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The Fredericton Region in 2040

Population growth planning document

PREPARED BY New Brunswick Multicultural Council

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INTRODUCTION

The Fredericton Region in 2040

The primary objective of this report is to show the need for population growth in the Fredericton Region in the coming years, if the area wants to ensure there will be enough workers to meet local needs and to provide talent for new industries to grow. In addition, another objective is to highlight the important role of local leaders in population growth planning and the related work needed to ensure the city and surrounding area's economy can grow in the years ahead.

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

For the purposes of this report, population/demographic/industry data for the Fredericton Census Agglomeration (CA) area is used (also called the Fredericton Region throughout the report). The Fredericton CA includes the City of Fredericton; the Hanwell rural community, the villages of Harvey, New Maryland and Tracy; two First Nations communities (Devon and Kingsclear) and the parishes of Bright, Douglas, Gladstone, Kingsclear, Lincoln, Manners Sutton, Maugerville, New Maryland, Queensbury and Saint Marys.

Covid-19 Considerations

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

The need for a population growth plan

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

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

The City of Fredericton has been a leader for its focus on population growth. According to the city's municipal plan, by 2041 the city's population is projected to increase by more than 50 percent from 60,000 in 2016 to over 90,000. As will be shown below, if this growth rate occurs at the Fredericton regional level, it will foster substantial growth in the workforce and the economy in the years ahead.

