



**WE KNOW ABOUT DECLINING POPULATIONS. NOW WHAT  
ARE WE GOING TO DO ABOUT IT?!**

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2019 MNL Annual Conference, St. John's, NL, November 14, 2019





# OVERVIEW

- RAnLab
- Demographics
- Population Project
- Innovation & Productivity
- Conclusion: Reasons for Optimism





# REGIONAL ANALYTICS LABORATORY (RANLAB)

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- Focuses on the use of regional economic and spatial analytics
- Quantitatively assess the capacity and sustainability of industries, labour markets and the population of places
- For the purpose of informing evidence based policies for regional development





# RANLAB AREAS OF FOCUS

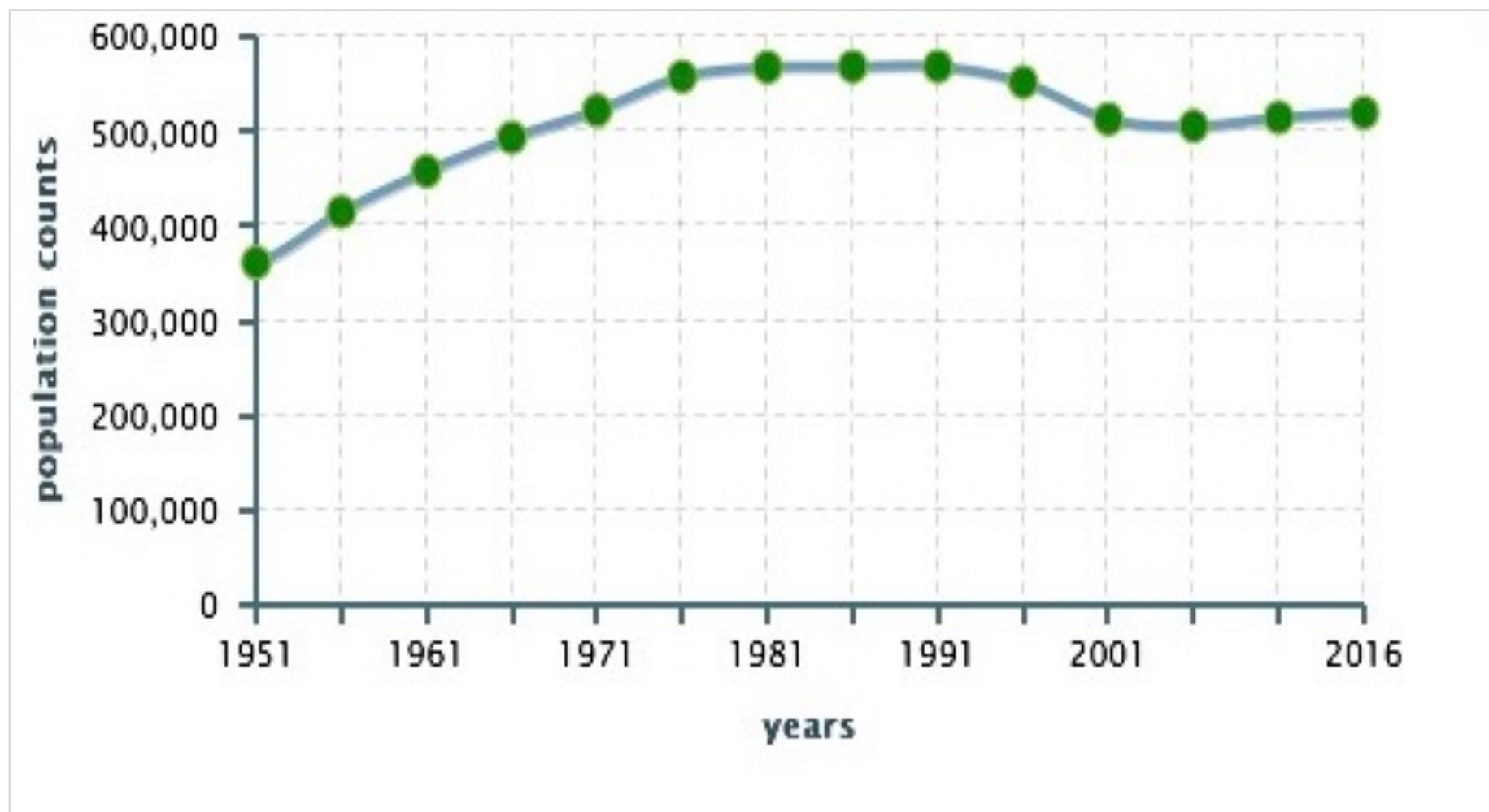
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- Regional Economic Impacts
- Forecasting Population Changes
- Analyzing Labour Force Supply Issues
- Supply Chain Analysis
- Cost benefit analysis of regionalization



