

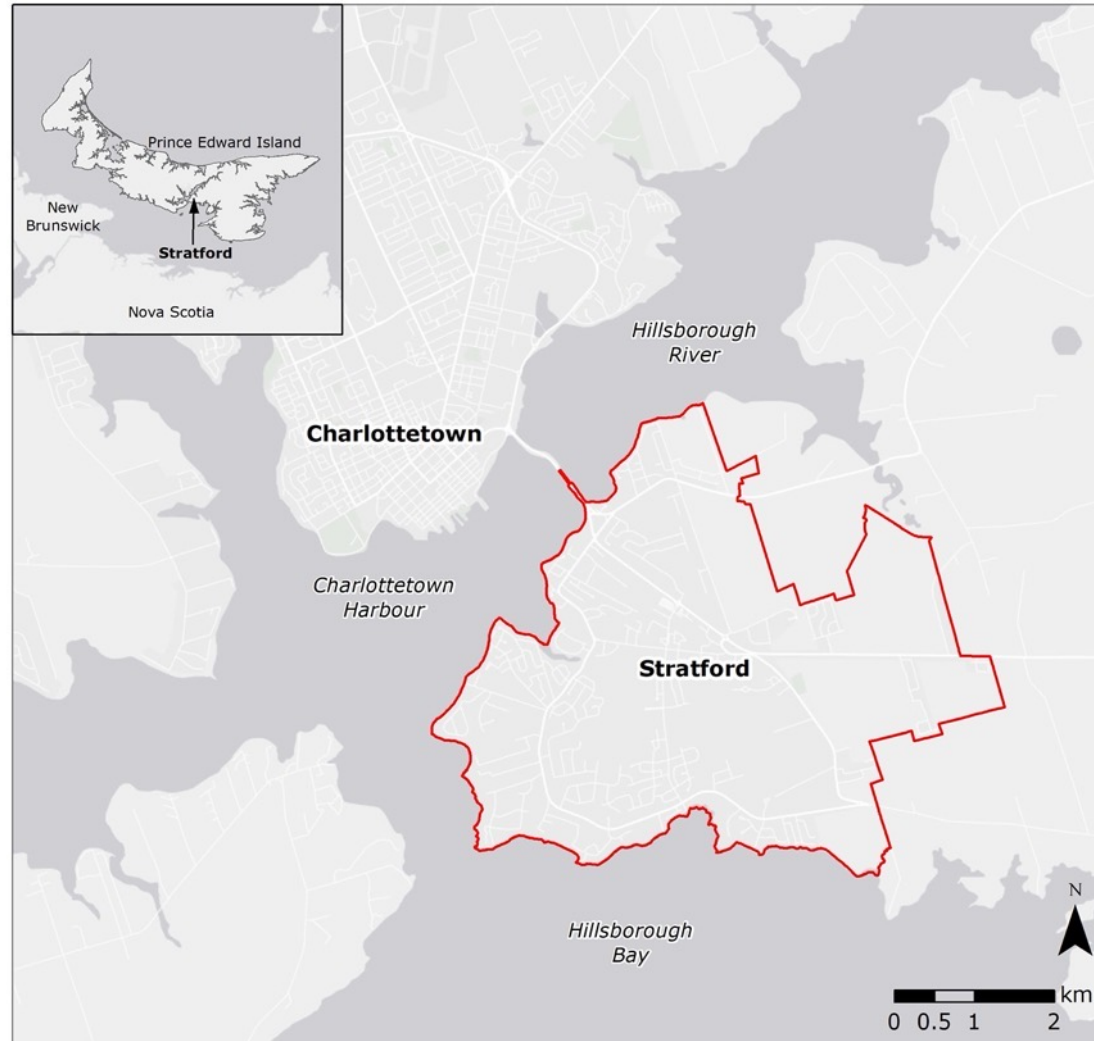
UPDATED: APRIL 27, 2023

Stratford's Story

Data Insights



Location of Stratford



Sources: Province of PEI; Esri, HERE, Garmin, (c) OpenStreetMap contributors, and the GIS user community

PEI Population

As of January 1, 2023, Statistics Canada estimates that the population of PEI is 173,954.

This represents a yearly increase of 7,096 persons- which is a 4.3% annual growth rate

PEI currently has the fastest-growing population of any province or territory in Canada

This is also the highest annual growth rate for PEI on record

Source: PEI Population Report Fourth Quarter 2022, PEI Statistics Bureau; Department of Finance