Sustaining our high-quality health care system and public services

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

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

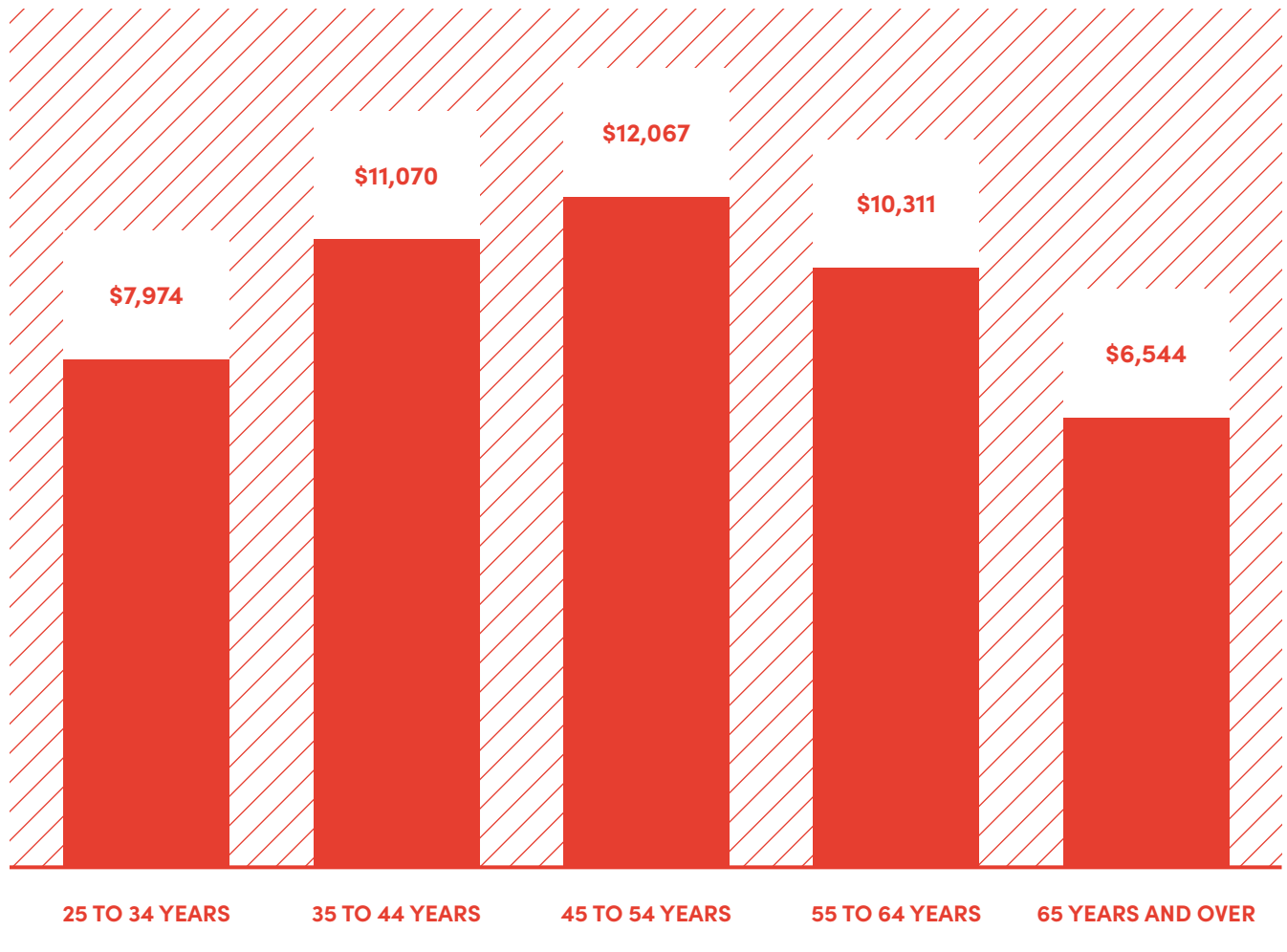


Figure 1: Average income taxes paid by age cohort, New Brunswick (2017)