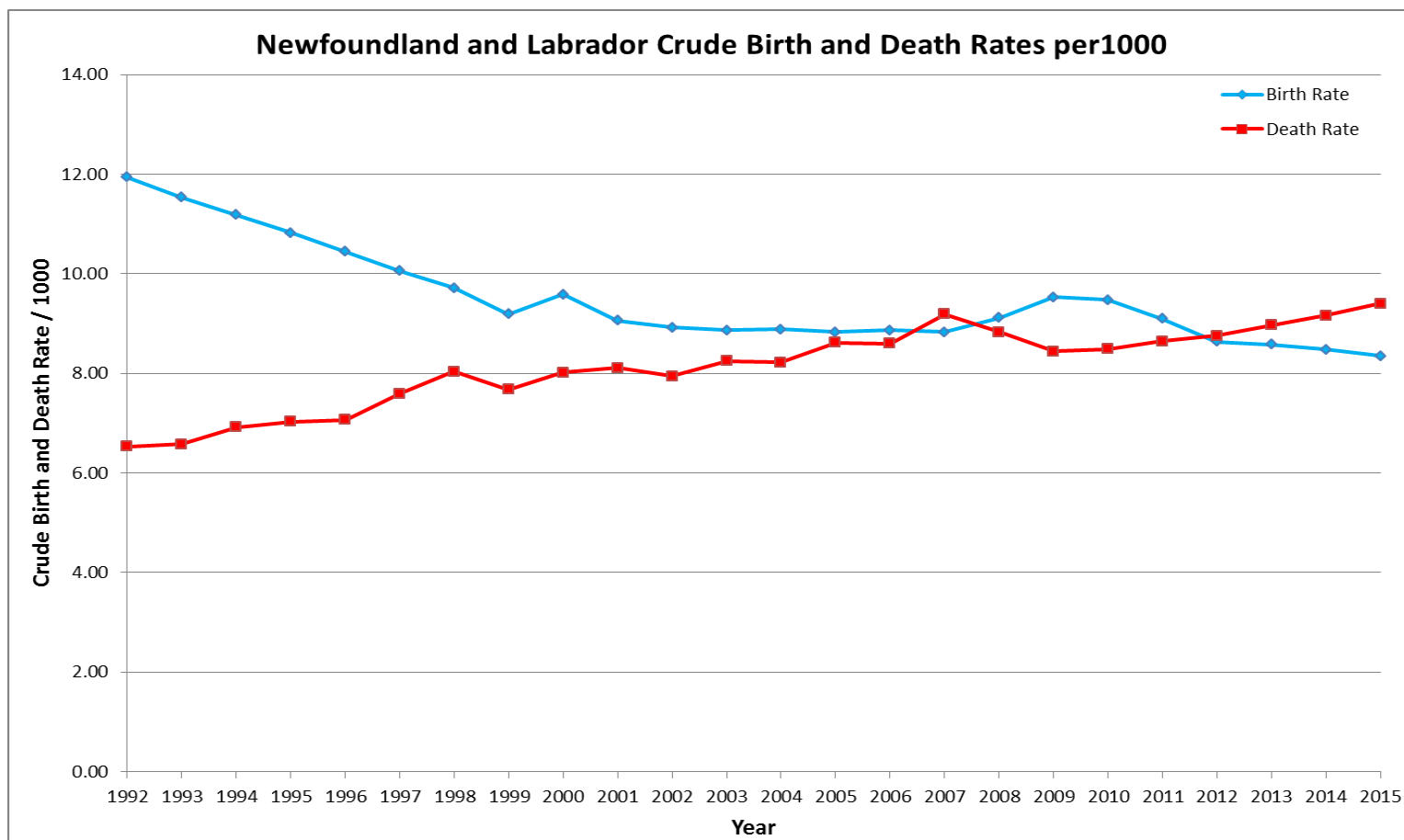


# NL POPULATION: 1951-2016



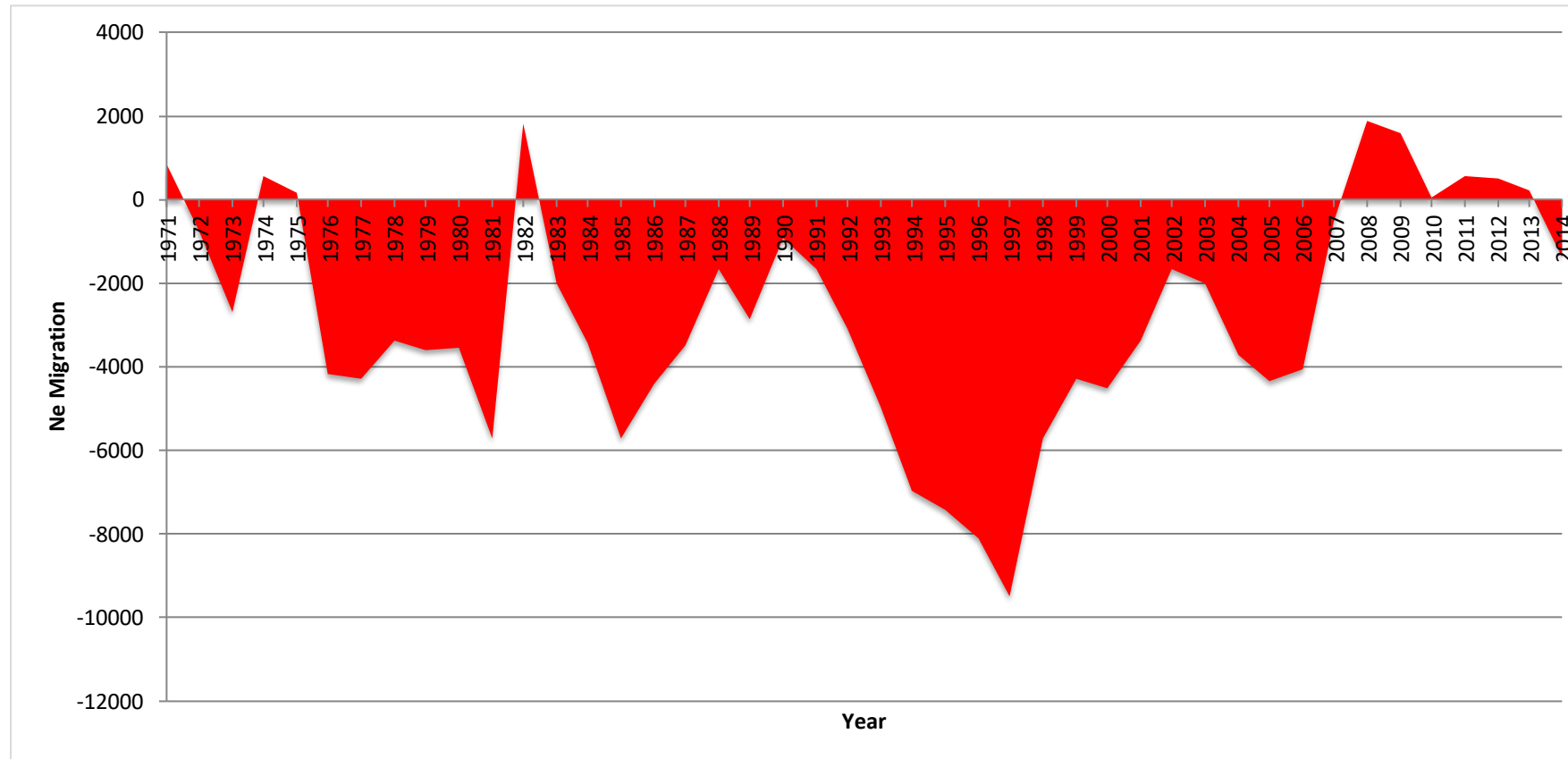


# NL POPULATION: BIRTHS & DEATHS 1992-2015



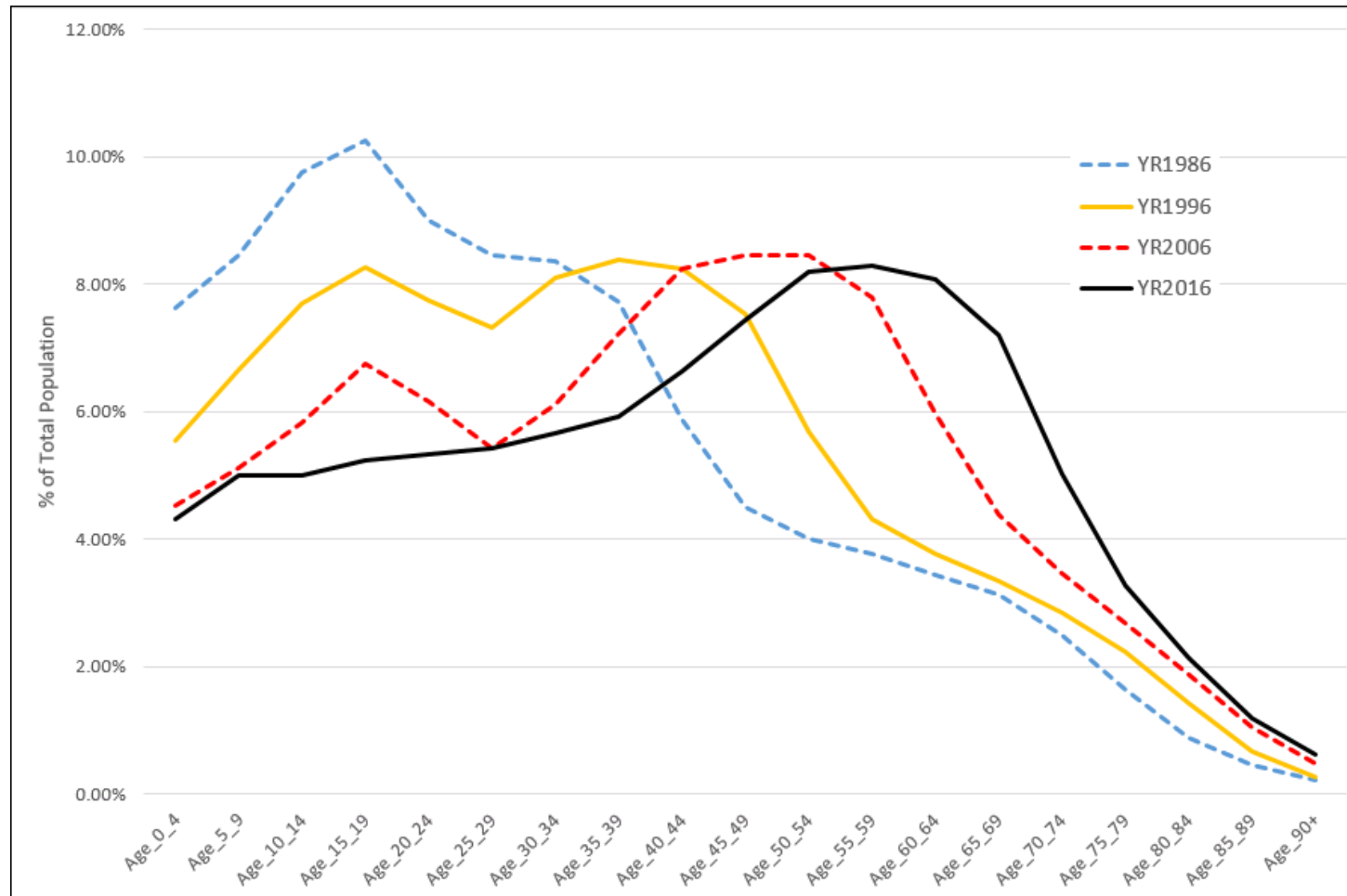


# NL POPULATION: NET MIGRATION 1971-2014



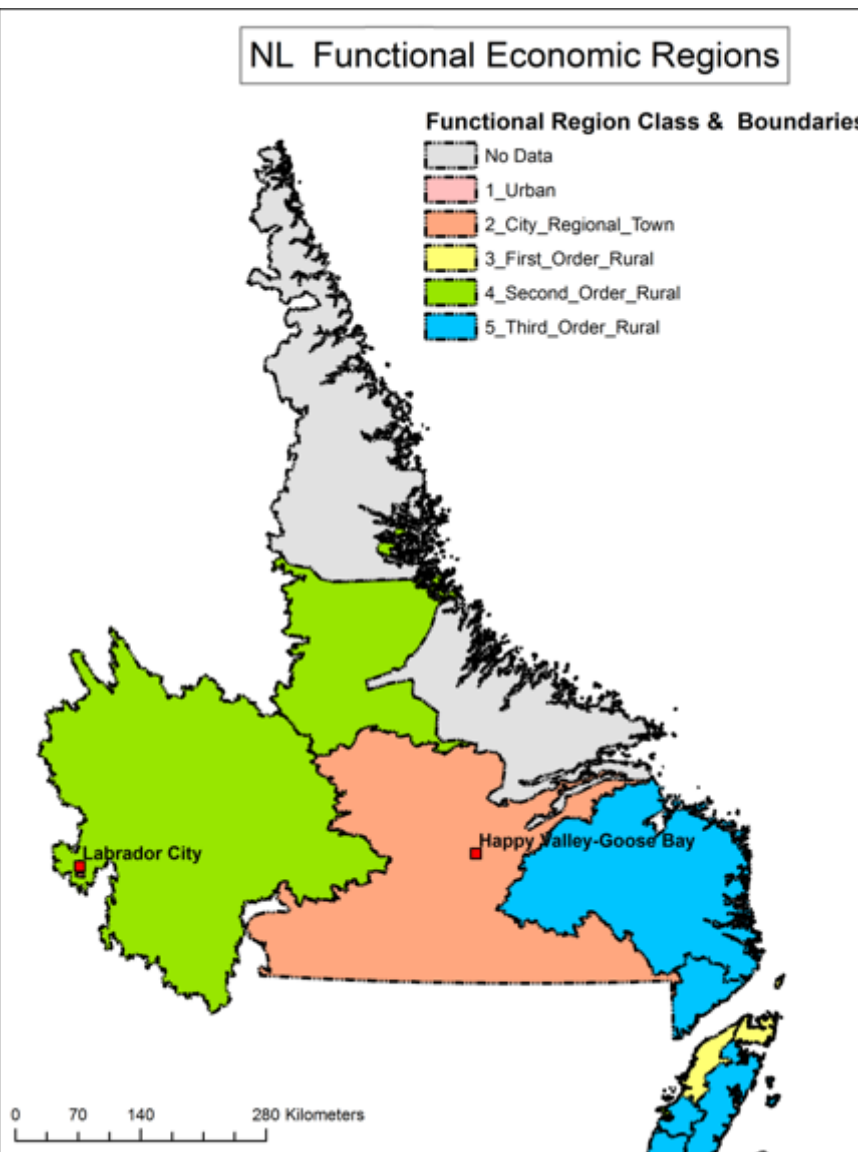
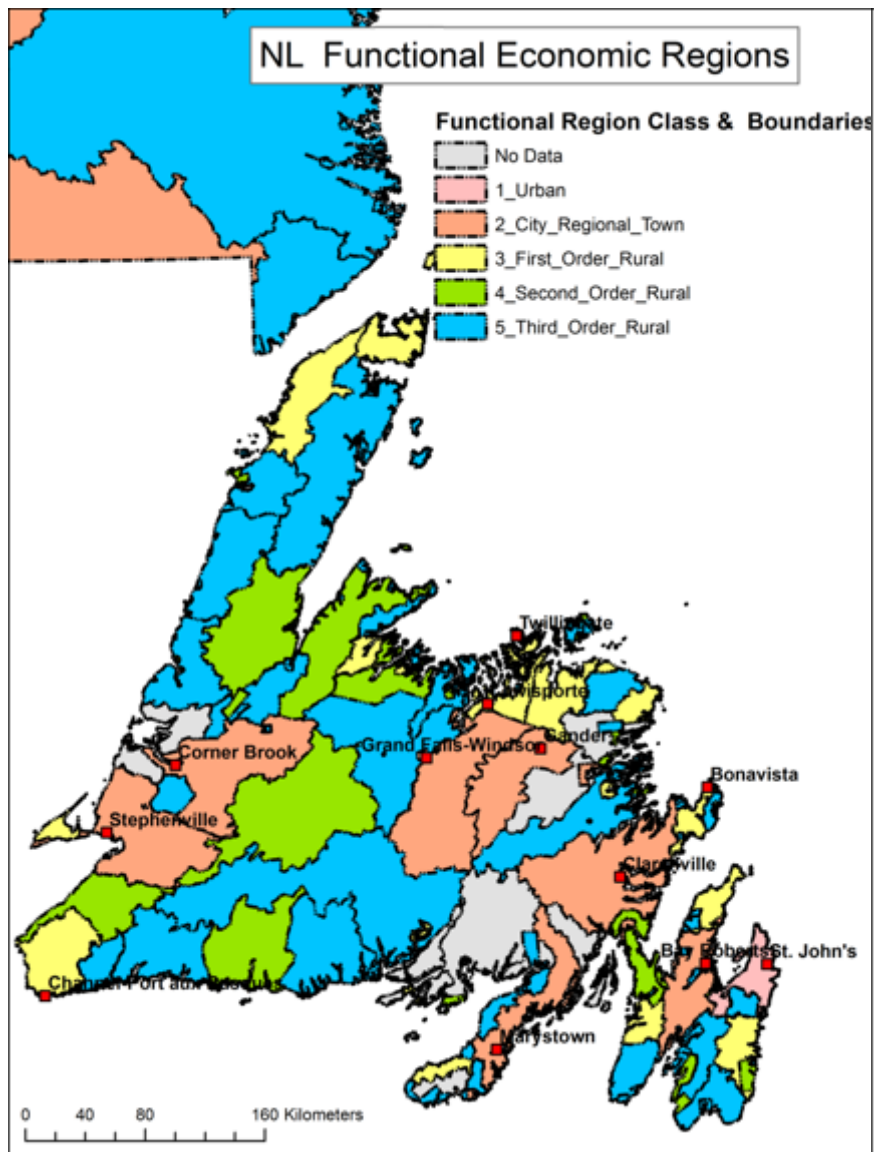


# DEMOGRAPHIC OVERVIEW: AGE STRUCTURE





# NL FUNCTIONAL ECONOMIC REGIONS





# NL FUNCTIONAL ECONOMIC REGIONS: DEFINITIONS

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## Labour market demography

- Age structure (+)
- participation rate (+)
