have strong immigrant support infrastructure in place.

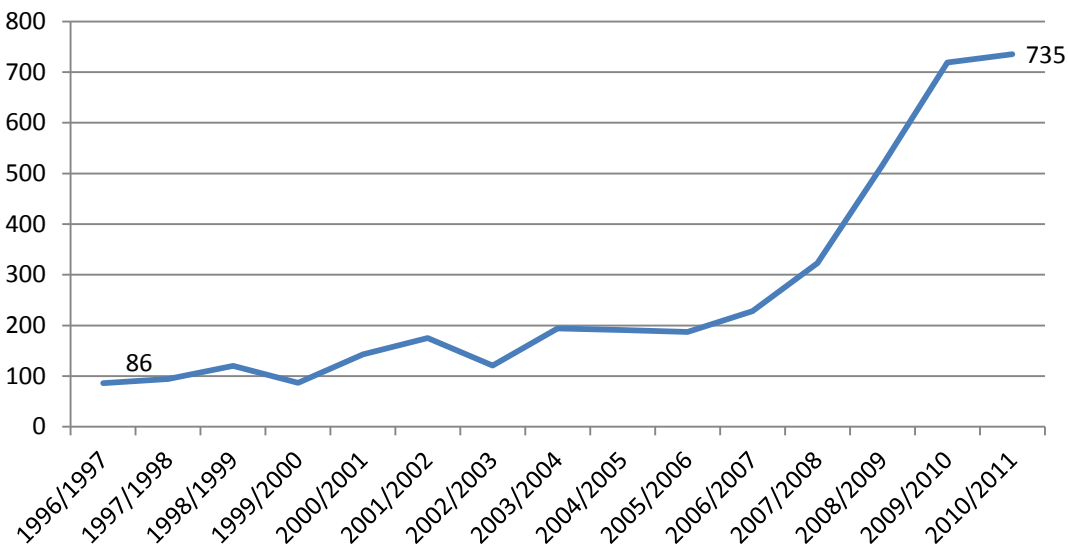
2. Immigration Trends: Greater Moncton

Please Note: The statistics on immigration into Greater Moncton in Section 2.1 come from Statistics Canada's CANSIM tables covering the components of population growth. The data is somewhat different than that which is reported by Citizen and Immigration Canada which only shows the location of initial settlement (and doesn't take into account any post-settlement migration within Canada).

2.1 Recent Immigration into Greater Moncton

Until recently Greater Moncton was not attracting a lot of immigrants. In the 1990s, the average annual immigration was only around 100 people. Most of the population growth in the region came from intra-provincial migration (people moving in from other areas of New Brunswick) and from natural population growth (births minus deaths). However, after the provincial government started to make immigration more of a priority in the mid-2000s, the Moncton CMA started to attract more immigrants. By the 2004 to 2008 period, annual immigration had increased to more than 200 per year and from 2009 to 2011 there were more than 650 new immigrants per year into the region (Figure 1).

Figure 1: Annual Immigration into the Moncton CMA (#)



Source: Statistics Canada CANSIM Table 051-0046.

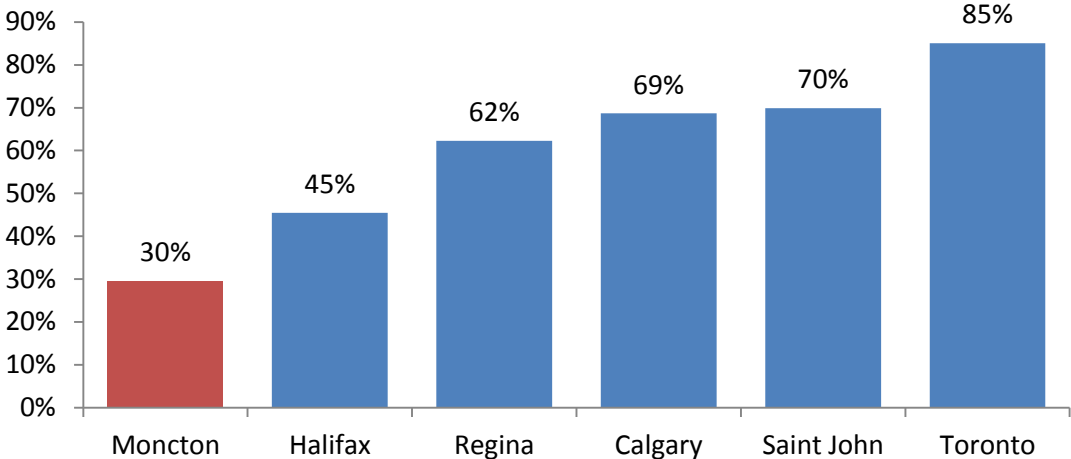
To put this into context, between 1997 and 2001 New Brunswick ranked 30th out of 33 Census Metropolitan areas for the number of annual immigrants per 10,000 population. During that period, the Moncton CMA only attracted 8.8 immigrants per 10,000 population compared to 49.4 in Halifax, 78.3 in Calgary, 187.1 in Vancouver and 195.3 in the Toronto CMA. During the 2002 to 2006 period, immigration into the Moncton CMA increased to 13.8 per 10,000. By 2007-2011, Moncton's

immigration per 10,000 had jumped to 37.5 per 10,000 population – or 18th out of the 33 CMAs across Canada.

Between the 1997-2001 and 2007-2011 periods, annual immigration to the Moncton CMA grew by over 300 percent – the fastest growth rate in Canada. During that same period, other mid-sized urban centres also witnessed a spike in immigration levels while many of the larger jurisdictions including Toronto, Vancouver and Ottawa saw a decline in relative immigration levels (see Section 4 below for more on immigration into mid-sized urban centres).