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

THE HEALTH CARE EXAMPLE

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

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

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

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

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

Sustaining our K-12 school system

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

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

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

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

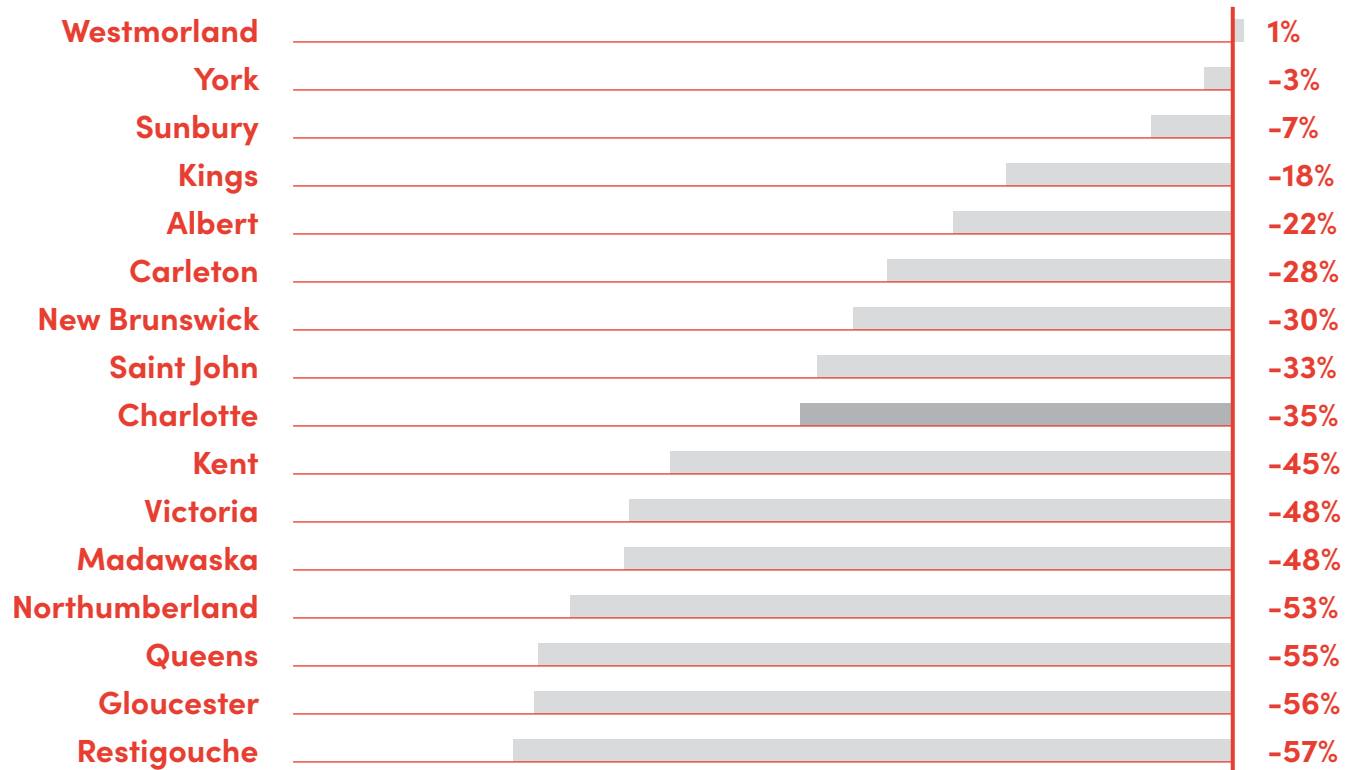


Figure 2: Percentage change in the 0-19 population (1988 – 2018), by county

Source: Statistics Canada.

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

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

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

Model assumptions:

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

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

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

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

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

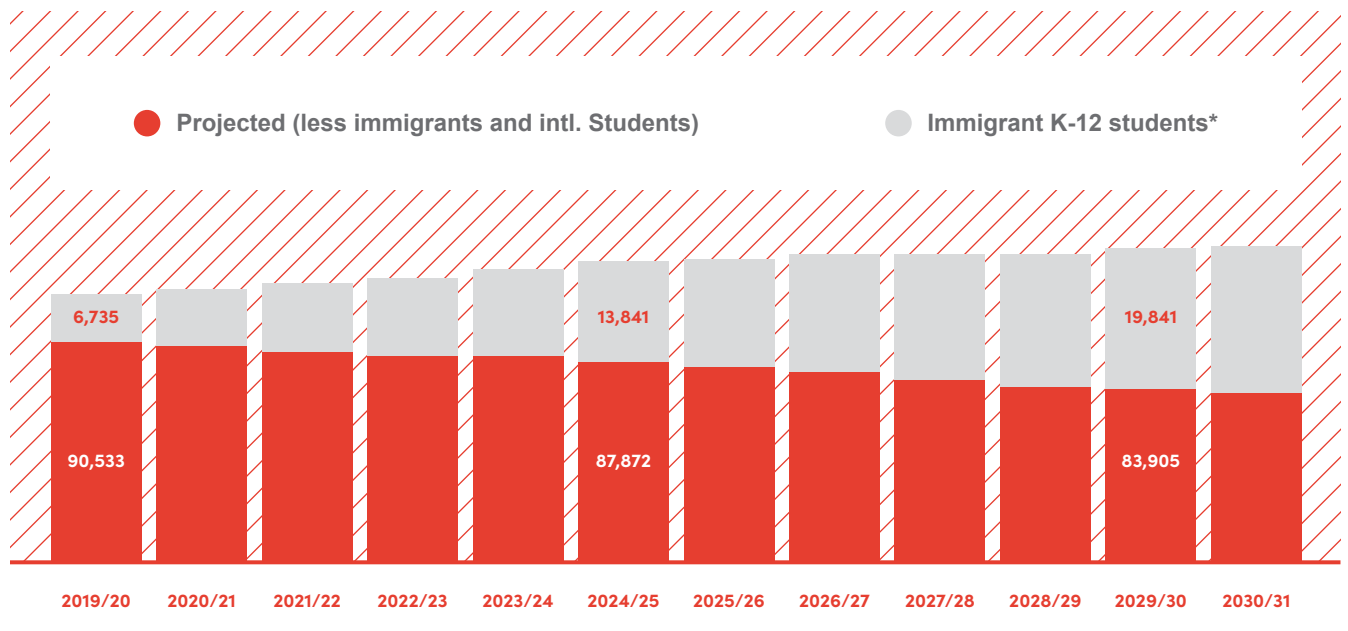


Figure 3: Forecasted impact of immigrants on K-12 student population in New Brunswick
Sources: Baseline numbers for 2019-20 provided by GNB. Forecast model based on the assumptions shown in Appendix A.

