JUNE 2019

LUNENBURG COMMUNITY PROFILE

PROJECT
LUNENBURG

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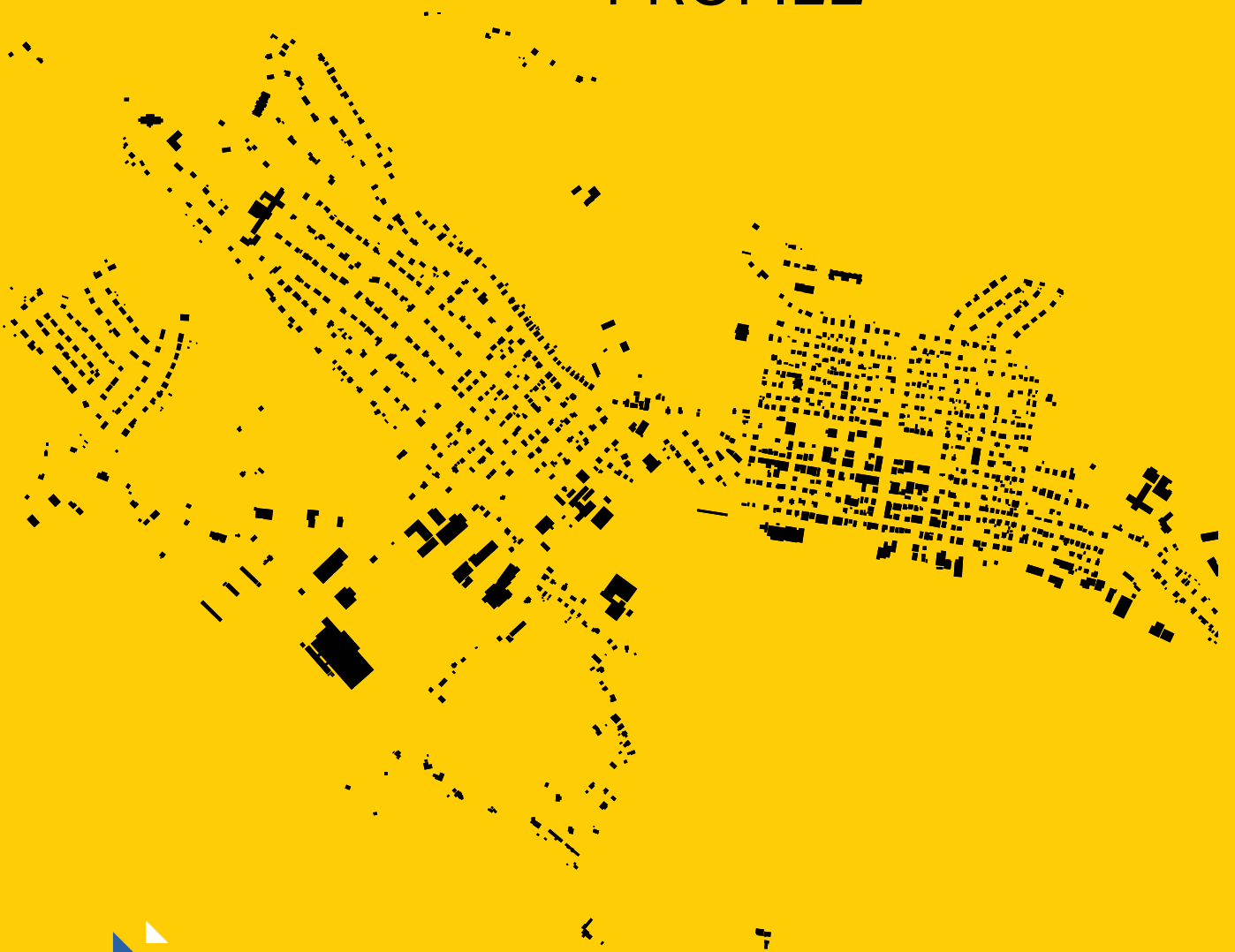
Community Profile
June 2019

Project Lunenburg
Town of Lunenburg Comprehensive Plan

UPL▲ND

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In planning for the future of Lunenburg, it is important to understand the past and current demographic context of the community. Project Lunenburg seeks to develop a far reaching plan based on public input, as well as data analysis and anticipated trends. The demographic trends of the past must be analyzed to derive information on housing, infrastructure requirements, demand for recreational facilities and lands, and need for commercial services.

The range of lifestyles and demographic profiles within the town is one of its biggest assets, yet it also presents the challenge of balancing the needs and impacts of the various businesses, residents, and institutions. By examining the trends of the past, the varied needs of the community can be effectively accommodated to ensure a successful future.

This document illustrates demographic trends and provides context on the current state of the Town of Lunenburg, comparing it to the region and province.

These comparison geographies are defined as follows:

Region: Combined total of Queens and Lunenburg counties (including all municipalities within)

Province: Provincial figures exclude the Halifax Regional Municipality (HRM) unless otherwise stated

HRM has been excluded from the provincial figures due to its different economic conditions compared to the rest of the province. If included in the analysis, HRM could potentially distort overall figures.

There is currently no good source for data that shows the seasonality of the economy or population, because the census counts residency and income based on location of primary residence. These considerations nonetheless have important implications for planning; the seasonal nature of Lunenburg has not been overlooked, but rather will be addressed elsewhere in the planning process.

POPULATION TRENDS

The past and current composition of Lunenburg - including population size, age, migration, family structure and income - compared to the broader context.

