OUR CAMROSE

SHAPING THE **FUTURE**

GROWTH STUDY

2023-2048

CITY OF Camrose

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GSA Green Space Alliance

Contents

1.0 Introduction

1.1 Purpose

The City of Camrose Growth Study is a comprehensive examination of future growth predicted for the city. The growth predictions developed in this study are based on the city's historic growth rate and future growth projections, with considerations for demographic shifts and employment forecasting. In combination with existing land supply analysis, it provides varied future growth scenarios for population and employment. It also establishes potential land that Camrose may require to accommodate future growth, and identifies what areas could be developed as a result of that growth.

1.1.1 MDP context

The existing City of Camrose *2011 Municipal Development Plan* provides high-level policies, goals and objectives that guide urban growth decisions. Key directions established in the MDP include:

- Future growth in the city should encourage a mix of housing types and ensure a sufficient supply of long-term industrial lands
- New growth should support the existing historical centre, connecting it with the city through multimodal transportation networks
- Existing open and green spaces within the city should be enhanced by new growth while natural areas are protected from new developments.

1.1.2 Master Planning Reports

The following existing master planning documents were reviewed to ensure compatibility and integration within the broader planning framework.

1. **Camrose Strategic Plan:** The Camrose strategic plan provides the direction for the municipality from 2022-2026. It focuses on four areas crucial to the success of Camrose, namely comprehensive investment in the people and processes of Camrose, an increase in engagement with citizens and staff, optimization of asset management, and the building of a strong economy.
2. **Municipal Sustainability Plan:** The Municipal Sustainability Plan expresses the municipality's efforts of achieving sustainability by reducing the city's ecological footprint, increasing local economic and cultural opportunity diversity, supporting existing social networks, and providing effective governance.
3. **Camrose Green Space Master Plan:** The Green Space Master Plan, enacted in 2014, provides a vision and strategy for protecting green spaces as the city expands and grows.
4. **City of Camrose Transportation Master Plan:** The Transportation Master Plan, developed in 2019, identifies transportation infrastructure requirements for future growth.
5. **Sanitary Sewer Master Drainage Plan:** This Master Plan, updated in 2007, provides an overall concept and guidelines for future upgrades and development to the city's sanitary sewer drainage system.
6. **Storm Water Master Plan:** The 2008 Storm Water Master Plan contains recommendations on new developments and existing upgrades for stormwater management within Camrose for the next 50 years following its enactment.
7. **Water Distribution Master Plan:** This 2006 Master Plan assesses the performance of existing water distribution systems and provides potential expansion areas as the city grows over the 5, 20, and 50 year periods.

1.2 Study Objectives

1.2.1 Develop a revised population growth projection

Camrose needs updated annual population growth projections. Pandemic recovery, economic shifts and municipal demographic changes have altered the current conditions of Camrose, potentially rendering previous growth estimates no longer accurate. Developing updated projections based on existing conditions is required to maximise accuracy in land requirement predictions and land allocation by type and location.

1.2.2 Use employment forecast as a basis for estimating and confirming population growth

Employment forecasting, due to the extensive availability of data both in granularity and length, and the capacity to assess the growth of individual economic sectors, provides a reliable basis for growth projection development that improves projection accuracy. By contextualizing data on the development of housing units, prior population growth, and recent net migration and immigration in Camrose with employment forecasts, growth projections can be further refined to ensure that predictions are as accurate as possible.

1.2.3 Develop a future community profile to inform the new land use scenarios

The form that future growth takes within Camrose will in part be determined by the demographic characteristics of its community. To ensure that generated land use scenarios are in line with future community requirements, this study will develop a future profile projection based on current demographic shifts and trends in Camrose.

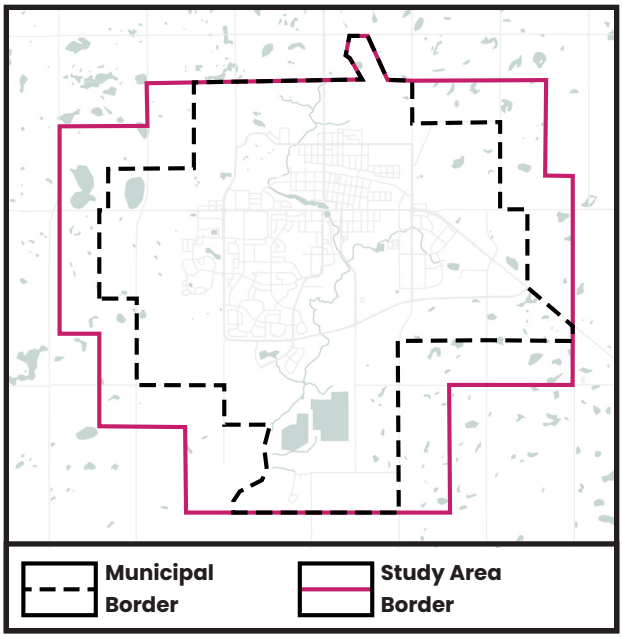
1.2.4 Develop a breakdown of low, medium, and high density land use statistics

Density is an important metric by which future growth can be qualified. Different development densities have different infrastructure requirements and place different economic pressures on the surrounding lands and Camrose as a whole. A breakdown of land use by density is necessary to ensure that future growth occurs in such a way that integration with existing developed land and infrastructure is maximized.

1.3 Study Area

The study area for the growth study includes the entirety of the lands located within the existing city boundary, in addition to a quarter-section-wide area beyond the city boundary to the East and West, to ensure that all potential areas of growth were analysed. Nearby population centres and employment growth nodes within Census Division 10 were also examined, in order to understand the dynamics of population exchange between the City of Camrose and the surrounding the region.

Map 1: Study Area



2.0 Growth Context

2.1 Historic Population Growth

In order to ensure that future population growth estimates are accurate, it is important to understand the context of previous growth in Camrose, and how that growth has evolved over the recent decades, so that current trends can be fully understood. Additionally, prior growth projections for the City must be examined and utilised where possible, to understand decisions behind existing growth provision.

2.1.1 Existing Growth Forecast

In 2020, a growth forecast was developed to assess where and when the City of Camrose would experience residential, commercial and industrial growth. From this study, a number of existing growth areas were developed and assigned to guide the location of future growth in the city. The growth areas and estimated land requirements of this forecast are referenced in section 5.1 of this document while the growth forecasting methodology is examined in section 4.1. Additionally, assessments of the density of existing residential and commercial developments in camrose established in the 2020 growth study are utilised in this document.

2.1.2 DARP Population Growth Projections

In 2017, the *Downtown and City of Camrose Retail Commercial Market Study* was developed to analyse retail and commercial market conditions in the city. The study includes predictions on commercial space demanded by the city from 2016 to 2041. These predictions are updated later in this document, extending the period of estimation to 2048. Additionally, the 2017 DARP developed estimations on the percentage of commercial growth that would be satisfied by developments within the downtown and by new developments. These estimations are utilised to help inform future land demand.

2.1.3 City of Camrose / Camrose County Industrial Land Market Analysis

In 2020, an *Industrial Land Market Analysis* was developed to determine whether the current allocations of industrial land were sufficient for future growth in Camrose. As part of the analysis, a number of observations were made regarding the feasibility of servicing industrial land and the speed at which industrial land was being developed. Additionally, the volume of currently undeveloped and developed industrial land designated by the city was determined. The findings of this analysis are referenced later in the document when assessing industrial land demand. This data is used to compare and validate growth projections for industrial areas.

2.1.4 Historic City Growth

The City of Camrose grew from a population of 15,312 in 2001 to 19,847 in 2022, a 30% increase over twenty-one years. Although the average annual growth rate was 1.24% over this period, the most rapid growth occurred between 2005 and 2010, while growth since 2016 has been much slower. Although growth in Alberta as a whole has similarly slowed in recent years, the province is still growing at a much faster rate than Camrose. Relative to the surrounding census division, CD 10, however, Camrose has consistently grown at a faster rate, with CD 10 experiencing an annual population loss of -0.12% in recent years. This reflects broader trends of rural depopulation in Alberta. Table 1 below provides a comparison in the annual population growth rate for camrose, census division 10, and Alberta.

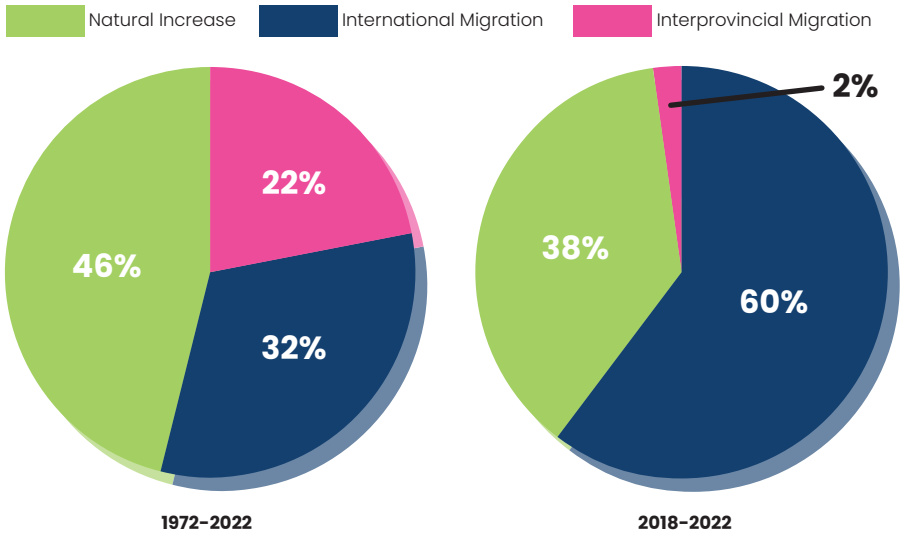
Table 1. Historic Growth Rates of Province, CD-10 and Camrose

	2001-2011	2011-2022	2011-2016	2016-2022	Overall (2001-2022)
Camrose City	1.54%	0.97%	1.50%	0.53%	1.24%
Census Division 10	1.20%	0.28%	0.77%	-0.12%	0.72%
Alberta	2.17%	1.62%	2.06%	1.25%	1.88%

The three major components of population change for the province, and by extension Camrose, are natural increase, international migration and interprovincial migration. However, in recent years the prevalence of each component has shifted significantly, with the source of Alberta's population growth being different than it was prior. Shifts in growth source patterns are significant as they have the potential to cause similar shifts within the city's demographics, and thus affect the form taken by future growth.

Population growth from natural increase has remained relatively stable over the past decades, being a constant source of moderate growth. While historically interprovincial migration was a significant growth contributor, in recent years its contribution to the province has been minimal. International migration, which was already a significant source of population growth in the past, has further increased in recent years. Figure 1 below provides a comparison of the composition of population growth for Alberta in recent years versus historically. These shifts in growth source patterns have the potential to cause similar shifts in the cities demographics, and thus affect the form taken by future growth.

Figure 1. Historic and Current Sources of Population Growth



2.2 Municipal Demographics

2.2.1 Current Community Profile

Camrose's residents are, on average, older than most municipalities in Alberta, with older median age, and people over the age of seventy accounting for almost 18% of Camrose's population. In conjunction with this, there is a slightly smaller proportion of residents between the ages of 0 to 29 and a significantly smaller proportion between the ages of 30 and 49. As a result, the relative size of the labour force is smaller for the municipality, the impact of which will be discussed later in section 3.0.

Camrose has a lower percentage of residents who are members of a visible minority and a lower percentage of immigrants relative to Alberta as a whole, which is significant as international immigration is the primary source of population growth in Alberta. However, immigration in Camrose has increased over recent years, with the city having a proportionally higher percentage of immigrants who are recent arrivals. For recent immigrants, the Philippines was the most common source country, accounting for two-thirds of arrivals in Camrose, much higher than the one-quarter of arrivals it provided for the province.

Camrose has a smaller average household size when compared to Alberta, being predominantly one and two-person households, with a current average household size of 2.3. The amount of one and two-person households has also increased in recent years, both in absolute and relative terms, while three- and four-person households have decreased. Additionally, Camrose residents are more likely to work locally than in province as a whole, as well as move their place of residence, with almost half of the population having moved within the last 5 years. Table 2 below shows a comparison between Camrose and Alberta for the key demographic characteristics of the community.

Table 2. Key Demographic Characteristics

	Camrose	Alberta
Population 2021	18,775	4,262,635
Median Age	43.2	38.4
Household Size	2.2	2.6
Average Household Income	$92,300	$119,700
Percentage Visible Minority	10%	27%
Percentage Immigrants	10.2%	23.2%
Percentage of Immmigrants who are Recent Arrivals (2016-2021)	28.3%	19.9%
Percentage of Population who moved within last 5 years	43.5%	41.1%
Percentage of Commuters who commute less than 15 minutes	67.1%	30.9%

Source: Statistics Canada Census, 2021

2.2.2 Expected Community Profile

Camrose's median age is likely to increase in the future, as current trends, which are shown in Table 3, predict young adults and children making up smaller portions of the population, while the proportion of seniors is predicted to increase. These changes are likely to occur as the result of young adults moving to other communities and larger municipalities, while seniors from surrounding rural areas relocate into the city. The proportion of those in middle age will remain relatively constant, due to the arrival of recent immigrants, who are predominantly under the age of 45, counteracting the reduced pool of young adults aging up.

Table 3. Change in Population by Age Group

Age	2016 Population	2021 Population	%Change
0 to 9	2,190	2,045	-6.62
10 to 19	1,985	2,120	+6.80
20 to 29	2,475	2,125	-14.14
30 to 39	2,335	2,350	+0.64
40 to 49	2,055	2,105	+2.43
50 to 59	2,480	2,290	-7.66
60 to 69	2,240	2,395	+6.92
70+	2,995	3,345	11.69

Source: Statistics Canada, Census

As net immigration into the municipality is predicted to increase in future years, the percentage of both immigrants and visible minorities within the community are likely to increase throughout future decades, primarily within the younger and middle age ranges. This immigration is likely to be driven almost entirely by international migration as opposed to interprovincial migration, and as a result a higher percentage of residents are likely to be new arrivals in Canada.

These demographic shifts generate a future community profile that has a high percentage of residents who have recently moved into the community, regardless of growth rates. In other words, regardless of whether the community as a whole is drastically increasing, its population demographics will still be shifting significantly, bringing with them a shift in demand for housing type. Changes in household size in Camrose reflect this, with further decreases in housing size being anticipated, continuing current trends. This is shown in Table 4 below, which displays a recent growth in the number of one and two person households and a loss in three and four person households.

Table 4. Change in Household Size

Household Size	2016	2021	% Change
1 Person	2,550	2,680	5.10%
2 Person	2,990	3,045	1.84%
3 Person	995	985	-1.01%
4 person	905	875	-3.31%
5 person+	530	545	2.83%
Average Size	2.3	2.2	-0.1

Source: Statistics Canada, Census

2.3 Government of Alberta 2022-2046 Population Forecast

Camrose's growth is linked with that of Alberta and of the surrounding region, Census Division 10, and as a result the population projections for Camrose are related to and based on population projections published annually by The Province of Alberta.

From these projections, in the near future, Alberta is expected to experience a surge in population growth as a result of high migration, resulting in an estimated average growth rate of ~1.8% per year between 2021 and 2024. This is expected due to several factors including strong oil prices, labour shortages, and relative affordability compared to other provinces. Following this, provincial growth is expected to gradually slow to 1.6% per year from 2025 to 2026, and then to 1.5% from 2027 to 2035, due to anticipated economic slowdown and reduced immigration. Further growth reductions will then continue to occur, with annual growth dropping to 1.4% between 2036 and 2041, and then 1.3% between 2031 and 2046.

However, population growth will not occur uniformly across the province. Large population centres including the Calgary and Edmonton regions are expected to experience the highest growth rates. Census Division 10, of which Camrose accounts for 20% of the population, is expected to grow at an average rate of 0.7% per year, or 47% of the provincial growth rate, between 2022 and 2046. It is important to note that while the predicted growth of CD 10 is lower than the provincial rate, the relative difference between the two is less than previous decades. CD 10 grew at 38% of the provincial rate between 2001 and 2022. Estimates developed for Camrose's future growth rate are presented in section 4.2 of this document

3.0 Economic & Development Analysis

In addition to developing population projection, it is important to understand the type and rate of employment, sector, and housing growth that has occurred recently in Camrose. These growth elements affect the form of future development that will take place and will help allocated appropriate amounts of land for future development

3.1 Employment

In recent years, between 2016 and 2021, Camrose has experienced a significant drop in its labour force participation. While the province as a whole experienced a similar decrease, Camrose's current labour force participation rate of 61.6% is significantly below the province's average of 69.7%. Although this is partially the result of the municipality's high proportion of senior citizens, its unemployment rate of 12.70% (higher than the province's rate of 8.6%) suggests that there are other contributing factors. Similarly, while net employment in the province grew by 2% in the province as a whole from 2016-2021, Camrose experienced a decrease of 8%. Table 5 summarizes the recent changes in employment for Camrose

Table 5. Camrose Employment Overview

	2016	2021
Population	18,520	18,775
Labour Force Size	9,715	9,245
Participation Rate	65.00%	61.60%
Employed	8,805	8,075
Unemployed	915	1,170
Unemployment Rate	9.40%	12.70%

Source: Statistics Canada Census

3.2 Sectors

As a result of recent decreases in employment, future growth decisions and predictions must be considerate of what sectors in Camrose are likely to experience contraction or expansion. Relative to the rest of Alberta and the surrounding region, Camrose has significantly higher rates of employment in the Health Care, Manufacturing and Utilities, and Sales and Service sectors relative to both Alberta and the Camrose-Drumheller Economic Region, reflecting its role as a shopping, entertainment and cultural centre as well as a source of medical support for the surrounding region. However, occupations in legislative and senior management and natural and applied sciences are under-represented in the municipality. The relative concentration of occupations in Camrose compared to Alberta and the Camrose-Drumheller Economic Region are presented in Table 6.

Table 6. Relative Occupation Concentration

Sector	Occupation rate in Camrose relative to:	
	Alberta	C-D Economic Region
Health occupations	1.41	1.51
Occupations in manufacturing and utilities	1.30	1.10
Sales and service occupations	1.22	1.37
Natural resources, agriculture and related production occupations	1.00	0.28
Trades, transport and equipment operators and related occupations	0.96	0.89
Occupations in education, law and social, community and government services	0.94	1.13
Buisness, finance and administration occupations	0.85	1.06
Occupation in art, culture, recreation and sport	0.72	1.11
Legislative and senior management occupations	0.59	0.96
Natural and applied sciences and related occupations	0.40	0.88

Source: Statistics Canada Census

Sector prevalence is and has not been static however. From 2016 to 2021, Occupations Sales and Service Occupations, Trades, Transport, Business & Finance in addition to Health Care and Social Assistance all experienced significant sector growth. Natural Applied Sciences, and Legislative and Senior Management occupation continued to decrease over this period. Additionally, the manufacturing and utilities sector also experienced occupation contraction, despite its relative prevalence in Camrose. See Table 7 for the changes in Camrose's labour force.

Table 7. Camrose Labour Force Shifts 2016-2021

Sector	Change in # of Occupations	% Change in Occupations
Sales and service occupations	195	7.93%
Trades, transport and equipment operators and related occupations	80	4.91%
Health occupations	70	7.25%
Natural resources, agriculture and related production occupations	55	15.94
Buisness, finance and administration occupations	35	2.80%
Occupations in art, culture, recreation and sport	5	3.45%
Occupations in education, law and social, community and government services	-30	-3.13%
Occupations in manufacturing and utilities	-45	-9.28%
Legislative and senior management occupations	-955	-94.55%[1]

Source: Statistics Canada Census

[1] The near 100% reduction in legislative and senior management occupations in Camrose over the period is primarily the result of occupation recategorization between 2016 and 2021 in Statistics Canada's Methodology, resulting in middle manager jobs being reallocated to to a different occupation classes.

Net future sector growth is predicted to be positive for the Camrose-Drumheller Economic Region, with demand predicted to increase by 0.9% per year from 2022 to 2025. For Camrose itself, significant increases are likely to occur in health care as well as sales and service occupations, while business, finance, administration, education, law, social, community, and government service occupations are likely to experience slight growth. Trades, transport and equipment operator occupations are expected to decrease, as a result of concentration in other parts of the region. Exact calculations for future growth by sector in Camrose will be provided in section 5.2.

3.3 Housing Starts

In recent years, between 2015 and 2021, the number of new housing units starting and finishing development in Camrose gradually dropped, regardless of housing type. However, in 2022 both development indicators rose, though not to the rates experienced at the start of the period. Of the houses constructed in this period the majority, 55%, were Single-Detached Housing Units. In 2022 a high share of developments were apartment and row housing, though it is unclear as to whether this trend will continue. See Table 8 below for a summary of housing starts and completions.