PEI Population Growth

DIAGRAM 1: PRINCE EDWARD ISLAND POPULATION, QUARTERLY, 2018 - 2023

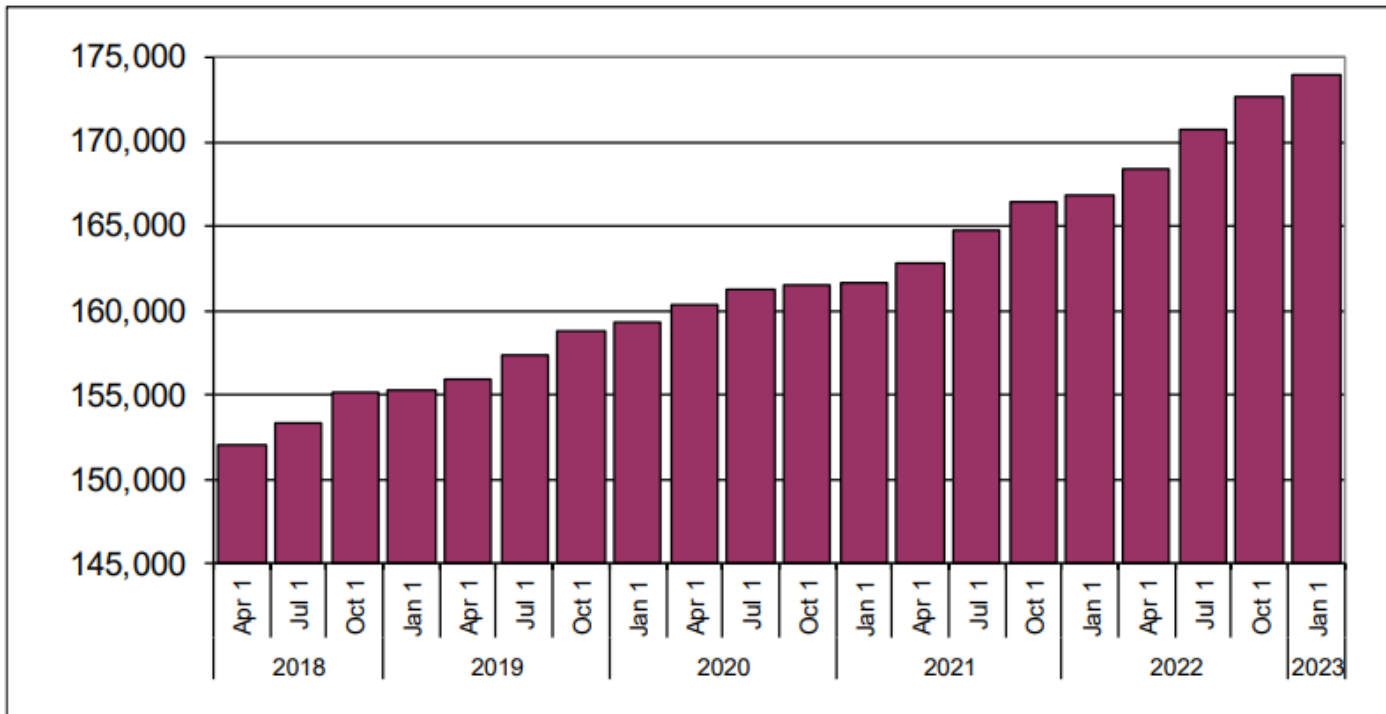


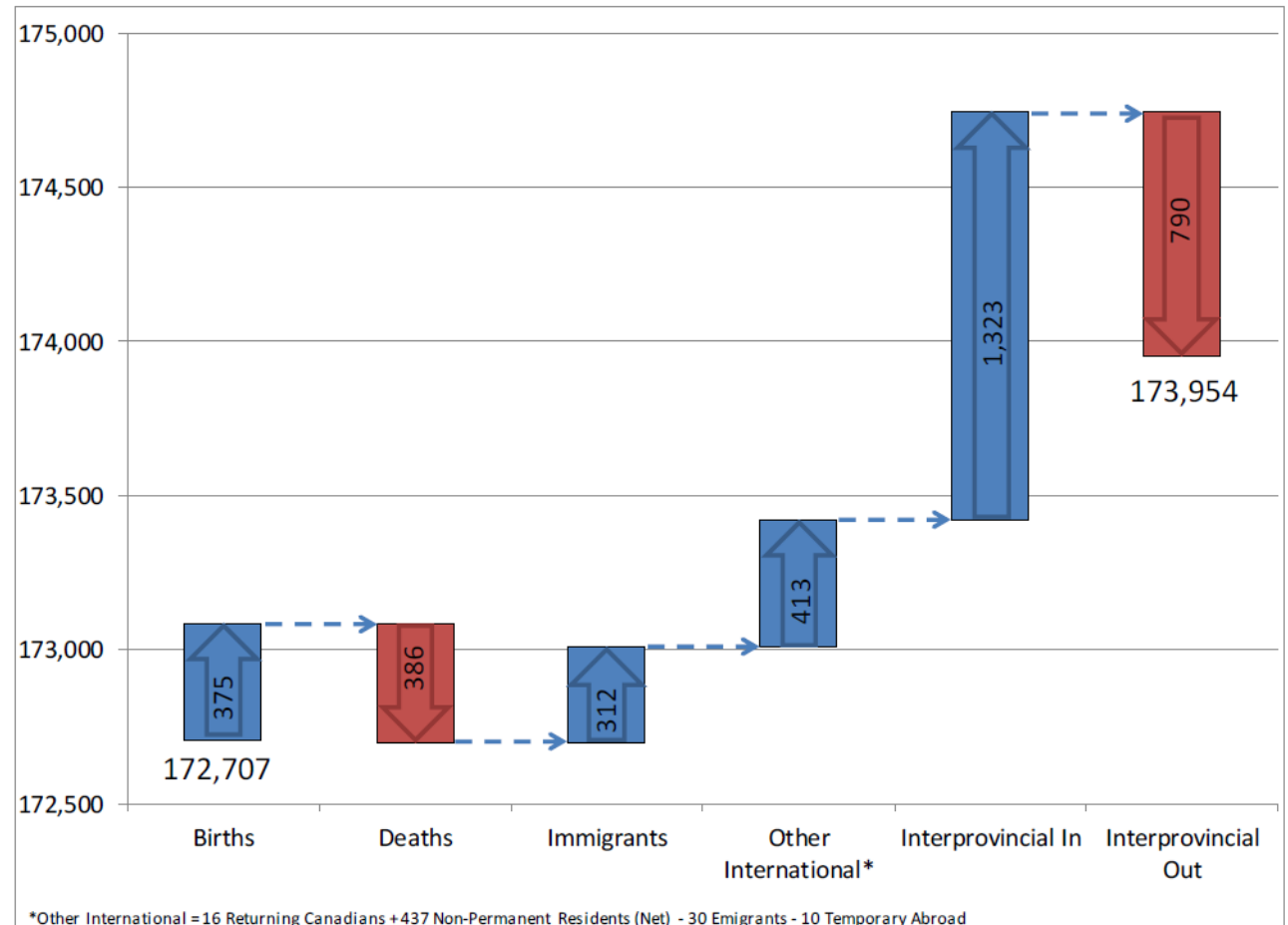
TABLE 2: POPULATION OF PROVINCES & TERRITORIES, JANUARY 1, 2022 and 2023 & ANNUAL GROWTH RATES

	Jan 1, 2022	Jan 1, 2023	Growth	Level
CAN	38,516,138	39,566,248	2.7%	1,050,110
NL	522,501	531,948	1.8%	9,447
PEI	166,858	173,954	4.3%	7,096
NS	1,002,441	1,037,782	3.5%	35,341
NB	799,245	825,474	3.3%	26,229
QC	8,637,650	8,787,554	1.7%	149,904
ON	14,940,912	15,386,407	3.0%	445,495
MB	1,398,303	1,431,792	2.4%	33,489
SK	1,185,311	1,214,618	2.5%	29,307
AB	4,482,385	4,647,178	3.7%	164,793
BC	5,251,578	5,399,118	2.8%	147,540
YK	43,241	44,238	2.3%	997
NWT	45,710	45,493	-0.5%	-217
NU	40,003	40,692	1.7%	689

Source: PEI Population Report Fourth Quarter 2022, PEI Statistics Bureau; Department of Finance

PEI Population Growth Components

DIAGRAM 2: PEI COMPONENTS OF GROWTH, OCTOBER 1, 2022 – DECEMBER 31, 2022



Source: PEI Population Report Fourth Quarter 2022, PEI Statistics Bureau; Department of Finance

PEI Population Growth Components

In 2022, PEI had a net population growth of ~7096 people

For natural growth (births and deaths), there was a net decline of 37 people

For interprovincial migration, there was a net increase of 2098 people

For international immigration, there was a net increase of 5035 people

New Units per Year

A representative from the Province told us during one of the Shape Stratford workshops with committee members that in all of PEI, we only build ~1,500 new units per year

That rate of development is not going to be able to keep up with population growth

Population Comparisons

Stratford Population Size:

- 2021: **10,927**
- 2016: **9,711**

% change from 2016 – 2021: **12.5%**

Charlottetown Population Size:

- 2021: **38,809**
- 2016: **36,094**

% change from 2016 – 2021: **7.5%**

Prince Edward Island Population Size:

- 2021: **154,331**
- 2016: **142,907**

% change from 2016 – 2021: **8%**

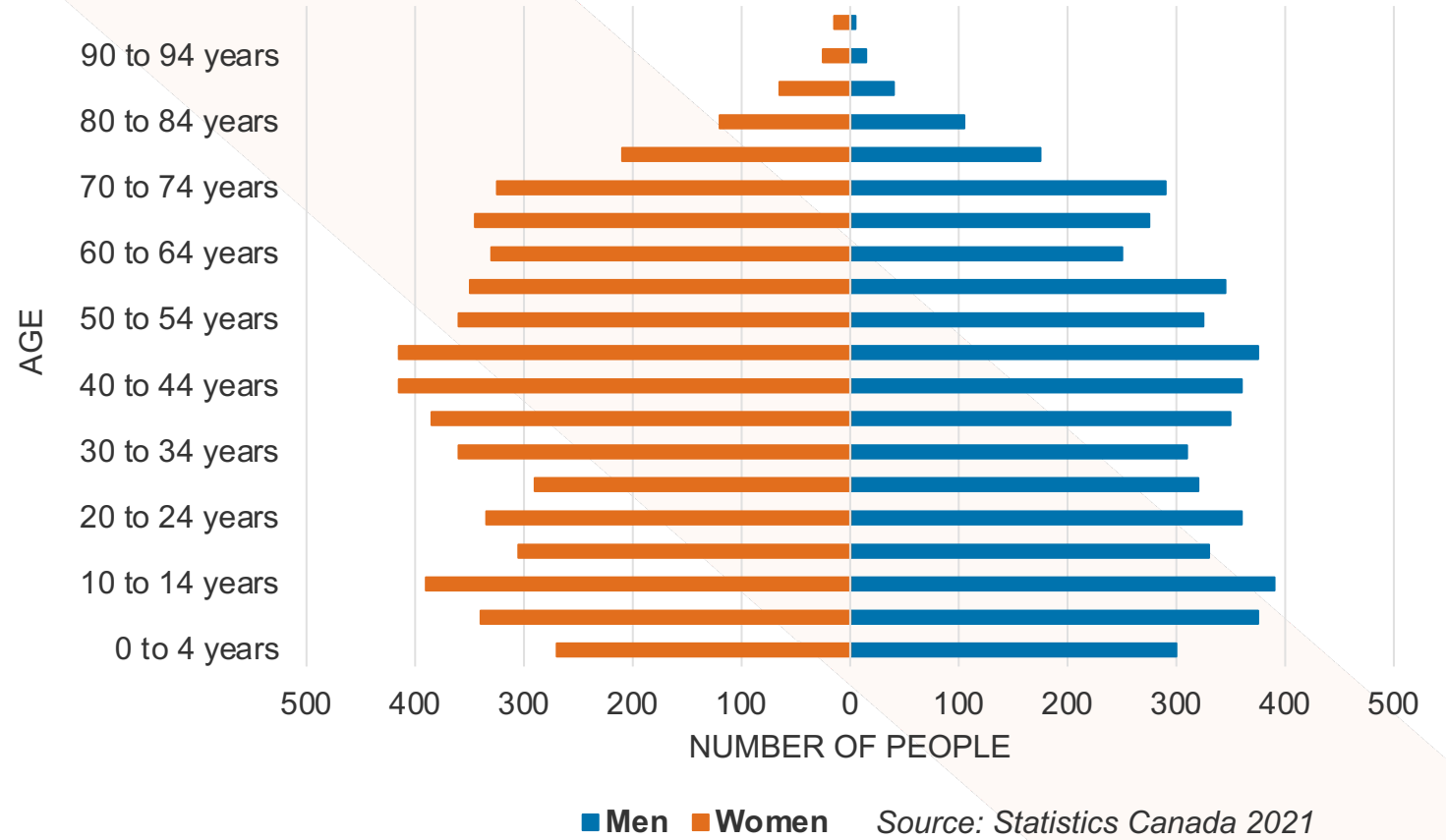
**Note—census population estimates are low—the population numbers in the quarterly PEI population report are more accurate because they account for what is known as ‘undercount’—Islanders that were not captured by the census*

Stratford Population Pyramid

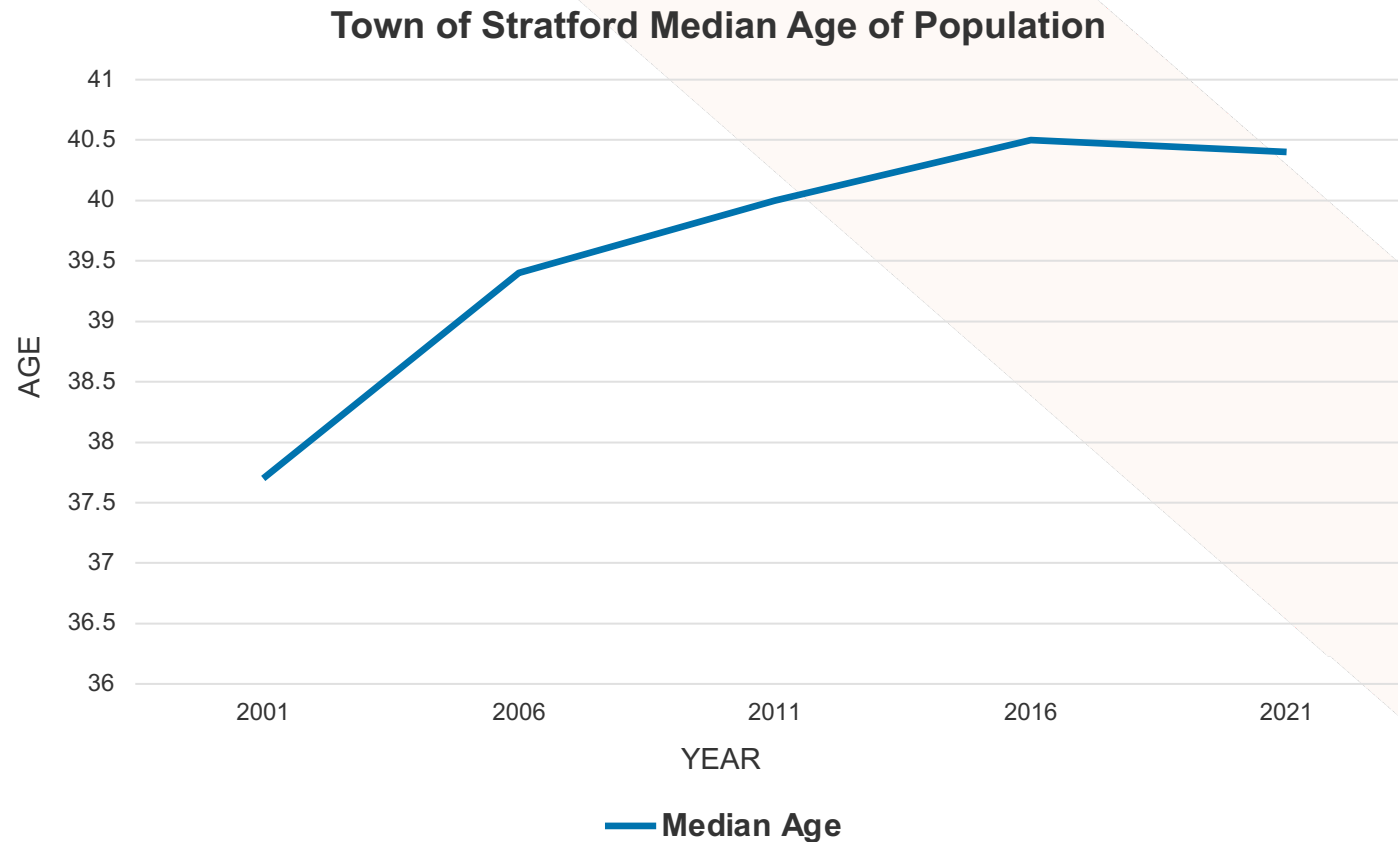
Town of Stratford 2021 Population Characteristics

Stratford	2021	2016	2011	2006
Population Size	10,927	9,711	8,574	7,083
% growth from previous year	12.5%	13.3%	21%	

Source: Statistics Canada 2006, 2011, 2016 & 2021



Median Age of Stratford Population 2021



Source: Statistics Canada 2001, 2006, 2011, 2016 & 2021

Affordable Housing Definition

“Housing that meets the needs of a variety of households in the low to moderate income range”.