Nova Scotia has experienced almost neutral population growth, expanding by an annual rate of 0.13% over the 15 year period from 1996-2016 (including Halifax). Since 2012, the provincial death rate has outpaced that of births; a trend expected to continue for the foreseeable future, continuing Nova Scotia's reliance on in-migration of people from within and outside Canada. High levels of in-migration, primarily from other provinces, were experienced in 2016 and 2017. While a promising trend, it remains to be seen whether it will continue. When Halifax is excluded, the province has been experiencing a slow population decline of approximately 0.44% per year from 2006-2016.

There are two current overarching growth trends within Nova Scotia:

▸ Steady growth within and around the Halifax Regional Municipality
▸ Decline or stagnation everywhere else

The age structure of the province is also shifting as baby boomers age, fertility rates decline, and youth leave for other areas (Figure 1, Table 1). Urbanization rates have also been gradually climbing in the province; from 38.24% to 39.45% between 2006 and 2016 censuses. However, the increase is largely due to a faster population decline in rural areas compared to urban.

As the major urban centre of the province, Halifax is effective in attracting new residents. Consequently, growth in the HRM is partially driven by a natural increase in population as well as a strong international migration rate (82% of all immigrants coming to Nova Scotia in the last 10 years) and continues to attract people from elsewhere in the province (25% of the growth in the last 10 years). These trends are all driven by the relatively strong economic opportunities as the provincial hub. In neighbouring municipalities, the opportunity to commute to Halifax supports upward population trends to some degree; nonetheless, the HRM clearly stands alone at the county level.

Legend:
- Young (0-19)
- Working Age (20-64)
- Retired (65-79)
- Elderly (80+)
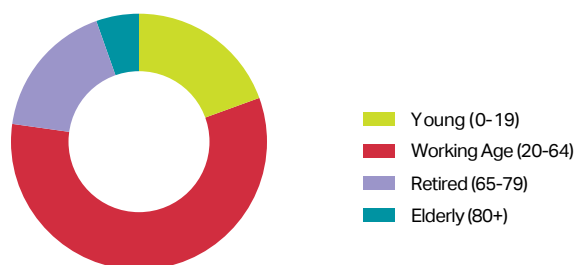
(Statistics Canada Census of Population 2016)

Figure 1: Population composition of Province, 2016.

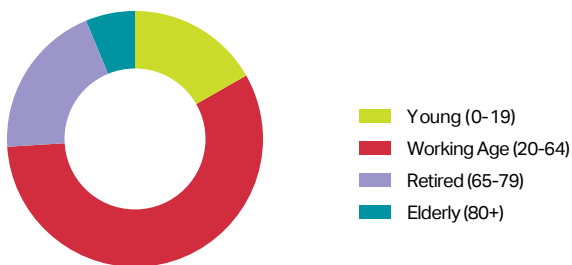|	2006	2016	% Change
Total	553,285	523,643	-5.4%
Young (0–19)	125,555	102,015	-18.7%
Working Age (20–64)	335,203	302,057	-9.9%
Retired (65–79)	66,700	90,975	36.4%
Elderly (80+)	25,827	28,596	10.7%

(Statistics Canada Census of Population 2016 & 2006)

Table 1: Provincial Population and Aging.

The region includes the combined totals of Queens and Lunenburg Counties, and generally reflects the demographic trends seen within the province. Between the 2006 and 2016 censuses, the region's population declined steadily at an approximate annual rate of 0.3%, slightly slower than that of the province (Table 2). Although marginally better, the lower rate of decline is due to increases in the aging population (aged 65 or older), which does not support future growth.

The region's urbanization rate is slower than the province, but exhibits a slight increase. The proportion of people living in an urban setting has gone from 24.5% in 2006 to 25.3% in 2016. This is a combination of both a growth in the region's urban population (most notably in the Town of Bridgewater), from 14,593 to 14,624 people over ten years, and a decline in rural areas of the region.

Compared to the province, the region also exhibits a similar pattern of population change components, driven by decreasing births, increasing deaths, and a typical level of out-migration. Further, the region is relatively consistent for international immigration. Interestingly, the region has maintained a relatively balanced position regarding migration to other locations in Canada with recent years, balancing out earlier losses of the youth population. The loss of population to other areas of Nova Scotia is the most significant regional challenge; nevertheless, 2014 to 2017 demonstrated substantially lower reductions than prior to 2014. Furthermore, the region, like the province, had an overall population increase in 2016 and 2017; the first years without decline since at least 2008.

Young (0–19)
Working Age (20-64)
Retired (65-79)
Elderly (80+)

(Statistics Canada Census of Population 2016)

Figure 2: Population composition of Region, 2016.

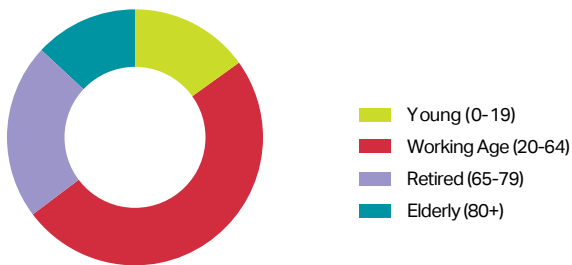|	2006	2016	% Change
Total	59,649	57,729	-3.2%
Young (0–19)	11,937	9,658	-19.1%
Working Age (20–64)	36,642	33,066	-9.8%
Retired (65–79)	8,044	11,382	41.5%
Elderly (80+)	3,026	3,623	19.7%

(Statistics Canada Census of Population 2016 & 2006)

Table 2: Regional Population and Aging.

