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## Campbellton and Eastern Restigouche in 2030

The Role of Immigration to Support a Sustainable Regional Economy

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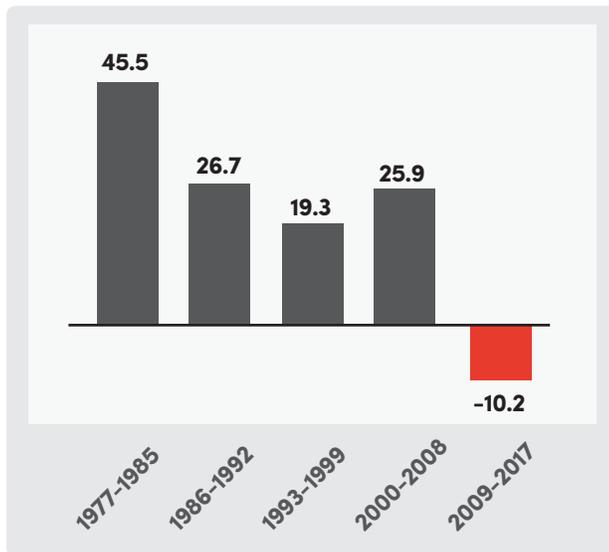
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# Introduction: New Brunswick's Biggest Challenge

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.

## Campbellton and Eastern Restigouche: A Unique and Important Role in the New Brunswick Economy

Campbellton and eastern Restigouche play an important role in the New Brunswick economy. The Campbellton Census Agglomeration (CA) labour force features above-average employment in retail trade, other services and public administration, highlighting the community's role as a regional services hub. The urban centre has more than twice as many people employed in health care compared to Canada as a whole, adjusted for size. The eastern Restigouche area features significant fishing and seafood processing sectors.

In the City of Campbellton alone there are over 300 businesses, including more than 50 in retail trade, 22 in construction, 27 in other services, and 26 in accommodation and food services.<sup>3</sup> Without Campbellton and eastern Restigouche, New Brunswick would lose an important manufacturing centre, as there are more than 600 people employed in manufacturing operations in the area. There are also many tourism assets in the region. A main contributor to the large health care industry is the nursing and residential care sub-sector. There are 21 related facilities in eastern Restigouche.

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.

3. Businesses with employees. Source: Statistics Canada Canadian Business Patterns (Dec. 2016).

### Geographic Definitions: Campbellton and Eastern Restigouche

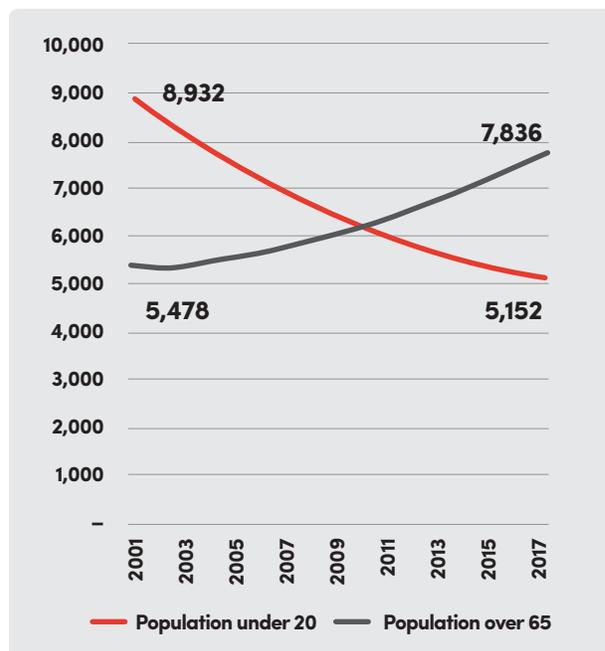
Statistics Canada groups the City of Campbellton and the outlying communities of Addington (Parish), Atholville (Village), Dalhousie (Parish) and Tide Head (Village) into a single CA area. Throughout this document three geographic regions will be referenced: 1) the municipalities in the region, 2) the Campbellton CA and 3) Restigouche County. All three are used because Statistics Canada publishes different sets of data based on geographic region. The components of annual population growth, for example, are only available at the county level. The term “Campbellton and eastern Restigouche” herein refers to the municipalities in eastern Restigouche County.

But like the rest of the province, Campbellton and eastern Restigouche are aging fast. The median age<sup>4</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 tourism, health care and manufacturing.