The broad nature of this definition exemplifies how affordable housing encompasses a large range that can address deep affordability for our most vulnerable populations as well as moderate affordability for our working population.

A household is considered to be in core housing need if:

- A household is below one or more of the adequacy, suitability and affordability standards;
- The household would have to spend 30% or more of its before-tax household income to access local housing that meets all three standards.

Attainable Housing

“ Attainable housing refers to housing that is **Adequate** in condition (no major repairs needed) **Appropriate** in size (bedrooms appropriate for household) **Affordable** (costing less than 30% of before-tax income) **Accessible** to Services (located in areas where common services are available) and **Available** (a range of housing types)”.

Source: Muskoka Housing Task Force, September 2021

Housing Condition 2021

Housing Condition	Town of Stratford	City of Charlottetown	Prince Edward Island	Canada
Total—Private households by housing suitability— 25% sample data	4,295	17,185	64,570	14,978,940
Suitable	98%	95%	97%	95%
Not suitable	3%	5%	3%	5%
Only regular maintenance and minor repairs needed	97%	94%	93%	94%
Major repairs needed	3%	6%	7%	6%

Source: Statistics Canada 2021

Affordability Indicators 2021

Affordability Indicators	Town of Stratford	City of Charlottetown	Prince Edward Island	Canada
Total — Owner households — 25% sample data	3045	7875	43730	9807720
Owner households spending 30% or more on shelter costs	11%	13%	9%	15%
Total — Tenant households — 25% sample data	1250	9310	19985	4936850
Tenant households spending 30% or more on shelter costs	32%	33%	30%	33%
Tenant households in subsidized housing	10%	17%	18%	12%

Stratford		
Total	4295	
Owner	3050	71%
Renter	1245	29%

Source: Statistics Canada 2021

Affordability 2016 – 2021 Census

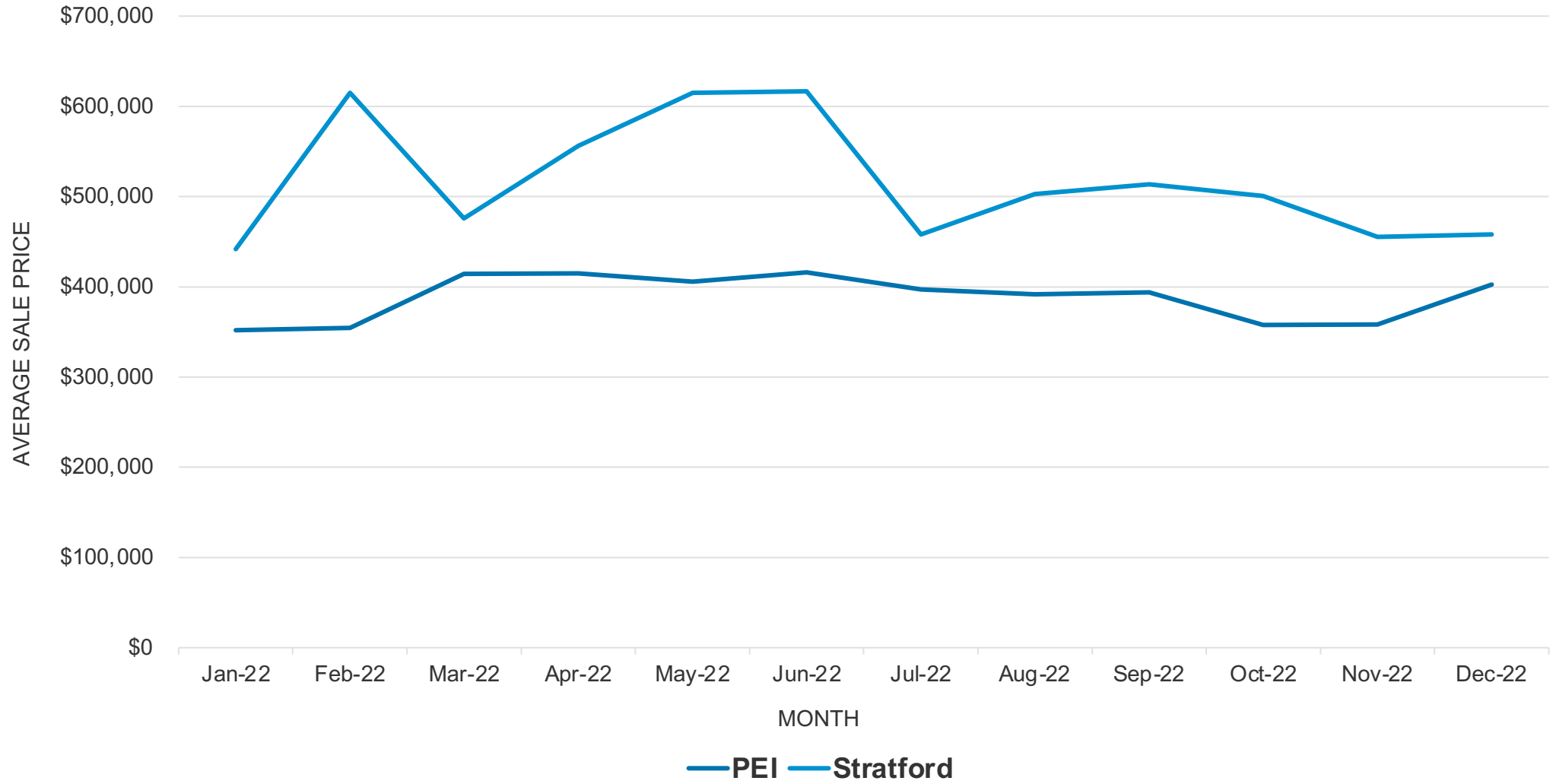
	Town of Stratford	City of Charlottetown	Prince Edward Island	Canada
Median value of (owned) dwellings 2016	\$240,102	\$200,142	\$170,651	\$341,556
Median value of (owned) dwellings 2021	\$400,000	\$348,000	\$300,000	\$472,000
Median monthly shelter costs for rented dwelling 2016	\$945	\$844	\$793	\$910
Median monthly shelter costs for rented dwelling 2021	\$1,150	\$980	\$940	\$1,070