The Town of Lunenburg has several notable differences from the broader region to which it belongs. With approximately 4% of the region's population, changes within the town have less impact on regional trends. Proportionately, the town's population has decreased by a lesser extent than that of the region and province between 2006 and 2016 (Table 3). In the decade from 1996–2006 the town experienced significantly higher population loss, but this stabilized over the following 10 years, transitioning from a 1.09% annual loss in the former decade to a 0.23% loss from 2006–2016.

Since 2006, Lunenburg's median age rose from 50.5 to 56.1 years, an 11% increase, which reflects the province's movement towards an older population. When comparing losses of younger cohorts, the town generally fares better than both the region and province, but is still experiencing significant declines in youth. Much like the rest of Nova Scotia, Lunenburg saw an increase in retirees (ages 65 to 79); however, the growth was 6.8 percentage points less than the region. Interestingly, the elderly cohort (ages 80 and more) decreased by 3.3%, a significant deviation from the equivalent regional or provincial data. This decrease is largely attributed to male out-migration; 31% of males between the ages 80 to 84 moved away.


■	Young (0-19)	
■	Working Age (20-64)	
■	Retired (65-79)	
■	Elderly (80+)	

(Statistics Canada Census of Population 2016)

Figure 3: Population composition of Lunenburg, 2016.

	2006	2016	% Change
Total	2,317	2,263	-2.3%
Young (0–19)	405	340	-16.0%
Working Age (20–64)	1,235	1,120	-9.3%
Retired (65–79)	370	500	35.1%
Elderly (80+)	305	295	-3.3%

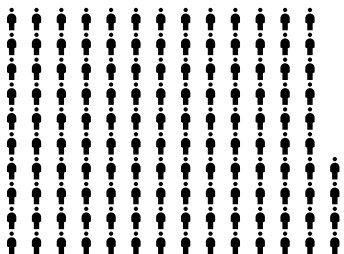(Statistics Canada Census of Population 2016 & 2006)

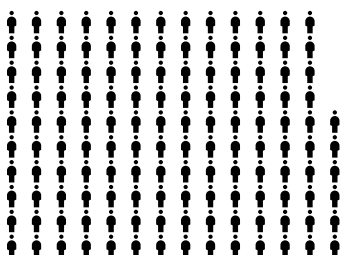Table 3: Town of Lunenburg Population and Aging.
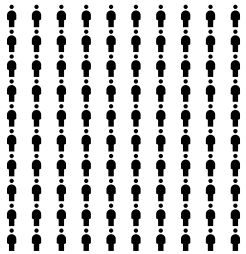
100
Non-working
age people
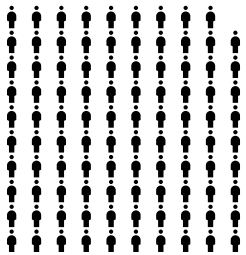
99
Working age
people
in Lunenburg

134
Working age
people
in the region

136
Working age
people
in the province

As the impacts of an aging population continue, the town will stay the course of a decreasing working-age population. The age dependency ratio is the measure of working age population to dependent (non-working age) population. Theoretically, the higher the ratio of non-working age population, the greater the pressure on the working cohorts to provide social and economic support. As of 2016, the working age population is already less than those not of working age (Figure 4), with an age dependency ratio of 1 to 0.99. This is in contrast to both the regional and provincial figures, which, for the time being, still have a larger population of working age than not.

(Upland, derived from Statistics Canada Census 2006, 2011, & 2016)

Figure 4: Ratio of Working Age to Non-Working Age People.

There is no available data for the town specifically on the components of population growth. However, general migration data can be derived using Statistics Canada birth and death tables and census information—all of which informs the population forecast later discussed. Based on these estimates, Lunenburg's primary contributor to out-migration are the cohorts between the ages 10 to 24; all other cohorts, except for those aged 35 to 39, experienced positive net migration (Figure 5). Although some of the young cohort loss is due to the migration of a whole family, the majority is likely attributed to students moving away for post-secondary education or to start a career.

Percent of age cohort arriving or leaving Lunenburg in a 5-year period
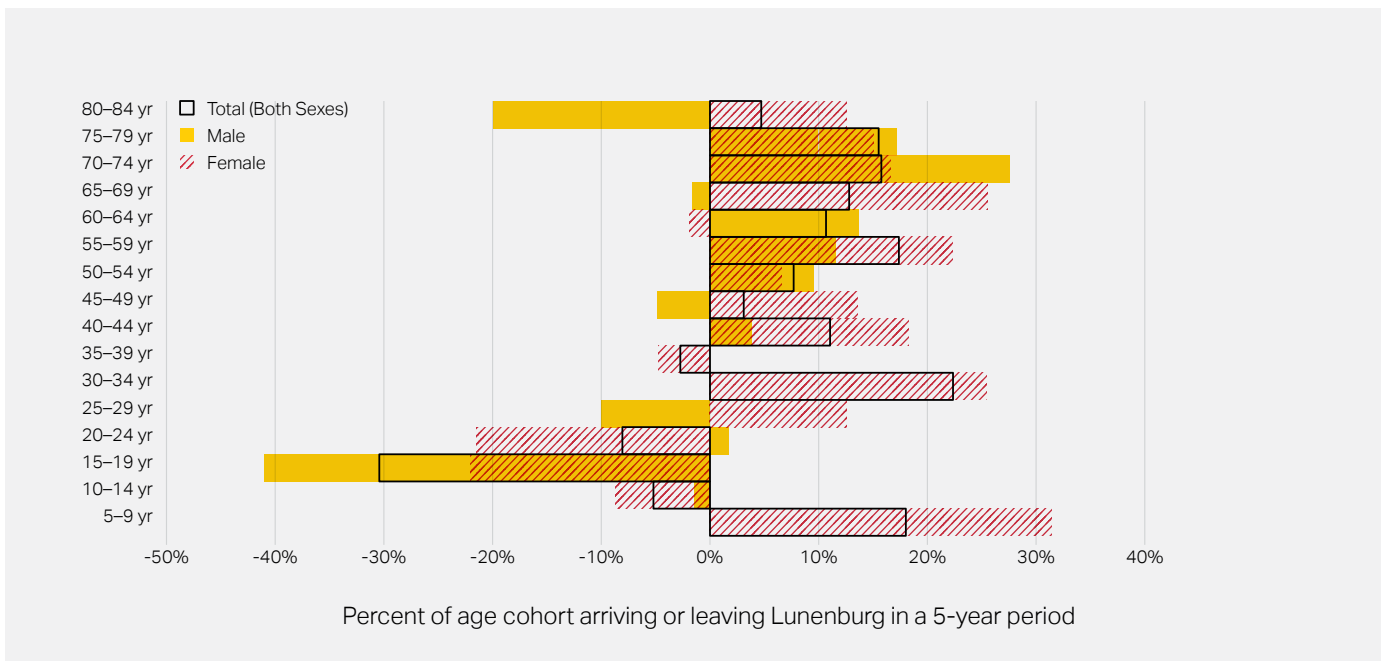
(Turner Drake, derived from Statistics Canada Census 2006, 2011, & 2016)