Yet despite the increase in immigration, the Moncton CMA continues to be below average in its need for immigrants to support population growth. In 2010 and 2011, a little less than 30 percent of the net population growth in the Moncton CMA came from immigration. This was well below the non-weighted average for the CMAs across Canada of more than 60 percent. Larger urban centres such as the Toronto CMA are heavily reliant on immigration to drive population growth (85 percent of Toronto’s net population growth in 2011 came from immigration). Seventy percent Saint John’s net population growth in 2011 was made up of immigrants.

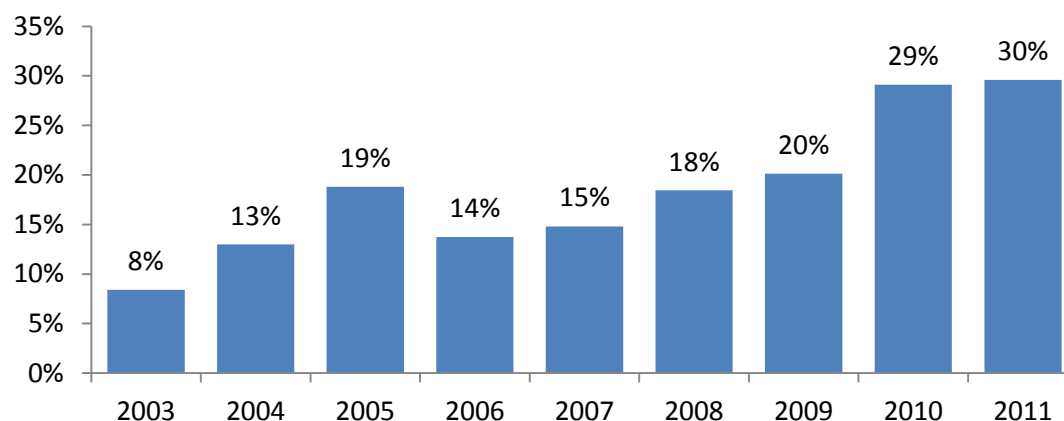
Figure 2: Immigrants as a Percentage of Net Population Growth (2011) – Benchmark CMAs



Source: Statistics Canada CANSIM Table 051-0046.

However, as shown in Figure 3, Greater Moncton’s reliance on immigration has been steadily rising in recent years and as will be shown in Section 3 below is likely to increase in the coming years as the other primary source of migrants, intra-provincial, starts to wane.

Figure 3: Immigrants as a Percentage of Net Population Growth (2003-2011) – Moncton CMA



Source: Statistics Canada CANSIM Table 051-0046.

2.2 Immigration into Greater Moncton by Age Group

In the past few years, the bulk of new immigrants have been in the 20 to 39 age group (Table 1). There has been a nearly four-fold increase in the number of immigrants into the Moncton CMA in the 20-29 year old age group. Interesting, there has been a spike among immigrants in the 45-54 year old group as well from only 19 between 2001 and 2006 (the annual average number) to 90 per year between 2007 and 2011.

Table 1: Immigrants By Age Group – Annual Averages (Moncton CMA)

Age Group:	Average Annual #		% Increase
	2001-2006	2007-2011	
0-19	64	143	+123%
20-29	31	151	+395%
30-39	35	107	+206%
40-44	15	5	-70%
45-54	19	90	+382%
55+	9	8	-11%

Source: Statistics Canada CANSIM Table 051-0046.

2.3 Immigration by Type

The federal government does not provide detailed statistics on immigration to the CMA level between Census periods (See Appendix A for a full profile of the immigrant population in Greater Moncton from the 2006 Census). However, there is data at the provincial level which provides an indication of how the immigrant population in changing in New Brunswick.

As shown in Table 2, the number of family class immigrants has not increased and neither has the number of refugees. The growth has been in the economic immigrant class which has increased by more than 300 percent between the 2001-2005 and the 2006-2010 timeframe.

Table 2: Permanent Residents by Type (2001-2010) – New Brunswick Wide

	Annual average (2001-2005)	2006	2007	2008	2009	2010
Family class	207	249	256	291	251	211
Economic immigrants	402	1,191	1,171	1,355	1,498	1,727
Refugees	177	178	174	165	132	157
Other	25	28	42	45	32	30
Total	811	1,646	1,643	1,856	1,913	2,125

Source: Citizenship and Immigration Canada (2011).

The majority of temporary foreign workers into New Brunswick fill jobs outside the urban centres (Table 3). From 2006 to 2010, only 15 percent of the temporary foreign workers in New Brunswick were employed in the Greater Moncton region. This increase in the use of temporary foreign workers in rural New Brunswick (and across Canada) was one of the issues that triggered the recent changes to the Employment Insurance (EI) program. More about this in Section 4 below.