## Campbellton and Eastern Restigouche’s Shrinking Talent Pipeline

In 2001 there were 163 young people (under the age of 20) living in Restigouche County for every 100 people over the age of 65. That year there were over 8,900 people living in Restigouche 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 5,150 (in 2017) – this represents a drop of 42 percent. There are now only 66 young people in the county for every 100 people over the age of 65. Figure 2 shows the population trend for those under the age of 20 and those over the age of 65 across Restigouche County.

**FIGURE 2: POPULATION TREND IN RESTIGOUCHE COUNTY BY SELECTED AGE GROUP (2001 TO 2017)**



Source: Statistics Canada annual population estimates.

As shown in Table 1, the municipalities in the region are losing population. All of the municipalities are considerably older than Canada as a whole, as measured by median age. Among municipalities across the province with a population of at least 1,000, the Village of Dalhousie has the oldest population with a median age of over 58.

In the 1970s, the median age across Restigouche County was similar to the national average. Now there is a wide and growing gap. The median age in the county was 51.7 in 2016 while it was only 41.2 across the country. In other words, the average Restigouche County resident is 25 percent older than the average Canadian.

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

**TABLE 1: RECENT POPULATION TRENDS – SELECTED CAMPBELLTON AND EASTERN RESTIGOUCHE MUNICIPALITIES**

Jurisdiction:	Population, 2016	% change since 2011	Median age
Campbellton	6,883	-6.8%	51.6
Dalhousie	3,126	-11.0%	58.4
Balmoral	1,674	-2.6%	48.1
Atholville	3,570	-5.5%	50.3
Restigouche	30,955	-5.0%	51.7
New Brunswick	747,101	-0.5%	45.7
Canada	35,151,728	5.0%	41.2

Source: Statistics Canada 2016 Census.

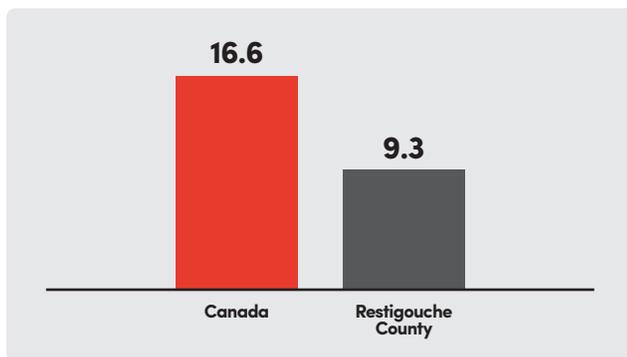
### The Opportunity: Refocusing on Growth

The population trend actually represents a great opportunity. Campbellton and eastern Restigouche feature small, highly liveable communities with a lower cost of living. They benefit from the City of Campbellton and its cluster of retail, recreation, personal and business services.

Among people who own their home, only a little over nine percent across Restigouche County spend 30 percent or more of their income on shelter costs (mortgage, home insurance, etc.) – nearly 44 percent less than the country as a whole (shown in Figure 3). The average cost of an owned dwelling in the City of Campbellton is 70 percent lower than the average across the country.

Attracting people to live and work in eastern Restigouche 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 the 2016 Census there were 6,130 people participating in the Campbellton CA labour force (either working or seeking employment) down from a 7,330 back in 2006. 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 Restigouche County and for the Campbellton CA. 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 Restigouche County has an LQ value of 1.44 meaning there are proportionally 44 percent more people working in manufacturing in the county compared to Canada as a whole.

Restigouche County has a higher concentration of workers in manufacturing, retail trade, health care and social assistance, other services, and public administration. Over the past decade, the county has witnessed employment decline in multiple sectors, including manufacturing, trade, transportation and warehousing, accommodation and food services, and education.