- high school completion (+)
- work age population (+)
- education level (mixed best) (+)
- non university but post secondary (+)

## Economic structure

- % In primary/secondary industries (-)
- Self-employment ratio (+)
- % On employment insurance (-)
- Distance to retail centre (+)
- Share of employment in largest 3 employers (-)

## Income

- Earnings (waged employment by year)
- Transfer payments  
(unemployment level/old age payments)

## Governance

- Grants received (+)
- Turnover in elected officials (middle #'s best)
- Volunteer organizations (+)
- part of multi-community organization
- Located in active RDA



# NL FUNCTIONAL ECONOMIC REGIONS: 5 REGION CLASSES

<b>FER Region Class</b>	<b>Number of Regions</b>	<b>Population 2016</b>	<b>% of Total Population</b>	<b>% Population Change 11-16</b>	<b>Mean Population Age</b>
Urban	1	212,594	39.13%	4.54%	40.5
Small City & Regional Town	9	179,893	34.61%	1.00%	44.1
First Order Rural	17	69,590	13.39%	-3.36%	48.4
Second Order Rural	30	30,063	5.78%	-4.58%	47.7
Third Order Rural	136	27,576	5.31%	-6.68%	48.8

\*Note that many Third Order Rural places are remote communities with weak or no economic linkages to other communities