Figure 5: Local Migration Rates.

Population mobility refers to the proportion of residents who have moved from their previous place of residence within the last year, including both moves within the same community and to the community from elsewhere.

In 2006, most recent movers had simply relocated from somewhere else in the Town, and the remainder was largely made up by people moving from somewhere else in the province. By 2016, movers originating from elsewhere in the country, and even international locations, became a far larger proportion.

It is important to consider mobility with in the context of a decreasing population. Although the town of Lunenburg is experiencing an increase of new residents from national or international points of origin, there are other factors at play:

- ▶ as a percentage of movers, the number of newcomers appears larger due to being an increasing subset of an overall shrinking population; and
- ▶ more local residents are possibly choosing to remain in place rather than moving, potentially attributed to retirees who are not pulled to other locations for work.

Origin of Move (mutually exclusive)	2006 1 Year	2016 1 Year
Elsewhere in Town	50.0%	29.5%
Elsewhere in NS	42.6%	20.5%
Elsewhere in Canada	7.4%	25.0%
International	0.0%	22.7%

(Statistics Canada Census of Population 2016 & 2006)

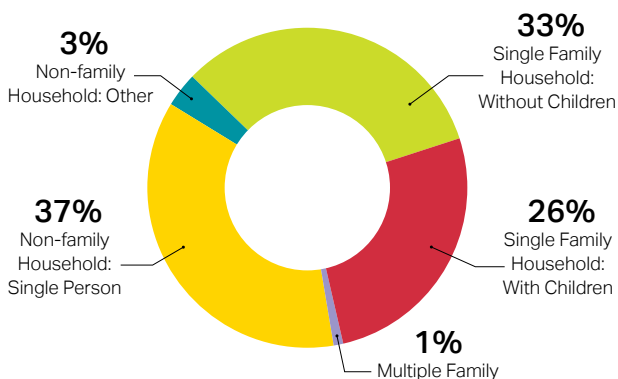Table 4: Weighted Average Migration Rate (2006 to 2016).

While the town's primary resident population decreased by 54 people from 2006 to 2016, it also recorded an increase in private households, from 990 to 1040, largely due to the decrease in household sizes (from 2.2 to 2 people per household) sparked by an aging population who no longer have live-in children or do not live with a spouse.

Statistics Canada data highlights this trend even further, indicating that the largest proportion of household structure types belongs to single persons, at 37% (Figure 6). Conversely, families with children make up 26% of household structure types. Within this segment of families with children, there are approximatelty 100 lone-parent households, and 175 multi-parent households (Figure 7).

This distribution of household structure does not vary greatly from 2006. Nonetheless, there are notable considerations:

▶ the proportion of families with children increased from 215 households in 2006 to 275 households in 2016, which equates to 6 new families with children per year in Lunenburg.

▶ single person households increased from 325 in 2006 to 380 in 2016, this is an increase of 11%.

These observations are relatively consistent compared to the province. Both share similar changes in families and single person households. The slight growth in families with children is not localized to Lunenburg and can be attributed to an echo of the Baby Boomer generation, as the slight demographic bulge of the Millennial generation enters prime child rearing age. Lunenburg's 22% growth in families with children is 11 percentage points below the Province, which reflects the overall population transition to older age groups.

Figure 6: 37% of households in Lunenburg are a single person.

33%
Single Family
Household:
Without Children

26%
Single Family
Household:
With Children

1%
Multiple Family

37%
Non-family
Household:
Single Person

3%
Non-family
Household: Other

(Statistics Canada Census of Population 2016)

Figure 7: 2016 Households By Structure.

Lunenburg, similar to the region and province, demonstrates a broad distribution of households by income levels, expressed as after-tax income to better illustrate household financial capacity (Table 7). The town closely reflects the patterns of the broader area, specifically for those incomes above $25,000. However, there is a notable concentration of households making between $15,000 to $24,999 (Table 5).

The town exhibits a greater degree of income polarization than the region or province, with larger concentrations at low income ranges, and a consistent concentration of middle-income households. It is also probable that given the concentration of seasonally-inhabited second properties, there are a number of households with above average income levels that contribute to the local economy but are not counted in Lunenburg census data.