Source: Statistics Canada 2021

PEI Real Estate Association 2022 Average Market Activity

2022		
Residential Market Activity	PEI	Stratford
Average Price	\$388,218	\$523,288
Median Price	\$355,000	\$472,500
Sales Activity	1,989	180
Single Family Market Activity	PEI	Stratford
Average Price	\$405,059	\$566,877
Median Price	\$375,000	\$520,000
Sales Activity	1,658	149
Condominium Market Activity	PEI	Stratford
Average Price	\$301,428	\$306,226
Median Price	\$269,900	\$290,000
Sales Activity	103	27

2022 Residential Market Activity



Source: PEI Real Estate Association 2022

PEI Careers and Salaries— Minimum Wage Position



- This could be a wide range of positions, such as retail, grocery store/fast food cashier, server at a restaurant, gas station attendant.
- Minimum wage as of April 2023 in PEI is **\$14.50/hour**
- Assuming a 40-hour work week, this is an annual income of **~\$30,160**
- Maximum monthly housing costs (30% of pre-tax income) according to CMHC definition of affordable housing: **\$754**

PEI Careers and Salaries— Teacher



- Base salary for new teacher (PEITF MOA): **\$50,337**
- 30% pre-tax income = **\$15,101**
- Max. housing costs per month based on affordable housing definition (CMHC): **\$1,258**

PEI Careers and Salaries— Police Officer



- Base salary estimate for new Police Officer in PEI: **\$58,323**
- 30% pre-tax income = **\$17,496**
- Max. housing costs per month based on affordable housing definition (CMHC): **\$1,458**

PEI Careers and Salaries— Registered Nurse (RN) & Licensed Practical Nurse (LPN)



- RN base rate of pay is **\$34.3/hour** (assuming 40-hour work week, this would be an annual salary of ~\$71,344)
- Maximum monthly housing costs (30% of pre-tax income) according to CMHC definition of affordable housing for an RN: **\$1,783**
- LPN base rate of pay is **\$22/hour** (assuming 40-hour work week this would be an annual salary of ~45,760)
- Maximum monthly housing costs (30% of pre-tax income) according to CMHC definition of affordable housing for an LPN: **\$1,144**

Career	Base Salary	Base Rate Per Hour (if applicable)	Max. Affordable Monthly Housing Costs (30% pre-tax income)
Minimum Wage Position	~\$30,160	\$14.50/hour	\$754
Teacher	\$50,337		\$1,258
Police Officer	\$58,323		\$1,458
Registered Nurse (RN)	~\$71,344	\$34.30/hour	\$1,783
Licensed Practical Nurse (LPN)	~\$45,760	\$22.00/hour	\$1,144

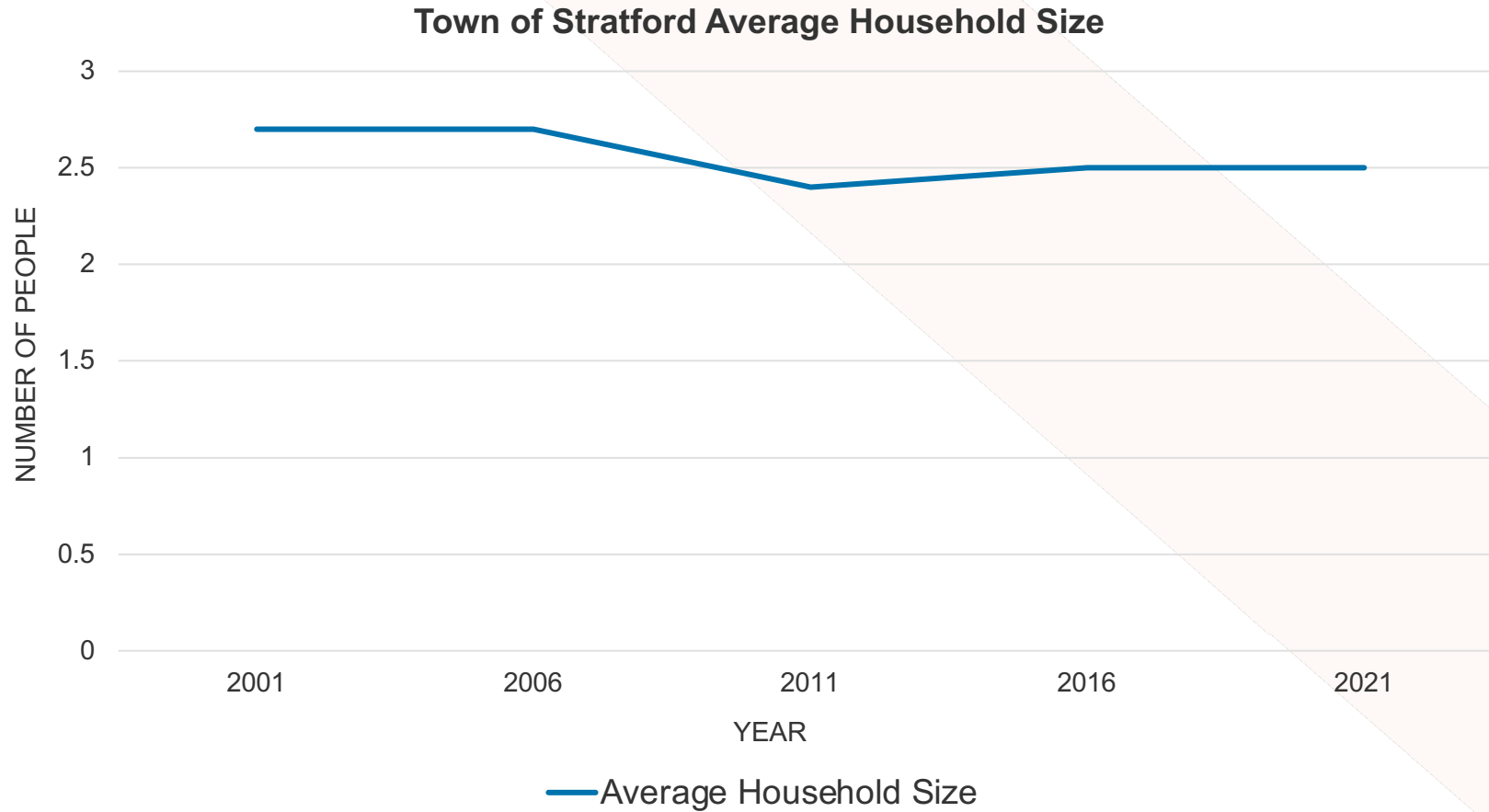
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Vacancy Rates

Town of Stratford private apartment vacancy rate (as of October 2022): **1.5%** (total of all sized apartments)

Same data for 2021 was **0.9%**

Average Household Size



Housing Form/Type

Housing Form by Type	Town of Stratford			
	2021	2016	2011	2006
Total — Occupied private dwellings by structural type of dwelling 100% data	4,305	3,820	3,285	2,640
Single-detached house	66%	67%	72%	77%
Semi-detached house	9%	9%	9%	8%
Row house	4%	3%	2%	1%
Apartment or flat in a duplex	1%	1%	1%	2%
Apartment in a building that has fewer than five stories	20%	20%	16%	12%
Apartment in a building that has five or more stories	1%	0	0	0

Source: Statistics Canada 2021

Town of Stratford Development Permits 2011—March 2023

Development Permits for New Builds (2011–March 2023)	Count	Percentage
Single Family Dwelling/Single-detached House	604	82%
Semi-detached House/duplex	51	6%
Rowhouse/Townhouse	59	8%
Apartment	27	4%
Total	741	100%

So what?