Table 8. Camrose Housing Starts & Completions

YEAR	2015	2016	2017	2018	2019	2020	2021	2022
HOUSING STARTS								
Single	47	50	46	31	31	19	18	28
Semi	18	4	10	2	8	6	2	10
Row Housing	16	47	15	0	16	12	4	6
Apartment/Other	4	0	13	2	1	0	0	28
Total Starts	85	101	84	35	56	37	24	72
HOUSING COMPLETIONS								
Single	50	54	30	43	32	24	17	31
Semi	22	8	8	2	6	8	4	6
Row Housing	31	28	31	3	0	16	12	10
Apartment/Other	4	0	0	14	1	1	0	12
Total Completions	107	90	69	62	39	49	33	59

Source: CMHC

4.0 Growth Forecasts

4.1 Previous Projections Methodology & Assumptions

Previous growth forecasting for the 2020-2044 period produced for the municipality utilized census data, the commercial and retail market study, and the industrial land analysis to produce its estimates. It relied on a number of assumptions and projections that are now in need of updating or correction. The assumptions guiding previous growth estimates are listed below:

- The Municipality would grow at a constant rate of 1% per year from 2020-2044
- 20% of residential growth would occur in infill/existing communities, while 80% would occur in new communities
- New residential developments would have an average household size of 2.4 persons per dwelling unit
- New residential development would have 20% higher density than existing communities. It was also assumed that future residential development would contain high density developments, resulting in a overall density of 16 dwelling units per net residential hectare
- 16,859 sq. ft. of commercial space was required per year for the 2020-2044 period
- Lot coverage for future commercial developments would be 20% higher than existing commercial developments, resulting in an average lot coverage of 28.8%
- 6 net hectares of serviced industrial land would be required by 2044, due to existing supply being estimated to meet historic demand for the next 10 to 20 years and that the development costs for land servicing were 2 to 4 times the current market value
- 128 gross hectares of unserviced industrial land would be required by 2044, due to growing demand for rural large parcel land by large users not requiring full municipal services

4.2 Study Methodology & Growth Projections

4.2.1 Study Assumptions

During the development of population and land demand projections, a number of assumptions were utilised to develop accurate growth estimates. For ease of access, Table 9 below presents a compilation of these assumptions, the topic they relate to, and the sections of the document they occur in. The rationale behind these assumptions will be explained in the sections they are utilised.

Table 9. Study Assumptions Summary

Topic	Assumption	Location in Document
Camrose Employment Proportion	Camrose will continue to comprise 8.7% of the C-D 10 labour force between 2023-2048.	4.2.2
Camrose Employment Growth	Camrose's Labour force will continue to grow at an average of 0.9% annually between 2023-2048, as it is projected to between 2022-2025.	4.2.2
Job Leakage	15% of people who work in Camrose do not live in Camrose.	4.2.3
Multiplicative Job Increases	Population growth will generate an additional 10% of jobs over and above regular job increases within new residential communities.	4.2.3
Average Dwelling Size	Camrose's average dwelling size will remain at 2.2 from 2023-2048.	6.2.1
Infill Growth	10% of new growth will occur as infill densification to existing areas.	6.2.1
Gross/Net Hectare Ratio	Net Hectares for new residential, commercial & industrial developments will be 70% of gross hectare requirements.	6.2.1, 6.2.2, 6.2.3
Industrial Job Density	High order industrial uses in Camrose would have a job density of 28 jobs/hectare, and low order uses would have a density of 14 jobs/hectare	6.2.3
Industrial Order Use	80% of new Industrial development would occur in the form of low order uses, with 20% as high order uses.	6.2.3
Labour Force Participation	Labour force participation rates would average 2022 levels between 2023-2048	6.2.3

4.2.2 Projected Population Methodology

Population projections for Camrose were generated through the synthesis of provincially developed forecast data for both the province and the Camrose-Drumheller region contextualized against historic growth relationships. In order to ensure preparations for future growth are adequate, and provide a diversity in future recommendations, three growth scenarios for Camrose based on high, medium, and low growth projections were generated.

From this methodology, it is projected that in a scenario where moderate growth occurs, Camrose's population will grow with an average rate of 0.9% growth per year between 2023 and 2048. This results in a rate that is only 60% of the provincial rate average of 1.48% per year, but 27.6% greater than the CD-10 growth rate of 0.7% per year. Like the province, Camrose's growth will be faster towards the beginning of this period, gradually slowing down through the decades. This will result in a net population increase from 19,612 in 2023 to 24,477 in 2048, a difference of 7,376 over the period. Table 10 and Table 11 summarize the projected annual population growth rate and the net population growth of Camrose for the 2023-2048 period respectively.

Table 10. Projected Annual Growth Rate

Growth Period	Low Growth Scenario	Medium Growth Scenario	High Growth Scenario
2023-24	0.82%	1.00%	1.29%
2024-28	0.79%	1.05%	1.38%
2028-33	0.65%	0.90%	1.30%
2033-38	0.59%	0.88%	1.31%
2038-43	0.51%	0.79%	1.19%
2043-48	0.51%	0.79%	1.29%
Overall Average	0.61%	0.9%	1.29%

Table 11. Projected Population Increase by Period

Period	Population Increase Over Period			Total Population at End of Period		
	Low Growth	Medium Growth	High Growth	Low Growth	Medium Growth	High Growth
2023-28	849	1,045	1,370	20,461	20,657	20,982
2028-33	608	1,025	1,404	21,069	21,682	22,386
2033-38	633	885	1,503	21,702	22,567	23,889
2038-43	600	964	1,545	22,302	23,531	25,434
2043-48	571	946	1,554	22,873	24,477	26,988
Overall	3,261	4,865	7,376			

Population Verification Projection Methodology:

- An overall employment projection was generated by taking the net employment growth for the region, and adjusting it based on the proportion of net employment currently located in Camrose. In 2021, Camrose comprised 8.7% of the region's employed labour. This means that of the 2,600 jobs predicted to be demanded in the region over the period, 226 would be based in Camrose.
- Net employment was then broken down by sector, with the jobs demanded in each sector being adjusted based on the relative prevalence of jobs in Camrose compared to the region.
- Demand was then forecast for the 2023-2048 period by determining the average yearly job growth rate for the 2022 to 2025 period both overall and by sector. This resulted in a net employment growth rate of 0.9% annually, though there was significant variance by sector. It is important to note that not all sectors were predicted to grow over the period, with some experiencing a loss in employment demand. The net growth rate and sector growth rates were then extended out to 2048 in order to generate overall estimates for the period.

The employment projections for Camrose by sector developed based on this methodology are presented in Table 12. The specifically listed sectors comprise 85% of employment in Camrose. Values in the table have been rounded up.

Table 12. Camrose Employment Forecast by Sector

Sector	Jobs per year	Total New Jobs 2023-2048
Sales and service operations	12	298
Trades, transport and equipment operators	41	1,032
Buisness, finance and administration	9	231
Health Occcupations	13	328
Occupation in education, law and social, community and government services	16	402
Legislative and senior management occupations	22	557
Natural and applied sciences and related occupations	-10	-255
Natural resources, agriculture and related production occupation	-8	-203
Occupations in manufacturing and utilities	0	0
Other	0	0
Total New	96	2,390

4.2.3 Population Projection Verification

In order to ensure the generated population projections were accurate, a secondary projection of population growth from 2023-2048 was developed based on 2021 Federal Census data, functioning as a comparison point for the initial projections. This methodology for the secondary projection is presented on the following page.

Population Verification Projection Methodology:

1. An annual employment growth of 0.9% was utilized for the City of Camrose.
2. A population to job ratio for the city was developed based on Federal Census data on the total population and number of jobs in Camrose in 2021.

2021 Population	19,612
2021 Jobs	8,256
Population/Job Ratio	2.375

3. Employment growth over the next 25 years was generated by utilizing the yearly growth rate and the number of existing jobs in the community, resulting in the development of a projection of the total jobs present in 2048. Total population in 2048 was then calculated using the job/population ratio in conjunction with the projection of total jobs.

Job Growth 2023-2048	1,858
Total Jobs 2048	10,114
Total Population 2048	24,025

4. In order to account for those work in the city, but do not live in it, a leakage factor of 15% was applied, resulting in a reduction in population equal to 15% of the total jobs present in 2048.

Population Leakage	-3,604
Net Reduced Population	20,421

5. A population multiplier effect of 10% was then utilized, generating additional jobs, which in turn generates additional population. This is due to the fact that over and above regular employment increases, population growth creates a variety of jobs within residential communities, such as drycleaning and convinience store services. 10% is the typical increase for most communities in Alberta. The leakage effect would also apply to these jobs.

Additional Jobs	2,042
Additional Population from Jobs	4,851
Additional Leakage	728
Net Additional Population	4,123

6. From this, the final population used for verification was developed through the combination of the net additional population and the net reduced population.

Final Population	**24,544**

This method of population growth projection results in a projected population very similar to the population of **24,477** produced by the medium growth projection in section 4.2.2. With a difference in population of only **67**, or **0.27%**, the two methods of population projection reaffirm the conclusions of the other.

5.0 Land Requirements and Developable Lands

5.1 Land Supply Analysis

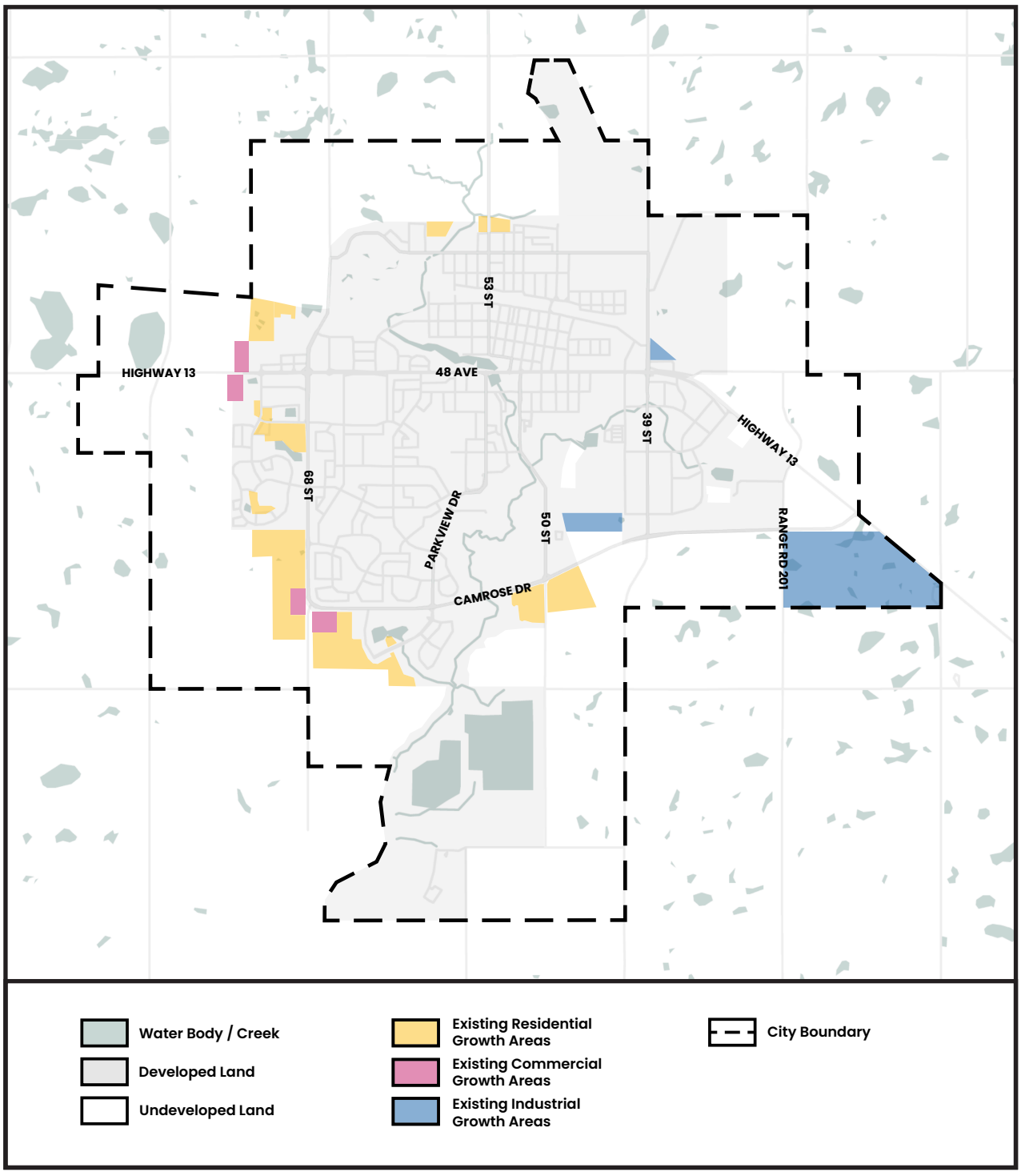
5.1.1 Existing Growth Areas

Existing growth areas are spread around the periphery of the city, and are divided into commercial, residential, and industrial growth, as shown by Map 2. The largest currently identified growth areas allocated as residential and commercial are the currently vacant areas of the city South-West of 68th Street and Camrose Drive. Additional residential and commercial land is allocated West of 68th Street on the vacant lands North and South of 48th Avenue. Further residential land is allocated South of Camrose Drive on either side of 50th Street. Industrial growth areas are primarily located on the eastern edge of the city, with the vast majority being South of Highway 13 and East of Range Road 201. Additional allocation exists North of Camrose Drive and West of 39th Street as well as North of 48th Avenue and East of 39th Street. Table 13 shows the amount of land currently allocated for each type of land use.

Table 13. Land Area of Existing Growth Areas

Land Use Type	Percent of Total	Net Hectares	Gross Developable Hectares
Residential	49%	114.0	140.4
Commerical	4%	10.6	11.8
Industrial	47%	127.3	134
Total	100%	260.9	286.2

Map 2. Existing Growth Areas



5.1.2 Approved Plans

Camrose currently has two Area Structure Plans (ASPs) in place governing development for the edges of the municipality where growth is likely to occur; the East Gateway Area Structure Plan, and the Railway Junction Area Structure Plan. The East Gateway ASP, covering the lands East of 39th Street and North of Highway 13, envisions the area as a commercial and industrial business park. The Railway Junction ASP, covering the lands East of Range Road 201 and South of Highway 13, pursues the development of the area as a economic hub for the region, promoting both commercial and industrial development. See Table 14 for the exact coverage of each ASP. As portions of the areas covered by the ASPs overlap with existing growth areas, their direction must be considered in order to ensure that land is not over allocated, and that synchronisation in growth direction is achieved between the ASPs and this growth study. To achieve this, the amount of undeveloped land allocated as residential, commercial, and industrial within each ASP has been calculated and will be accounted for when future growth scenarios are developed.

Primarily both the East Gateway ASP and Railway Junction ASP allocated undeveloped lands to future industrial developments, due to their proximity to existing industrial areas. Each ASP also allocated undeveloped area for highway commercial development, however the total amount of land was minimal compared to industrial allocation. No undeveloped area in either ASP was allocated as residential land, and thus no residential growth can occur within the areas the ASPs encompass. See Tables 14 and 15 for the amount of total undeveloped land within the area of each ASP and the amount of land within each ASP identified as a growth area in the 2020 growth forecast.

Table 14. Amount of Undeveloped ASP Land

ASP	Total	Residential	Commercial	Industrial
East Gateway ASP	318.6 ha	0 ha	7.5 ha	311.1 ha
Railway Juncion ASP	227.6 ha	5.3 ha	0 / 36.3 ha	222.3 / 186 ha

Table 15. Amount of Undeveloped ASP Land Overlap with Previously Identified Growth Areas

ASP	Total	Residential	Commercial	Industrial
East Gateway ASP	2.96 ha	0 ha	0 ha	2.96 ha
Railway Juncion ASP	105.4 ha	0 ha	0 / 9.1 ha	105.4 /96.3 ha

Growth Areas located within the East Gateway ASP were minimal as it was determined in the production of the 2020 forecast that servicing costs for the land was uneconomical, and it was more advantageous to locate growth areas on lands within the Railway Junction ASP. These findings influenced the identification of potential future growth areas seen in the growth concepts presented in Section 5.4.

5.2 Land Demand Analysis

5.2.1 Residential Demand

Residential demand in Camrose for the 2023-2048 period was estimated by determining the number of dwellings required to satisfy projected growth rates based on the low, medium, and high growth scenarios developed in section 4.2.2. Average dwelling size was assumed to remain at the current average of 2.2 persons/dwelling throughout, as although recent trends show a decrease in average housing size, there is not enough evidence to develop a projection that continues the trend into the following decades. Table 16 shows the increase in residential dwellings required over each five year period from 2023 to 2048 for the three growth scenarios.

Table 16. Required Increase in Number of Residential Dwellings

Period	Low Growth	Medium Growth	High Growth
2023-28	386	475	623
2027-33	277	466	639
2033-38	288	403	684
2038-43	273	439	703
2043-48	260	430	707
Total (2023-48)	1,483	2,212	3,353

From these projections, the land requirements of future residential developments for two different residential growth scenarios were developed. These scenarios were based around different target densities, in order to allow the municipality further clarity in the requirements of different urban development.

The density scenarios are based off of the following:

1. **Density of 25du/nrha:** This aligns with municipal density targets as listed in the City of Camrose *Area Structure Plan Guidelines*
2. **Density equivalent to Existing Communities:** To ensure compatibility and integration with already existing communities

Each of these scenarios develops net residential and gross hectare requirements listed based on low, medium and high growth scenarios. Net residential hectares were assumed to be 70% of gross hectares, in order to accommodate for municipal reserve, road and other land requirements.

Typically, a portion of new growth in municipalities occurs in the form of infill densification, though the percentage amount varies from municipality to municipality. As a comparison point, the average percentage of infill developments in Edmonton for the past five years is 25.4%, as per the *2020 Mature Area Infill Study*. However, residential infill opportunities in Camrose are more limited than in a larger municipality such as Edmonton. Though there is potential for intensification on lots to the West of downtown, as well as South of the University of Alberta's Augustana Campus, on the whole infill is likely to be relatively minimal. Due to this, an infill percentage of 10% was selected for future residential growth, leaving 90% to occur in new growth areas.

A 10% infill rate would result in 5,056 m2 of infill development occurring each year under a medium growth scenario, assuming that the average density of development occurs at the city's target of 25du/nrha. This is equivalent to about ~9 new developments emerging from infill per year.

While it is possible that residential infill occurs at a higher rate than 10%, it is unlikely to exceed 15%. Additionally, the amount of required undeveloped residential land if 10% or 15% infill occurs is near identical, with a difference of only 0.25 gross hectares required per year. Because of this, the lower rate of 10% was selected in order to ensure that land allocation was sufficient.

5.2.1.1 Residential Land Requirements at 25 du/nrha

Table 17. Required Residential Hectares at 25 du/nrha

	Low Growth	Medium Growth	High Growth
Net Residential Hectares	59.32 nrha	88.48 nrha	134.12 nrha
Gross Hectares	84.74 ha	126.4 ha	191.6 ha

5.2.1.1 Residential Land Requirements at Density of Existing Community

This scenario was developed based on the combined density of the communities of Duggan Park and Southwest Meadows. These communities were selected as they were utilized to determine the growth areas currently in effect at the time of this study's production, which allows for more direct comparisons to past growth estimates. Additionally, the communities have no secondary suites, allowing for existing density to be calculated based on the number of listed properties. The statistics for the Duggan Park and Southwest Meadows community were calculated in Camrose's 2020 Growth Forecast, and are presented in Table 18.

Table 18. Duggan Park and Southwest Meadows Statistics

Gross Hectares	64 ha
Net Residential Hectares	52 nrha
Dwelling Units	595
Dwelling Units per Net Residential Hectare	11.44 du/nrha

Based on the calculated residential density of the Duggan Park and Southwest Meadows community, the required area for future residential growth from 2023-2048 was developed, as shown in Table 19.

Table 19. Required Residential Hectares to match density of existing communities

	Low	Medium	High
Net Residential Hectares	129.61 nrha	193.32 nrha	293.04 nrha
Gross Hectares	185.15 ha	276.17 ha	418.62 ha

The residential density scenarios together provide a range of 126.4 to 276.17 gross hectares required for residential developments. The exact amount of land required within this range will largely be determined by the growth direction the city decides to pursue. Sample growth directions developed in Section 5.4 of this document will utilize values within this range.

5.2.2 Commercial Demand

As part of the production of this study, the production of updated projections for commercial demand in alignment with those generated as part of the Retail Commercial Market Study was pursued. However, during the production of these updated estimates it was determined that demand had not changed enough to warrant a comprehensive update, as it was almost identical to the demand determined in 2018. As a result of this, commercial space demands as calculated in the Retail Commercial Market Study were shifted forward to cover the period from 2023-2048.

From these projections it was then determined how much land would be required for new growth areas and how much would be satisfied by densification of existing land. In accordance with the Retail Commercial Market Study, 37% of demand would be satisfied by downtown densification, leaving 63% to occur on newly developed lands. The square footage of commercial development demanded in new developments during the 2023-2048 period under low, medium and high growth scenarios is presented in Table 20.

Table 20. Square Footage of New Commercial Space Demanded by Year

Year	Low Growth	Medium Growth	High Growth
2028	6,921 sq. ft.	20,149 sq. ft.	26,265 sq. ft.
2038	64,355 sq. ft.	96,365 sq. ft.	135,568 sq. ft.
2048	107,597 sq. ft.	222,728 sq. ft.	370,643 sq. ft.

The land area required by this 63% was then calculated based on two different commercial development scenarios, as was done for residential demand. These scenarios were developed based on differing percentages of lot coverage, and are as follows:

1. **Lot coverage of 50%:** The maximum lot coverage allowed in C2 and C3 Zones of the current land use bylaw, ensuring efficient and economically viable land use.
2. **Lot coverage equivalent to existing developments:** To align with currently profitable development patterns.

Each of these scenarios develops net commercial and gross hectare land demands from the 2023-2048 period based on low, medium and high growth scenarios. Net commercial hectares were assumed to be 70% of gross hectares, in order to accommodate for municipal reserve, road and other land requirements.

5.2.1.1 Lot Coverage of 50%

Table 21. Required Commercial Hectares at 50% Lot Coverage

	Low Growth	Medium Growth	High Growth
Net Residential Hectares	2.00 ncha	4.14 ncha	6.89 ncha
Gross Hectares	2.86 ha	5.91 ha	9.84 ha

5.2.1.1 Commercial Land Requirements at Lot Coverage of Existing Developments

This scenario was developed based on the average lot coverage of the Cornerstone Development in Camrose. This development was selected as it, like Duggan Park and Southwest Meadows, was utilized to determine the growth areas currently in effect. Additionally, it is the most continuous commercial development in Camrose and possesses a variety of uses, allowing for the development of the current average rate of lot coverage across commercial use types. The statistics for the Cornerstone Development were calculated in Camrose's 2020 Growth Forecast, and are presented in Table 22.