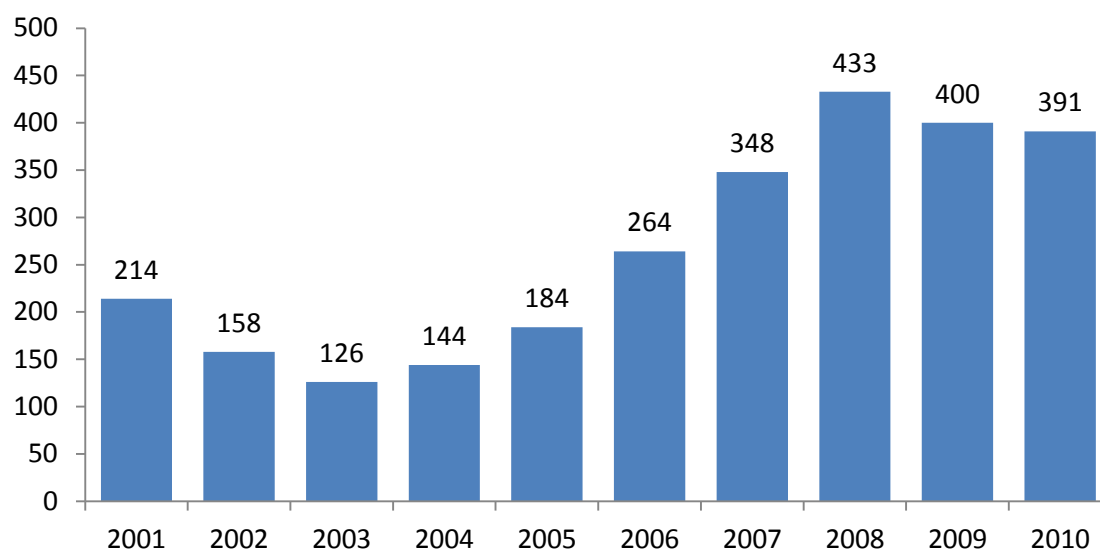
Table 3: Foreign Workers into New Brunswick (Annual Average 2006-2010)

	#	% of Total
Moncton	227	15%
Saint John	311	21%
Fredericton	186	12%
Other New Brunswick	764	51%
New Brunswick	1,487	

Source: Citizenship and Immigration Canada (2011).

Between 2008 and 2010, the Moncton CMA attracted approximately 410 international students each year. This was around 30 percent of the total foreign student population across New Brunswick and up from an average of 15 percent of the total in the first half of the 2000s.

Figure 4: Foreign Students into the Moncton CMA – through 2010 only



Source: Citizenship and Immigration Canada (2011).

The Statistics Canada data understates the extent of total foreign students enrolled in post-secondary institutions in the region because it doesn't include Mount Allison University (outside the Moncton CMA) or community colleges. In addition, the numbers of increased since 2010. In 2012, the three universities and two public community colleges have more than a thousand international students studying in the region (Table 4).

Table 4: International Post-Secondary Students in the Moncton Region (2012)*

<u>Institution:</u>	<u>International Students:</u>
Université de Moncton (Moncton campus)	655
Mount Allison University	250
New Brunswick Community College – Moncton	23
Collège communautaire du Nouveau-Brunswick - Dieppe	85
Crandall University	8

**Does not include private colleges which also have international students (i.e. Moncton Flight College).*

Source: Institutional survey 2012.

Foreign students are emerging an important source of new immigrants but New Brunswick still only attracts less than 1.5 percent of the national total. Section 4 below discusses this issue in greater detail.

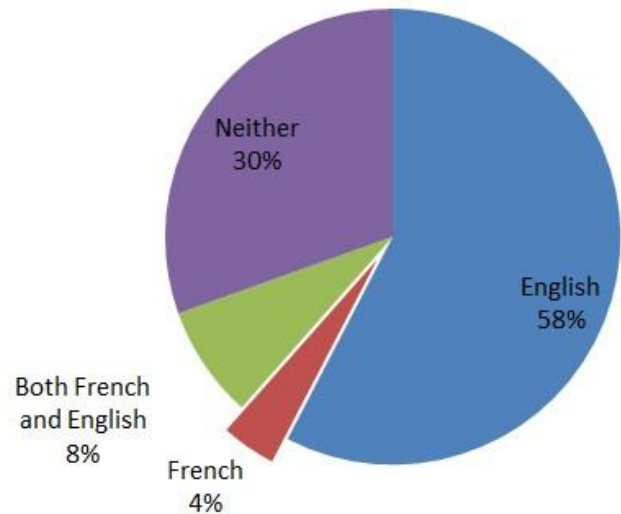
2.4 Immigrants by Language

The absolute number of immigrants to New Brunswick that can speak French has been increasing in recent years but not as a percentage of the total. In 2010, the number of French speaking immigrants to the province (those that spoke French or both French and English) had declined to 11 percent of the total compared to an average of 19 percent of the total in the first half of the 2000s.

Nova Scotia continues to attract approximately the same number of French-speaking immigrants as New Brunswick and Manitoba attracted twice as many French-speaking immigrants in 2010.

New Brunswick attracted 232 French-speaking immigrants out of the 45,787 who came to Canada in 2010 (one half of one percent of the national total).

**Figure 5: Immigrants by Language - New Brunswick
% of Total
(Annual Average 2006-2010)**



Source: Citizenship and Immigration Canada (2011).

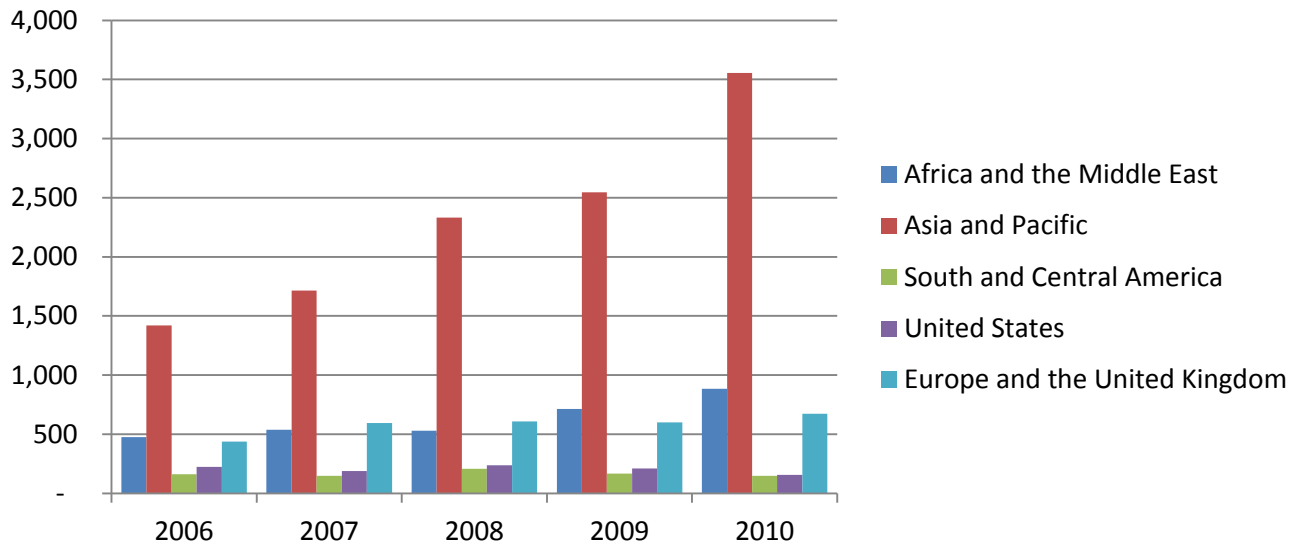
The issue of French-speaking immigration is discussed further in Section 4 below.