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

Restigouche County

	Employed in 2016	% Change Since 2006	LQ 2016 CAN = 1.00*
<b>All Industries</b>	<b>14,330</b>	<b>-10%</b>	
11 Agriculture, forestry, fishing and hunting	855	-25%	2.50
21 Mining and oil and gas extraction	105	+40%	0.50
22 Utilities	140	-30%	1.34
23 Construction	960	-1%	0.92
31-33 Manufacturing	1,770	-14%	1.44
41 Wholesale trade	170	-23%	0.33
44-45 Retail trade	1,930	-13%	1.19
48-49 Transportation and warehousing	575	-15%	0.85
51 Information and cultural industries	135	+29%	0.42
52 Finance and insurance	240	+14%	0.40
53 Real estate and rental and leasing	65	-58%	0.25
54 Professional, scientific and technical services	335	-7%	0.33
56 Administrative and support**	370	+1%	0.60
61 Educational services	905	-20%	0.88
62 Health care and social assistance	2,980	+20%	1.81
71 Arts, entertainment and recreation	150	-53%	0.51
72 Accommodation and food services	805	-26%	0.82
81 Other services (except public administration)	660	-15%	1.05
91 Public administration	885	+1%	1.02

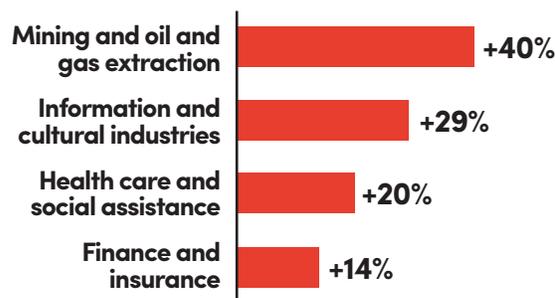
\* Any number above 1.00 means the region has a larger concentration of workers in this sector compared to Canada as a whole.

\*\*Includes waste management and remediation services.

Source: Statistics Canada 2016 Census.

On a percentage basis, mining and oil and gas extraction has been the fastest growing sector, up 40 percent between 2006 and 2016 (Figure 4). Information and cultural sector employment is also expanding, as is the health sector.

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



Source: Statistics Canada 2011, 2016 Censuses.

The Campbellton CA also shed jobs between 2006 and 2016. Overall, the number of people in the labour force dropped by 16 percent. Health care, administrative and support services, and information and cultural industries all added employment. In addition, Campbellton has high LQ values for retail trade and health care.

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

Campbellton CA

	Employed in 2016	% Change Since 2006	LQ 2016 CAN = 1.00*
<b>All Industries</b>	<b>6,130</b>	<b>-16%</b>	
11 Agriculture, forestry, fishing and hunting	155	-26%	1.06
21 Mining and oil and gas extraction	15	+50%	0.17
22 Utilities	30	-40%	0.67
23 Construction	370	-20%	0.83
31-33 Manufacturing	510	-22%	0.98
41 Wholesale trade	50	-50%	0.23
44-45 Retail trade	1,020	-19%	1.48
48-49 Transportation and warehousing	175	-20%	0.61
51 Information and cultural industries	75	+25%	0.54
52 Finance and insurance	90	-5%	0.35
53 Real estate and rental and leasing	30	-70%	0.27
54 Professional, scientific and technical services	140	-28%	0.32
56 Administrative and support**	190	+27%	0.72
61 Educational services	375	-35%	0.85
62 Health care and social assistance	1,615	+16%	2.31
71 Arts, entertainment and recreation	65	-69%	0.52
72 Accommodation and food services	385	-28%	0.92
81 Other services (except public administration)	290	-18%	1.09
91 Public administration	425	-11%	1.15

\* 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.

In the years ahead, the main export-focused industries – 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 region 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.

## A Significant Number of Workers are Heading towards Retirement

The pace of workers heading into retirement in Campbellton and eastern Restigouche is quickening. Across Restigouche County there are nearly 3,800 workers over the age of 55 or more than one out of every four workers (Figure 5). A large share of the regional workforce is heading towards retirement in the near future.

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



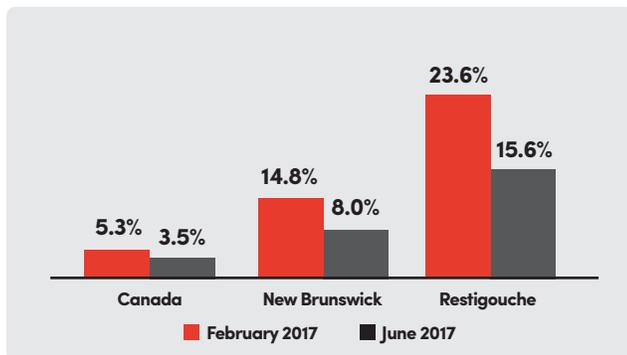
Source: Statistics Canada 2016 Census.