Table 22. Cornerstone Development Statistics

Gross Hectares	17.3 ha
Net Commercial Hectares	15.1 nrha
Hectares of Total Building Area	3.6
Average Lot Coverage	23.8%

Based on the calculated average lot coverage of the Cornerstone Development, the required area for future commercial growth from 2023-2048 was determined, as shown in Table 23.

Table 23. Required Commercial Hectares at Lot Coverage of Existing Development

	Low Growth	Medium Growth	High Growth
Net Commercial Hectares	4.19 ncha	8.68 ncha	14.45 ncha
Gross Hectares	5.99 ha	12.40 ha	20.64 ha

The two lot coverage scenarios together provide a range of 5.91 to 12.40 gross hectares required for commercial developments. The exact amount of land required within this range will largely be determined by the growth direction the city decides to pursue. Sample growth directions developed in Section 6.4 of this document will utilize values within this range.

5.2.3 Industrial Land Development

5.2.1.1 Estimations from Projected Industrial Job Demand

Industrial land demand was predicted through the utilisation of job demand projections in Camrose, as developed in section 4.2.2. By isolating the sectors primarily responsible for industrial employment, a projection for industrial job growth was generated. Table 24 presents the total new industrial jobs predicted for 2023-2048.

Table 24. Projected Industrial Jobs (2023-2048)

Sector	Jobs per year	Total New Jobs 2023-2048
Trades, transport and equipment operators	41	1,032
Natural resources, agriculture and related production occupation	-8	-203
Occupations in manufacturing and utilities	0	0
Total New	33	829

Upon determining the amount of industrial job growth projected to occur between 2023-2048, an employment density was developed in order to determine industrial land requirements. In order to insure accurate industrial job density assumptions, density numbers produced from the 2018 *Commercial and Industrial Land Use Study* for the Regional Municipality of Wood Buffalo were utilised. In this study, it was determined that higher order industrial uses in urban service areas for the region had an average density of 28 jobs per hectare, whereas lower order industrial uses, had an average density of 14 jobs per hectare. The average density of industrial uses by order is unlikely to change across the province.

However, the proportion of low order uses relative to high order uses is likely to change by region due to changes in sector prevalence, as different sectors typically require different orders of intensity. For the Wood Buffalo region, it was assumed that 66% of industrial growth would occur through high order uses and 33% would occur in low order uses. However, relative to Camrose, the Wood Buffalo region has a greater focus on the Oil and Gas industry, resulting in a higher proportion of high order uses. Additionally, the majority of industrial job growth in Camrose is predicted to occur due to occupations as trades, transport and equipment operators, which primarily require low order uses, such as lay down yards. Due to this, it was assumed that 20% of new industrial growth for Camrose would occur as high order uses, and 80% as low order uses. This results in an average jobs per hectare of 19.2.

Utilising this developed job density in conjunction with projected job growth, net Industrial land requirements from 2023-2048 can be generated. See Table 25 below for the projected requirements. It was assumed that net industrial hectares required was 70% of gross hectares.

Table 25. Industrial Land Requirements at 19.2 jobs per hectare

Net Industrial Hectares/Year	1.73 niha
Gross Industrial Hectares/Year	2.46 ha
Total Net Industrial Hectares (2023-2048)	43.2 niha
Total Gross Industrial Hectares (2023-2048)	61.7 ha

5.2.1.2 Estimations from Prior Industrial Land Development Rates

To ensure that industrial land demand is accurately predicted, a second method of projection development based on rates of prior industrial land development was generated. This projection method involved utilising previously gathered industrial development data gathered as part of the 2020 Industrial Land Market Analysis. As part of this analysis, the volume of industrial land developed between 2009 to 2019 was recorded using satellite imagery cross referenced with information from Alberta Land Titles. The volume of industrial land developed is presented in Table 26 below (Note: Land values from the analysis were converted from acres to hectares).

Table 26. Volume of Industrial Land Developed (2009-2019)

Hectares/Year	2.43 ha
Total Hectares 2009 - 2019	24.33 ha

These values were adapted by adjusting them based on the average historic growth rate from 2009-2019 and the projected growth rate of the municipality from 2023-2048 for the three growth scenarios. The growth rates of the two periods are presented in Table 27.

Table 27. Average Growth Rate by Period

	Growth Rate
2009-2019	1.22%
2023-2048 Low Projection	0.61%
2023-2048 Medium Projection	0.9%
2023-2048 High Projection	1.29%

Following this, the land demand projections were then adjusted based on the relative labour force participation rates of the two periods, as labour force participation has dropped in camrose since the average rate of 2009-2019. It was assumed that labour force participation would remain at current levels throughout the 2023-2048 period, as there is not enough data to assess whether it will continue to drop. The rates of labour force participation for each period are listed below in Table 28. A participation ratio from the two periods was then developed, which was used to further adapt historic industrial land development rates.

Table 28. Average Labour Force Participation Rate by Period

	Participation Rate
2009-2019	68.9%
2023-2048	65.1%
Participation Ratio	0.945

From the use of both the participation ratio and growth rate adjustments, the following industrial land projections were developed, as presented in Table 29. It was assumed that net industrial hectares required was 70% of gross hectares.

Table 29. Industrial Land Demand Requirements

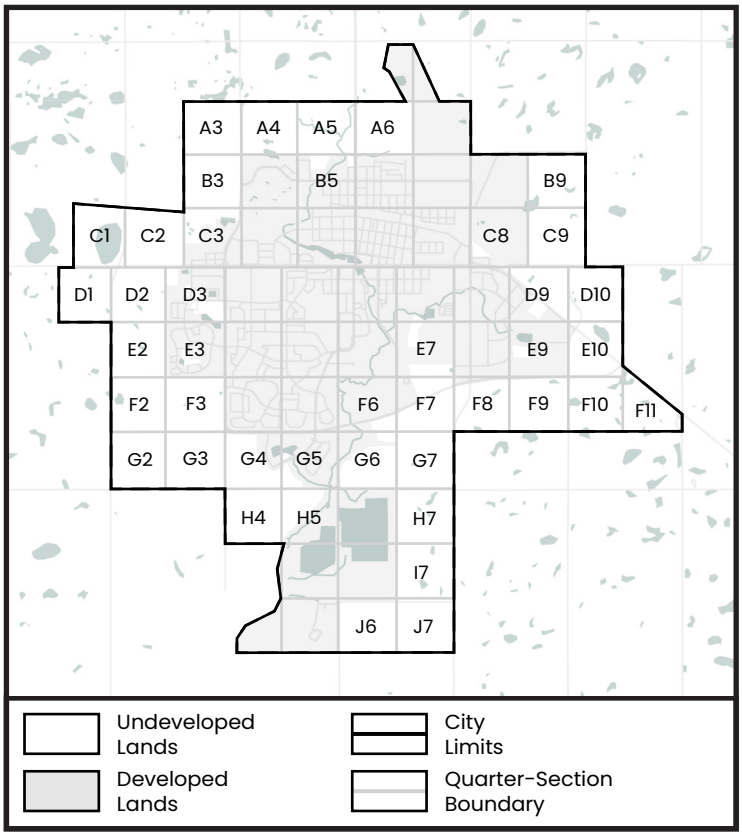
	Low Growth	Medium Growth	High Growth
Net Industrial Hectares/Year	1.15	1.70	2.44
Gross Industrial Hectares/Year	1.65	2.43	3.48
Total Net Industrial Hectares (2023-2048)	28.80	42.49	60.90
Total Gross Industrial Hectares (2023-2048)	41.14	60.70	87.00

This method of industrial demand projection results in a total gross area under the medium growth scenario that is very similar to the **61.71** gross industrial hectares produced by the job demand projection. With a difference in area demanded of only **1.01 ha**, or **1.66%**, the two methods of industrial demand projection reaffirm the conclusions of the other.

5.3 Land Developability Evaluation

As part of the process to assess which undeveloped lands in Camrose were most suited as the location for future growth, an evaluation criteria was developed. As part of the evaluation process, the undeveloped lands within the boundaries of Camrose were divided based on the legal quarter-section assigned from the Alberta Township Survey system. Each quarter-section was then notated based on its relative location. See Map 3 for a map of the assessed quarter-sections and their associated notation. Note that quarter-sections upon which the land was already entirely developed were not assessed. Those that were only partially developed were assessed only based on the portions of the land that were undeveloped at the time of this study.

Map 3. Assessed Quarter Sections



Each quarter-section was then independently assessed based on six key criteria . For each of these criteria, a quarter section was assigned a value from 1 to 5, based on the relative developability of the land, with a 5 indicating the quarter-section was among those best suited for development, and a 1 indicating that it was undesirable to develop that quarter section. The values across the six development criteria were then totalled, in order to determine which quarter-sections as a whole were the most desirable to develop. The criteria were equally weighted in the assessment process so as to not introduce any unnecessary complexity to the developability evaluation.

The six development criteria used to determine developability are:

1. **Proximity to Existing Development.** High values indicate a close proximity to existing city developments, with low values being reserved for quarter-sections far from the city. Developments that are closer to existing city development are easier to integrate into existing infrastructure, and are more economically desirable to develop due to the friction-of-distance.
2. **Mobility/Transportation.** High values at present for lands that possess high levels of mobility with easy automobile access to other parts of the city, while low values indicate lands that would result in inefficient automobile travel. This value was also influenced by the strain that would be created on congested road infrastructure by the development of a given quarter section. Limited consideraion was given to the proximity of developable lands to Camrose's currently existing community bus service. Roads currently or predicted to be congested were determined in the City of Camrose Transportation Master Plan.
3. **Green Space/Trail Access.** High values indicate lands with easy access to existing or potential green space and urban trail systems. The location of potential future green space and trail systems was informed by the future green space concept developed in Camrose's Green Space Master Plan. Low values indicated lands without sufficient access to existing or potential green space, or that would require a significant proportion of land to be allocated as green space, due to environmental or other concerns, thus limiting the amount of development that could occur.
4. **Water, Sanitary and Sewer Distribution.** High values indicate lands that could easily be integrated into existing water, sanitary and sewer networks, with minimal costs of expansion. Values were informed by the City of Camrose's Water Distribution System Master Plan and the Sanitary Sewer Master Plan.
5. **Stormwater Facility Presence.** High values indicate lands that would require minimal expansion to the storm drainage system and fewer metres of trunk line development. Lower values indicate lands upon which a significant proportion of land would need to be allocated as a stormwater facility, thus limiting development, or would require extensive trunk line development, increasing costs. Values were informed by the City of Camroses's Stormwater Master Plan.
6. **Plan Alignment.** High values were utilised for lands identified as areas of future growth in other municipal master plans and policy documents, while low values indicated areas that past plans assumed growth would not occur. As many of Camrose's plans and policy documents currently in operation assumed growth would occur in specific areas, the predictions of those plans should be taken into account in order to maximise plan compatibility and minimise conflict.

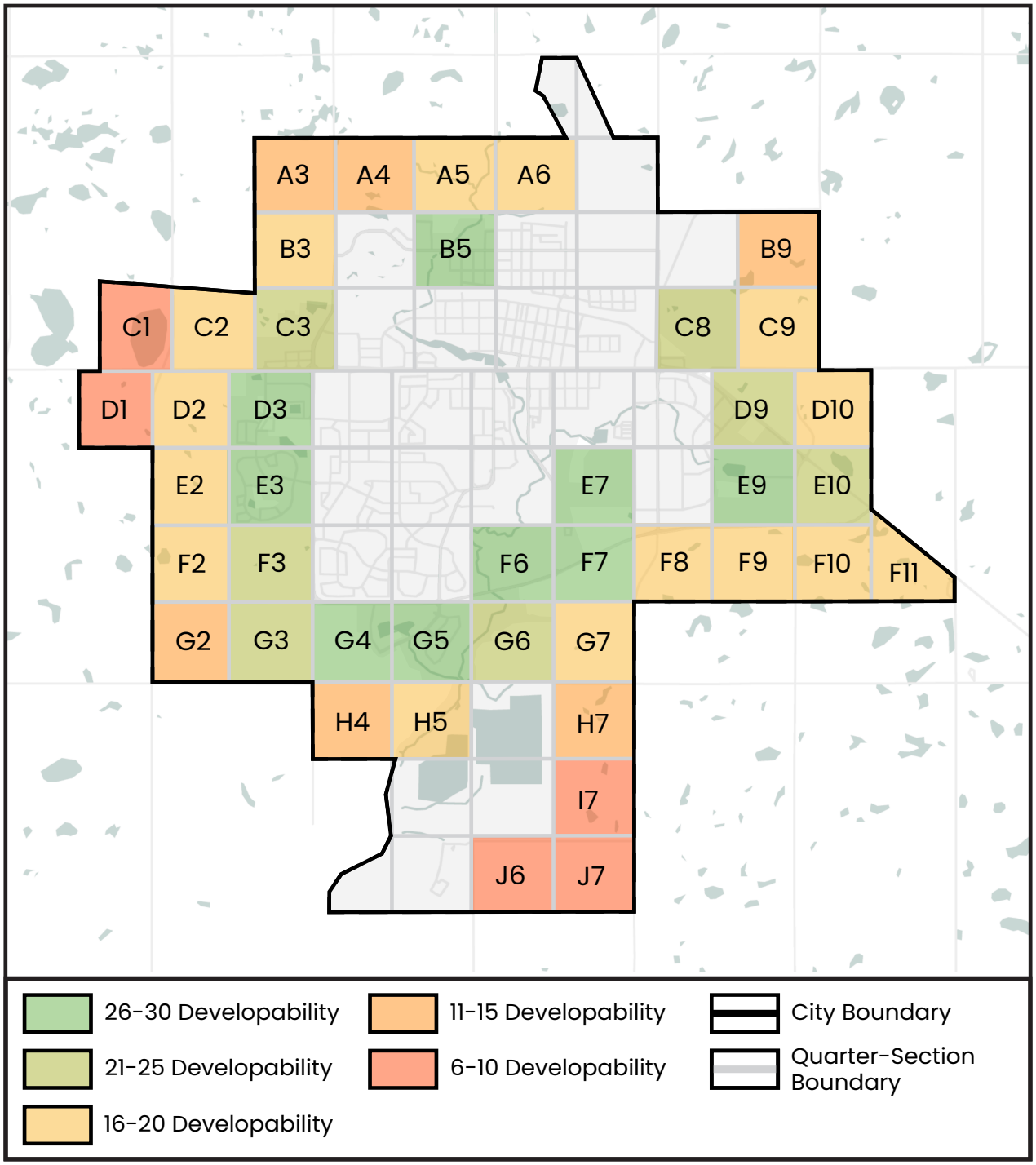
Table 30 contains the values for each criteria for each of the quarter sections, as well as the total value of all criteria combined.

Table 30. Relative Developability Values of Quarter-Sections

Land Section	Proximity	Mobility/ Connectivity	Green Space/ Trail Access	Water, Sanitary, Sewer	Stormwater Access	Plan Alignment	TOTAL
A3	2	2	3	2	4	2	**15**
A4	3	2	3	2	3	2	**15**
A5	3	3	4	3	3	2	**18**
A6	3	4	2	4	3	2	**18**
B3	3	3	3	3	3	4	**19**
B5	5	4	5	4	3	5	**26**
B9	2	1	1	2	3	2	**11**
C1	1	1	3	2	1	2	**10**
C2	3	3	2	4	2	4	**18**
C3	4	3	4	5	4	4	**24**
C8	5	5	2	2	5	5	**24**
C9	3	3	1	3	5	3	**18**
D1	1	2	1	2	2	2	**10**
D2	3	3	3	4	2	3	**18**
D3	5	4	4	5	5	5	**28**
D9	5	5	2	3	2	4	**21**
D10	3	4	2	2	3	3	**17**
E2	3	3	3	3	4	3	**19**
E3	5	4	4	5	5	5	**28**
E7	5	5	4	5	5	5	**29**
E9	5	4	4	5	5	4	**27**
E10	4	5	4	3	2	3	**21**
F2	3	3	3	3	3	3	**18**
F3	4	5	3	5	3	5	**25**
F6	5	4	5	4	5	5	**25**
F7	5	5	4	4	5	4	**28**
F8	3	4	1	4	3	3	**18**
F9	4	3	3	4	3	3	**20**
F10	3	4	2	2	4	3	**18**
F11	2	4	2	2	3	3	**16**
G2	1	2	3	2	3	3	**14**
G3	3	5	3	4	3	4	**22**
G4	4	5	5	4	4	5	**27**
G5	4	4	5	3	5	5	**26**
G6	3	3	5	3	4	4	**22**
G7	3	3	2	2	4	3	**17**
H4	2	3	4	1	2	2	**14**
H5	2	3	5	1	3	3	**17**
H7	2	2	2	1	2	2	**11**
I7	1	1	2	1	3	1	**9**
J6	1	1	1	1	4	1	**9**
J7	1	1	1	1	2	1	**7**

In order to provide a clear visual representation of the relative developability of the different quarter sections, the quarter sections were then sorted into tiers of development desirability based on their total values. Map 4 presents the map of the quarter sections tiered by developability.

Map 4. Tiered Quarter-Sections by Developability



5.4 Concept Growth Directions

Utilising the developability evaluation in conjunction with the developed land demand estimates, potential future growth directions from Camrose can be generated. Potential Future growth direction for camrose can be generated by utilising the findings. This study presents three potential growth directions for the City, each demonstrating different forms of growth with different approaches that the City could choose to pursue over the next 25 years. Each of these scenarios utilise medium growth projections for their land demand requirements. These scenarios could be easily adapted to low or high growth rates by removing or adding peripheral areas of growth respectively.

5.4.1 Community Integration Scenario

This scenario builds on the existing growth patterns within the city.

Key Characteristics Include:

- Locate future growth areas adjacent to areas where recent growth has occurred;
- Densities of future communities are similar to existing nearby communities;
- Locate future commercial developments in a manner that services both future and existing communities.

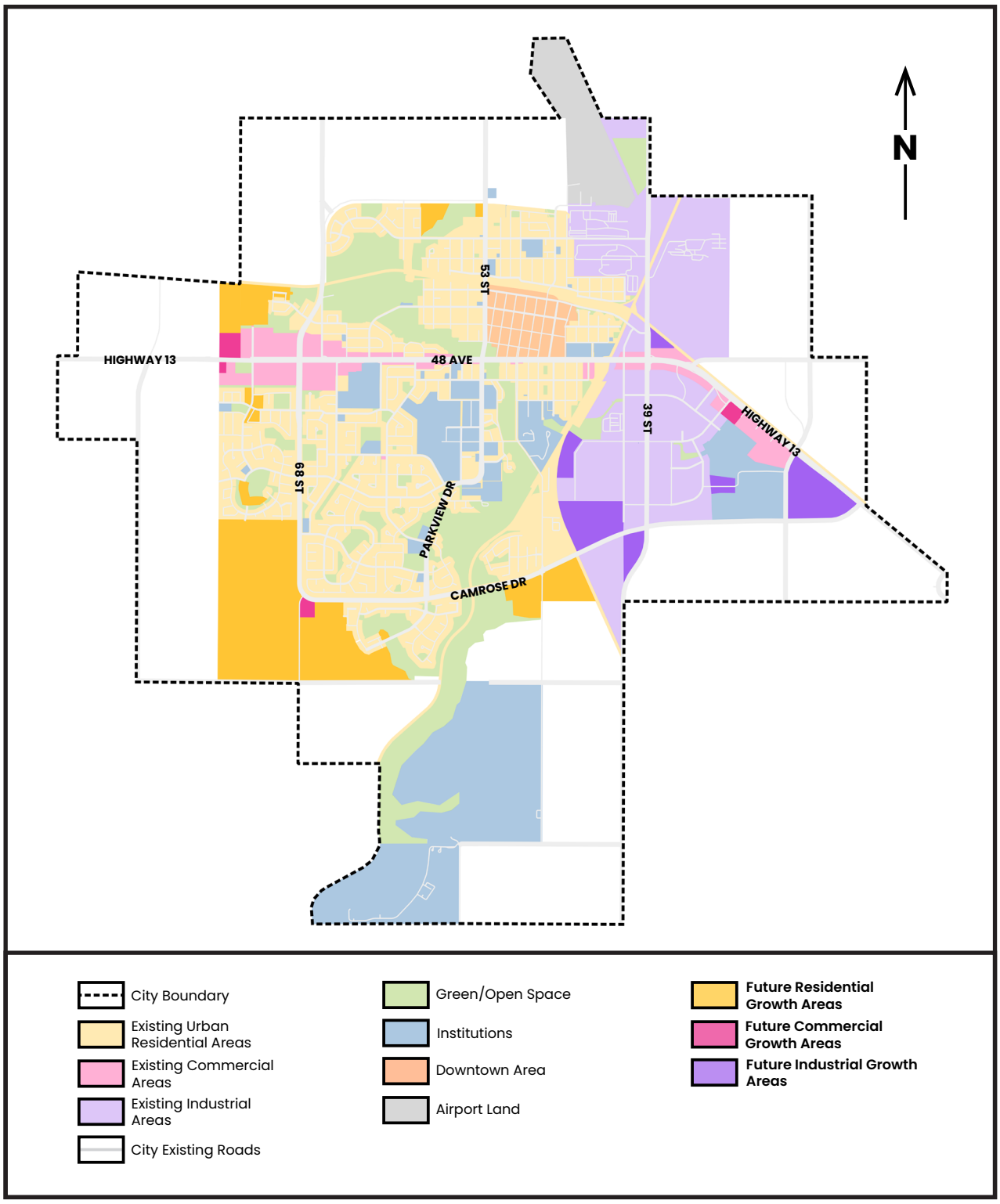
Table 31 provides a summary of key scenario statistics utilised for this scenario.