2.5 Source Countries of Recent Immigrants

Unfortunately, Citizenship and Immigration Canada groups New Brunswick, Prince Edward Island and Newfoundland and Labrador together when it reports data on immigration by source country. However, based on anecdotal evidence, the data for the Atlantic region (less Nova Scotia) is similar to New Brunswick. The biggest increase in immigration is from Asia – primarily China and South Korea. Africa has become the second most important source for new immigrants followed by Europe and the United Kingdom third. The United States, Central and South America still provide relatively few immigrants into the region.

Nova Scotia attracts more immigrants from Africa and the Middle East as well as Europe and the United Kingdom compared to the rest of the Atlantic Provinces. In 2010, thirty-one percent of all immigrants into Nova Scotia came from Africa and the Middle East compared to only 16 percent in the rest of Atlantic Canada.

Figure 6: Immigrants by Source Country – Atlantic Canada less Nova Scotia



Source: Citizenship and Immigration Canada (2011).

Anecdotally, the Greater Moncton region is attracting an increasing number of Asian immigrants (South Korea, China, etc.) and North Africans (Tunisians, etc.). Statistics from the 2011 Census (out in 2013) will provide full details on the immigrant population in the Greater Moncton area.

3. Filling the Population Pipeline: The Role of Immigration

As shown above, the Moncton CMA is less reliant on immigrants as a source of population growth compared to most other urban centres across Canada. Table 5 below shows the estimated population increase in the Moncton CMA by component for the period 2000/2001 to 2010/2011. The first important point is the growth rate in overall population which has been accelerating in recent years. The estimated population growth in the past three years is considerably higher than in the previous eight years. Driving this net population growth has been a doubling of the natural increase (births minus deaths) and a more than tripling of immigration. Another important source of net population growth has been net interprovincial migration (people moving in from other provinces. Between 2004/2005 and 2006/2007, Moncton exported more people to other provinces than it imported but in the past four years there has been a positive migration from other provinces. By contrast, net intraprovincial migration (from other parts of New Brunswick) seems to have plateaued in recent years in absolute terms and declined sharply in relative terms (only 35 percent of net new population in 2010/2011).

Table 5: Net Population Increase – by Component 2001-2011 (Moncton CMA)*

	2000/2001	2001/2002	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011
Natural increase	202	219	260	208	186	249	390	493	505	479	456
Immigration	143	175	121	194	191	187	228	323	516	719	735
Net interprovincial migration	42	136	198	197	(115)	(113)	(119)	46	339	423	381
Net intraprovincial migration	886	918	934	947	746	908	1,011	874	1,133	901	901
Net non-permanent residents	8	54	45	41	42	18	63	60	133	4	68
Totals	1,281	1,502	1,558	1,587	1,050	1,249	1,573	1,796	2,626	2,526	2,541
Percentage Share:											
Natural increase	16%	15%	17%	13%	18%	20%	25%	27%	19%	19%	18%
Immigration	11%	12%	8%	12%	18%	15%	14%	18%	20%	28%	29%
Interprovincial	3%	9%	13%	12%	-11%	-9%	-8%	3%	13%	17%	15%
Intraprovincial	69%	61%	60%	60%	71%	73%	64%	49%	43%	36%	35%
Non-permanent	1%	4%	3%	3%	4%	1%	4%	3%	5%	0%	3%

*Not including net emigration which represents a marginal share.

Source: Statistics Canada CANSIM Table 051-0046.

It is difficult to predict how these population components will change in the future. Because of the increase in the aging population, more deaths per year will occur in the future but the rate of growth is harder to predict because of advances in health care and better lifestyle choices. Despite the moderate baby boom in recent years (up 20 percent since the middle of the last decade), it is unlikely the absolute number of new births will increase substantially in the coming years but should remain relatively similar over the next decade.

Interprovincial migration is also very difficult to predict. After the recession of 2008-2009, net interprovincial migration turned positive but that could change given the upturn in the economy in western Canada. Ontario is not the pull it once was for Moncton residents and, in fact, Moncton has a positive net migration from Toronto in the past few years.

Intraprovincial migration from other parts of New Brunswick has likely plateaued and may drop off – particularly among the younger demographic. The youth population in Northern New Brunswick has dropped by more than 50 percent in the past 20 years – leaving a much smaller pool of potential migrants. There is some evidence that older New Brunswickers from rural and northern parts of the province are moving to the Moncton CMA (still limited in the data) but they will have less of an impact on the labour market.