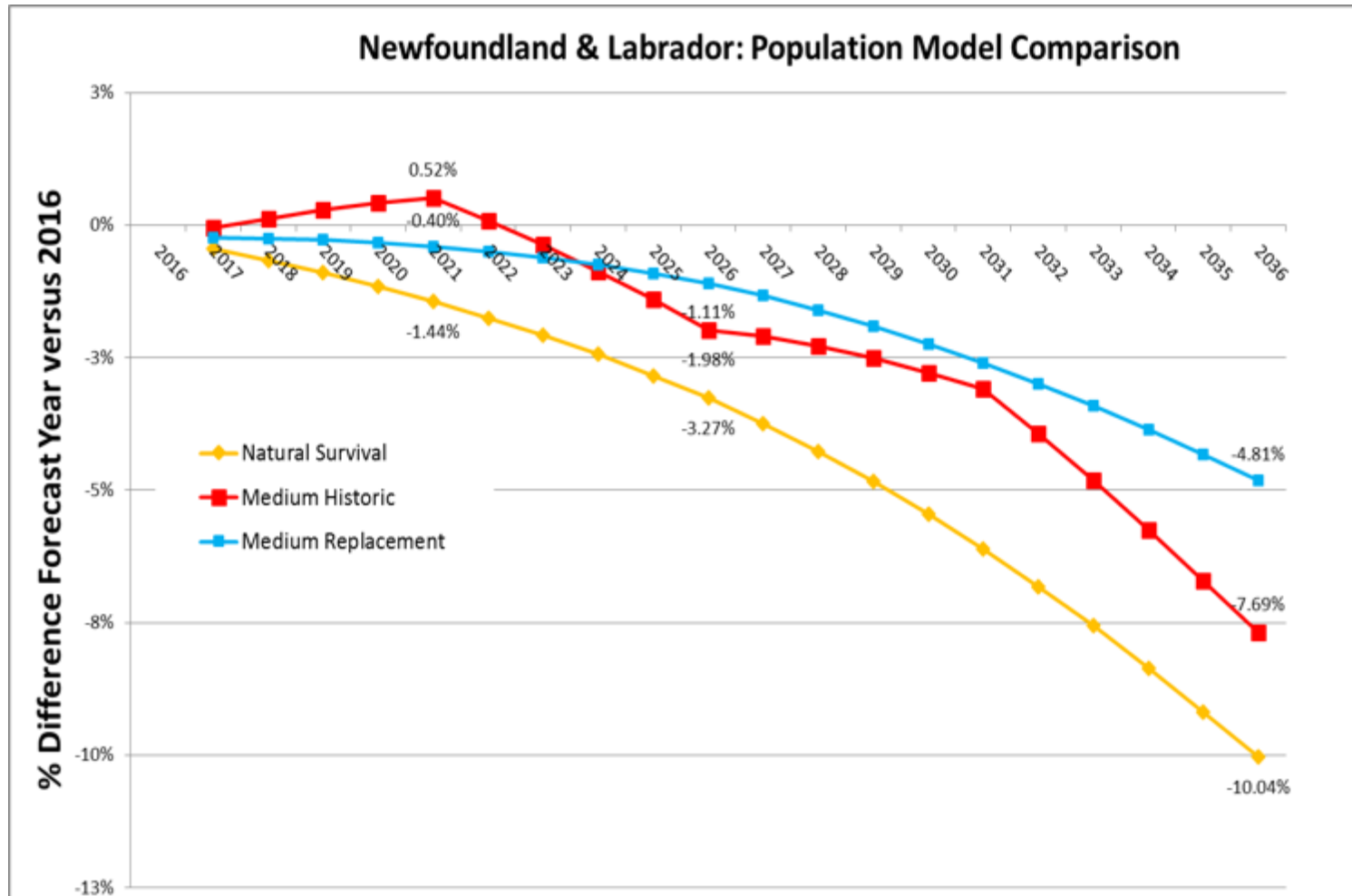
# NL FUNCTIONAL ECONOMIC REGIONS: 5 REGION CLASSES

<b>FER Region Class</b>	<b>Average population</b>	<b>Range in size of regional population</b>
Urban	212,594	212,594
Small City & Regional Town	19,710	8,656 – 38,996
First Order Rural	4,094	2,036 – 7,163
Second Order Rural	994	566 – 1,735
Third Order Rural	219	5 – 1,526

\*Note that many Third Order Rural places are remote communities with weak or no economic linkages to other communities