Strong local communities = strong provincial economy

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

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

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

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

The business plan for New Brunswick and local communities

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

THE CASE: LOCAL COMMUNITIES NEED TO GET ENGAGED

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

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

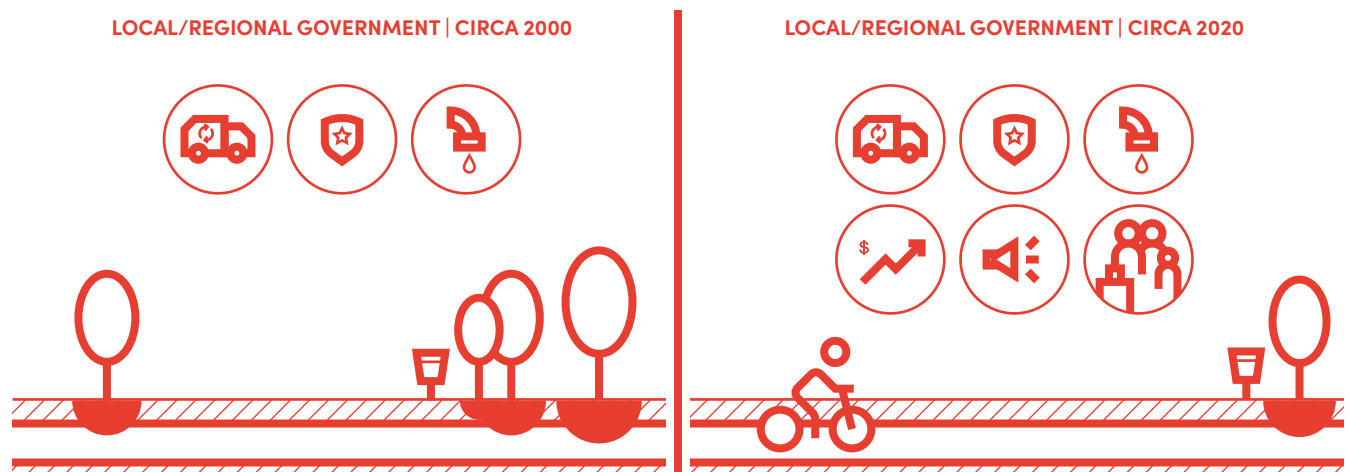


Figure 4: The changing demands on local/regional government

THE GOAL: A STRONGER PARTNERSHIP BETWEEN LOCAL AND PROVINCIAL GOVERNMENT

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

WHAT DOES A LOCAL 'BUSINESS PLAN' LOOK LIKE?

The City of Fredericton has a business plan focus. It has a plan for economic development, people attraction and for investments in the city that support growth in the years ahead. The components of a 'business plan' for municipalities include:

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

Most of all the 'business plan' should be aspirational. It might not be easy to grow a regional economy, but we should make the effort. It is fair to say the City of Fredericton has an aspirational plan for the future.

Why focus on 2040?

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

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

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

² Real gross domestic product (GDP) growth.

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

Where will the new population come from?

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

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

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

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

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

POPULATION GROWTH IN THE FREDERICTON REGION THROUGH 2040:

Three Scenarios

Fredericton is already growing its young population

As of 2020, Statistics Canada estimates there are about 23,700 people aged 0 to 19 living in the Fredericton CA. Unlike most areas of New Brunswick, the number of people under 20 living in the region has increased over the past decade (up seven percent). This represents essentially the maximum number of persons currently living in the region who could join the workforce within the next 20 years. However, the current population profile indicates that only around 80% of people aged 15-30 are active in the workforce so the likely maximum number is closer to 19,000. Based on the 2020 workforce estimates for the region, it is likely around 23,000 people will leave the workforce over the next 20 years through retirements.

As shown in Table 1, this leaves a potential workforce shortage of 4,000 before accounting for any migration. This reiterates the important role that attracting population to the Fredericton region will have if the city and region are to achieve strong population growth.