Further complicating projections is the aging of the population. Because there is a bulge in the population aged 50-65, over the next 10-15 years there will be a much higher exit rate requiring more workers to backfill existing jobs in addition to any forecasted increase in the size of the workforce,

Tables 6 through 8 below show three scenarios for population growth through 2026 in the Greater Moncton CMA. All three scenarios assume a slight decline in the natural population increase over the period (two percent per year), an average annual decline in intraprovincial migration of five percent per year and a constant number of interprovincial migrants using the average annual amount over the past decade. The variation in the model is based on population growth forecasts. The slow growth scenario assumes an annual 1.2 percent population growth rate which is the observed rate between 1998 and 2011. The moderate growth scenario assumes an annual 1.5 percent population growth rate which is the observed rate between 2006 and 2011. The high growth scenario assumes an annual 1.9 percent population growth rate which is the observed rate between 2009 and 2011.

Please note the model does not account for the impact of the aging population. If total employment is expected to grow in line with population growth, a faster overall population growth rate would be required to account for the increase in older population exiting the workforce.

In each scenario, the number of immigrants required is the amount required to meet the annual forecast after other population components have been addressed.

Forecast Model Highlights:

In all scenarios, immigration becomes a rising share of overall population growth each year. In the slow growth scenario, 43 percent all net new population will come from immigration by 2026. In the high growth scenario, 72 percent will come from immigration by 2026.

On an absolute basis, the numbers are even more pronounced. In the moderate growth scenario the Moncton CMA will need more than 1,000 new immigrants per year by 2017 and nearly 1,700 per year by 2026. In the high growth scenario – *the observed population growth rate between 2009-2011* – the Moncton CMA will need more than 1,200 immigrants in 2014 rising to more than 2,400 per year in 2026.

Figure 7: Immigration Levels Required by Forecast Scenario
Percentage of net population growth

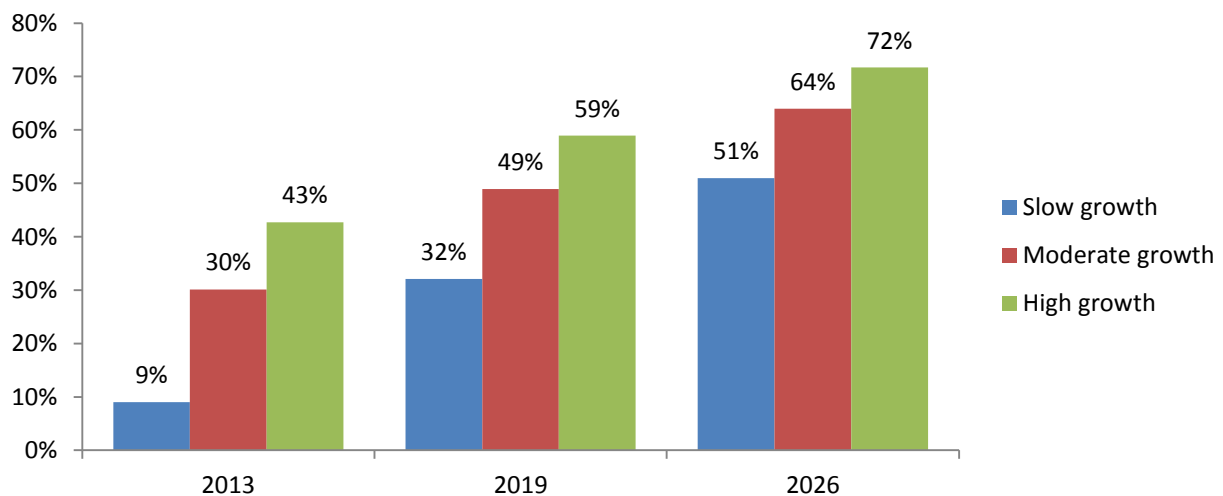


Table 6: Moncton CMA Population Forecast – Slow Growth Scenario 2013-2026

	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>
Natural increase	456	442	429	416	404	392	380
Immigration	150	226	300	371	441	508	574
Net interprovincial migration	137	137	137	137	137	137	137
Net intraprovincial migration	856	813	772	734	697	662	629
Net non-permanent residents	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>
Net population change	1,667	1,686	1,706	1,726	1,747	1,767	1,788
	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>	<u>2026</u>
Natural increase	368	357	347	336	326	316	307
Immigration	638	700	760	819	877	933	988
Net interprovincial migration	137	137	137	137	137	137	137
Net intraprovincial migration	598	568	539	512	487	463	439
Net non-permanent residents	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>
Net population change	1,809	1,830	1,851	1,873	1,895	1,917	1,940

Percentage Shares by Source:

	<u>2013</u>	<u>2019</u>	<u>2026</u>
Natural increase	27%	21%	16%
Immigration	9%	32%	51%
Net interprovincial migration	8%	8%	7%
Net intraprovincial migration	51%	35%	23%
Net non-permanent residents	4%	4%	4%

Assumptions:

- Annual population growth rate of **1.2 percent over the forecast period** (the **observed average annual population growth rate between 1998-2011**).
- The natural population increase (births minus deaths) starts at the current level and declines by two percent per year during the forecast period.
- Interprovincial migration (net) remains constant throughout the forecast period at the annual average level (2002-2011).
- Intraprovincial migration starts at the current level and declines by five percent per year throughout the forecast period.
- Net emigration is not included in the model.
- The immigration estimate for each year is the amount required to meet population growth after accounting for all other population growth components.