Income Level	Town			Region			Province		
	Households	Percent (%)		Households	Percent (%)		Households	Percent (%)	
Under $5,000	20	1.93		400	1.52		3,250	1.42	
$5,000 to $9,999	20	1.93		460	1.76		4,735	2.07	
$10,000 to $14,999	35	3.38		770	2.94		7,495	3.28	
$15,000 to $19,999	70	6.76		1,645	6.28		14,635	6.40	
$20,000 to $24,999	95	9.18		1,815	6.93		15,120	6.62	
$25,000 to $29,999	55	5.31		1,720	6.56		14,180	6.21	
$30,000 to $34,999	75	7.24		1,970	7.52		16,175	7.08	
$35,000 to $39,999	60	5.80		1,785	6.81		14,755	6.46	
$40,000 to $44,999	75	7.24		1,650	6.30		13,535	5.92	
$45,000 to $49,999	60	5.80		1,545	5.90		12,915	5.65	
$50,000 to $59,999	100	9.66		2,905	11.09		23,840	10.43	
$60,000 to $69,999	75	7.24		2,445	9.33		20,235	8.86	
$70,000 to $79,999	80	7.73		1,860	3.28		16,410	7.18	
$80,000 to $89,999	55	5.31		1,380	5.27		12,795	5.60	
$90,000 to $99,999	30	2.90		1,025	3.91		9,785	4.28	
$100,000 to $124,999	70	6.76		1,535	5.86		15,375	6.72	
$125,000 to $149,999	40	3.86		680	2.60		7,030	3.08	
$150,000 and over	20	1.93		610	2.33		6,245	2.73	
Total	1,035			26,200			228,510		

(Statistics Canada Census of Population 2016 & 2006;
data reflects incomes for 2015 & 2005)

Table 5: After-Tax Income.

From 2005 to 2015, Lunenburg's median income increased by 29.9%, which is a greater growth than the region but less than the province (Table 6). However, the 2005 and 2015 incomes alone do not compare the relative purchasing power, or real income, that residents had. In actuality, after accounting for inflation in the cost of living, the purchasing power of Lunenburg households increased by 9.8% over 10 years (calculated by indexing census incomes to a 2018 Consumer Price Index benchmark).

The town maintains historically lower income levels than those of the region and province, which is in line with the significantly older town population. People typically experience a decline in income as they retire and support themselves with savings, pensions, and other government programs that do not match the compensation they were receiving in their most senior working years. Furthermore, income statistics do not include inheritances or tax-free savings account withdrawals. The higher proportion of lower income households suggests that the town is attracting retirees who are relying on alternative income sources.

	INCOME				REAL INCOME		
	Town	Region*	Province	CPI**	Town	Region*	Province
2005	$35,016	$37,618	$40,591	80.2	$43,655	$46,900	$50,606
2015	$45,483	$47,943	$53,129	94.9	$47,926	$50,519	$55,983
% Change	29.9%	27.4%	30.9%		9.8%	7.7%	10.6%

(Statistics Canada Census of Population 2016, data reflects incomes for 2015)

* Weighted average between Lunenburg and Queens Counties

** Consumer Price Index in 2018 real dollars; 2018 = 100

Table 6: Median Household After-Tax Income.
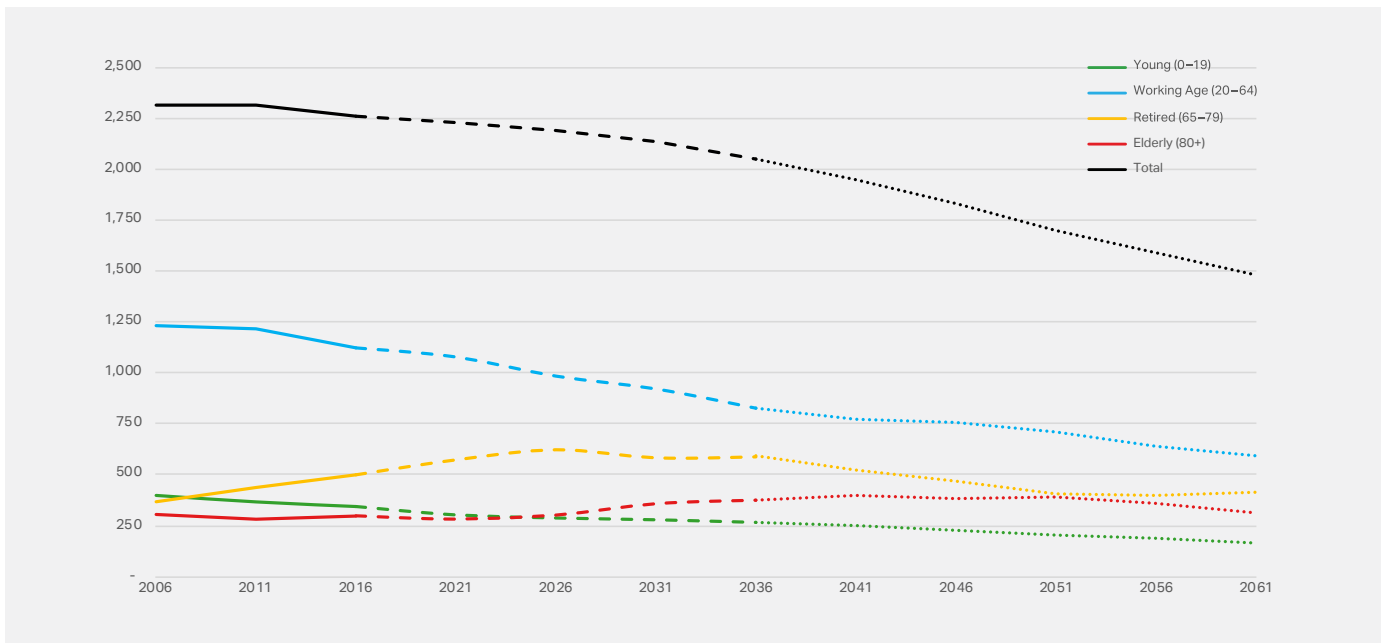
POPULATION PROJECTIONS

Estimates of long-term future trends, based on historical demographics and the broader context.