Main message — we won't have enough housing, prices will continue to go up, and people will have nowhere to live

- The above statement is specifically talking about the number of dwellings vs. Population
- This does not even take into account "affordability"

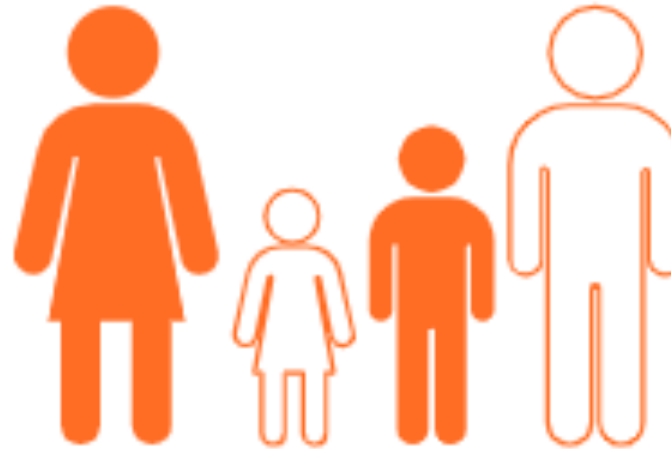
Growth Management

- Low vacancy rate
- Rising average house cost
- Rising rents
- Forecasted continued population growth

FUTURE POPULATION AND HOUSING NEEDS

- If the Capital Region can sustain the elevated level of growth experienced between 2016 and 2021, we calculate it will add 67,195 residents requiring 28,849 more dwelling units.

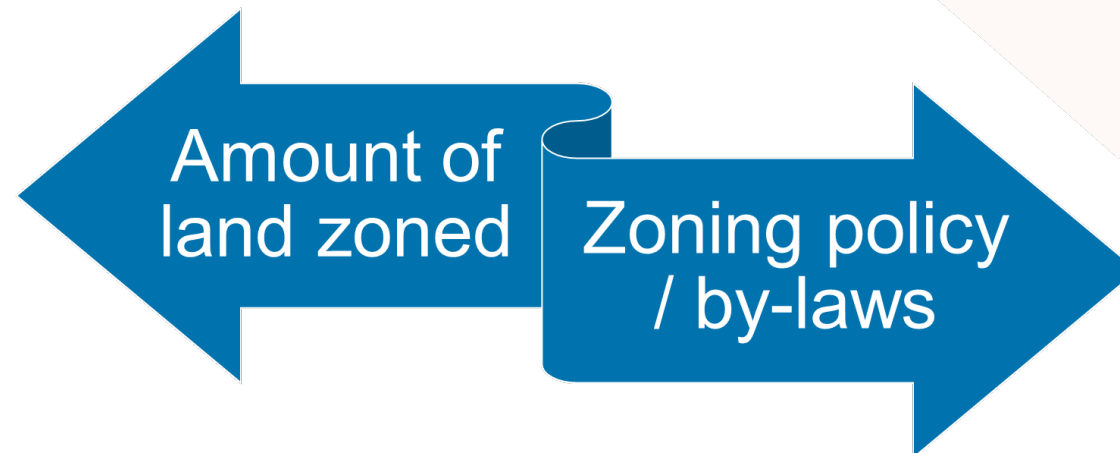
Conservatively, we estimate **1,780 of these units (6.2%)** should be affordable units for households in core housing need.



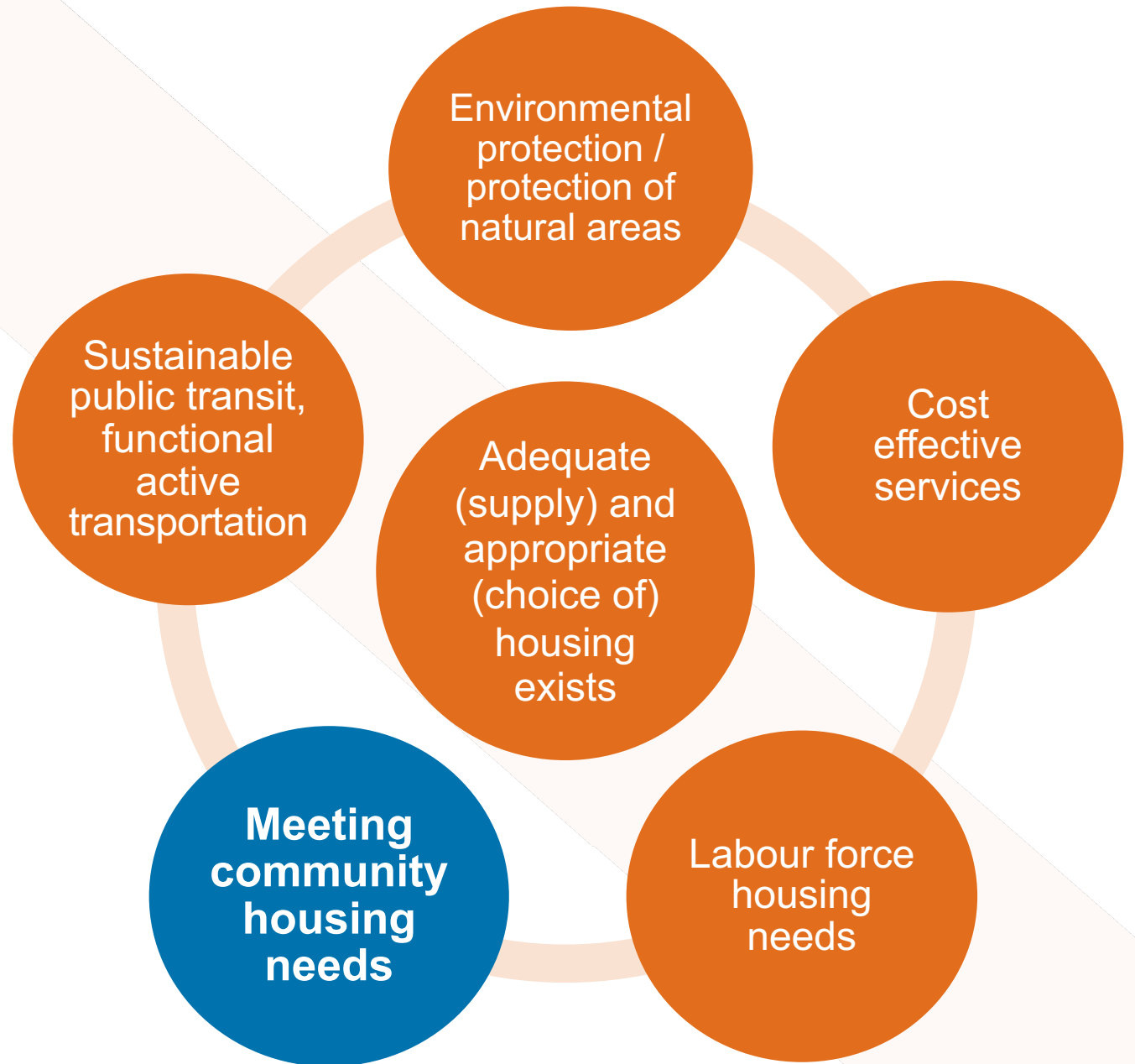
Source: Stantec Growth Management Study Capital Region