Table 7: Moncton CMA Population Forecast – Moderate Growth Scenario 2013-2026

	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>
Natural increase	456	442	429	416	404	392	380
Immigration	654	744	831	917	1,001	1,083	1,163
Net interprovincial migration	137	137	137	137	137	137	137
Net intraprovincial migration	856	813	772	734	697	662	629
Net non-permanent residents	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>
Net population change	2,171	2,204	2,238	2,272	2,307	2,342	2,377

	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>	<u>2026</u>
Natural increase	368	357	347	336	326	316	307
Immigration	1,242	1,320	1,396	1,472	1,546	1,619	1,691
Net interprovincial migration	137	137	137	137	137	137	137
Net intraprovincial migration	598	568	539	512	487	463	439
Net non-permanent residents	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>
Net population change	2,413	2,450	2,487	2,525	2,564	2,603	2,642

Percentage Shares by Source:

	<u>2013</u>	<u>2019</u>	<u>2026</u>
Natural increase	21%	16%	12%
Immigration	30%	49%	64%
Net interprovincial migration	6%	6%	5%
Net intraprovincial migration	39%	26%	17%
Net non-permanent residents	3%	3%	3%

Assumptions:

- Annual population growth rate of **1.5 percent over the forecast period** (the **observed average annual population growth rate between 2006-2011**).
- The natural population increase (births minus deaths) starts at the current level and declines by two percent per year during the forecast period.
- Interprovincial migration (net) remains constant throughout the forecast period at the annual average level (2002-2011).
- Intraprovincial migration starts at the current level and declines by five percent per year throughout the forecast period.
- Net emigration is not included in the model.
- The immigration estimate for each year is the amount required to meet population growth after accounting for all other population growth components.

Table 8: Moncton CMA Population Forecast – High Growth Scenario 2013-2026

	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>	<u>2017</u>	<u>2018</u>	<u>2019</u>
Natural increase	456	442	429	416	404	392	380
Immigration	1,130	1,236	1,340	1,442	1,543	1,643	1,741
Net interprovincial migration	137	137	137	137	137	137	137
Net intraprovincial migration	856	813	772	734	697	662	629
Net non-permanent residents	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>
Net population change	2,647	2,696	2,746	2,797	2,849	2,902	2,955

	<u>2020</u>	<u>2021</u>	<u>2022</u>	<u>2023</u>	<u>2024</u>	<u>2025</u>	<u>2026</u>
Natural increase	368	357	347	336	326	316	307
Immigration	1,839	1,935	2,031	2,126	2,221	2,315	2,409
Net interprovincial migration	137	137	137	137	137	137	137
Net intraprovincial migration	598	568	539	512	487	463	439
Net non-permanent residents	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>	<u>68</u>
Net population change	3,010	3,066	3,122	3,180	3,239	3,299	3,360

Percentage Shares by Source:

	<u>2013</u>	<u>2019</u>	<u>2026</u>
Natural increase	17%	13%	9%
Immigration	43%	59%	72%
Net interprovincial migration	5%	5%	4%
Net intraprovincial migration	32%	21%	13%
Net non-permanent residents	3%	2%	2%

Assumptions:

- Annual population growth rate of **1.9 percent over the forecast period** (the **observed average annual population growth rate between 2009-2011**).
- The natural population increase (births minus deaths) starts at the current level and declines by two percent per year during the forecast period.
- Interprovincial migration (net) remains constant throughout the forecast period at the annual average level (2002-2011).
- Intraprovincial migration starts at the current level and declines by five percent per year throughout the forecast period.
- Net emigration is not included in the model.
- The immigration estimate for each year is the amount required to meet population growth after accounting for all other population growth components.

4. The Issues: Fostering immigration into the Moncton CMA

There are a number of issues that will be addressed at the May 2013 immigration summit in Moncton. The following summarizes a few of the key issues that will inform the new immigration attraction and retention strategy that will be the outcome of the 2013 summit.

⇒ **The education system: A conduit for immigration?**

The number of immigrant students is on the rise in Greater Moncton. As shown above, there are now approximately 400 post-secondary immigrant students enrolled in local schools. Foreign students are emerging an important source of new immigrants but New Brunswick still only attracts less than 1.5 percent of the national total. It is not known how many of these students remain in the Moncton region and begin their careers. Anecdotal evidence would suggest the numbers are low. Can we do more to link post-secondary immigrant students with our workforce requirements? Can UdeM, Mount Allison, Crandall, NBCC and CCNB actually recruit immigrant students and provide a pathway to future employment in the Moncton region?

It is also worth noting that the number of immigrant students attending primary and secondary schools has dramatically increased in recent years. For the school year School Year 2011-2012, there were 677 students in the immigrant category in School District 02. Over 300 of them were from South Korea, 55 from Vietnam and 43 from Africa. In summer 2013, School District 02 will host another EAL Summer Camp for children ages 8 to 16. This proves to support newcomer students. The primary and secondary school system is a critical tool for immigrant integration into the community.

⇒ **Immigrant entrepreneurs**

As is shown in Appendix A, immigrations tend to have a much higher self-employment rate due to the many that have historically been attracted by purchasing and operating local businesses. The federal government and other stakeholders are looking at ways to attract the kind of immigrant entrepreneurs that will build export-based businesses in sectors such as information technology, life sciences and manufacturing. There are very few of these immigrants in the Moncton CMA. Is there potential to attract these high growth potential entrepreneurs to Greater Moncton?

⇒ **Immigrants and integration into the workforce**

Despite successes in sectors such as health care, education, retail, food service and manufacturing, there are still many sectors that are not hiring immigrant workers. The information technology sector, for example, has a very limited track record of hiring immigrants even though skilled IT workers from Romania, Poland, Tunisia, etc. are immigrating into Canada. What can we do to see immigrant workers integrated into strategic sectors such as IT, life sciences, professional services, etc.?