The population projection analysis sorts the population into age cohorts to estimate long-term population trends based on age, fertility, mortality, and observed migration trends. Population projections are difficult to estimate for small areas such as the Town of Lunenburg, and do not account for social, political, or economic changes that may impact the population. Additionally projections are more accurate in shorter time-spans. For comparison, Statistics Canada only prepares population projections of this length at the national level, and provincial projections are only prepared for roughly 25 years. The population projection below is intended as a general guide; it is not a forecast or prediction of the future.

The graph below (Figure 8) is organized into three primary sections, illustrated by different line types:

▶ solid lines that reflect available census data;
▶ dashed lines illustrating those years of projection that are of greatest certainty; and
▶ dotted lines illustrating years that are for discussion purposes only and cannot be measured with reasonable certainty.
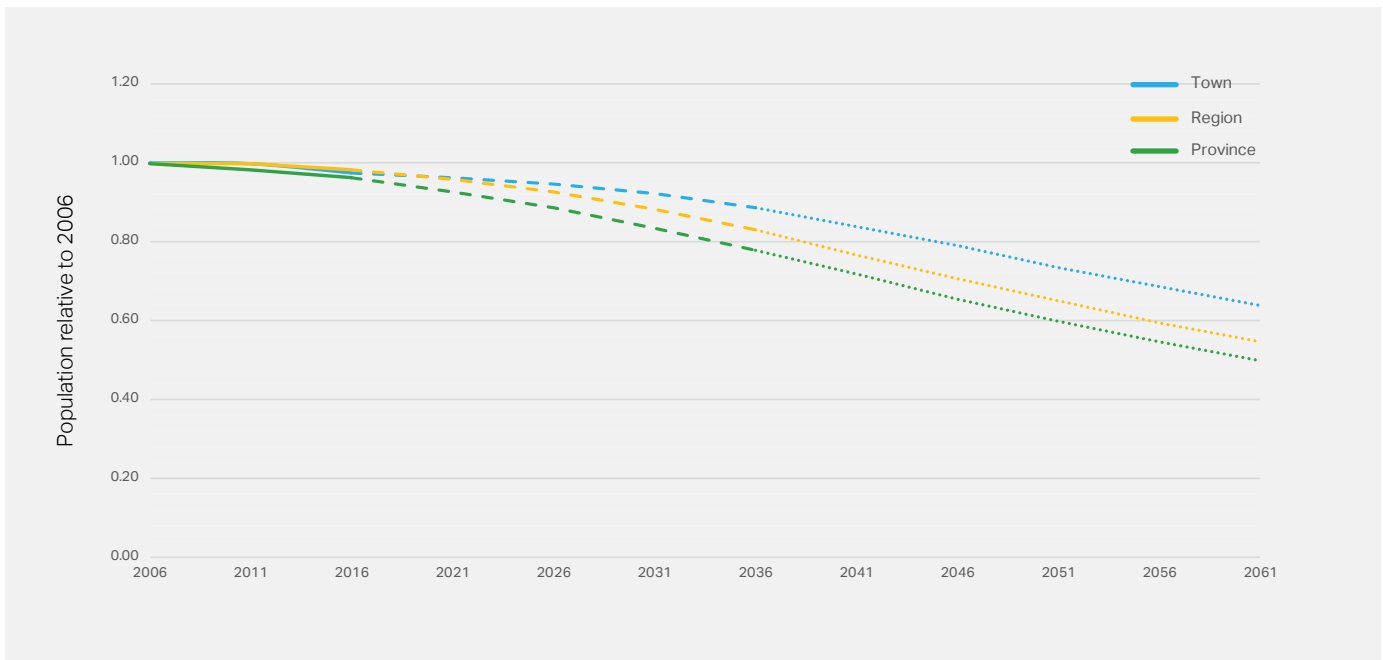

(Turner Drake, derived from Statistics Canada Census Population 2016 & 2006)

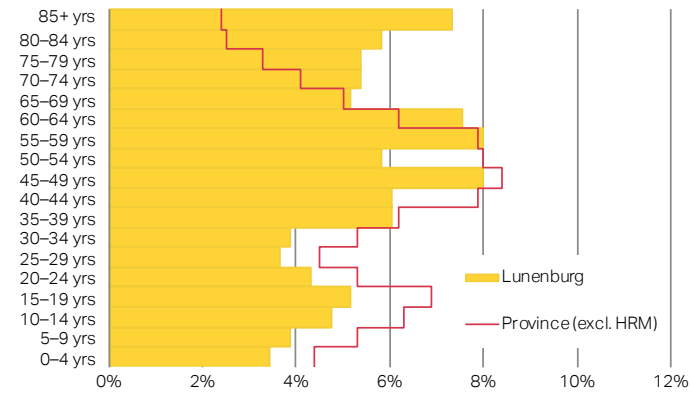Figure 8: Town of Lunenburg Population Projection.

This model projects that Lunenburg will continue on the trend of population decline, with increasing intensity from year to year. By 2036, it is estimated that Lunenburg will have 2,053 residents; a 9.3% decrease from 2016. By 2061, the population is projected to drop to 1,483; a 34.5% decrease from 2016, or 0.77% decrease annually.