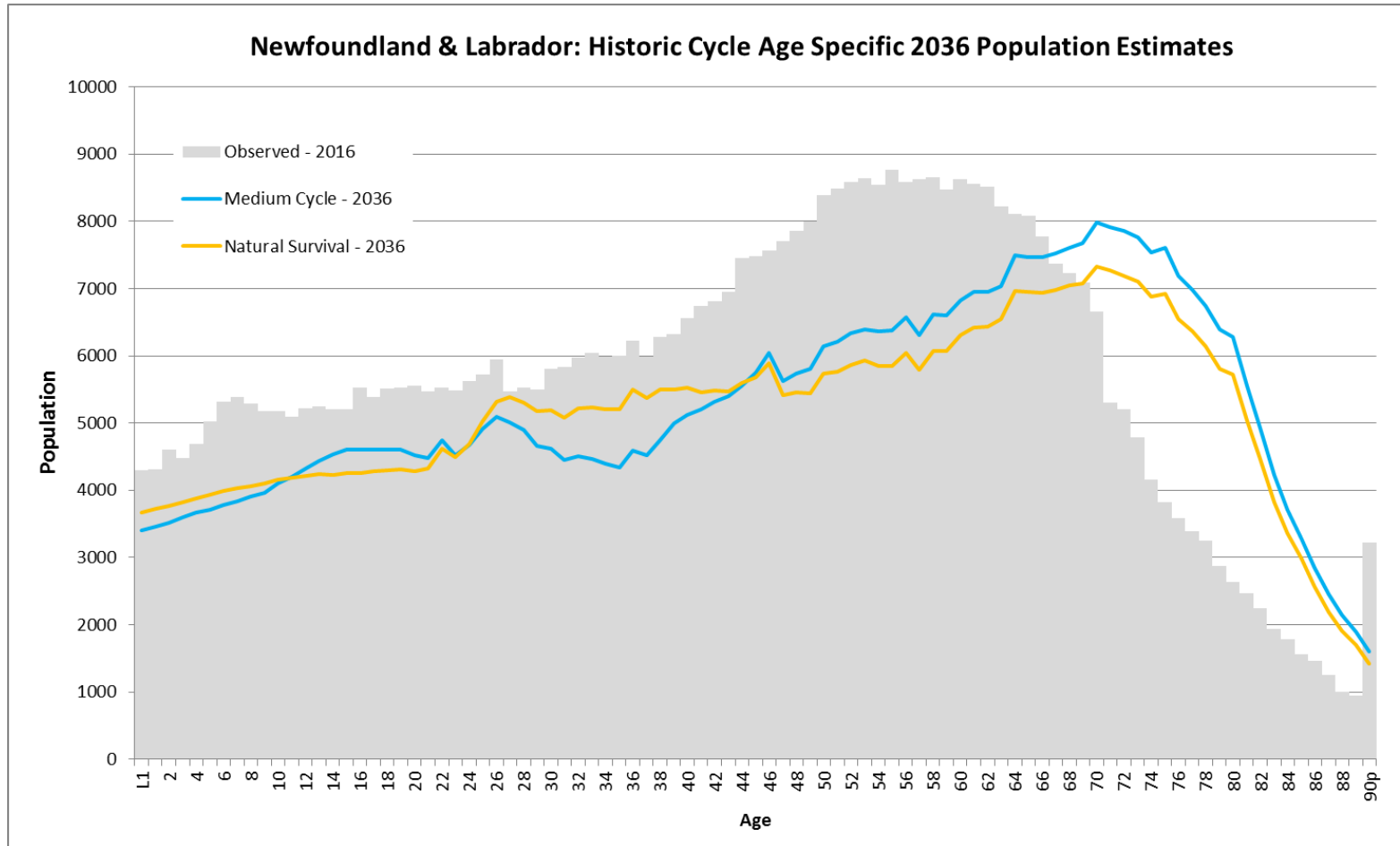
# NL POPULATION PROJECTIONS: 2016-2036



2016 population **519,716**  
2036 projected **479,907**



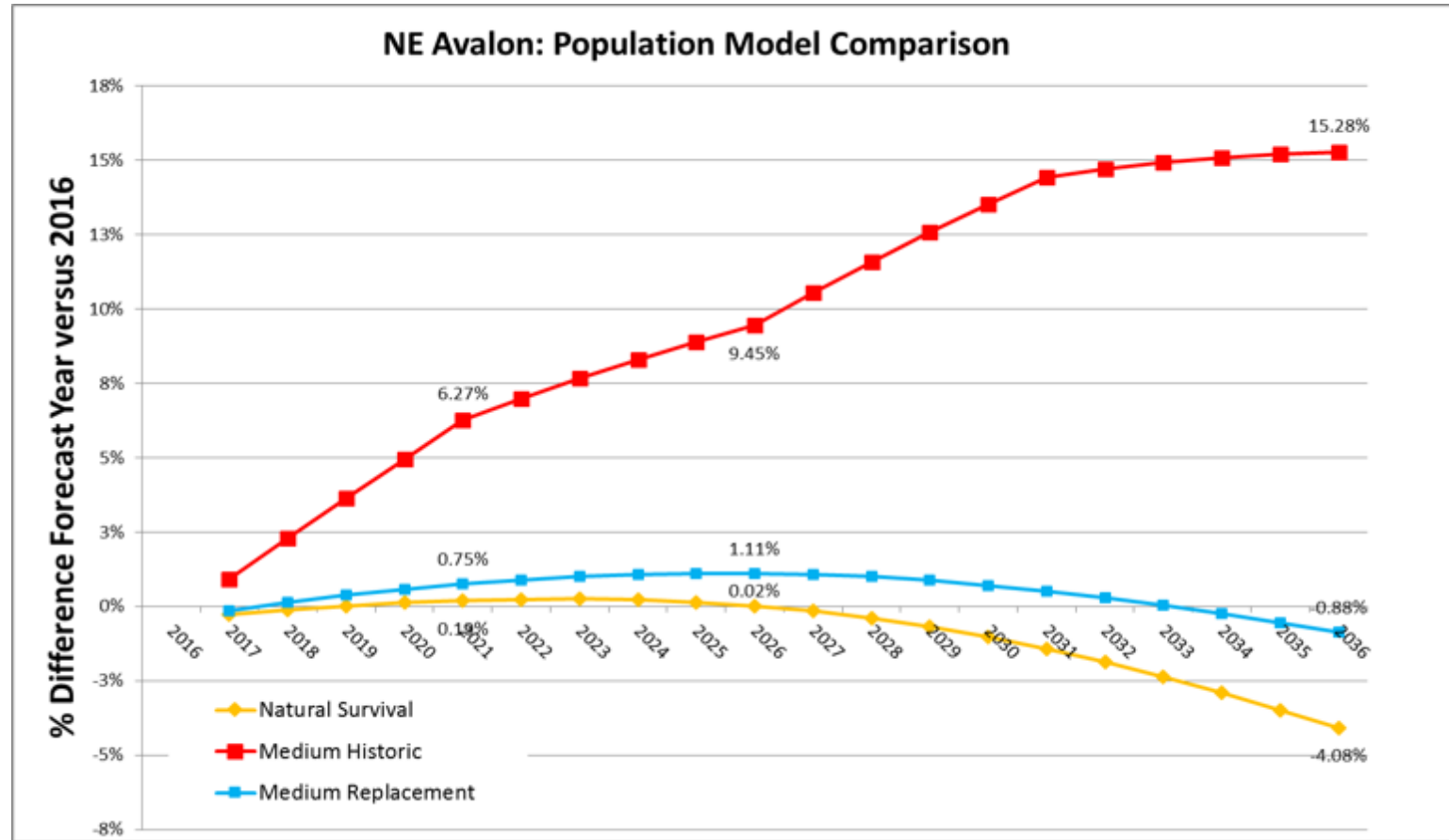
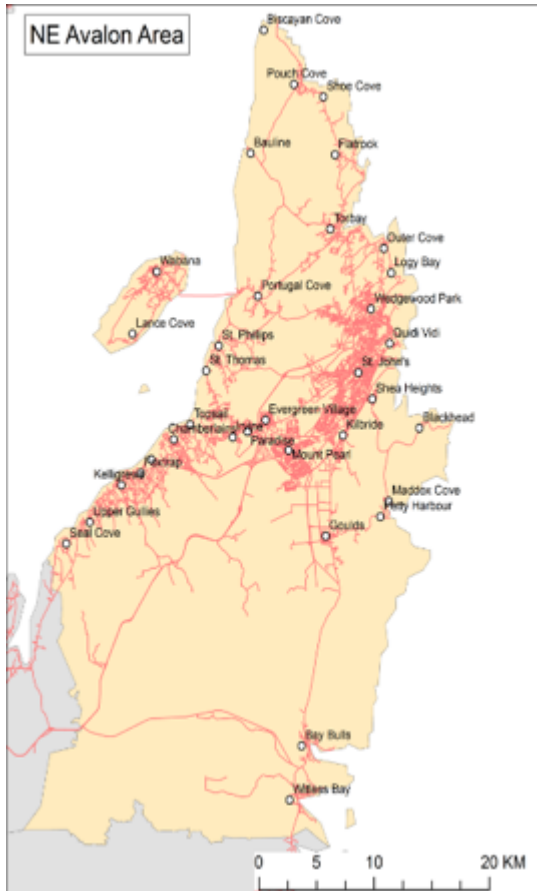
# NL POPULATION PROJECTIONS: AGE STRUCTURE 2016-2036