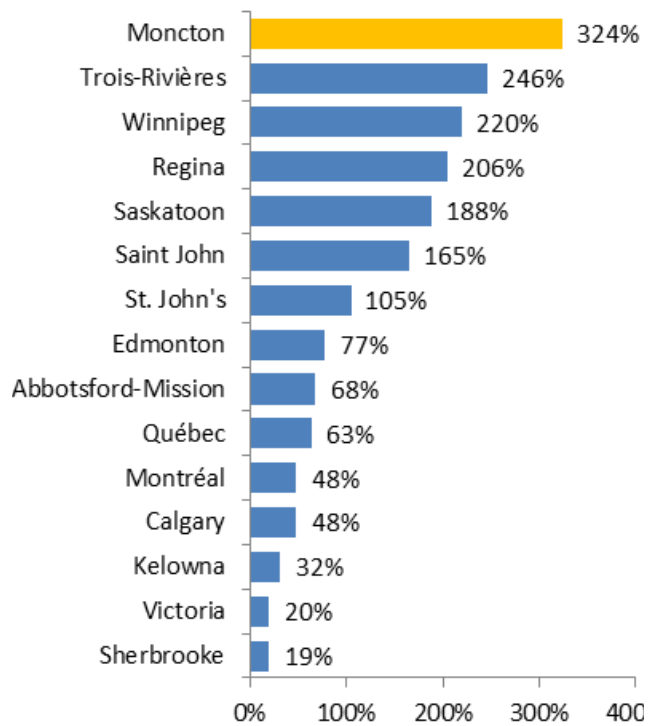
⇒ **Immigration into mid-sized urban areas: Seeking a new federal government approach**

Despite record immigration levels in the Moncton CMA, the federal government recent moved their immigration office to Fredericton.

As discussed above, mid-sized cities in Canada – many that haven't experienced much immigration historically – are now seeing rapid growth in the level of immigration (as measured per 10,000 persons in the population). Until recently, immigration into Canada has overwhelmingly benefitted Greater Toronto, Montreal and Vancouver. Now demographic and economic trends will necessitate a broader distribution of immigration into mid-sized urban areas such as Moncton.

There is discussion in Ottawa about reducing or freezing the number of immigrants into Canada even as places such as Toronto are expecting to see an increase after several years of decline. This could end up squeezing mid-sized urban areas such as Moncton.

Figure 8: Fastest Increase in Immigration Levels per 10,000 Population (Between the periods 1997-2001 and 2007-2011) -Canadian CMAs



We need a new federal government approach that understands the long term need for immigration into mid-sized urban centres. More than just viewing immigration as a tool to fill workforce gaps, immigration needs to be viewed as a broader tool to foster population and economic growth – just as it has in Toronto, Montreal and Vancouver.

⇒ **Immigration and EI reform**

One of the stated reasons for the recent Employment Insurance reform was to limit the use of immigrant workers to fill positions that “should be filled by New Brunswickers”. While it is very appropriate for government and industry to work together to address the skills gaps in the New Brunswick workforce, choking off immigration with the expectation that those jobs will be filled by current residents could end up causing more harm than good. Already some businesses in New Brunswick have complained that the EI reform has led to them losing their immigrant workers with a negative impact on their businesses. We need to find a solution that views immigration as a longer term part of our workforce and population mix while addressing any skills gaps among the local population.

⇒ **Immigration and Moncton's commitment to bilingualism**

As the data above clearly shows, New Brunswick has a poor record of attracting and retaining French speaking immigrants despite our French language commitment and institutions. Nova Scotia, Manitoba and other provinces have attracted far more French speaking immigrants than New Brunswick. Why? Is it only economic considerations? Are there other issues? Are we doing enough to promote New Brunswick into French speaking areas? Can our French language institutions (i.e. UdeM, CCB, Vitalité, etc. do more to act as conduits for French speaking immigrants)?

In addition, we need to look at ways to foster more French and English language use among new immigrants to the region. As is shown in Appendix A, non-Francophone immigrants into Moncton have a high rate of French language knowledge than non-immigrant Anglophones. They have clearly been willing to learn French and we need to ensure they have the opportunity.

⇒ **Immigration and settlement services**

Greater Moncton has two main immigrant settlement service providers: Centre d'accueil et d'accompagnement francophone des immigrants du Sud-Est du N.-B. (CAFI) and the Multicultural Association of the Greater Moncton Area (MAGMA). Both have been expanding their service offerings in recent years to accommodate the rising level of immigration. However, there is work to be done to make the Moncton region a more immigrant-friendly place. The primary and secondary education system has taken steps to better integrate new immigrant students. A similar focus needs to be placed on other services such as health care. In addition, more work needs to be done to integrate immigrants into local civic organizations and business groups.

Appendix A: Summary Profile of Moncton's Immigrant Population from the 2006 Census

Unfortunately the detailed profile of Greater Moncton's immigrant population comes from the 2006 Census before the recent spike of immigrants into the region from 2007 to 2011. When released, the immigrant profile from the 2011 Census will have more recent data but it is not expected to be made public until early to mid-2013. The 2006 Census profile does shed important light on the profile of over 4,200 immigrants who have chosen to make Moncton their home. All statistics below come from the 2006 Census and are based on the Moncton Census Metropolitan Area (CMA).

Source country and language

Over 46 percent of the first generation immigrants living Greater Moncton have English as their mother tongue. They come primarily from the United States and the United Kingdom. A little over 13 percent of them have French as their mother tongue. Twenty-eight percent of all immigrants are from the United States and 18 percent are from the United Kingdom. The other main source countries are Germany, the Congo, Italy and China. The most recent immigrants – 1996 through 2006 – are primarily from Africa and Asia.

Although only 13 percent of immigrants are mother tongue French, a full 37 percent speak both English and French. In Greater Moncton, more non-Francophone immigrants speak French than non-Francophone, non-immigrants.

Age at immigration

Moncton's immigrants tend to be younger than other areas of New Brunswick. Nearly 41 percent were under the age of 14 at immigration compared to 33 percent in Saint John and 32 percent in Fredericton.

New Brunswick's immigrant population in 2006 was much older than the non-immigrant population.