Projections for the region and province demonstrate similar expectations of population decline, with differing levels of intensity (Figure 9). Relative to population, the Town of Lunenburg will retain more of its residents than Nova Scotia, due mostly to the less intense decline experienced between 2016 and 2036; post 2036 projections show almost identical decline severity, indicating that the model relies more heavily on birth and death rates, which are provincial level statistics, rather than migration, which is uniquely local. However, this should all be read with caution. It is unreasonable to assume that the population would only decline; rather, broad economic forces would likely create periods of steady population or possibly growth.
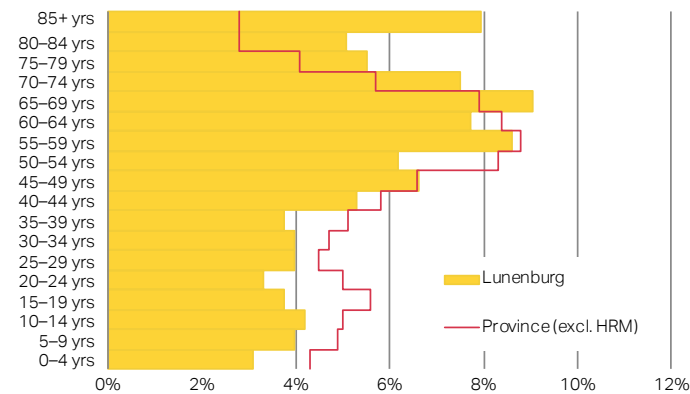

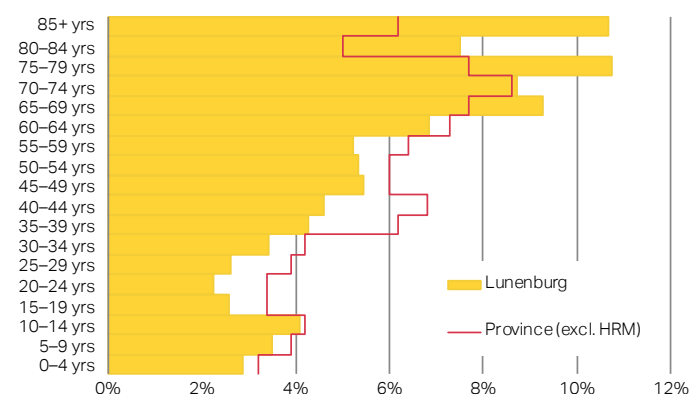(Turner Drake, derived from Statistics Canada Census Population 2016 & 2006)

Figure 9: Town of Lunenburg v. Region & Province Population Projection.

2006 Observed Population Age Structure

2016 Observed Population Age Structure

2036 Projected Population Age Structure

(Turner Drake, derived from Statistics Canada Census of Population 2016 & 2006)

Figure 10: Population projection by age cohort.

The Town of Lunenburg's declining population is largely attributed to the noteworthy decreases in young and working age cohorts. Although the model illustrates growth for retired and elderly age groups, this growth is not enough to match the loss of the younger generation. The age-distribution charts to the left visualize the populations of each census age cohort in Lunenburg and the province in 2006 and 2016, and the projected populations of the same cohorts for 2036 (Figure 10). To ensure age cohorts are comparable between scales they are charted based on their proportion of the overall population.

The age-distribution charts show a consistent trend of youth out-migration and an aging population within the local and broader geographic area. Overall, the town is not experiencing anything unusual regarding relative population transitions from cohort to cohort. However, the town sustains a larger than normal elderly population, supported by its high original census totals and levels of in-migration.

The population of young and working age citizens is projected to decrease by roughly 25% by 2036 and 50% by 2061; by 370 and 699 people, respectively. Conversely, the retiree and elderly population is projected to increase by 21% by 2036 and then decrease by 9% by 2061, due to lack of incoming youth to stabilize the population. Regardless of the older cohort population decline, the proportion of persons age 65 or more will make up at least 45 percent of the town's total from 2036 onward.