# Employment Insurance and Unemployment

Restigouche County and northeastern New Brunswick in general has another particular, but not altogether unique, challenge that makes the labour market situation more complicated. Its unemployment rate at the time of the last Census was 15.6 percent. How is it possible to have “high” unemployment alongside multiple industries voicing concern about the challenges associated with hiring new workers?

Restigouche County’s seasonal industries point to a main reason. In February 2017 there were 3,400 people living in the county and collecting Employment Insurance. That is an amount equivalent to 23.6 percent of the total workforce in the county (Figure 6) and more than four times as many compared to the national workforce. Even in the middle of the summer, the share of the workforce collecting Employment Insurance was 15.6 percent – nearly triple the national level.

**FIGURE 6: PERCENTAGE OF THE WORKFORCE COLLECTING EI INCOME (FEBRUARY AND JUNE 2017)**



Sources: Statistics Canada CANSIM Table 276-0035 and the 2016 Census.

Many important industries and jobs in Restigouche County are seasonal in nature making a lot of people unavailable for jobs that are open in other sectors. This makes it seem like the real unemployment picture in the county is worse than it may be in reality.

# Why are Young People Still Leaving?

As discussed above, the number of young people in Campbellton and eastern Restigouche 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

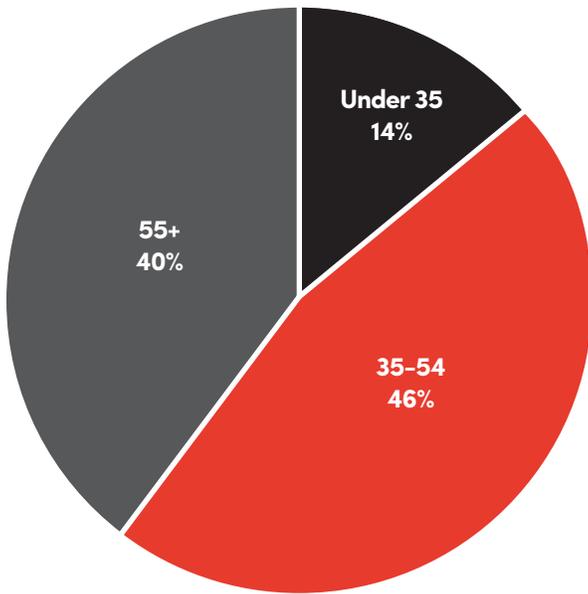
We need to ensure that young people understand the career opportunities on offer at home in Campbellton and eastern Restigouche and make informed choices about training and/or post-secondary education. We also need to attract some of them back once they have left to pursue education or other opportunities,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

# Campbellton and Eastern Restigouche’s Aging Entrepreneurs

New Brunswick’s entrepreneurs and small business owners are also getting older. In Restigouche County, 40 percent of everyone self-employed is over the age of 55 (Figure 7). This means within a few years over 400 entrepreneurs are likely to be retiring

**FIGURE 6: SELF-EMPLOYED BY AGE GROUP**

Restigouche County



Source: Statistics Canada 2016 Census.

This represents a serious challenge for Campbellton and eastern Restigouche. 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 manufacturing, tourism and natural resources development, where many of these small businesses are active.

### **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 Campbellton and eastern Restigouche.

## **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.

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

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

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

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 Campbellton and eastern Restigouche’s core economic activity in agriculture, natural resources development, manufacturing and other export-oriented industries.

## The Role of Immigration

What will be the role of economic immigration to support Campbellton and eastern Restigouche in the years ahead? The region has not attracted many immigrants in recent years. In 2016, there were 65 people living in the City of Campbellton who lived outside of Canada five years earlier. This was a slightly higher immigration rate than in the past, but still well below the rate needed to replenish the population and regional workforce.<sup>7</sup>

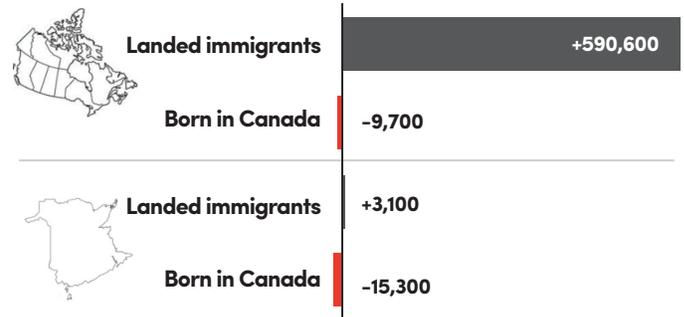
Boosting the number of immigrants to Campbellton and eastern Restigouche will: 1) ensure important industries have the workers they need; 2) help rebuild the K-12 student population in the region; and 3) boost the local economy through increased household spending.