Table 31. Community Integration Scenario Summary Statistics

Statistic	Value
Annual Growth Rate	0.9%
Residential Density	11.44 du/nrha
Gross Residential Hectares Required	248.55 ha
Commercial Lot Coverage	23.8%
Gross Commercial Hectares Required	12.40 ha
Industrial Jobs/Hectare	19.2 jobs/hectare
Gross Industrial Hectares Required	61.71 ha
Total Gross Hectares Required	**322.66 ha**

Map 5 identifies future growth areas associated with this scenario.

Map 5: Community Integration Scenario Growth Areas



5.4.1 Densification Scenario

This scenario aims to develop future communities that achieve the density goals outlined in the City's *Area Structure Plan Guidelines*

Key Characteristics Include:

- Utilize areas where supporting infrastructure has already been developed for higher densities
- Minimize strain on current mobility & transportation systems by locating new developments in areas where extra capacity is supported
- Prevent negative effects on existing communities through relative neighbourhood independence
- Lower land allocation requirements

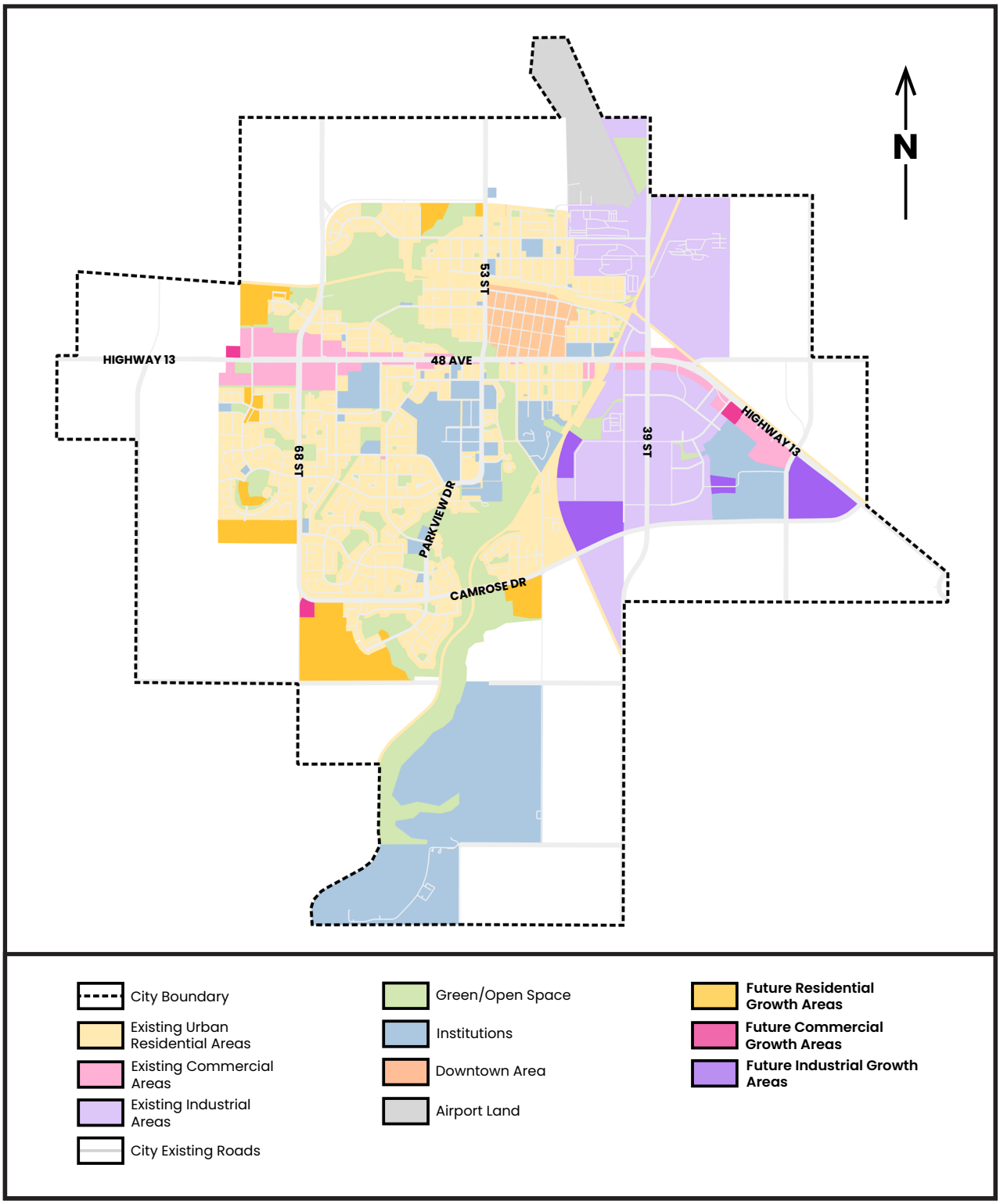
Table 32 provides a summary of key scenario statistics utilised for this scenario.

Table 32. Densification Scenario Summary Statistics

Statistic	Value
Annual Growth Rate	0.9%
Residential Density	25 du/nrha
Gross Residential Hectares Required	113.76 ha
Commercial Lot Coverage	50%
Gross Commercial Hectares Required	5.91 ha
Industrial Jobs/Hectare	19.2 jobs/hectare
Gross Industrial Hectares Required	61.71 ha
Total Gross Hectares Required	**181.38 ha**

Map 6 identifies future growth areas associated with this scenario.

Map 6. Densification Scenario Growth Areas



5.4.1 Highway Corridor Scenario

Previous studies conducted by the City illustrated demand for commercial and industrial land located nearby highways and major roads. This scenario focuses on developing future growth areas along the Highway 13 and 48th Avenue corridor in Camrose.

Key Characteristics Include:

- Locate future industrial and commercial developments on serviced land along the highway, when possible.
- Provide large parcels of unserviced industrial land to appeal to future large users.
- Allocate future residential growth around existing commercial nodes.

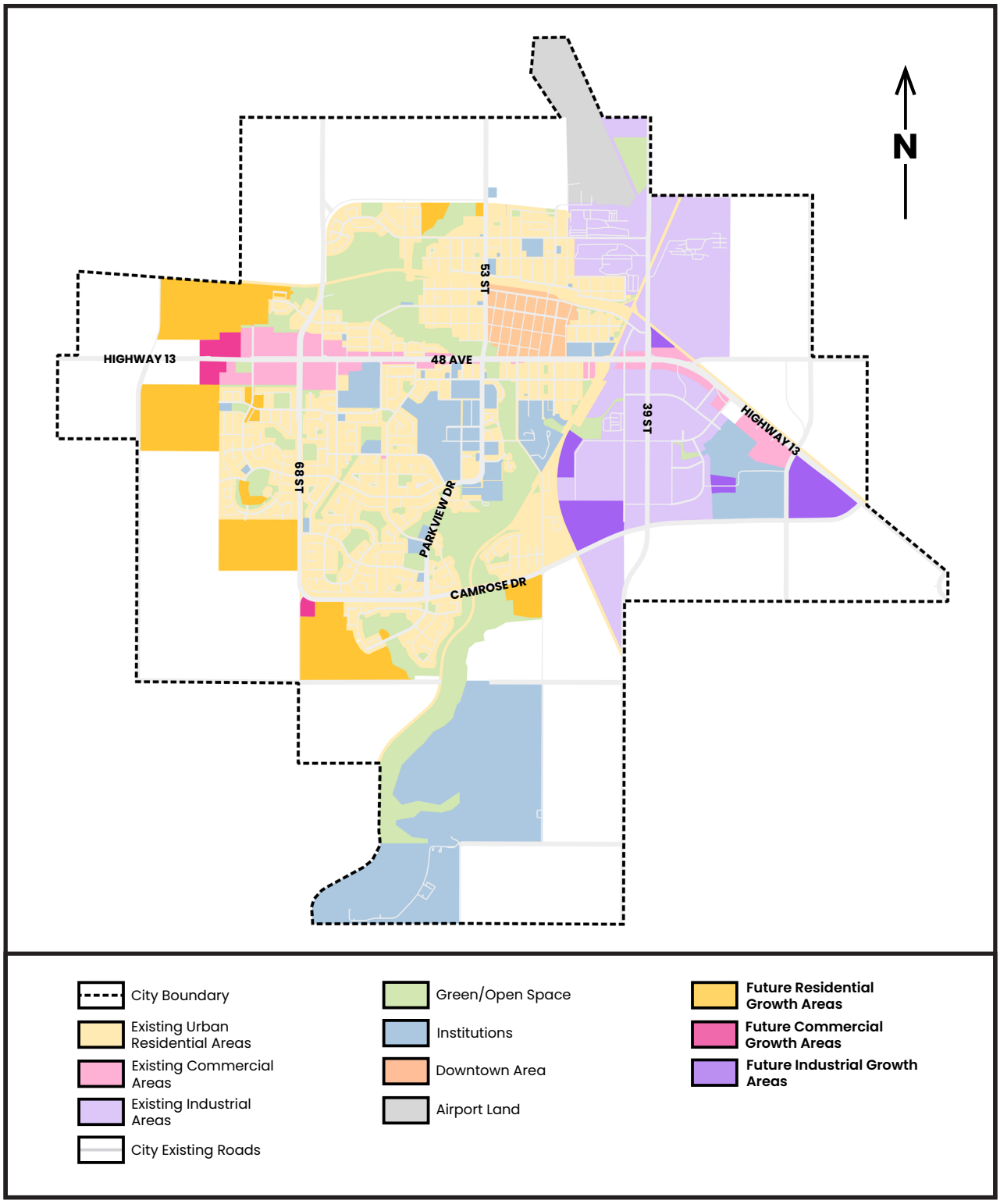
Table 33 provides a summary of key scenario statistics utilised for this scenario.

Table 33. Highway Corridor Scenario Summary Statistics

Statistic	Value
Annual Growth Rate	0.9%
Residential Density	11.44 du/nrha
Gross Residential Hectares Required	248.55 ha
Commercial Lot Coverage	23.8%
Gross Commercial Hectares Required	12.40 ha
Industrial Jobs/Hectare	19.2 jobs/hectare
Gross Industrial Hectares Required	61.71 ha
Total Gross Hectares Required	**322.66 ha**

Map 7. identifies future growth areas associated with this scenario.

Map 7. Highway Corridor Scenario Growth Areas



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Appendix A.

Camrose Demographic and Economic Analysis

As a component of the background work required to update the City of Camrose's Municipal Development Plan, John Archer & Associates was retained to update the population growth projection and components of the economic analysis undertaken for the *2018 Commercial and Retail Market Study*. This data was used as the source of the population projections presented in this document as well as the basis for the developed land demand projections. This Study is presented as an appendix on the following pages

Camrose Demographic And Economic Analysis

John Archer & Associates.

July 2023

Introduction

As a component of the background work required to update the City of Camrose's Municipal Development Plan, John Archer & Associates was retained to update the population growth projection and components of the economic analysis undertaken for the 2018 Commercial and Retail Market Study (as part of Three Sixty Collective). The following memo summarizes this work under the following headings:

1. Review of the City of Camrose's Historic Population Growth
    - Trends in the City of Camrose are compared with those in the Province of Alberta and Census Division 10, the area that includes Camrose City
    - Growth since 2016 is compared with the 2018 population projections.
    - Key demographic characteristics that impact growth are assessed in more detail.
2. Review of Housing Starts and Completions and Residential Building Permits.
3. Review of Economic Context in Alberta as a whole and the Camrose-Drumheller Economic Region.
4. Review of Recent Economic Trends and Conditions in the City of Camrose and Assessment of Implications for Future Growth
5. Updated population Projections to 2046 by combining data from Statistics Canada and the Alberta Treasury Board and Finance.

Disclaimer

The information and documentation contained in this report is based on content available online or provided by the City of Camrose as of July 2023. John Archer & Associates has not attempted to independently verify the information provided unless otherwise indicated.

Pursuant to the terms of our engagement, it is understood and agreed that all decisions in connection with the implementation of advice and recommendations as provided by John Archer & Associates during the course of this engagement shall be the responsibility of, and made by, the City of Camrose. John Archer & Associates has not and will not perform management functions or make management decisions for the City of Camrose.

While every reasonable attempt has been made to ensure that the information contained in this report is accurate It is not intended, nor should be interpreted, to be legal advice or opinion.

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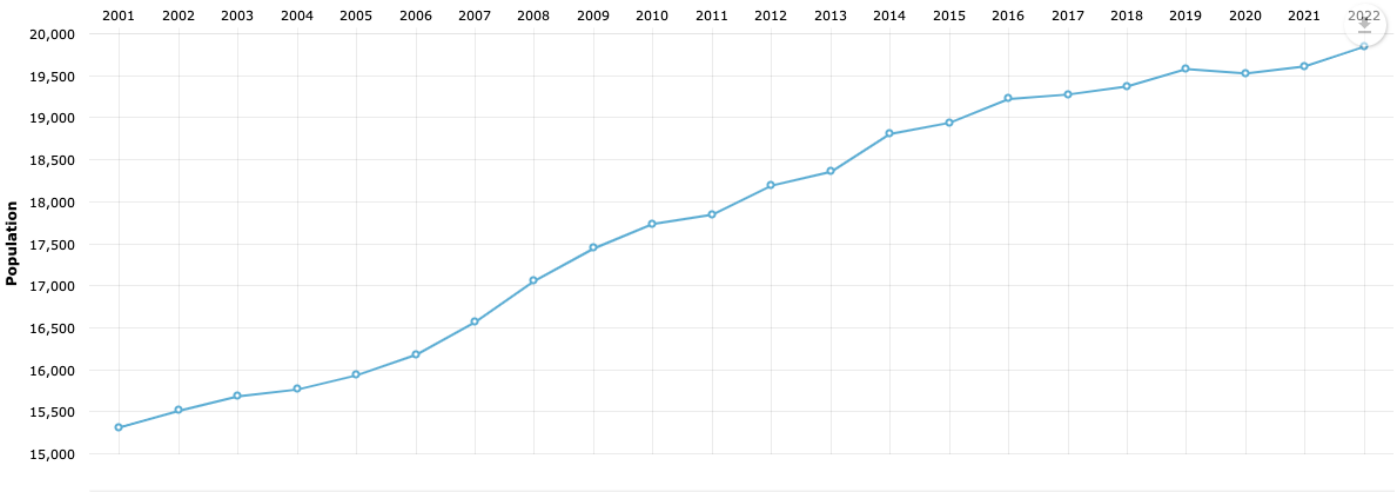
1.0 City of Camrose Historic Population Growth

The population growth that has occurred in the City of Camrose since 2001 is illustrated in the following figure.



Source: https://regionaldashboard.alberta.ca/region/camrose/population/#/?from=2001&to=2022

Findings:

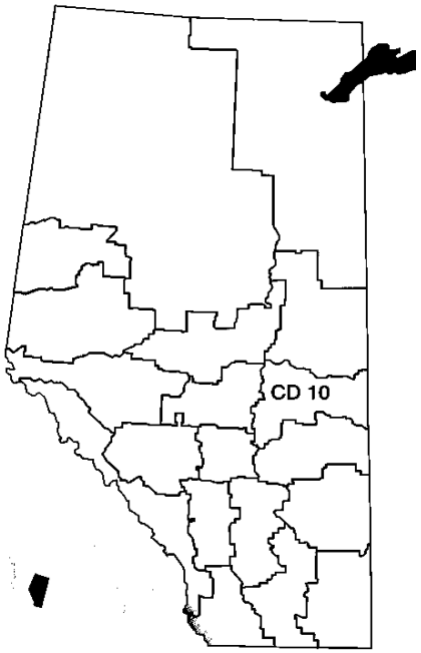
- Overall, the City of Camrose's population has increased from 15,312 in 2001 to an estimated 19,847[1] in 2022. This represents a 30% increase over twenty-one years and an average annual growth rate of 1.24%.
- There was considerable fluctuation in growth throughout the period, with the most rapid growth occurring between 2005 and 2010.
- Growth during the most recent 2016-2022 period is the slowest since 2001, averaging 0.53% per year.
- The Province of Alberta estimates that Camrose's population increased by 1.1% in 2022 over 2021. This was significantly greater than the growth rate experienced between 2016 and 2021 (0.23% growth per year).

[1] As estimated by the Province of Alberta. The 2021 Census count is about 4% less than the Alberta estimate for the same year (18,775). It is noted that the timing of the 2021 Census coincided with a pandemic lockdown period, introducing a short term distortion in the reporting of population and employment trends.

1.1 Historic Population Change in City of Camrose Compared with Alberta and Surrounding Region (Census Division 10)

The following tables summarize the average annual growth rate experienced in the City of Camrose, Census Division 10, the portion of Census Division 10 that is outside of Camrose and the Province of Alberta as a whole. Census Division (CD) 10 was chosen for the regional geography since Alberta provides population projections for this area (see Section 5.0 below).

The general location of CD 10 is shown in the accompanying map. The City of Camrose is located in its southwest corner. The remaining area includes the portion of the City of Lloydminster that is in Alberta, about two dozen small towns and villages, an Indian Reserve and rural areas.



	Average Annual Population Growth Rate (%)				
	2001-2022	2001-2011	2011-2022	2011-2016	2016-2022
Camrose City	1.24	1.54	0.97	1.50	0.53
Census Division 10	0.72	1.20	0.28	0.77	-0.12
CD 10 outside Camrose	0.60	1.13	0.12	0.60	-0.28
Alberta	1.88	2.17	1.62	2.06	1.25

Source: Alberta Treasury Board and Finance

Findings:

- The general slowdown in the population growth rate observed for Camrose from the 2001-2011 period to 2011-2016 and then to 2016-2022 is mirrored in Alberta as a whole and in CD 10.
- Camrose consistently grew at a faster rate than CD 10 and at a slower rate than Alberta as a whole (see also the following table).
- Within CD 10, the area outside of Camrose experienced a drop in annual population growth from 1.13% (2001-2011) to 0.6% (2011-2016) to an annual population decline of 0.28% between 2016-2022. Rural depopulation also was experienced in other regions of Alberta (and in many areas across the country).

The following table expresses the growth rates experienced in the City of Camrose as ratios with those in CD 10 as a whole and in Alberta. For example, it shows that the population of Camrose

increased 1.72 times faster than the population of CD 10 between 2001 and 2022[2]. These ratios are used to inform the population projections for Camrose (in Section 5 below).

Average Growth Rate Comparisons					
	2001-2022	**2001-2011**	**2011-2022**	**2011-2016**	**2016-2022**
Camrose/CD10	1.72	1.28	3.44	1.96	-4.51
CD10/Alta	0.38	0.56	0.17	0.37	-0.09
Camrose/Alta	0.66	0.71	0.60	0.73	0.43

Source: Calculated from data in preceding table.

Findings:

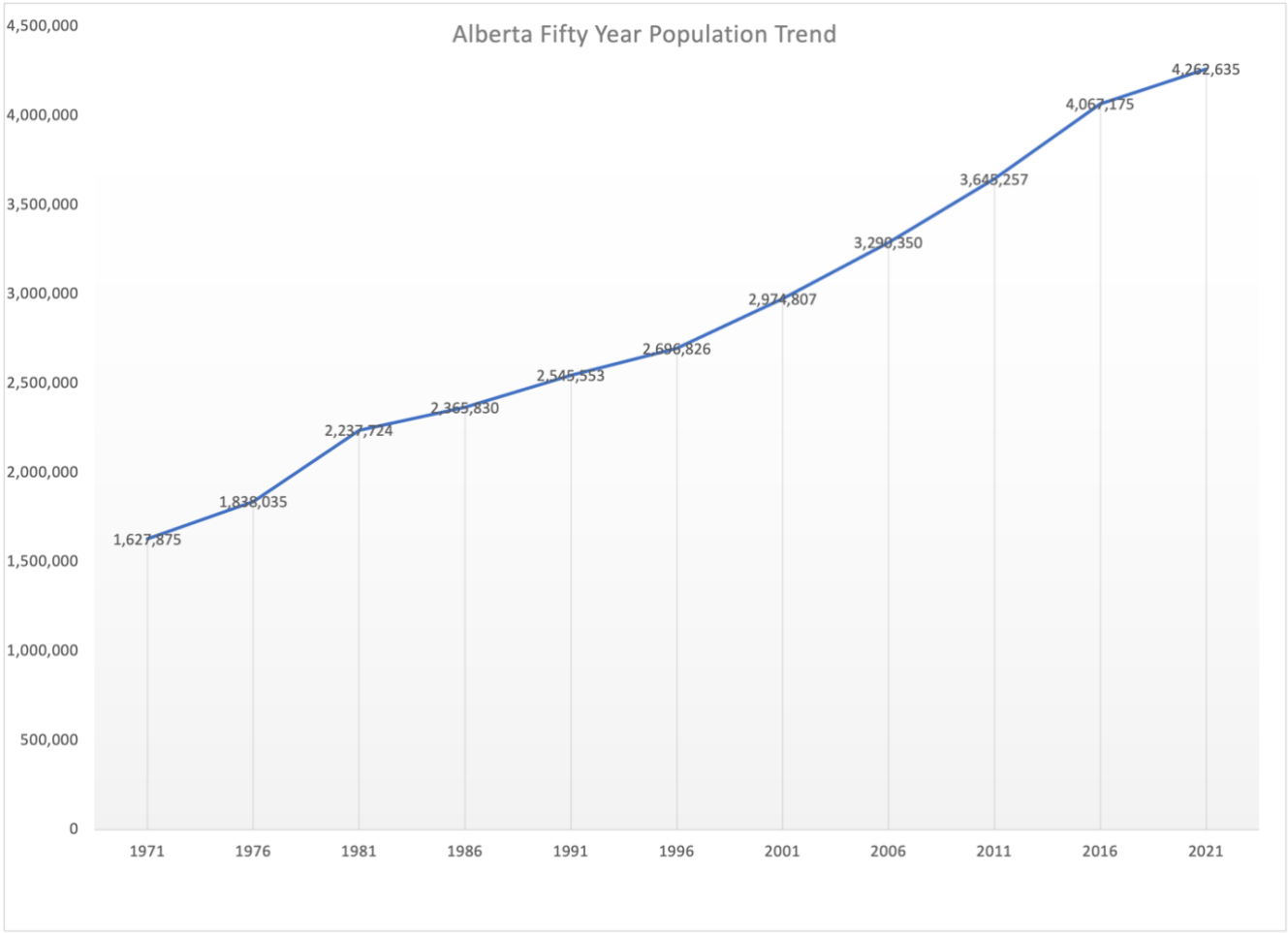
- The relationship in growth rates between the different geographies has not been stable over the last twenty years.
- CD10 shows the greatest variation in growth rate relationships, suggesting that some specific factors are influencing population change in this area.
- The Camrose/Alberta relationship was fairly stable (within about five percentage points) around the average of 66% except for the "slow growth" period between 2016 and 2022. Camrose grew at less than half the provincial rate during this period.