As shown in Table 9, nearly a quarter of the immigrant population was 65 years and older compared to only 12.5 percent of those born in Canada.

Less than 13 percent of immigrants were under the age of 24 compared to over 30 percent among the Canadian born population. Based on the student immigrant data, this profile has likely shifted considerably in the past five years.

Table 9: Moncton CMA Non-Immigrant and Immigrant Population by Age Group

Age Group	Total	Non-immigrants		Immigrants Total
		Born in NB	Born outside NB	
Under 24	30.4%	32.9%	21.3%	12.7%
25-44	29.7%	28.5%	34.1%	32.7%
45-64	27.4%	26.2%	31.9%	30.0%
65+	12.5%	12.5%	12.7%	24.4%

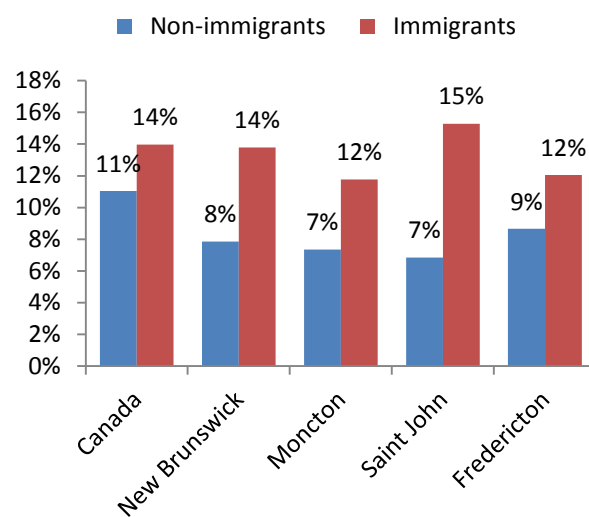
Source: Statistics Canada 2006 Census.

Labour force profile

The immigrant population had a lower unemployment rate compared to the non-immigrant population in 2006 but not by a wide margin (5.7 percent versus 6.2 percent). There were fewer adult immigrants in the workforce (61 percent versus 69 percent) but that was primarily due to the age of immigrants as discussed above.

There are some differences in where immigrants were working in 2006. Immigrants were far more likely to be working in education, health care, utilities and professional services and far less likely to be working in construction, manufacturing and public administration. Immigrants were 43 percent less likely to work in trades and transportation occupation and more than 50 percent less likely to be working in manufacturing occupations.

Figure 9: Self-Employment Rate (2006)



Source: Statistics Canada.

Moncton's immigrant population has a much higher rate of self-employment. Immigrants are 60 percent more likely to be self-employed compared to non-immigrants. This is the case across Canada but the spread is greater in New Brunswick.

Educational profile

In 2006, Moncton's immigrant population had a much higher level of education than the non-immigration population.

Moncton's immigrants population was more than 3.5 times more likely to have a post-graduate university degree (Masters, earned doctorate, etc.) than the non-immigrant population.

Table 10: Non-Immigrant and Immigrant Population by Education Level

<u>Jurisdiction:</u>	<u>Population:</u>	Less than high school	High school only	College, trades or below diploma university education	Bachelor's degree (only)	Post- graduate degree
Canada	Non-Immigrant	24.6%	26.4%	33.2%	12.3%	3.4%
	Immigrant	21.3%	22.7%	30.6%	17.3%	8.1%
New Brunswick	Non-Immigrant	30.0%	26.1%	31.6%	9.9%	2.5%
	Immigrant	17.3%	22.8%	33.9%	14.8%	11.3%
Moncton	Non-Immigrant	23.4%	27.1%	33.9%	12.5%	3.1%
	Immigrant	18.2%	20.7%	34.3%	15.5%	11.4%
Saint John	Non-Immigrant	24.0%	29.4%	33.3%	11.1%	2.3%
	Immigrant	14.1%	20.8%	39.4%	17.0%	8.8%
Fredericton	Non-Immigrant	19.0%	27.0%	30.1%	17.9%	6.0%
	Immigrant	12.5%	20.1%	27.7%	19.4%	20.3%

Source: Statistics Canada 2006 Census.

Nearly two thirds of the immigrant population with post-secondary education (64 percent) received their degree/diploma from a Canadian educational institution. This is considerably higher than the national average of 46.5 percent.

Over 42 percent of Moncton's immigrant population with post-secondary education received that training in New Brunswick.

Of the 36 percent who were educated elsewhere, the United States, United Kingdom and France were the three top locations (with relatively marginal percentage shares).

Income/Earnings profile

Immigrants in Moncton are slightly more likely to work full time and full year. Fifty-eight percent of non-immigrant workers in Greater Monctonians worked full time and year round in 2005 compared to 61 percent among immigrant workers.

Among those working full time, full year the average employment income for immigrants was eight percent higher than for non-immigrants. Across New Brunswick, immigrants earn on average 11 percent more than non-immigrants. Across Canada immigrants earn less than non-immigrants.

In Moncton, immigrants in 2006 had a 54 percent greater chance of earning at least \$75,000 per year.

The difference has to do with where immigrants fit in the labour market. In New Brunswick, there is a higher concentration in health care, education and other professional occupations compared to Canada as a whole with the immigrant population more prevalent in retail and services. While we don't have hard data on this, anecdotal evidence would suggest this trend towards immigrant workers in retail and services is emerging in New Brunswick.

Because of the older profile of the immigrants in Moncton, they were more reliant on retirement income and public pensions than non-immigrants.

However, the average immigrant in 2006 paid 17.7 percent of total income in personal income taxes compared to 16.8 percent among non-immigrants.

There is a divergence in income levels among immigrants, however. In 2005, 16.5 percent of immigrants in Moncton were below the low income cut-off compared to 9.1 percent among non-immigrants.