### 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 8, 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 8), 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 8: 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 8 above 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>8</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 Campbellton CA’s labour force declined by 1,200 between 2006 and 2016. The 65 immigrants added to the region’s labour force did not have much of an impact.

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

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

**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

\*CMA and CA areas.

Source: 2006, 2016 Census. Statistics Canada.

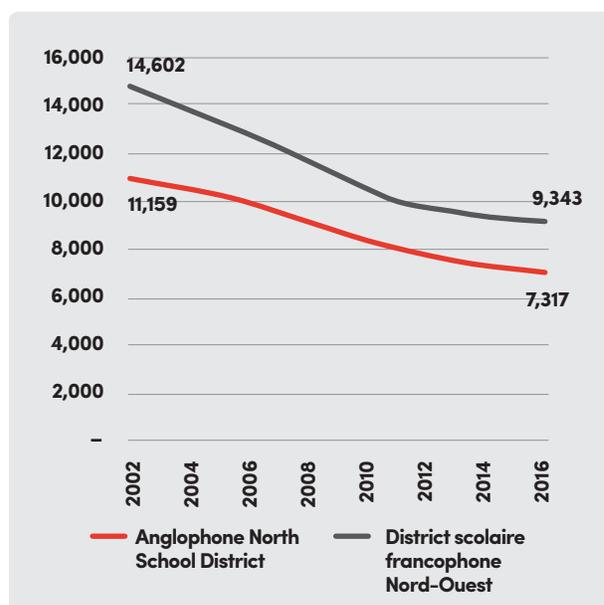
Economic immigration will be an important way that we can bring people that have the skills, education, language capacity and interest to permanently work the job opportunities in Campbellton and eastern Restigouche. This will boost the regional economy and create even more demand for high value services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

### 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 northern New Brunswick. Since 2002, the student population in the Anglophone North School District has dropped by 34 percent and it has dropped by 36 percent in the District scolaire francophone Nord-Est (Figure 9).

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.

**FIGURE 9: K-12 STUDENT ENROLMENT (2002-2017)**



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

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

An increase in younger immigrant families will also mean more students to feed into the post-secondary education system in Campbellton and eastern Restigouche in the coming years.

### Boosting Local Economies

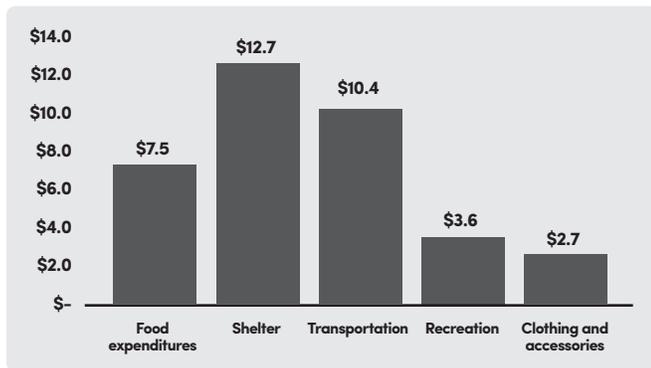
Attracting more immigrants will create new demand for local products and services. Adding 1,000 immigrant families with an average household income profile will directly generate \$68 million worth of new household expenditures – much of this spending in the local community.<sup>9</sup> These 1,000 immigrant 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 10 shows the expected spending from the new families for a few specific categories.

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

**FIGURE 10: 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 Campbellton and eastern Restigouche 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.

## Campbellton and Eastern Restigouche in 2030

So, what will Campbellton and eastern Restigouche look like in 2030? Will the City of Campbellton continue to be a hub for health care and services? Will the broader region continue to have a manufacturing sector? Will new industries emerge related to health care, tourism and personal services? Will the workforce be there to ensure the region and its communities can take advantage?

Campbellton and eastern Restigouche has the potential to continue its 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 in Campbellton and eastern Restigouche.

If we are to attract more immigrants, we need to figure out how to better infuse them into our social and community life. Across Restigouche County, 96 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.

# new conversations

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