[2] The calculation is Camrose growth rate divided by CD 10 growth rate.

1.2 Components of Population Change

There are three major components of population change: natural increase, net international migration and net interprovincial migration. Trends in each of these can be analysed at the provincial level. [3]

To provide context, the following chart summarizes Alberta's total population size as reported in the Census from 1971 to 2021. Historically, Alberta's growth has outpaced Canada's. The average annual growth rate across the fifty-year period was 2.0% for Alberta and 1.1% for Canada.



Source: Statistics Canada

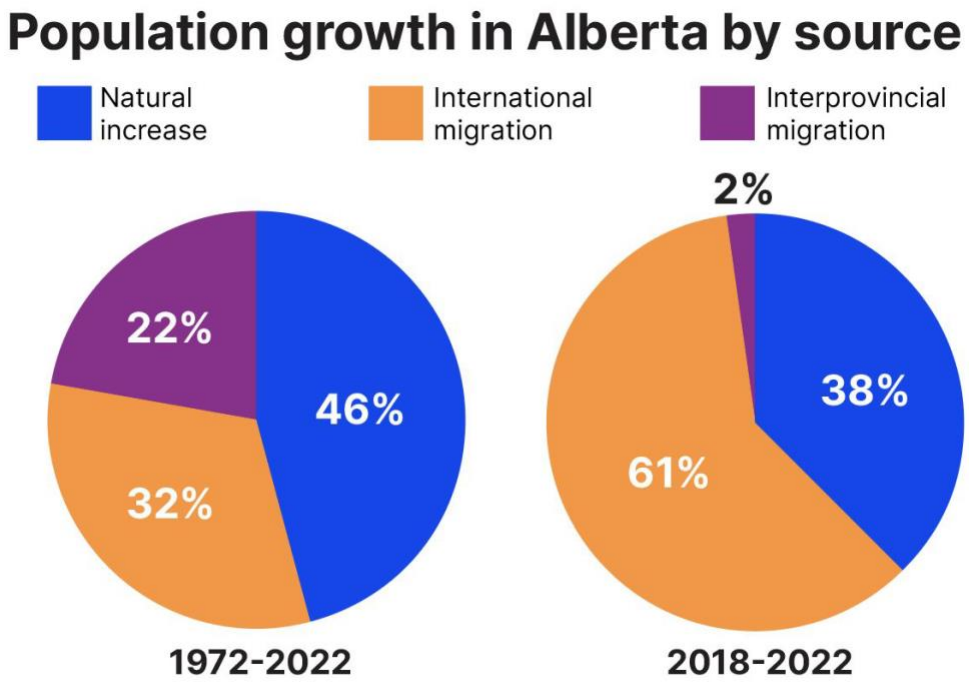
Findings:

- Considerable fluctuation in growth is evident. Alberta's highest five-year growth rate occurred between 1976 and 1981 (21.7%). This was immediately followed by a slow period of growth between 1981 and 1986 (5.7%). Double digit growth returned in the 2001 to 2016 period, with the five-year growth rate ranging between 10 and 12%. The most recent period, between 2016 and 2021, was marked by the slowest rate of growth since 1971 at 4.8% over five years. As is

[3] The Alberta Treasury Board and Finance publishes annual reports at https://www.alberta.ca/population-statistics.aspx#population-estimates and we've also relied on the special report published in June 2023 by ATB Economics

discussed in Section 5 below, growth returned to Alberta in 2022 and this trend seems likely to continue.

The following chart illustrates the contribution that natural increase, net international migration and net interprovincial migration made to Alberta's population growth during the total period between 1972 and 2022 and the most recent period between 2018 and 2022.



Source: Statistics Canada Table 17-10-0008-01 and ATB Economics

Reproduced from ATB Economics June 2023 Report

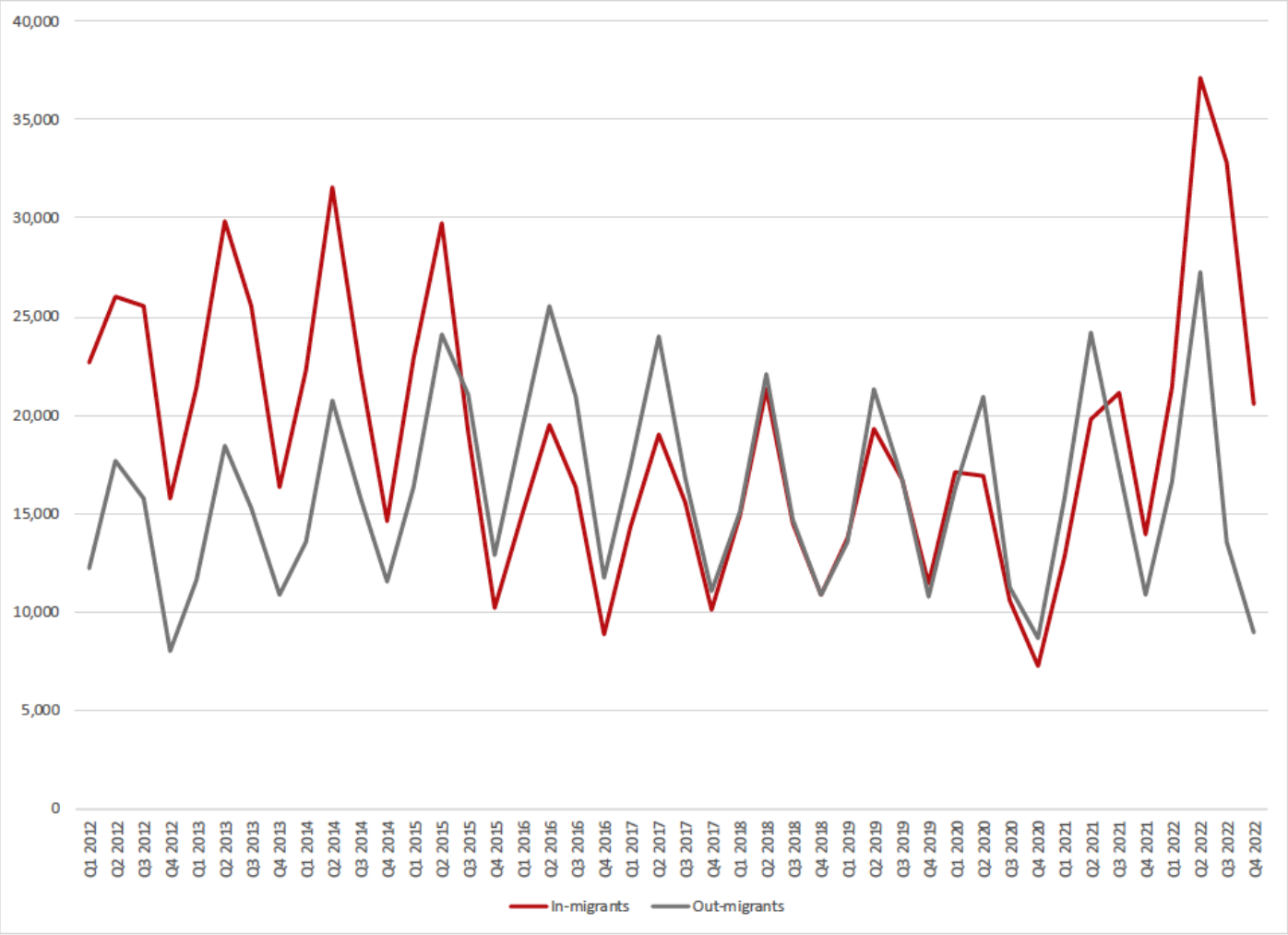
Findings:

- A significant shift in the balance between the three components of growth occurred during the most recent four years compared to the fifty-year average, with international migration accounting for the majority of recent growth.
- Natural increase accounted for 46% of growth between 1972 and 2022 and 38% of growth during the most recent period. It is the most stable component, although slowly decreasing as the Alberta population ages.[4] There also was a short- term dip 2020-2021, with fewer births and more deaths occurring.[5] This could be associated with the pandemic.
- Net international migration is playing an increasing role in Alberta's population growth.
- Net interprovincial migration is extremely volatile. Variations in people moving in and out of the province account for much of the previously noted fluctuation in its growth rate. The following chart shows the number of in-migrants and out-migrants between 2012 and 2022 in more detail. Out-migrants exceeded in-migrants from the fourth quarter of 2015 through most of 2021. Alberta lost almost 50,000 people to other provinces during this period.

[4] Noting that Alberta nonetheless still has the youngest population and highest rate of natural increase among Canadian provinces.
[5] Statistics Canada Table 17100059

- As will be further discussed in Section 3 below, inter-provincial migration is strongly correlated with economic output (GDP) and the unemployment rate. In recent years, the relative affordability of housing in Alberta compared to British Columbia and Ontario also is thought to be attracting Canadians to Alberta.[6] When Statistics Canada updates the data summarized in the following chart, it is expected it will show continued strong in-migration to Alberta from other provinces.
- 97% of the interprovincial migrants and 88% of international migrants who arrived in Alberta since 1971 were under 45 years old. [7] The popularity of Alberta to migrants is contributing to its younger age profile.

Interprovincial Migration to and from Alberta



Source: Statistics Canada, Table 17100020

[6] ATB Economics June 2023 Report
[7] ibid

1.3 Key Demographic Characteristics of the City of Camrose Population

The following table compares some key demographic characteristics of the people who lived in Camrose and the Province of Alberta in 2021.[8]

	Camrose	Alberta
Population 2021	18,775	4,262,635
Households	8,135	1,633,220
Median Age	43.2	38.4
Male/Female	48% / 52%	50% / 50%
Household Size	2.2	2.6
Average Household Income	$92,300	$119,700
Percentage Visible Minority	10%	27%
Percentage Immigrants	10.2%	23.2%
Percentage of Immigrants who are Recent Arrivals (2016-2021)	28.2%	19.9%
Percentage of Recent Arrivals from Philippines	66.7%	23.0%
Percentage of Population who have moved within last 5 years	43.5%	41.1%
Percentage of Commuters who commute less than 15 minutes	67.1%	30.9%

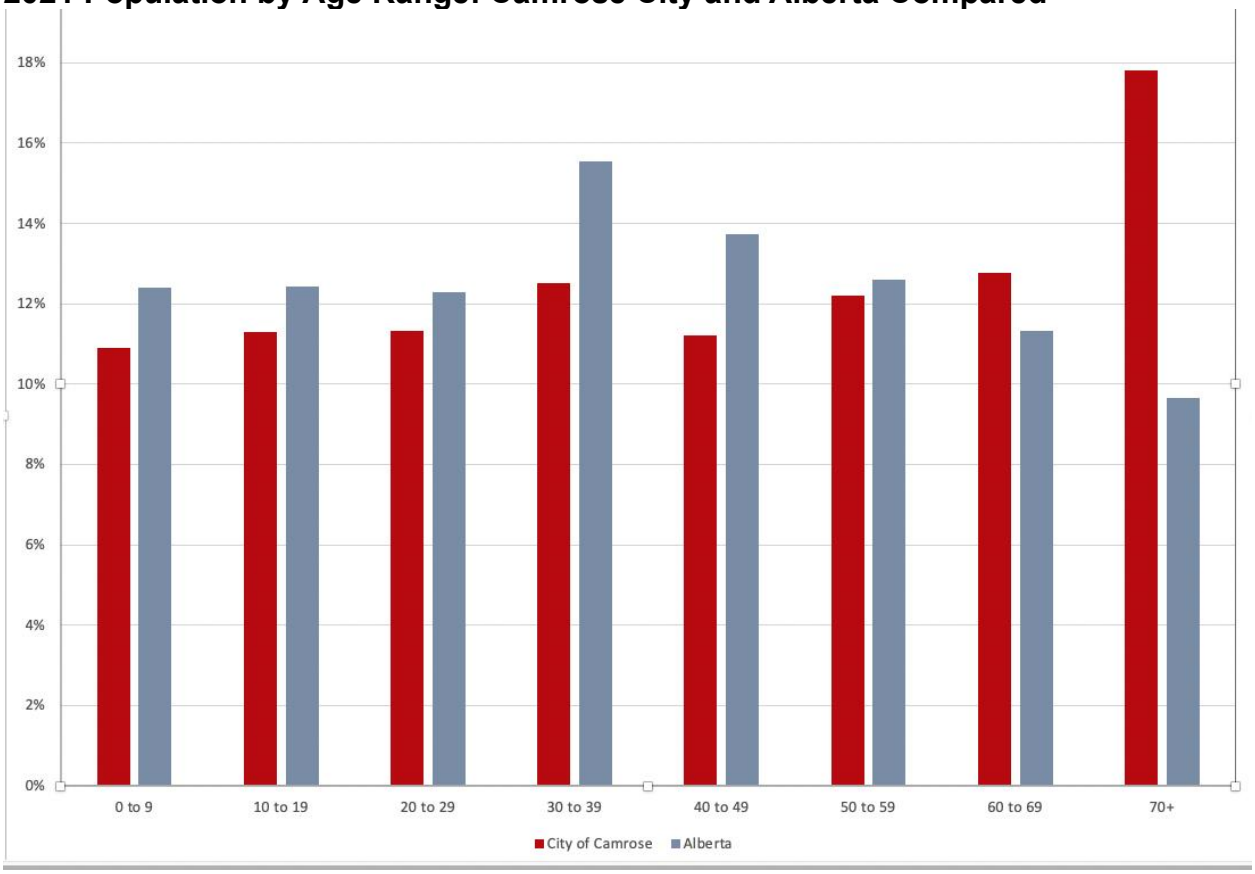
Source: Statistics Canada Census, 2021

Findings

- Camrose has an older median age, smaller average household size and lower average household income compared to Alberta as a whole.
- The City has much lower percentages of people who are members of visible minorities and who are immigrants. This is especially significant since international immigrants account for the majority of the Province of Alberta's recent population growth.
- However, immigration is increasing, as evidenced by the higher percentage of immigrants who arrived since 2016.
- The Philippines was the most common source country for recent immigrants in both Camrose and Alberta. However, it accounted for two third of arrivals in Camrose versus about one quarter of arrivals in the Province as a whole.
- About 43.5% of Camrose residents had changed their place of residence within the last five years, a slightly higher percentage than in the Province as a whole.
- 67% of Camrose residents work locally, within a fifteen-minute travel time. This is a much higher percentage than in the Province as a whole. 84% work in the same Census Division as they live.

[8] Census data is used despite the pandemic-related distortion since it is the only source of data for the demographic makeup of the population. Points where the pandemic may have had a particularly significant impact are noted throughout the analysis.

2021 Population by Age Range: Camrose City and Alberta Compared



Source: Statistics Canada 2021 Census

Findings:

- Camrose's population has a higher percentage of people over the age of 60 than Alberta. The difference is most *pronounced for older adults. People 70+ account for almost 18% of Camrose's population. It is noted that Camrose is seen as a retirement destination, and has significant housing and services oriented to seniors.
- Camrose's population has a much lower percentage of people aged between 30 and 49 than Alberta.
- The proportion of the population aged under 30 and between 50 and 59 in Camrose is slightly lower than in Alberta.
- The age composition of Camrose's population suggests that natural increase will be less of a factor in future population growth than in Alberta as a whole.
- Also, a smaller proportion of the population is in the 20-to-60-year age bracket. The impact on the labour force is considered in Section 3 below.
- The low percentage of international immigrants in the community may be another factor in its older age profile. As was previously noted, almost 90% of international migrants to the province were under 45 years when they arrived.

Recent changes in Camrose's distribution of age groups and household size groups are summarized in the following tables.[9]

Camrose: Change in Population by Age Group 2016 to 2021

	2016	2021	Change	%change
0 to 9	2190	2045	-145	-6.62%
10 to 19	1985	2120	135	6.80%
20 to 29	2475	2125	-350	-14.14%
30 to 39	2335	2350	15	0.64%
40 to 49	2055	2105	50	2.43%
50 to 59	2480	2290	-190	-7.66%
60 to 69	2240	2395	155	6.92%
70+	2995	3345	350	11.69%
Total	18755	18775	20	0.11%

Source: Statistics Canada, Census

Findings:

- The number of young adults (20-29) and young children decreased the most between 2016 and 2021. This could in part reflect university students and workers in locked-down sectors such as education, hospitality, retail and in-person non-emergency health and personal care temporarily leaving the City during the pandemic. However, a small decrease in this age group also was experienced between 2011 and 2016 (a loss of 85 people in the 20-29 age group), suggesting that the change is not completely due to the pandemic.
- The number of people between 50 and 59 also decreased.
- The number of seniors (60+) increased.
- These data suggest that Camrose's population may be aging in place and that seniors living in the surrounding rural area may be relocating to the City. Young adults appear to be leaving the community.

[9] Note that Census data is used and that the Census reported a very small population increase (+20 people) in the City of Camrose between 2016 and 2021. The Province of Alberta's growth estimate was higher, at 389 people (0.4% annualized growth rate).

Camrose City: Change in Households and Household Size 2016 to 2021

	2016	2021	Change	%change
Total - Private households	7970	8135	165	2.07%
1 person households	2550	2680	130	5.10%
2 person households	2990	3045	55	1.84%
3 person hoouseholds	995	985	-10	-1.01%
4 person households	905	875	-30	-3.31%
5 or more person households	530	545	15	2.83%
Average household size	2.3	2.2	-0.1	

Source: Statistics Canada, Census

Findings:

- One-person households increased the most. This could be aligned with the population increase in the 60+ age group.
- Three and four-person households decreased.
- Overall, the average household size in the City of Camrose decreased from 2.3 to 2.2 between 2016 and 2021.
- It is noted that the Province of Alberta's population estimates report a smaller decrease in people per dwelling unit (from 2.28 in 2016 to 2.27 in 2021). It reports an annualized increase in the number of dwelling units of 0.4% (from 8,446 DU to 8,621 DU) in the City of Camrose whereas the Census reports a 2.07% annual increase in the number of households.

2.0 Review of Housing Starts and Completions and Residential Building Permits.

The 2018 analysis of housing starts and completions in the City of Camrose was updated to include the period between 2018 and 2022. The value of residential building permits issued also was analysed.