Average age:  
 2016 **43**  
 2036 **48**

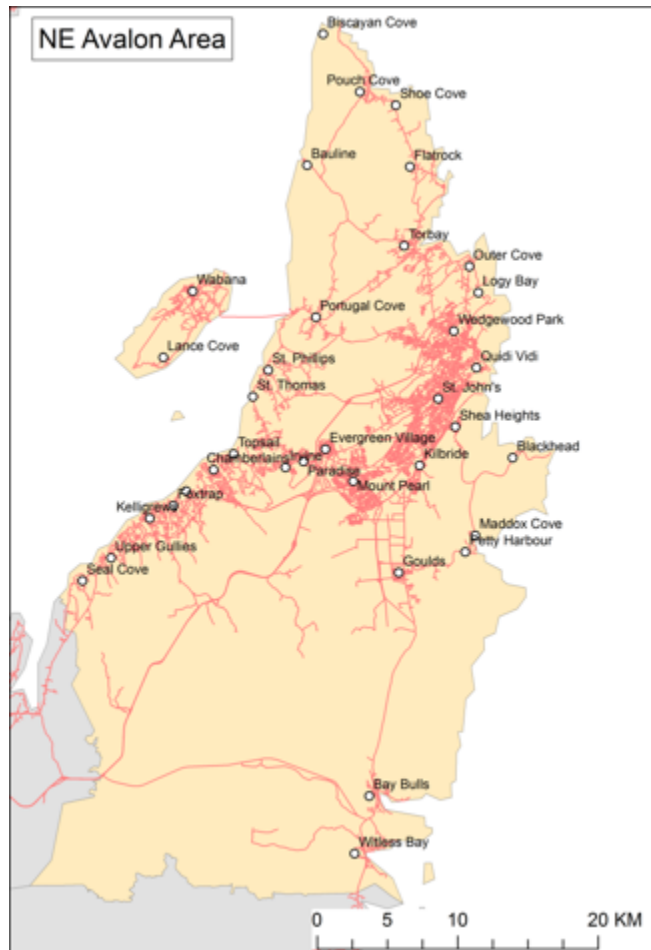


# POPULATION PROJECTIONS : NE AVALON 2016-2036





# POPULATION PROJECTIONS : NE AVALON 2016-2036



Population:

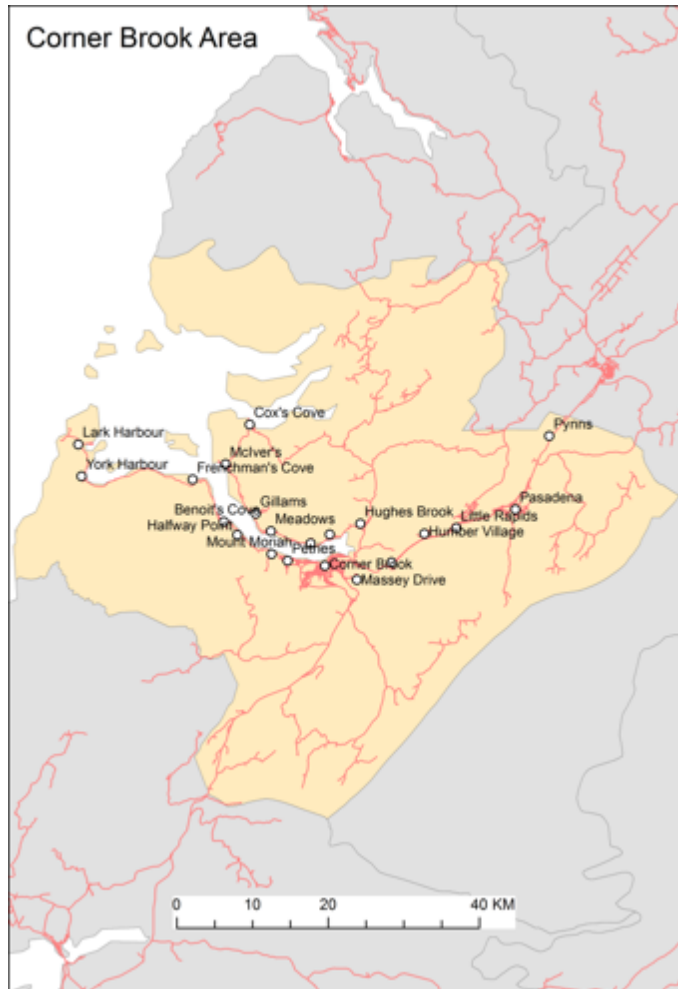
2011 – **205,168**

2026 – **235,093**

2036 – **246,904 (20.3%)**



# POPULATION PROJECTIONS: CORNER BROOK 2016-2036



Population:

2011 – **33,644**

2026 – **30,687**

2036 – **27,333 (-22.7%)**



# POPULATION PROJECTIONS : LABRADOR SOUTH COAST 2016-2036



Population:

2011 – **2,248**

2026 – **1,770**

2036 – **1,411 (-37.2%)**



# POPULATION PROJECTIONS : BURIN PENINSULA 2016-2036



Population:

2011 – **21,031**

2026 – **18,504**

2036 – **15,218 (-27.6%)**



# NL POPULATION: IMPLICATIONS

- **Labour Markets** – demand/supply imbalances
- **Business Sector** – shifting spending/needs
- **Health Care** – home support, pharmaceuticals
- **Education** – declining enrolments
- **Municipalities** – declining revenue base
- **Regional Economic Development** – declining rural population, loss of entrepreneurs/ volunteers



# Population Project

- Attracting and Retaining Professionals in Labrador
- Municipal-Level Service Delivery in Labrador
- Regional Population Projections for Newfoundland and Labrador, 2016-2036
- The Temporary Foreign Worker Program and Employers in Labrador
- Predicting Health Human Resource Needs for an Evolving Population in the Labrador-Grenfell Regional
- Housing Demand and Supply in Central Labrador
- Demographic Change and Regionalization of Public Services
- Succession Planning for Small and Medium-sized Business in Labrador and the Northern Peninsula





# NL POPULATION: LABOUR MARKET STRATEGIES

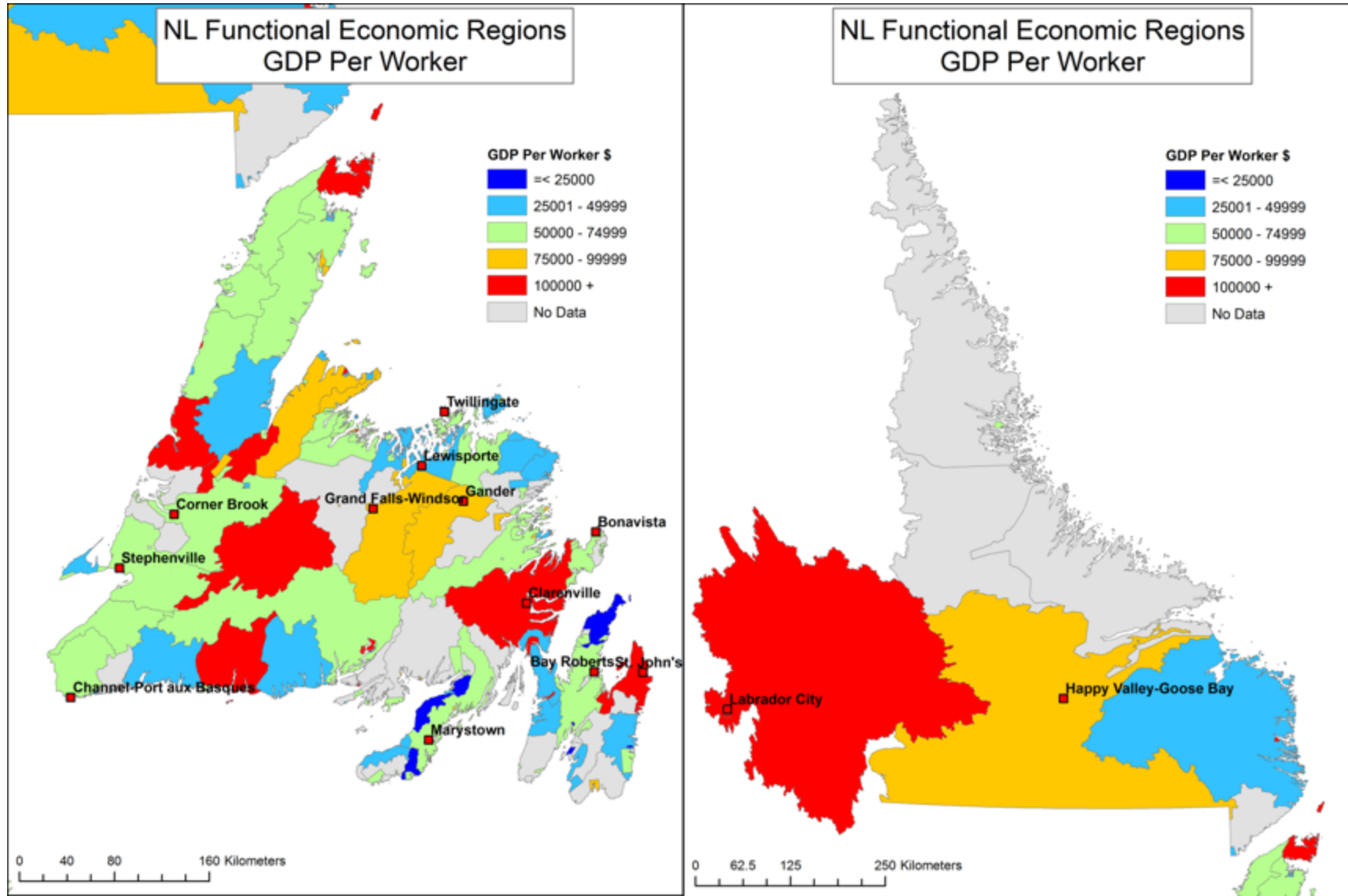
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- Fertility rates
- Immigration
- Youth attraction and retention
- Long Distance Commuting
- Participation increases
  - Underrepresented marginalized groups:
    - Women
    - Indigenous
    - Low-skilled
    - People with disabilities
- Education and training





# PRODUCTIVITY LEVELS





# ECONOMIC DEVELOPMENT STRATEGIES

- Productivity gains in all sectors
- Exports
- Start ups AND work with existing firms
  - Succession planning
- Innovation
  - Technology
  - HR practices
  - Supply Chain Management
  - etc., etc.
- Quality of jobs matters more than number of jobs





# GOVERNANCE & PUBLIC SERVICES

- Regionalization (bottom up)
  - Decentralization (top down)
  - Distance delivery
  - Mobile delivery
  - NGOs / Social Enterprise
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- innovation
  - productivity gains
  - culture change





# REASONS FOR OPTIMISM

- NL resource endowment: renewable and non-renewable – productivity key
- Ocean tech, ICT, aquaculture, etc.
- Post-secondary system
- NL identity & tourism: with new people, ideas, networks





Demographic crunch demands  
innovation and productivity gains.  
Are we ready to shape our future?