Planning Research Findings

- There is a need for additional housing — and additional affordable housing
- Stantec's Charlottetown Region Growth Study and Housing Needs Assessment released in May 2022 identifies an anticipated shortfall in housing in Stratford if current trends continue — **shortfall of 2000 to 4000 units by 2041** — at least a third of which would have to be affordable
- Challenges for Mixed Use/Density. Current zoning limits densification —both in amount of land zoned and permitted uses



More than just number & affordability of dwellings



Our Problem

Lack of affordable housing, lack of available housing placing increasing pressure on affordable housing. Zoning barriers to pre-development:

- Public opposition to density
- Adversarial process
- Lack of knowledge of planning processes
- Planning framework that inherently limits ability to meet the shortfall

Public support and engagement are required to address these predevelopment barriers

Housing: Fundamental Human Right

- 1948, United Nations *Universal Declaration of Human Rights*, Article 25
- 2019, Government of Canada, *National Housing Strategy Act*, Section 4

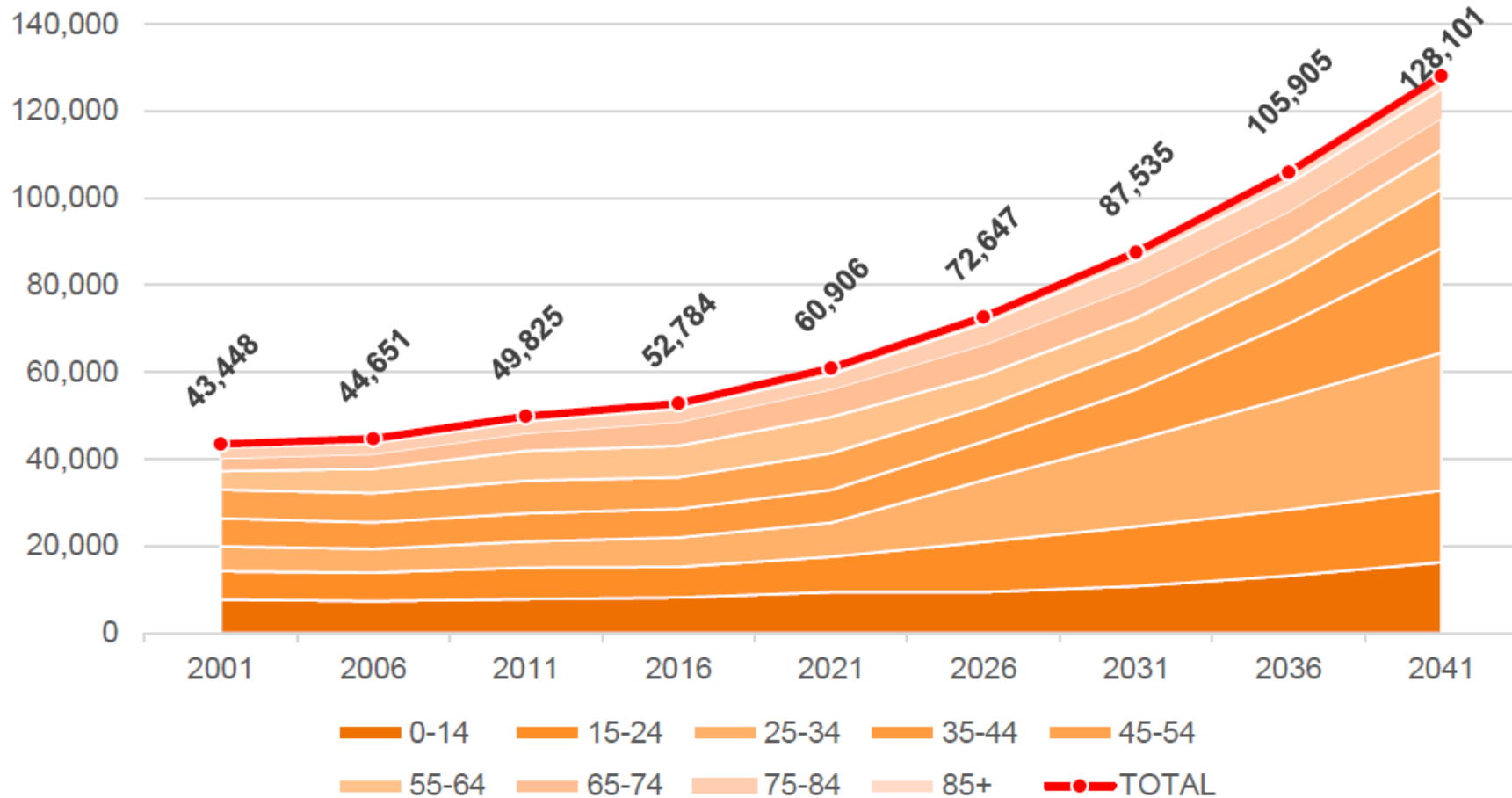
4. It is declared to be the housing policy of the Government of Canada to

- (a) recognize that the right to adequate housing is a fundamental human right affirmed in international law;
- (b) recognize that housing is essential to the inherent dignity and well-being of the person and to building sustainable and inclusive communities;
- (c) support improved housing outcomes for the people of Canada; and
- (d) further the progressive realization of the right to adequate housing as recognized in the International Covenant on Economic, Social and Cultural Rights.

National Housing Strategy Act, S.C. 2019, c. 29, s. 313, Assented to 2019-06-21. Retrieved from: <https://laws-lois.justice.gc.ca/eng/acts/n-11.2/FullText.html>

Growth Study Insights

Figure 6-12 Population by Age Group, Capital Region, Scenario 3, 2001-2041



Growth Study Insights

Under Scenario 3 in the report (highest rate of growth), the Capital Region will require 28,849 additional dwelling units from 2021 – 2041 (1,442 units per year)

Estimated dwelling units needed by type in Capital Region, **based on today's housing preferences** (Scenario 3):

Timeframe	Single-Family Dwelling	Apartment (5+ Storeys)	Semi-detached Dwelling	Rowhouse	Duplex	Apartment 1 — 4 Storeys	Other Attached Dwellings	Moveable Dwelling
2021 – 2041	13,929	56	2,943	1,419	884	9,018	4	596

Growth Study Insights

The estimated number of units required to accommodate population growth in Stratford by 2041 is 7,979

The number of units that could potentially be built in Stratford under pre-Crossroads zoning requirements is 5,955 (4,606-5,433 of those units being serviced).