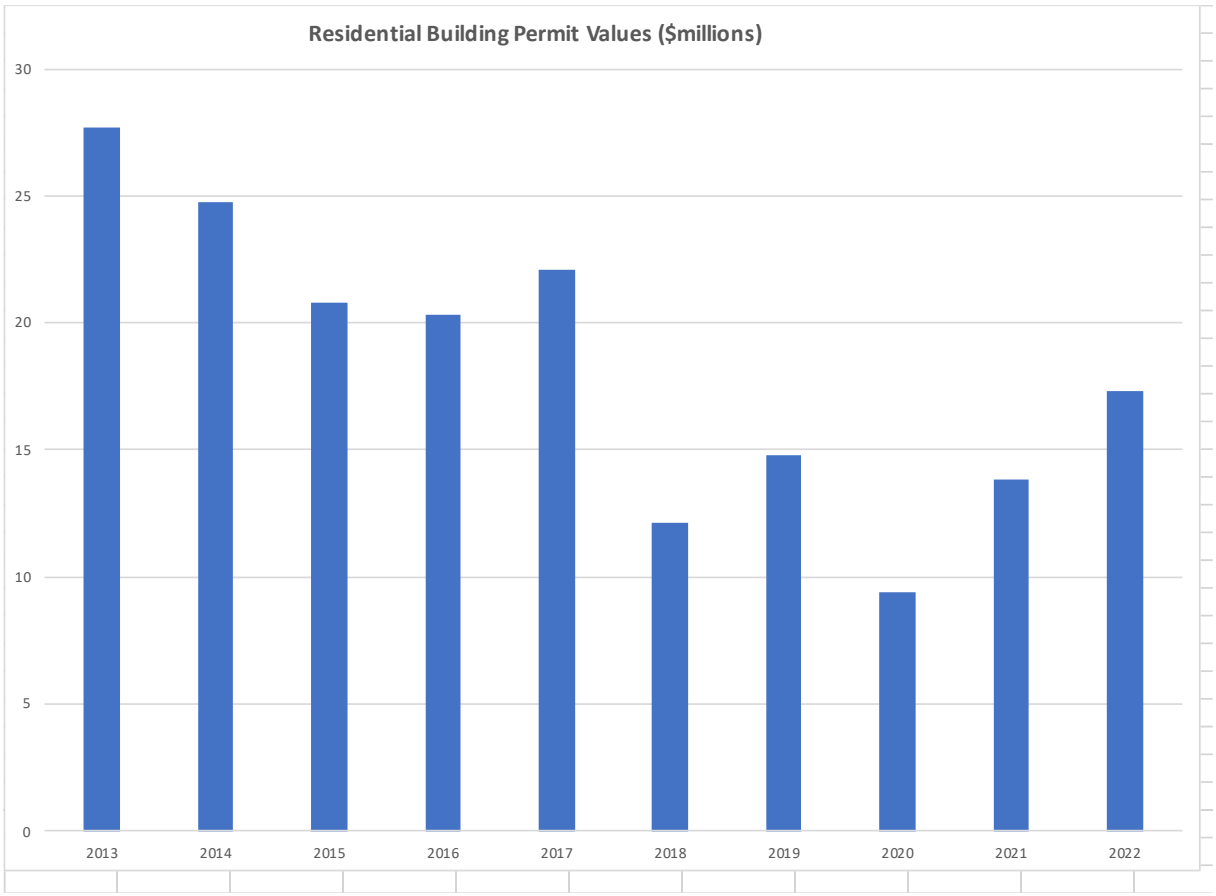
Camrose City Housing Starts and Completions: 2015-2022

	Total Units		Average Units/Yr.		Units
	2015-17	2018-2021	2015-17	2018-2021	2022
Housing Starts					
Single	143	99	47.67	24.75	28
Semi	32	18	10.67	4.50	10
Row Housing	78	32	26.00	8.00	6
Apartment / Other	17	3	5.67	0.75	28
Total Housing Starts	**270**	**152**	**90.00**	**38.00**	**72**
Housing Completions					
Single	134	116	44.67	29.00	31
Semi	38	20	12.67	5.00	6
Row Housing	90	31	30.00	7.75	10
Apartment / Other	4	16	1.33	4.00	12
Housing Completions	**266**	**183**	**88.67**	**45.75**	**59**

Source: CMHC. Note that the housing starts and completions data exclude nursing homes, purpose-built student residences and other collective resident institutions

Findings:

- Housing Starts dropped from an average of 90 units per year between 2015 and 2017 (the period that was analysed for the 2018 study) to 38 units per year between 2018 and 2021.
- Starts and completions increased in 2022 but have not returned to the levels experienced in the 2015-2017 period.
- A total of 508 housing units were completed between 2015 and 2022.
- Single-Detached Housing Units accounted for 55% of the housing constructed between 2015 and 2022. Although apartment and row house units accounted for a higher share of starts and completions in 2022, it is not clear from the data whether or not this shift will continue.



Source: City of Camrose

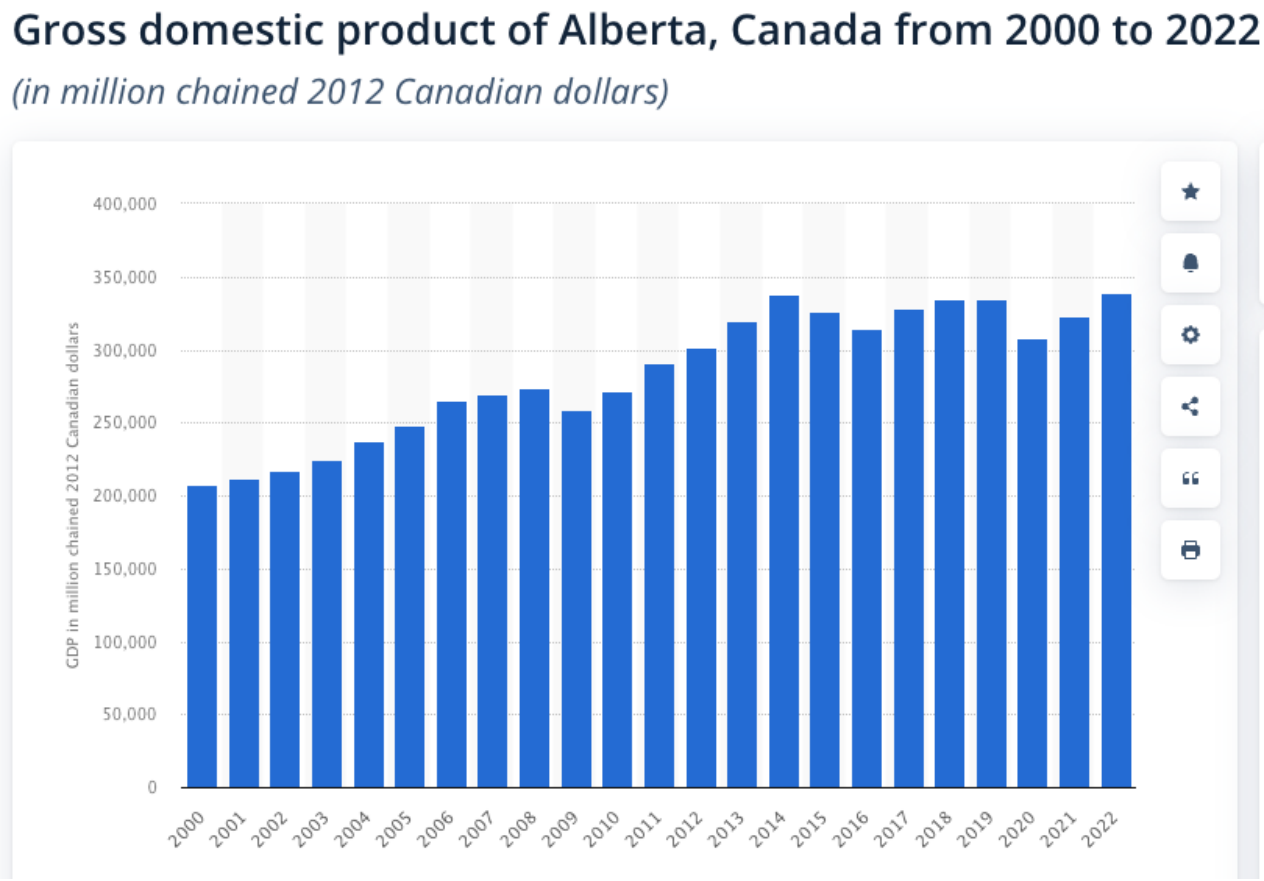
Findings:

- The residential building permits issued in Camrose show a similar pattern as housing starts over the last ten years, dropping from a peak of $27.7 million in 2013 to a low of $9.4 million in 2020.
- Growth has occurred since 2020, with 2022 permit values totalling $17.3 million.

3.0 Economic Context: Alberta and Camrose-Drumheller Economic Region

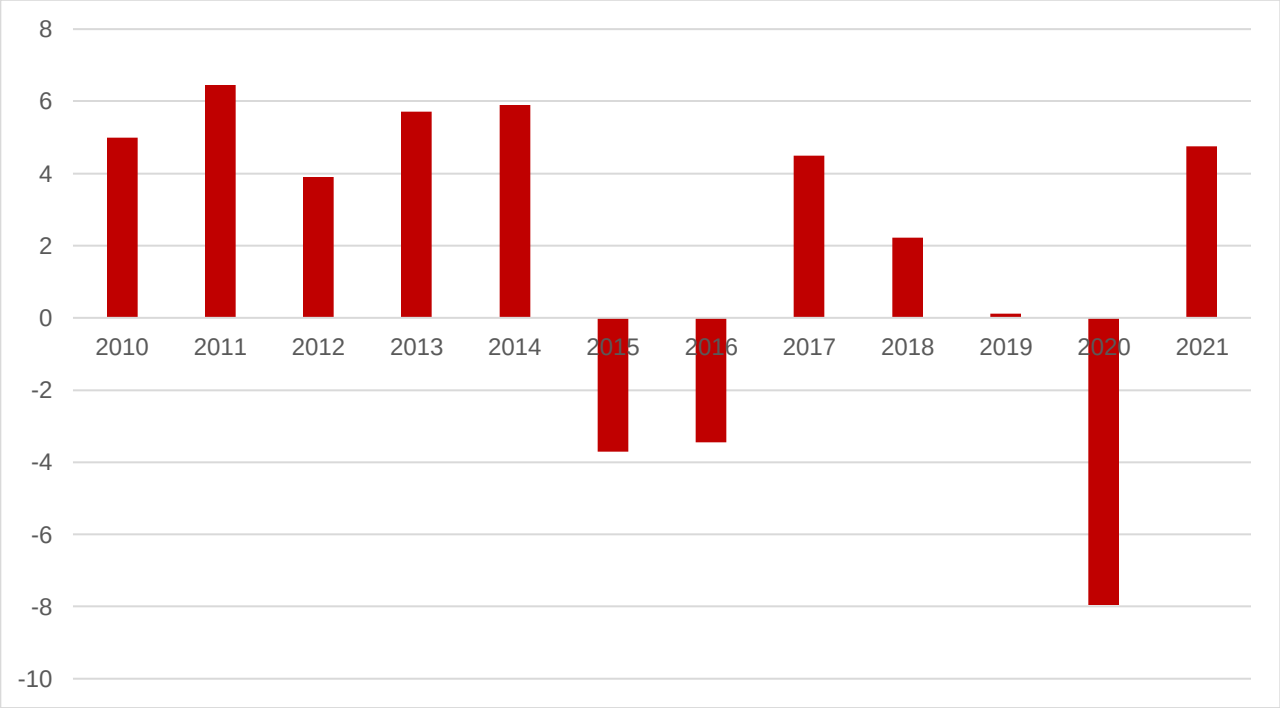
3.1 Alberta GDP

Economic data are best understood in the context of longer-term trends and where the current period sits in the normal cyclical waves of expansion and contraction. The following charts illustrate the value of Alberta's GDP over the 22 years between 2000 and 2022, and then the annual rate of change between 2010 and 2021.



Source: *https://www.statista.com/statistics/577560/gdp-of-alberta-canada/#:~:text=This%20statistic%20shows%20the%20gross,billion%20chained%202012%20Canadian%20dollars*.

Annual rate of change in Alberta GDP, 2010 to 2021



Source: Statistics Canada Table 36-10-0222-01. Dollars are expressed in chained 2012 values (adjusted for inflation).

Findings:

- The periods of growth between 2000 and 2008; 2009 to 2014; and 2015-2019 can be seen on the first chart. The years of contraction in 2009, 2015-2016 and 2020 also are evident.
- The rate of growth between 2009 and 2014 was especially robust, averaging 3.6% per year.
- This was followed by a two-year period of contraction, recovery in 2017 and slower growth in 2018 and 2019.
- COVID-19 lockdowns in 2020 were accompanied by a sharp decline in GDP. The economy shrank back to close to 2012 levels.
- Growth in 2021 and 2022 was strong. Alberta was one of the top performing provinces in Canada during this period. GDP is now back to 2014 levels. The annual growth rate was 4.8% in 2021 and about 5% (Statista estimate) in 2022.
- The historical long term average rate of GDP growth has been in the order of 2.8% to 3.6% per year. This estimate neutralizes the effect of the normal economic cycle by considering the average growth rate between two troughs (2009-2016: 2.8% annual growth) and between two peaks (2008-2014: 3.6% annual growth).
- The trend in GDP is similar to the population growth trend discussed in Section 1.2. Periods of rapid and slower population growth generally lagged behind changes in GDP growth by about a year.

Alberta GDP Forecast

	2022	2023	2024	2025
Conference Board of Canada April 4 2023	4.3	2.1	2.8	2.6
TD Economics Mar 16 2023	4.7	2.0	0.9	
ATB Mar 9 2023	5.0	2.6	2.3	

Source: Conference Board of Canada, Province of Alberta & TD Economics forecasts

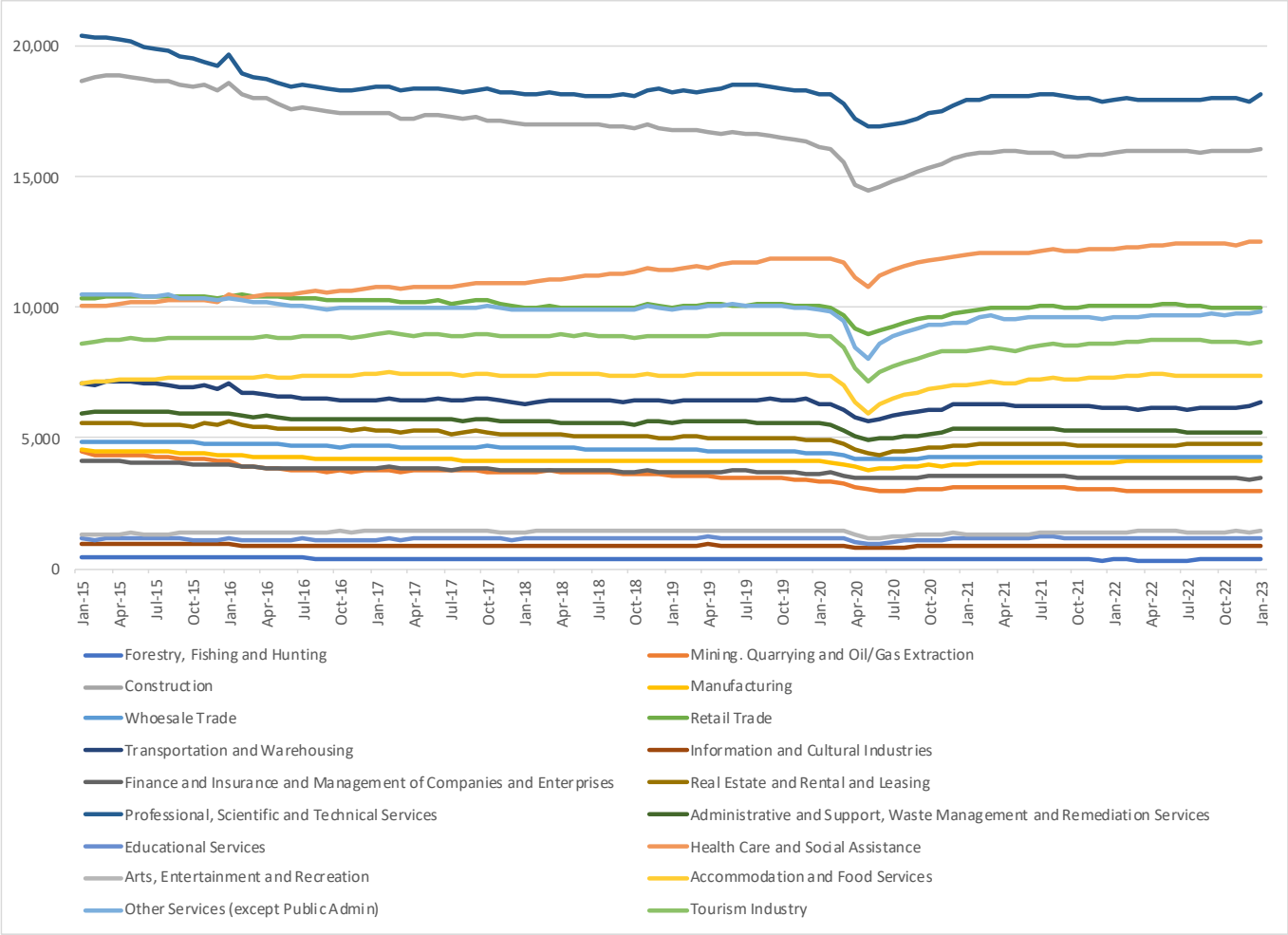
Findings

- All three economic forecasts expect growth to slacken in 2023 to 2-2.6%.
- Longer term forecasts reflect diverse opinions about Alberta's future economic prospects. The Conference Board of Canada is the most optimistic, forecasting modest increases in growth. Factors include the province's strong labour force growth, completion of the Transmountain Pipeline in late 2023 and increased opportunities in natural gas, decarbonization investment and investments in new energy sources (hydrogen, ethanol). Agriculture is benefiting from better weather and higher global prices. Other sectors posed for growth include petrochemicals, transportation and logistics, alternative energy, carbon capture, tourism and a wide range of creative industries.
- TD and the Government of Alberta cite the same conditions but are less optimistic about the extent to which they will counteract the dampening impact of higher interest rates and inflation on consumer demand and business investment in the next few years.
- All forecasts note the currently high-level uncertainty associated with the global geopolitical situation, especially the Russian invasion of Ukraine, and impact of climate change.

3.2 Alberta Active Businesses 2015 to 2023

The count of active businesses shows periods when the balance between businesses opening and closing changed. Note that some sectors are dominated by smaller businesses than others. Therefore, the number of businesses is not necessarily related to the volume of business activity or employment. Also, public sector activity is not included in the count of active businesses.

Active Alberta Businesses by Sector 2015 to 2023

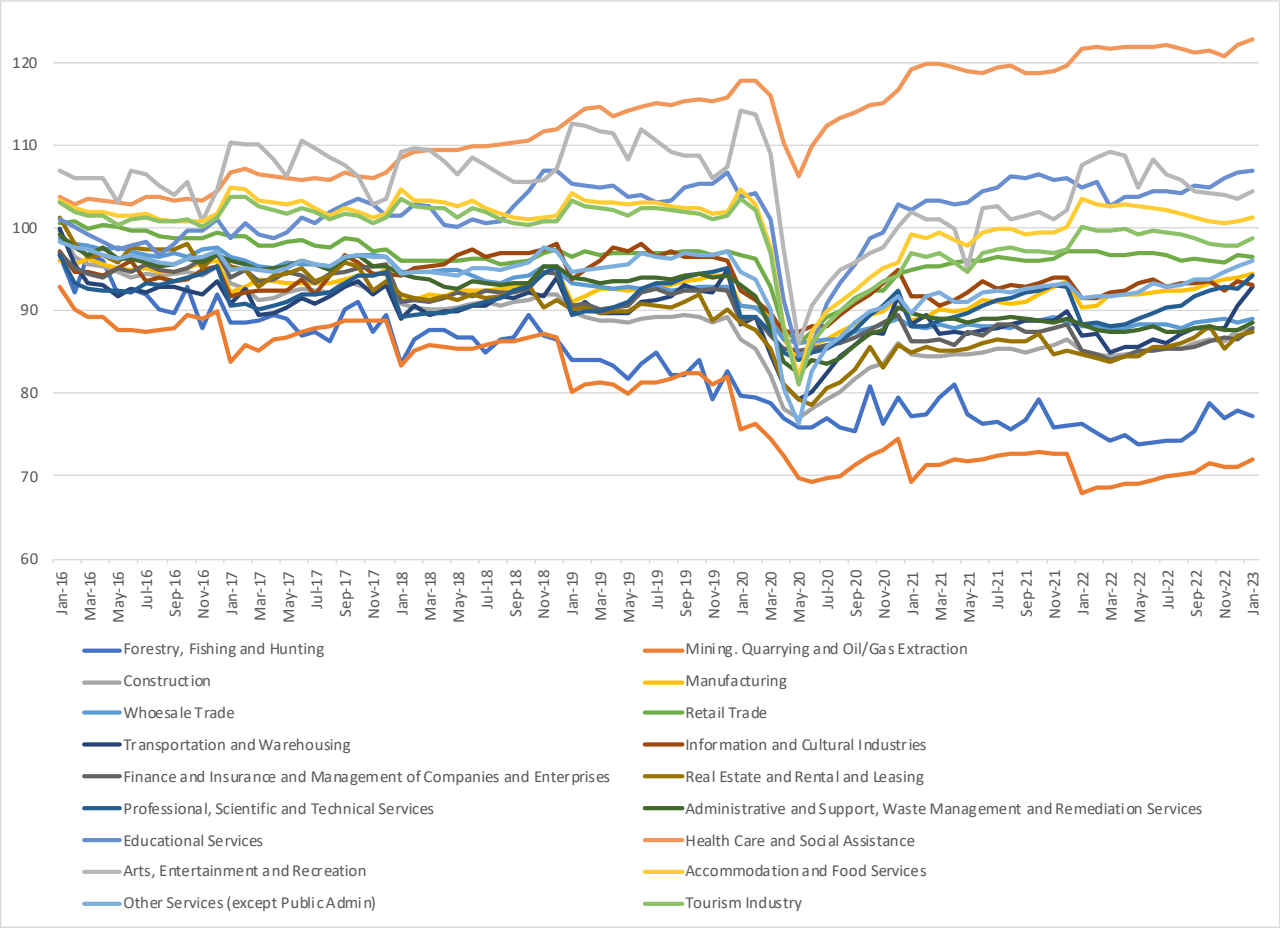


Source: Statistics Canada. Table 33-10-0270-01

Findings:

- The sectors accounting for the largest number of businesses in Alberta are #1 – Professional, scientific & Technical Services; #2 – Construction; and #3 Health Care and social assistance.
- Most sectors experienced a decrease in the number of operating businesses in the COVID lockdown period that began in April 2020.
- In general, the number of businesses in most sectors gently decreased throughout the period, reflecting the slowdown in GDP growth that occurred after the 2014 peak. The main exception was the Health Care & Social Assistance sector, where the number of businesses increased throughout the period except in April/May 2020.