As a result of the past and projected decrease of young and working age people, and increase in the population aged 65 and over, Lunenburg is set to intensify its age dependency ratio; the measure of working age population to dependent (non-working age) population. As of 2016, the Town's dependency ratio was 0.99, and is projected to decrease consistently until 2036 where it will then fluctuate (Figure 11). The region and province will experience similar movements, but will experience less intense change in the short-term since both will maintain more working age people over non-working until at least 2026—the province will fluctuate around equilibrium until 2061. By 2036, Lunenburg is projected to have a ratio of 0.67, or 1.49 dependents for each working age person.
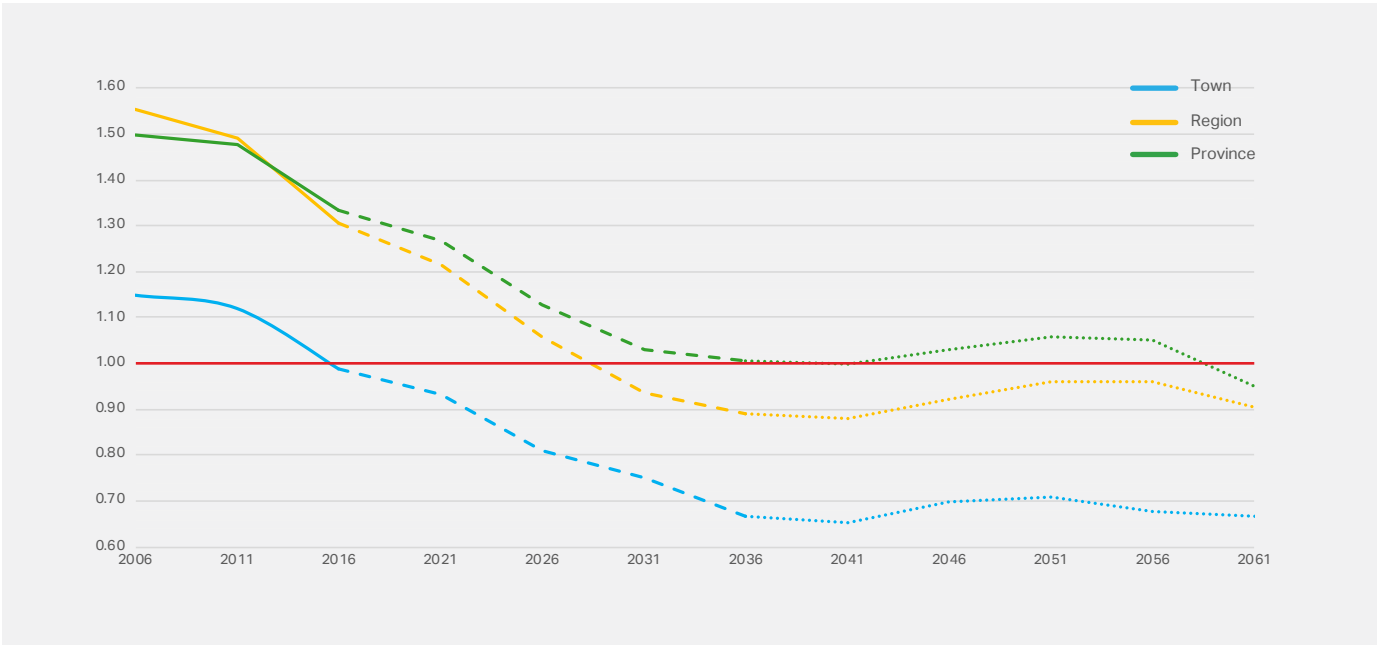
(Turner Drake, derived from Statistics Canada Census of Population 2016 &2006)

Figure 11: Projection for Age Dependency Ratio in the Town of Lunenburg v. Region & Province.

IMPLICATIONS

The conclusions and ramifications that can be drawn from statistical data, and the role that planning can play in response.

Summary

The demographic composition of Lunenburg is shifting as Baby Boomers retire and youth outmigration continues. Younger individuals and families are often obliged to move closer to urban centres for school or work, relocating closer to Halifax, to other Nova Scotian towns, or leaving the province all together. At the same time, the town is disproportionately attracting retirees and experiencing accelerated population aging.

The town's primary resident population has been in decline for two decades, with no sign of stopping over the next two decades; projections indicate a loss of 210 people by 2036. At the core of this trend is the sharp swing in demographics as people are aging without younger cohorts taking their place.

This projection is driven both by the aging of the current population, as well as the in-migration of new residents of older age groups. As such, the town has seen a drastic decrease in people moving around within the town proper, while the number of persons moving to Lunenburg from elsewhere in Canada or abroad increased. Despite the decline in total population, the number of private households continues to grow due to a decreasing household size; in Lunenburg, 37% of households now belong to single people without children, living alone.

From 2006 to 2016, the town has maintained a lower median income than that of the region and province, again likely driven by its higher proportion of senior residents who tend to rely more heavily on financial resources other than employment income (e.g. savings or government transfers). Even so, Lunenburg has kept pace with the broader region for resident purchasing power; growth in median incomes in the last decade translated to a 9.8% purchasing power increase in 2018 dollars.

This Community Profile focuses on demographic trends and characteristics of the town's full-time citizens. However, Lunenburg has been, and continues to be, a popular location for seasonal residences due to its coastal location and heritage character. While seasonal residents make a significant contribution to Lunenburg's community, economy and culture, there is currently no good source for data reflecting economic and population seasonality because the census counts residency and income based on primary residence. The considerations in this profile, focused on full-time citizens, nonetheless have important implications for planning; the seasonal nature of Lunenburg has not been overlooked, but rather will be addressed elsewhere in the planning process.

Local governments have little control over many of the factors influencing population growth or decline, and the impacts they have on economic indicators (e.g. income). As such, local planning seeks to anticipate the implications of these trends and to mitigate their impacts, or leverage the opportunities they present to improve the lives of local residents.

In the context of the Town of Lunenburg, population aging is the dominant trend. The population will increasingly require a community that provides for the social and physical needs of an older population: accessible infrastructure and maintenance practices; community amenities and programming which provide for socialization as single-person families become more common; and affordable services and cost-of-living as household income is increasingly derived from fixed sources.

Though the population has been declining for some time, and is likely to continue to do so in the near future, this has not been as pronounced in Lunenburg as in other areas due to the town's ability to attract new, older residents. This is likely driven by the fact that the town already offers an attractive post-retirement lifestyle, which is increasingly recognized outside of the region and province. Thus, the Town is starting from a position of relative strength in terms of accommodating the future needs of its population, and continued investment towards those ends will also have broader population growth-related benefits.

Finally, though the aging population theme rightfully attracts much attention, it also risks overshadowing the needs of the young and working-age population that forms an increasingly important subsection of the population. Though it is unlikely that the overall declining trend among these age groups can be reversed, effort can be made to minimize it. This can be done by ensuring sufficient institutional and recreational facilities and programming are available, that housing costs can be borne by the typical incomes that the local economy produces, and that opportunities for employment and entrepreneurship are fostered.

Statistics Canada Census of Population, 1996, 2006, 2011, 2016.

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