TABLE 1: POTENTIAL WORKFORCE SHORTFALL BY 2040, CLOSED LABOUR MARKET, FREDERICTON, CA

Maximum potential entrants (excluding migration)	+19,000
Forecasted exits	<u>-23,000</u>
Shortfall (before any migration)	-4,000

Summarizing three population growth scenarios

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

SCENARIO	PROJECTED OUTCOME	IMPLICATIONS
1. Current trajectory	<ul style="list-style-type: none"> Population forecast to increase from 111,000 today to 143,300 by 2040 (a 29% increase). The workforce will increase from 59,400 today to 72,900 by 2040 (a 23% increase). 	<ul style="list-style-type: none"> The local economy will be able to meet workforce demand in the years ahead (both replacement and growth demand). This will strengthen the local economy and tax base.
2. To maintain the current workforce size	<ul style="list-style-type: none"> The population needs to grow to 121,500 by 2040 (+9.5%) – an addition of 10,500. The workforce stays at 59,400. 	<ul style="list-style-type: none"> Only maintaining the current size of the workforce over the next 20 years will likely lead to fewer workers for important export-focused industries as more workers will be required in service industries such as health care, home care and personal care.
3. To grow the workforce by 0.5% per year	<ul style="list-style-type: none"> The population needs to grow to 130,400 by 2040 (+17.5%). The workforce grows to 64,900. 	<ul style="list-style-type: none"> The population will need to grow by a net 5,500. This would represent a significant decline in the current trajectory but still a solid growth rate. It would provide additional workforce to meet some level of growth demand.

Methodology: Forecasting population growth

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

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

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

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

Scenario 1: Current population and workforce trend

The Fredericton CA population has been growing at a rate of 1.5 percent per year for the past five years. If that growth rate continues it will lead to both substantial population and workforce growth in the years ahead.

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

Based on this forecast, the population in the Fredericton CA is expected to increase by 29 percent between 2020 and 2040. Even though the population over the age of 70 will increase by 54 percent, there will be enough growth in the younger population to boost the workforce.

The number of people in the workforce is projected to rise by 13,500 or an 23% increase.

TABLE 2: BASELINE, CURRENT TRAJECTORY OF THE FREDERICTON REGION’S POPULATION AND WORKFORCE

	2020	2040	CUMULATIVE % CHANGE	AVG. ANNUAL % CHANGE	# CHANGE
Population	111,000	143,300	+29%	+1.5%	+32,300
Workforce	59,400	72,900	+23%	+1.1%	+13,500

See Appendix A for sources and methodology.

IMPLICATIONS OF SCENARIO #1

It will be challenging to sustain a 1.5 percent growth rate for two decades. Between 2001 and 2015, the Fredericton CA population increased by 1.1 percent per year on average. This is an impressive growth rate but lower than 1.5 percent which can add up over a 20-year timeframe. The implications of Scenario #1 are clear. At current growth rates, the Fredericton region will continue to be one of the fastest-growing urban centres in Atlantic Canada.

Scenario 2: Population growth to maintain the current workforce size

Unlike most regions of New Brunswick, to maintain the current workforce size in the Fredericton region through 2040 will require a decrease in the annual population growth rate to around 0.5 percent per year. It will still require considerable population growth (+10,500 over the 20 years) but well below the historical growth rate for the city and region going back over 20 years.

TABLE 3: POPULATION GROWTH TO MAINTAIN THE CURRENT WORKFORCE SIZE

	2020	2040	CUMULATIVE % CHANGE	AVG. ANNUAL % CHANGE	# CHANGE
Population	111,000	121,500	+9.5%	+0.5%	+10,500
Workforce	59,400	59,400	0.0%	0.0%	0

See Appendix A for sources and methodology.

IMPLICATIONS OF SCENARIO #2

Maintaining the workforce at the current level over the next 20 years could lead to fewer workers for important export-focused industries as more workers would be needed in industries such as health care, home care and personal services. It would still require a 9.5 percent population growth.

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

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

TABLE 4: POPULATION GROWTH REQUIRED TO EXPAND THE WORKFORCE

	2020	2040	CUMULATIVE % CHANGE	AVG. ANNUAL % CHANGE	# CHANGE
Population	111,000	130,400	+17.5%	+0.9%	+19,400
Workforce	59,400	64,900	+9.2%	+0.5%	+5,500

See Appendix A for sources and methodology.

IMPLICATIONS OF SCENARIO #3

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

The Fredericton region growth plan



There are a few considerations for the city and surrounding municipalities as they look to sustain a strong growth rate into the future.

Attracting population

Fredericton has been attracting immigrants at a rate well above-average for urban centres in Atlantic Canada for most of the decade. In the past five years, the region has averaged 1,260 immigrants per year according to Statistics Canada. This represents an immigration rate of around 110, per 10,000 population.