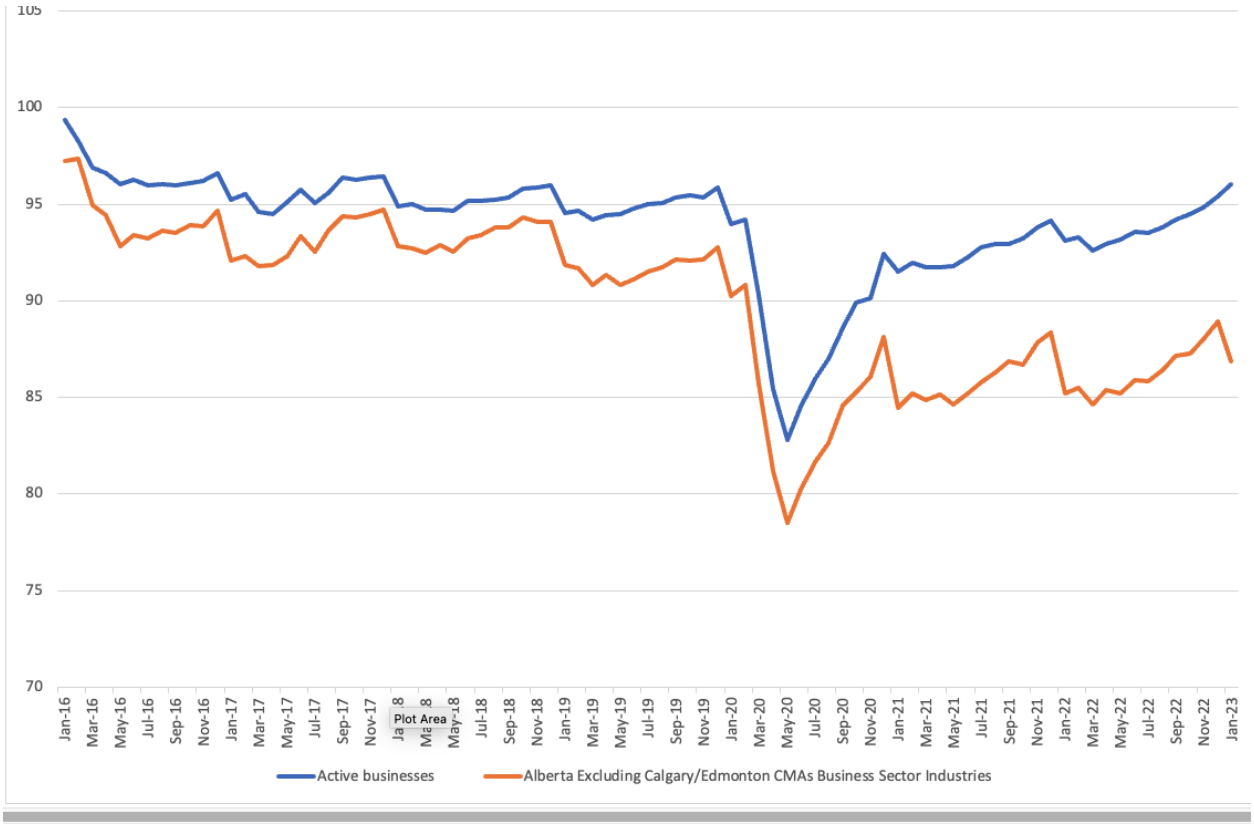
Number of Businesses by Sector Indexed to Same Month in 2015 (No change = 100)



Findings:

- The chart compares the number of businesses in each sector that were operating each month compared to the same month in 2015. Sectors which gained businesses have indices above 100 while sectors which lost businesses have indices below 100.
- Growth has occurred in Health Care and Social Assistance businesses, Education Service businesses, Arts, Entertainment & Recreation businesses and in Accommodation and Food Services.
- As noted in the previous chart findings, all other sectors have experienced a decrease in active businesses. This was especially the case for Mining, Quarrying and Oil/Gas Extraction and Forestry, Fishing & Hunting.
- All sectors experienced a loss of businesses in April/May 2020 (COVID lockdowns). Most have since recovered to pre-COVID levels. Health Care and Social Assistance businesses were the most resilient.
- Many sectors experienced a return to net business growth in early 2022.

Number of Businesses Indexed to Same Month in 2015 in Province as a Whole and outside of the Calgary and Edmonton CMAs (No change = 100)



Findings:

- Net business formation has been less outside of Calgary and Edmonton than in the Province as a whole. This is especially the case since the pandemic.

3.3 Labour Force Characteristics in Alberta and Camrose-Drumheller Economic Region

Information about the regional economy is available from the Labour Force Survey. Residents aged 15 years and older are asked whether they are employed or looking for employment (included in the labour force) or not looking for work at the present time. The Camrose Drumheller Economic Region includes the cities of Camrose and Drumheller as well as surrounding towns and villages and rural areas. The City of Camrose accounts for 9.8% of the region's population.

Alberta and Camrose Drumheller Labour Force Characteristics 2012-2022

	Population (x 1,000)										
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Alberta	3,078.5	3,158.5	3,237.2	3,284.5	3,316.3	3,350.5	3,398.4	3,454.4	3,507.0	3,543.7	3,616.6
Camrose-Drumheller	158.9	160.5	162.3	162.9	162.4	161.9	162	162.3	162.5	161.9	162.8
	Labour force (x 1,000)										
Alberta	2,273.8	2,317.3	2,359.4	2,411.6	2,401.3	2,415.2	2,439.9	2,477.3	2,417.8	2,471.0	2,522.6
Camrose-Drumheller	112.5	113.1	111.9	110	108.6	108.1	109.6	102.5	103.8	102.6	106
	Employment (x 1,000)										
Alberta	2,166.6	2,211.1	2,246.9	2,265.6	2,204.6	2,221.1	2,280.1	2,307.8	2,143.7	2,259.6	2,376.1
Camrose-Drumheller	108.3	108.7	108	104.9	100.5	99.8	104.3	96.3	92.5	94.2	100.8
	Full-time employment (x 1,000)										
Alberta	1,811.7	1,857.4	1,874.0	1,874.4	1,787.1	1,803.8	1,870.1	1,889.3	1,757.6	1,835.0	1,936.7
Camrose-Drumheller	86.5	86.6	86.3	85.4	78.6	78.8	82.4	78	72.8	73.7	83.8
	Part-time employment (x 1,000)										
Alberta	354.9	353.7	373	391.2	417.5	417.3	410	418.5	386	424.6	439.4
Camrose-Drumheller	21.8	22.1	21.8	19.5	21.9	21	21.9	18.3	19.7	20.6	17
	Unemployment (x 1,000)										
Alberta	107.2	106.2	112.5	146	196.7	194.2	159.7	169.5	274.1	211.4	146.5
Camrose-Drumheller	4.2	4.3	3.9	5	8	8.3	5.3	6.2	11.3	8.3	5.2
	Not in labour force (x 1,000)										
Alberta	804.7	841.2	877.8	872.9	915	935.2	958.6	977.1	1,089.20	1,072.70	1,094.00
Camrose-Drumheller	46.5	47.5	50.4	52.9	53.9	53.8	52.4	59.8	58.6	59.4	56.8
	Unemployment rate										
Alberta	4.7	4.6	4.8	6.1	8.2	8	6.5	6.8	11.3	8.6	5.8
Camrose-Drumheller	3.7	3.8	3.5	4.5	7.4	7.7	4.8	6	10.9	8.1	4.9
	Participation rate										
Alberta	73.9	73.4	72.9	73.4	72.4	72.1	71.8	71.7	68.9	69.7	69.8
Camrose-Drumheller	70.8	70.5	68.9	67.5	66.9	66.8	67.7	63.2	63.9	63.4	65.1
	Employment rate										

Alberta	70.4	70	69.4	69	66.5	66.3	67.1	66.8	61.1	63.8	65.7
Camrose-Drumheller	68.2	67.7	66.5	64.4	61.9	61.6	64.4	59.3	56.9	58.2	61.9

Source: Based on Statistics Canada Table 14-10-0393-01 from 2012 to 2022. Population is the number of people aged 15 or older.

Findings:

- The labour force participation rate in Camrose-Drumheller is lower than in the Province as a whole. This is aligned with its older age profile and smaller proportion of people in the 25 to 50 age cohort. The participation rate increased in 2018 and 2022, but the overall trend throughout the 2012-2022 period was downwards.
- The area's unemployment rate is lower than in the Province as a whole and frequently has been below 5%. This suggests a fairly tight job market.
- The employed labour force has decreased in Camrose-Drumheller. Overall, 7,500 fewer residents were employed in 2022 than in 2012, a reduction of 7.5%. However, most of the decrease was in part-time employment.
- Since 2020, full-time employment has rebounded (a gain of 11,000) while part-time employment has continued to fall.
- Alberta's employed residents generally increased except during the 2016-2017 period and in 2020. In 2022 the number of employed residents was 2.4 million, 9% greater than in 2012 and 3% greater than the previous peak in 2015.

3.4 Alberta Employment Growth Rate and Unemployment Rate Forecasts

Alberta Employment Growth Rate Forecasts

	2022	2023	2024	2025
Conference Board of Canada April 4 2023	5.2%	1.7%	1.9%	1.6%
ATB Mar 9 2023	5.2%	2.3%	0.2%	
TD Economics Mar 16 2023	5.2%	1.7%	1.8%	

Source: Conference Board of Canada, ATB, TD Economics forecasts,

Alberta Unemployment Rate Forecasts

	2022	2023	2024	2025
Conference Board of Canada April 4 2023	5.8	6.1	5.9	5.9
ATB Mar 9 2023	5.8	5.9	5.8	
TD Economics Mar 16 2023	5.8	6.2	6.7	

Source: Conference Board of Canada, ATB, TD Economics forecasts

Findings

- The 5.2% employment growth rate that all three agencies estimate for 2022 is the highest since 2012, reflecting recovery from the sharp decrease in 2020. The growth rates forecast for 2023 to 2025 are more in line with those experienced during the previous periods of employment growth (2012-2014 and 2016-2019).
- Forecasts are for unemployment to remain in the high 5% to 6% range. This is lower than was experienced throughout most of the period between 2016 to 2021.

3.5 Alberta Labour Force by Type of Industry 2012 to 2022

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	Annualized % Change 2012-16	2016-22	2012-22
Total, all industries	**2167**	**2211**	**2247**	**2266**	**2205**	**2221**	**2280**	**2308**	**2144**	**2260**	**2376**	**0.4%**	**1.3%**	**0.9%**
Health, Education Government, Social Service														
Health care and social assistance	234	237	242	260	264	265	274	285	285	306	309	3.0%	2.7%	2.8%
Educational services	124	124	125	135	138	140	146	149	143	168	168	2.6%	3.4%	3.1%
Public administration	96	96	92	96	94	99	106	112	104	103	108	-0.5%	2.4%	1.2%
Total: Health, Educ'n, Govt. & Soc Serv	**455**	**457**	**459**	**491**	**496**	**505**	**526**	**546**	**532**	**577**	**585**	**2.2%**	**2.8%**	**2.6%**
Sales & Service, Arts & Culture														
Retail trade	238	240	235	229	241	244	250	261	230	269	279	0.3%	2.5%	1.6%
Accommodation and food services	146	140	143	153	146	146	136	137	111	112	129	0.0%	-2.1%	-1.3%
Information, culture and recreation	72	78	73	74	74	72	79	76	71	65	82	0.8%	1.8%	1.4%
Total: Sales & Service, Arts & Culture	**456**	**458**	**450**	**455**	**461**	**462**	**464**	**473**	**411**	**446**	**490**	**0.3%**	**1.0%**	**0.7%**
Management, Business, Finance, Admin, Science														
Professional, scientific and technical services	163	174	181	171	173	170	172	178	174	190	219	1.5%	4.0%	3.0%
Business, building and other support services 12	71	77	79	77	76	77	83	79	68	69	74	1.7%	-0.6%	0.3%
Finance and insurance	69	66	67	69	71	66	68	67	72	77	80	0.7%	2.2%	1.6%
Real estate and rental and leasing	31	37	35	39	38	42	46	45	38	47	45	5.3%	2.5%	3.6%
Total: Management, Business, Finance Admin., Science	**334**	**354**	**362**	**356**	**359**	**356**	**368**	**369**	**353**	**383**	**418**	**1.8%**	**2.6%**	**2.2%**
Trades, Transp., Processing, Mfg, Utilities														
Transportation and warehousing	118	121	124	132	130	136	137	138	125	132	131	2.3%	0.1%	1.0%
Manufacturing	139	143	145	142	117	119	133	134	126	125	130	-4.3%	1.9%	-0.7%
Wholesale trade	81	82	87	87	81	93	87	90	86	75	87	0.2%	1.1%	0.7%
Durables	89	83	89	87	69	69	78	78	69	71	71	-5.9%	0.4%	-2.2%
Non-durables	51	60	56	55	47	51	54	56	57	54	60	-1.7%	3.9%	1.6%
Utilities	15	15	17	19	17	18	21	22	20	19	20	3.3%	2.5%	2.8%
Total: Trades, Transp., Proc., Mfg., Utilities	**493**	**504**	**519**	**522**	**462**	**486**	**510**	**518**	**482**	**475**	**498**	**-1.6%**	**1.3%**	**0.1%**
Primary Industries														
Agriculture 8	54	66	63	61	50	52	53	56	49	41	43	-1.9%	-2.5%	-2.3%
Forestry, fishing, mining, quarrying, oil and gas 9 10	174	173	174	155	136	136	147	142	131	141	139	-5.9%	0.3%	-2.2%
Total: Primary Industries	**217**	**233**	**236**	**224**	**202**	**181**	**196**	**200**	**192**	**181**	**186**	**-1.8%**	**-1.4%**	**-1.5%**
Construction	**235**	**233**	**249**	**253**	**241**	**231**	**234**	**233**	**218**	**227**	**237**	**0.6%**	**-0.2%**	**0.1%**

Source: Statistics Canada Table 14-10-0022-01 (formerly CANSIM 282-0007)

Findings

- Overall, there was a 0.9% annualized increase in employment in Alberta between 2012 and 2022 and shift in employment from Goods Producing Industries to Service Producing Industries. Services accounted for about 76.6% of employment in 2022 versus 71.5% in 2012.
- Employment in the primary industries decreased the most. Forestry, Fishing, Mining, Quarrying and Oil and Gas Extraction experienced an annualized 2.0% decrease across the decade. Agricultural employment also experienced a decrease.
- The greatest employment growth has been in Real Estate, Rental & Leasing and Professional, Science & Technology Services, followed by Educational Services and Health Care and Social Assistance.
- Accommodation & Food Service employment dropped sharply in 2020 and had not recovered by 2022. Agriculture was the only other sector still below 2019 employment levels by 2022.

4.0 Camrose (City) Economic Conditions and Trends

4.1 Registered Businesses

The following table summarizes the number of registered businesses operating in the City of Camrose during the 2016 to 2022 period.

CAMROSE (CITY) REGISTERED BUSINESSES		Annual Change	
Year	**Establishments**	#	%
2016	1,014		
2017	954	-60	-5.9%
2018	940	-14	-1.5%
2019	959	19	2.0%
2020	940	-19	-2.0%
2021	888	-52	-5.5%
2022	955	67	7.5%
		#	%
Total Change 2016-2022		-59	-5.8%

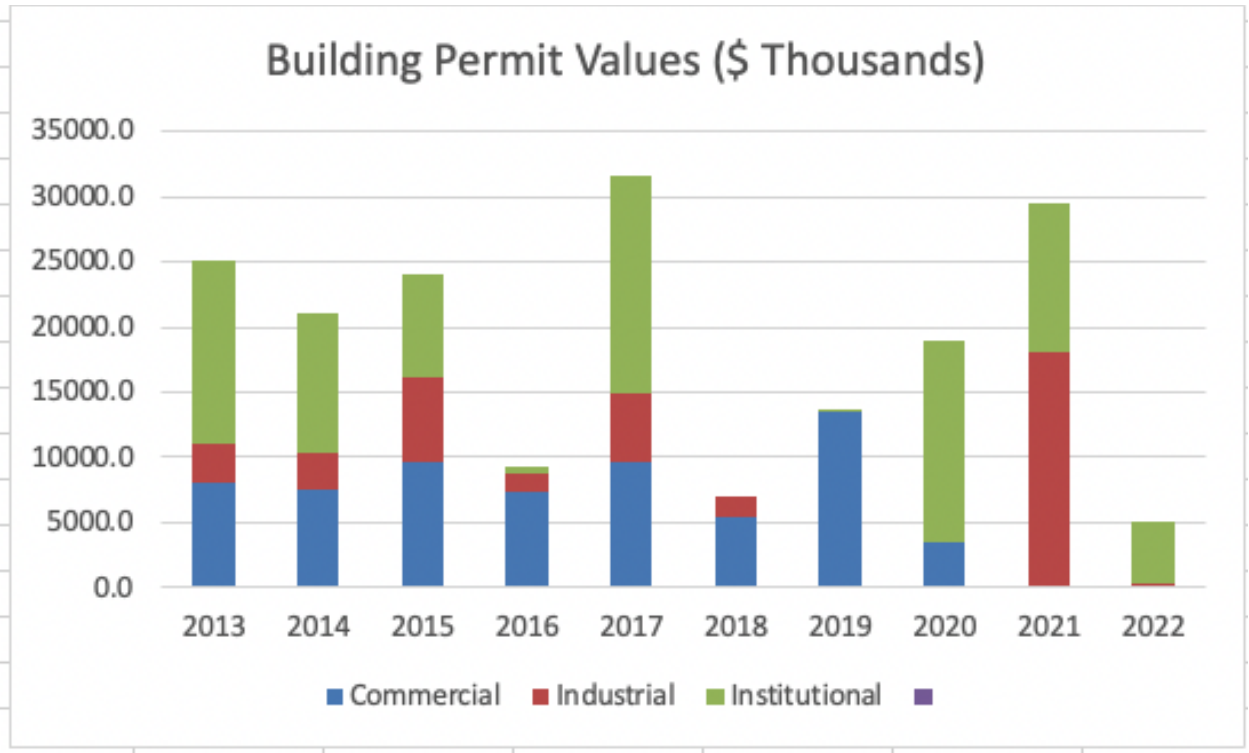
Source: *https://camrose.ecdev.org*
Based on Statistics Canada Business Registry

Findings:

- As of 2022, there were 955 businesses operating in the City of Camrose.
- There was a net loss of 59 businesses between 2016 and 2022, a 5.8% decrease. This mirrors the decrease in active businesses in the province that was described in Section 3.
- The greatest loss was experienced between 2020 and 2021 and probably reflects the impact of the pandemic. Considerable recovery occurred in 2022, as was also experienced in the province as a whole.
- As was discussed in Sections 1 and 3, 2016-2021 was a period of economic downturn in Alberta caused by low energy prices among other factors, and then exacerbated by the pandemic. Positive growth returned in 2022.

4.2 Non-Residential Building Permits

The following table summarizes the value of non-residential building permits issued in the City of Camrose.



Source: /https://www.camrose.ca/en/business-and-development/resources/Documents/Building-Permit-Reports/2013-2022-Building-Permit-Summary.pdf

Findings:

- There is considerable year-to-year variation in the value of non-residential building permits. This “lumpiness” is caused by the occasional approval of major development projects.
- Major projects can take several years for planning, design and approval, leading to lags between the decision to proceed and the issuance of permits.
- The low value of permits issued in 2022 may reflect lack of business confidence during 2020-2021 and/or the sudden increase in interest rates which increased financing costs.
- Indications from the City of Camrose are that the first half of 2023 was extremely active for development, with non-exempt construction value in the first seven months of the year exceeding the total for the previous 48 months combined.

4.3 Assessment

The following table summarizes the assessed value of commercial and industrial property in the City of Camrose each year between 2018 and 2022.

	City of Camrose Commercial and Industrial Assessment				
	2018 to 2022				
	2018	2019	2020	2021	2022
Commercial	$365,294,750	$371,929,220	$363,838,730	$358,047,040	$364,191,110
Industrial	$242,705,430	$243,608,790	$256,779,010	$260,529,010	$275,642,730
Total City	$608,000,180	$615,538,010	$620,617,740	$618,576,050	$639,833,840
	Annual % Change				
	2018-2019	2019-2020	2020-2021	2021-2022	2018-2022
Commercial	1.82%	-2.18%	-1.59%	1.72%	-0.08%
Industrial	0.37%	5.41%	1.46%	5.80%	3.23%
Total City	1.24%	0.83%	-0.33%	3.44%	1.28%

Source: City of Camrose

Findings:

- The assessed value of commercial properties decreased in 2020 and 2021 coincident with the pandemic. A healthy increase was experienced in 2022, returning commercial assessment to only slightly below 2018 values.
- Commercial properties in the East End Industrial Park and North Industrial area experienced the greatest decreases.
- Industrial assessment increased throughout the period. The value in 2022 was 13% greater than in 2018, with an annualized growth rate of 3.23%.
- Total C-I assessment increased by $31 million throughout the period, a 5% increase representing an average annualized growth rate of 1.28%.

4.4 Commercial Real Estate

The following table summarizes the current (as of May 2023) commercial real estate inventory and value in the City of Camrose as included in the CoStar database,

	Inventory	Market Rent	Sale Price	CAP Rate	Vacancy
Retail	596,000	$16.58	$282	6.00%	10.86%
Office	92,100	$20.51	$149	9.10%	n/a
Source: CoStar May 2023					

Findings:

- As is the case in many other communities, commercial real estate is still adjusting after the recent disruptions created by remote work and accelerated adoption of omni-channel shopping.

4.5 Labour Force Characteristics

Data on Camrose City's labour force characteristics is only available from the Census. It compares two snapshots in time: May 2016 and May 2021. The data is for the residents of Camrose and does not include people who are employed in Camrose businesses but who live outside of the city. As was described in Section 1.3, most Camrose residents work locally, 84% within the same Census Division and 67% within a fifteen-minute commuting time.