The Fredericton CA does have a higher-than-average negative net interprovincial migration rate. Over the past five years, the Fredericton region has lost a net 400 per year to other provinces. It is likely a fairly large share of that migration is made up of new immigrants. Local stakeholders should work to increase retention rates and reduce the net loss of population through interprovincial migration in the coming years.

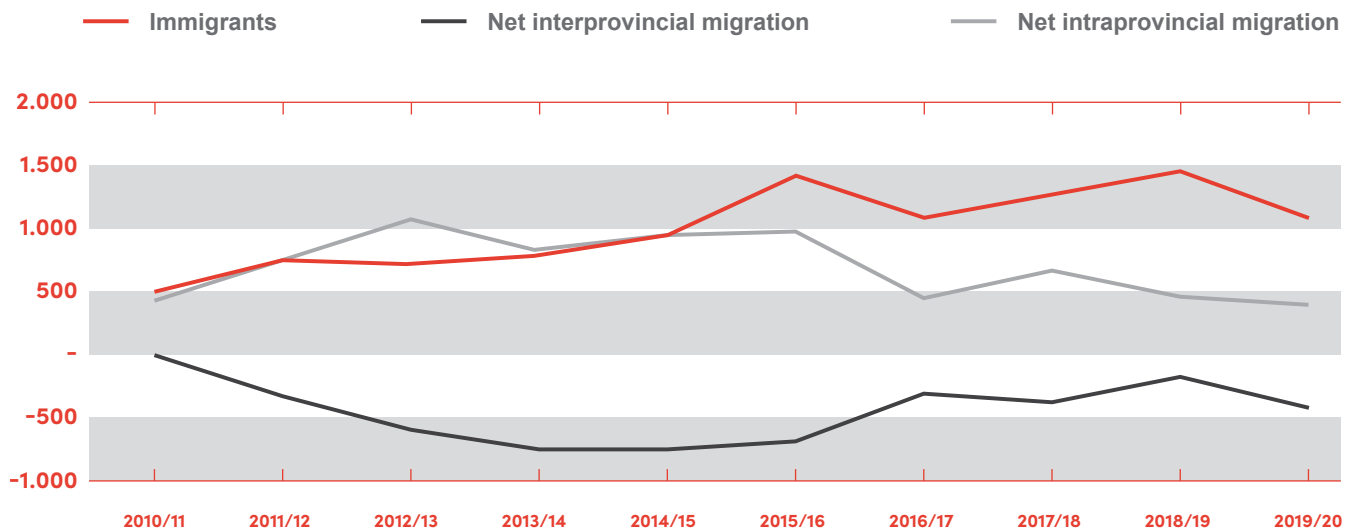


Figure 5: Population attraction by component and year, Fredericton CA
Source: Statistics Canada Table: 17-10-0140-01.

Ensuring there is a focused effort at retention

In the long run, the goal is to retain as many newcomers as possible in the community. This means integration into business and social networks, local schools, churches, sports and recreation organizations. Ultimately, newcomers that build these relationships and develop personal networks and friendships are far more likely to stay in the community long term. This can be facilitated by settlement agencies as well as a host of other organizations in the community. Fredericton has a strong ecosystem of service providers to support immigrants.

Ensuring there is adequate housing

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

In addition, more rental housing options are important. Many newcomers prefer to rent rather than buy when they first settle in the community. This puts smaller communities at a disadvantage compared to larger urban centres, and it needs to be a focus. Fredericton has developed a good mix of new housing in recent years, but the cost of housing is starting to become unaffordable for some.

Conclusion

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

There are no fundamental reasons why the Fredericton region cannot maintain a strong population growth rate through 2040. The city and surrounding communities are well positioned but need to ensure there is adequate housing and support systems in place to support the newcomer population.

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

APPENDIX A:

Sources and Methodology

Population projections for New Brunswick

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

Population values: Table 17-10-0057-01

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

Recent population trends – Fredericton region

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

Components of population growth, annual, Fredericton region

Source: Statistics Canada Table: 17-10-0140-01

New Brunswick K-12 education enrolment forecast

Model assumptions:

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

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

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The Fredericton Region in 2040



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Canada

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