Camrose Labour Force Overview 2016 and 2021	2016	2021
Population,	18520	18775
Population aged 15 years and over	14935	15010
Population in the Labour Force	9715	9245
Participation rate	65.00%	61.60%
Employed	8805	8075
Unemployed	915	1170
Unemployment rate	9.40%	12.70%

Source: Statistics Canada Census

Findings:

- Camrose's labour force participation rate is fairly low at 61.6% in 2021. It decreased between 2016 and 2021. It is possible that temporary layoffs during the pandemic lockdowns that were in effect in May 2021 contributed to this.

- As was summarized in Section 3.3, The participation rate also decreased in the province as a whole (72.4% to 69.7%) and in the Camrose-Drumheller Economic Region (66.9% to 63.4%). Camrose labour force participation is lower than in the province or the region, reflecting the high proportion of senior citizens in its population.
- Whereas there was a 2% net increase in provincial employment in between 2016 and 2021, Camrose employment decreased by 8%.[10] Employment in the Camrose-Drumheller Economic Region decreased by 6%. This could reflect the relative concentration of sectors most impacted by the pandemic lockdown in the City of Camrose (see the following tables including Location Quotients).
- Camrose's unemployment rate is higher than in the province as a whole or the economic region (8.6% and 8.1% respectively). This could also be due to the concentration of sectors impacted by pandemic layoffs in Camrose.

[10] Alberta's employment increased between 2016 and 2019, dropped in 2020 and had started to recover in 2021 for a net increase in 2021 over 2016.

The following tables summarize Camrose's labour force by occupation and by industry sector. Location Quotients (LQ) were calculated to highlight the sectors that are concentrated in and those that are underrepresented in Camrose compared to the surrounding region and to the province as a whole.[11]

Sectors Employing Camrose Labour Force 2016-2022				
	% of Total Employed		Change 2016-2021	
Industry Sector (NAICS codes)	2016	2021	#	% change
11 Agriculture, forestry, fishing and hunting	2.2%	1.5%	-80	-37.2%
21 Mining, quarrying, and oil and gas extraction	4.2%	3.5%	-85	-21.3%
22 Utilities	1.3%	0.8%	-45	-37.5%
23 Construction	8.5%	8.3%	-70	-8.6%
31-33 Manufacturing	6.3%	6.5%	-20	-3.3%
41 Wholesale trade	3.1%	2.8%	-45	-15.0%
44-45 Retail trade	14.8%	15.7%	-5	-0.4%
48-49 Transportation and warehousing	3.3%	3.1%	-45	-14.1%
51 Information and cultural industries	1.4%	1.1%	-35	-26.9%
52 Finance and insurance	2.7%	3.1%	20	7.7%
53 Real estate and rental and leasing	1.3%	1.5%	10	8.0%
54 Professional, scientific and technical services	3.5%	3.7%	0	0.0%
55 Management of companies and enterprises	0.0%	0.0%	0	
56 Administrative and support, waste management and remediation services	3.0%	4.2%	90	31.0%
61 Educational services	7.1%	6.4%	-105	-15.4%
62 Health care and social assistance	16.5%	19.4%	155	9.8%
71 Arts, entertainment and recreation	2.3%	2.0%	-45	-20.5%
72 Accommodation and food services	8.2%	7.4%	-125	-15.9%
81 Other services (except public administration)	5.9%	5.0%	-120	-21.2%
91 Public administration	4.5%	3.8%	-90	-20.9%

Source: Statistics Canada Census

Findings:

- The sectors employing the most Camrose residents in 2021 were:
  1. Health Care (19%),
  2. Retail Trade (16%),
  3. Construction (8%),
  4. Accommodation and Food Service (7%),
  5. Manufacturing (6%), and
  6. Education Services (6%).

[11] LQ = (sector's share of labour force in Camrose)/(sector's share in Region or Province). An LQ above 1.0 indicates relative concentration and below 1.0 relative under representation.

- Sectors **increasing the** employment of Camrose residents by more than 5% between 2016 and 2021 were:
  1. Administrative Support, waste management & remediation services (31%, 90 persons)
  2. Health Care (+10%, 155 persons)
  3. Real Estate and Rental and Leasing (+8%, 10 persons)
  4. Finance & Insurance (+8%, 20 persons)

- Sectors **decreasing the** employment of Camrose residents by more than 5% were[12]:
  1. Utilities (-38%, 45 persons)
  2. Agriculture (-37%, 80 jobs)
  3. *Information and cultural industries (-27%, 35 persons)*
  4. Mining, Quarrying & oil and gas extraction (-21%, 85 persons)
  5. *Public Administration (-21%, 90 persons)*
  6. *Other Services (-21%, 120 jobs)*
  7. *Arts, entertainment & recreation (-20%, 45 persons)*
  8. *Accommodation and Food Services (-16%, 125 jobs)*
  9. Wholesale Trade (-15%, 45 jobs)
  10. *Education Services (-15%, 90 persons)*
  11. Transportation and warehousing (-14%, 45 persons)
  12. Construction (-9%, 70 persons)

The following table summarizes Camrose's 2021 Location Quotients relative to the Camrose-Drumheller Economic Region and the province as a whole.

[12] The sectors most likely to have been impacted by pandemic related layoffs are italicized.

2021 Relative Concentration of Sectors Employing Camrose Labour Force in and Camrose-Drumheller Economic Region		
	Location Quotients	
Industry Sectors (NAICS codes)	Camrose/Alberta	Camrose/Region
11 Agriculture, forestry, fishing and hunting	0.52	0.11
21 Mining, quarrying, and oil and gas extraction	0.69	0.51
22 Utilities	0.82	0.76
23 Construction	0.88	0.98
31-33 Manufacturing	1.22	1.54
41 Wholesale trade	0.88	0.88
44-45 Retail trade	1.38	1.48
48-49 Transportation and warehousing	0.53	0.65
51 Information and cultural industries	0.82	1.41
52 Finance and insurance	1.02	1.27
53 Real estate and rental and leasing	0.85	1.56
54 Professional, scientific and technical services	0.47	0.92
55 Management of companies and enterprises	0.00	0.00
56 Administrative and support, waste management and remediation services	1.03	1.29
61 Educational services	0.96	1.06
62 Health care and social assistance	1.51	1.60
71 Arts, entertainment and recreation	1.02	1.19
72 Accommodation and food services	1.23	1.54
81 Other services (except public administration)	1.06	0.97
91 Public administration	0.71	0.72

Findings:

- Camrose's specialization in Health Care and Social Assistance is immediately apparent.
- Camrose's role as a shopping and regional cultural/entertainment centre also is highlighted.
- The manufacturing sector also is concentrated in Camrose, especially compared to the region.

- The professional, scientific & technical services, Management companies, public administration, and transportation and warehousing all are significantly underrepresented in Camrose.

The following tables analyze the occupational makeup of Camrose's labour force.

Occupations Employing Camrose Labour Force 2016-2022					
	% of Total Employed			Change 2016-2021	
Occupation (NOCS codes)	2016	2021		#	% change
0 -Legislative and senior management occupations	10.5%	0.6%		-955	-94.55%
1 - Business, finance and administration occupations	13.0%	14.3%		35	2.80%
2 - Natural and applied sciences and related occupations	3.5%	3.3%		-45	-13.24%
3- Health occupations	10.1%	11.6%		70	7.25%
4 - Occupations in education, law and social, community and government services	10.0%	10.4%		-30	-3.13%
5 - Occupations in art, culture, recreation and sport	1.5%	1.7%		5	3.45%
6 - Sales and service occupations	25.7%	29.6%		195	7.93%
7 - Trades, transport and equipment operators and related occupations	17.0%	19.1%		80	4.91%
8 - Natural resources, agriculture and related production occupations	3.6%	4.5%		55	15.94%
9 - Occupations in manufacturing and utilities	5.1%	4.9%		-45	-9.28%

Source: Statistics Canada Census. Note that NOC was changed in 2021. Most significantly, middle management occupations were included in NOC 0 in 2016 but redistributed to their respective broad occupational categories in 2021. In 2021, NOC 0 included only "legislators and senior managers in the public and private sectors.

Findings:

- Most Camrose residents are employed in sales and service occupations; trades, transport & equipment operators; business, finance & administration; and health occupations. Growth occurred in all of these occupations.
- Contraction occurred in natural & applied sciences and related occupations; and in manufacturing & utilities. The apparent decrease in legislative and senior management occupations could be due to the inclusion of middle management in NOC 0 in 2016 but not in 2021.

2021 Relative Concentration of Occupations in Camrose Compared to Alberta and Camrose-Drumheller Economic Region		
	Location Quotients	
Occupations (NOCS codes)	Camrose/Alberta	Camrose/Region
0 Legislative and senior management occupations	0.59	0.96
1 Business, finance and administration occupations	0.85	1.06
2 Natural and applied sciences and related occupations	0.40	0.88
3 Health occupations	1.41	1.51
4 Occupations in education, law and social, community and government services	0.94	1.13
5 Occupations in art, culture, recreation and sport	0.72	1.11
6 Sales and service occupations	1.22	1.37
7 Trades, transport and equipment operators and related occupations	0.96	0.89
8 Natural resources, agriculture and related production occupations	1.00	0.28
9 Occupations in manufacturing and utilities	1.30	1.10

Findings:

- The locations quotients highlight Camrose's strong specialization in health occupations and in sales and service occupations, both regionally and relative to the province as a whole. It also specializes in occupations related to manufacturing and utilities relative to the province.
- Its labour force is under-represented in legislative and senior management occupations and in natural and applied sciences and related occupations, potentially limiting its ability to attract employers requiring senior management and scientific & technical expertise.

The Government of Alberta publishes occupational demand forecasts for economic regions. The current forecast is for the 2020 to 2025 period. The following table summarizes the 2022 to 2025 forecast for the Camrose-Drumheller Economic Region for each major NOC grouping. The groupings are listed in order of their percentage of the City of Camrose's employed labour force. The concentration of the regional occupation in Camrose also is indicated by providing the Location Quotients.

Overall, the Region had an estimated 94,900 persons in its employed labour force in 2022. The City of Camrose accounted for about 8.7% of the Region's employed labour force in 2021 and probably a similar proportion in 2022.

Regional Occupational Demand Forecast for Camrose Occupations Ranked by Percentage of Labour Force				
		% Camrose	C-D Region	Camrose/Region
Rank		Labour Force	Job Forecast	LQ
in Camrose		-2021	(2022-2025)	
1	Sales and service occupations	29.60%	300	1.37
2	Trades, transport and equipment operators and related occupations	19.10%	1600	0.89
3	Business, finance and administration occupations	14.30%	300	1.06
4	Health Occupations	11.60%	300	1.51
5	Occupations in education, law and social, community and government services	10.40%	500	1.11
6	**Occupations in manufacturing and utilities**	4.9%%	0	1.1
7	Natural resources, agriculture and related production occupations	4.50%	-1,000	0.28
8	Natural and applied sciences and related occupations	3.30%	-400	0.88
9	Legislative and senior management occupations	0.60%	800	0.96
	Total Regional Job Forecast		2400	

Source: Calculations based on Alberta Occupational Outlook and 2021 Census

Findings:

- Overall, the Region's occupational demand is forcast to grow by about 2,400 jobs between 2022 and 2025 (a 2.5% increase across the three years, or about 0.8% annually).
- The top five occupations in the City of Camrose all are expected to have positive growth prospects. Collectively, these five occupations accounted for 85% of Camrose's employed labour force (2021). Their location quotients suggest that all but "trades, transport and equipment operators and related occupations" are relatively concentrated in Camrose, and might be expected to attract at least a proportional share of the growth in demand.
- Occupations in manufacturing and utilities have neutral growth prospects[13] while natural resources and and natural and applied sciences are expected to contract. Note that this doesn't necessarily imply that the demand for these occupations in the

[13] Noting that some occupations within the sector are expected to grow (e.g. NOC 952: Mechanical, electrical and electronics assemblers) and others to contract (e.g.NOC 923: Central control and process operators), netting out a zero growth.

City of Camrose will also contract, but the general overview data suggest that the growth prospects are not favourable.

- Although Legislative and senior management occupations are expected to grow within the Region, currently a very small proportion of Camrose's labour force are employed in these occupations.

5.0 Population Projections: 2022 to 2046

5.1 Province of Alberta

The population projections for Camrose are based on the Province of Alberta's projections for the province as a whole and for Census Division 10. The Province of Alberta updates its population projections annually (https://open.alberta.ca). The current forecast was published on July 5, 2023[14]. Low, medium and high growth scenarios are provided, as summarized below.

Alberta Population Projections for Low, Medium and High Growth Scenarios.

	Low	Medium	High
Total Population 2022	4.4 million	4.4 million	4.4 million
Total Population 2046	5.7 million	6.4 million	7.5 million
Average Annual Growth Rate	1.0%	1.5%	2.1%

Source: https://open.alberta.ca

The average annual growth rate over the previous twenty-five years was 1.9%. The medium and low growth scenarios are less than that due to the expectation that Alberta's population will continue to age and therefore experience a slower rate of natural increase, and that there will be slower gains in migration. Under the medium growth scenario, natural increase is expected to account for 28% of growth, inter-provincial migration for 17% and international migration for 55%.

The growth rate is expected to fluctuate within the 2022-2046 period. In the short term, the province is experiencing a surge in migration and a resultant high rate of population growth (an estimated average of 1.8% per year between 2021 and 2024). A strong rebound in oil prices, labour shortages, post-pandemic catch-up in immigration as well as increased federal targets, and relatively affordable housing prices and living costs compared with other provinces are factors driving this growth. The inflow of non-permanent residents (NPR) also is surging due to increased demand for temporary foreign workers, international students and Ukrainian refugees.

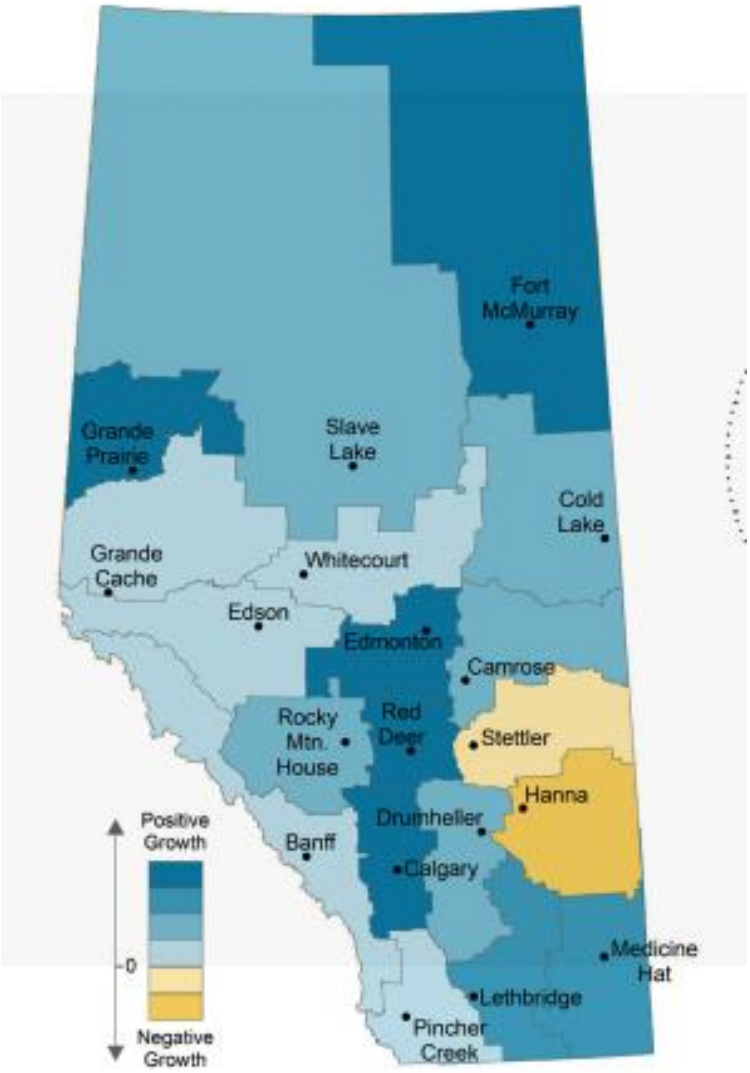
After 2024, population growth is expected to slow to about 1.6% per year in 2025-2026 and then to 1.5% through to 2035 (medium growth scenario). This is in response to an anticipated slowdown in economic growth and a reduced inflow of refugees. Average annual growth is expected to continue to slightly fall to 1.4% between 2036 and 2041 and 1.3% between 2041 and 2046. It is noted that currently unforeseen major shifts in the economy, global context, and/or cost of living relative to the rest of Canada could alter these forecasts.

[14] The current projections are for the period 2023-2051.

5.2 Census Division 10

As has been the case in the past, population growth is expected to be unevenly distributed within the province. The Calgary-Edmonton Corridor is forecast to grow the most and increase its share of Alberta's population from the current 77% to 80% by 2046.

Census Division 10, which includes Camrose, is expected to have a lower-than-average rate of growth at 0.7% per year, 47% of the provincial growth rate. The factors in this difference are its older age profile and traditionally lower attractiveness to immigrants. Camrose accounts for about 20% of CD 10's population.



It is interesting that the projected relationship between growth rates in CD 10 and the province is closer than was experienced in the past. Between 2001 and 2022 CD 10 grew at only 38% of the provincial rate. An explanation is not provided in the provincial analyses. One might speculate that the difference in age profiles is expected to become less marked as the province ages and as the gains from migration slow.

5.3 City of Camrose

Population projections for the City of Camrose have been estimated from the provincial forecasts, taking into account historic relationships in growth rates and factors in Camrose that may influence its future growth relative to the province.

The analysis of Camrose's historic population trends, current demographic characteristics relative to the province, housing starts and economic conditions support the expectation that Camrose's population will continue to grow at a higher rate than CD10 as a whole but at a slower rate than the Province of Alberta. Factors suggesting that its growth rate will continue to be lower than the Province as a whole include:

- Older age profile than the provincial average, leading to a slower rate of natural increase. Young adults have been leaving the community while the number of seniors over 60 has been increasing, suggesting they are aging in place and relocating into Camrose from the surrounding rural areas (supporting the City's higher rate of growth than the rest of CD 10).
- Traditionally low intake of international migrants, who are expected to be the main source of provincial population growth in the future.
- Smaller proportion of the population of working age and participating in the labour force.
- Smaller proportion of the local labour force working in the high growth scientific and senior management occupations and in the professional, science and technical services sector.
- Location outside, but close to, the main Edmonton-Calgary growth corridor that is centred on Highway 2 about 60 km to the west.

Camrose's positive growth factors include:

- High proportion of the labour force employed in the healthcare sector, a growth sector that is relatively recession-proof province-wide.
- High proportion of the labour force employed in manufacturing. Although regional and provincial growth prospects for manufacturing are not as high as the service-producing sectors, it continues to be a major employer.
- Camrose's role as a shopping, cultural and service centre for the surrounding region and its high level of amenities and good quality of life.

On balance, it is estimated that Camrose will grow at an average of 60% of the provincial rate over the next twenty-five years. This is slightly less than the relationship observed over the previous twenty-five years (which was an average of 66% of the provincial growth rate) to take into account its older age structure and currently low profile as a destination for migrants.

It results in the estimate that the City of Camrose will grow at a rate that's 27.6% greater than Census Division 10. This is generally consistent with past patterns. It implies that by 2026 the City of Camrose will account for 20.5% of CD10's population versus the current 19.9%.

The following tables:

a) Summarize the projected annual population growth rate in the Province of Alberta under the low, medium and high growth in five-year increments within the 2021-2046 period, and the estimated growth rates for the City of Camrose if it achieves 60% of the provincial rate.
b) Apply the projected annual growth rates to the City of Camrose's 2021 population as estimated by the Province of Alberta to project what it's population would be at each five-year increment through to 2046.
c) Calculate the population increase expected to occur in each five year and over the entire twenty-five years.

Estimated % Annual Growth Rate: Low, Medium and High Growth Scenarios							
	Alberta				Camrose City		
Average	**LOW**	**MED**	**HIGH**		**LOW**	**MED**	**HIGH**
Annual Growth %							
2021-22	1.36	1.7	2.14		0.82	1.00	1.29
2022-26	1.31	1.75	2.3		0.79	1.05	1.38
2026-31	1.08	1.5	2.17		0.65	0.9	1.3
2031-36	0.99	1.46	2.18		0.59	0.88	1.31
2036-41	0.91	1.4	2.1		0.51	0.79	1.19
2041-46	0.84	1.32	1.99		0.51	0.79	1.29
2022-46	1.01	1.48	2.14		0.61	0.9	1.29

Source: Alberta Treasury Board & Finance and John Archer & Associates Estimates (for Camrose City)

Estimated City of Camrose Population 2022 - 2046 Low, Medium and High Growth Scenarios			
	Low	**Med**	**High**
2021	19,612	19,612	19,612
2022	19,772	19,812	19,864
2026	20,461	20,657	20,982
2031	21,069	21,682	22,386
2036	21,702	22,567	23,889
2041	22,302	23,531	25,434
2046	22,873	24,477	26,988

Source: Alberta Treasury Board & Finance and John Archer & Associates Estimates

Estimated City of Camrose Population Increases Low, Medium and High Growth Scenarios			
	Low	**Med**	**High**
2021-26	849	1,045	1,370
2026-31	608	1,025	1,404
2031-36	633	885	1,503
2036-41	600	964	1,545
2041-46	571	946	1,554
2021-46	3,261	4,865	7,376

Source: Alberta Treasury Board & Finance and John Archer & Associates Estimates

It should be noted that there are likely to be short term fluctuations in growth that are not reflected in these estimates. Factors resulting in such fluctuations include short term expansions and contractions in the economy, the closure, opening or expansion of a major employer, new housing construction, and policy changes impacting Camrose's relative attractiveness to immigrants or to new business investment relative to other communities.

CAMROSE GROWTH STUDY