The number of likely-to-be developed units (serviced and undeveloped) in the Town is only **3,134**, giving a **deficit of ~4,845 units** (Table 6-4 in Stantec Report) by 2041.

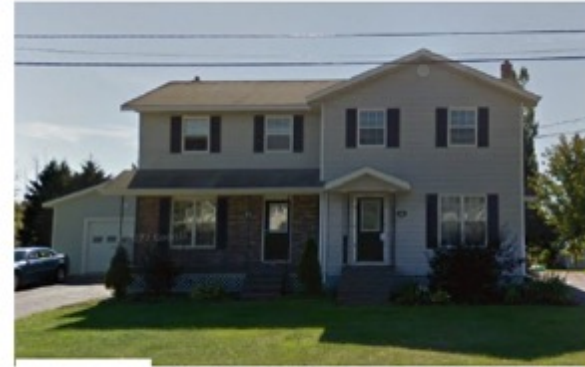
Stantec — Stratford Housing Typologies

Source: Stantec (slides used for Growth Management Strategy Workshop 2023)

CURRENT TYPOLOGIES



SINGLE

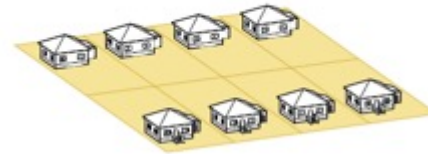


TWO-UNIT

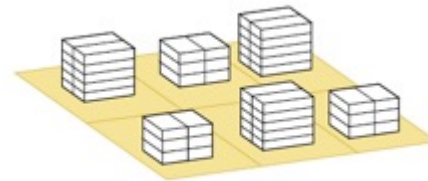


MULTI-UNIT

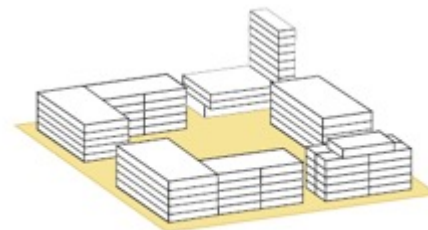
Stantec—Residential Density



LOW DENSITY - 8 units / ha



MEDIUM DENSITY - 80 units / ha



HIGH DENSITY - 150 units / ha

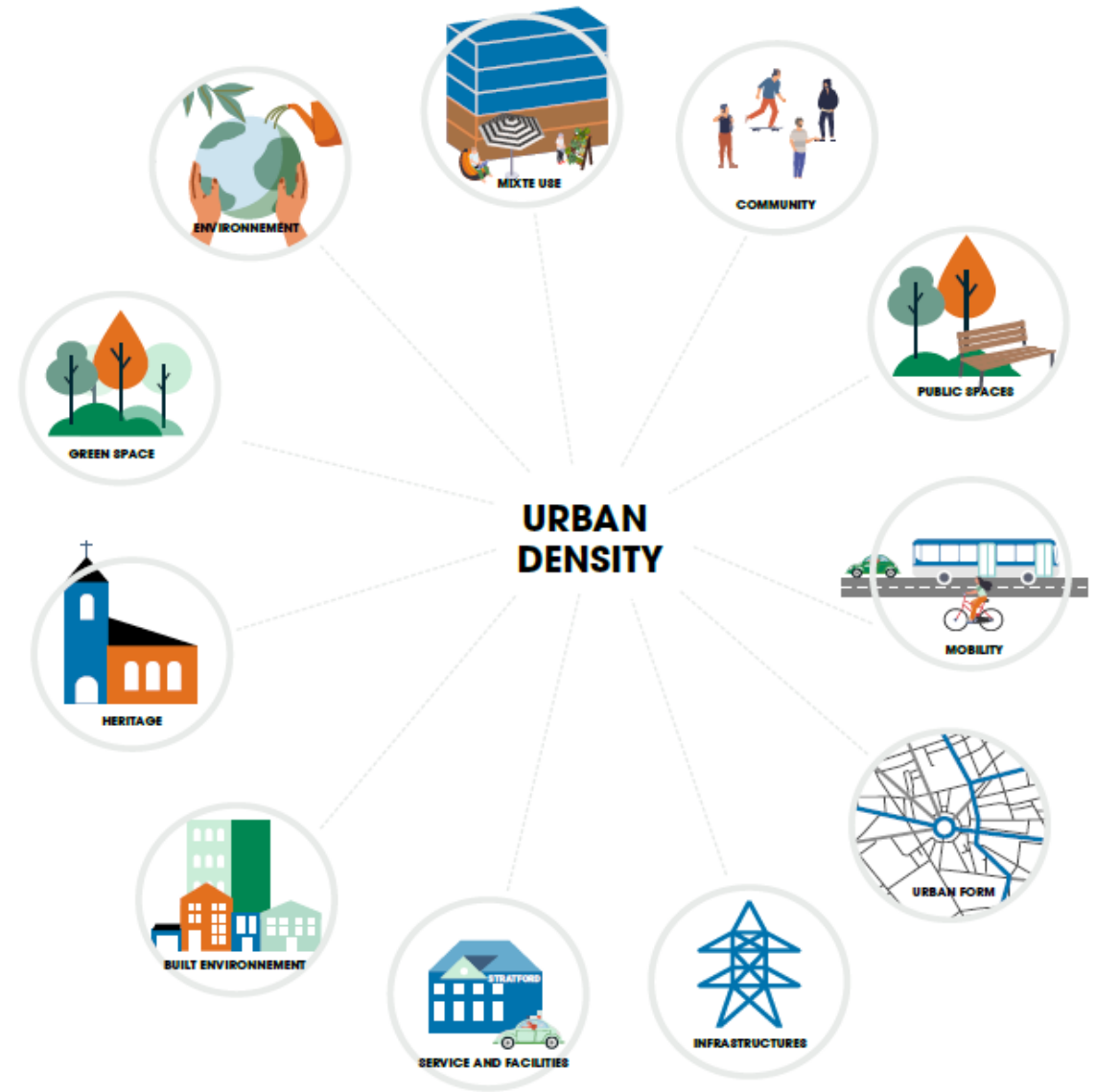
$$\begin{array}{c} \text{RESIDENTIAL} \\ \text{DENSITY} \\ \\ = \\ \\ \text{NUMBER OF DWELLINGS} \\ \hline \text{SURFACE AREA OF THE} \\ \text{TERRITORY STUDIED} \end{array}$$

CONCEPT OF DENSITY

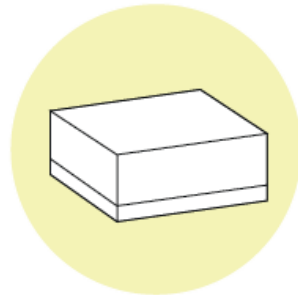
WHAT DOES DENSITY BRINGS IN A COMMUNITY ?

- › Diversification of **Community Services**
- › Ability to protect the **Environment**
- › Increase the **profitability of Infrastructure**
- › Reorientation of **Open space from private to public**

- › A **denser Built Form** that must adapt to specific communities
- › Creation of a **centrality**
- › Creation of living environments such as **landscape and public facilities**
- › Reduce **automobile travel** and increase **active transportation**

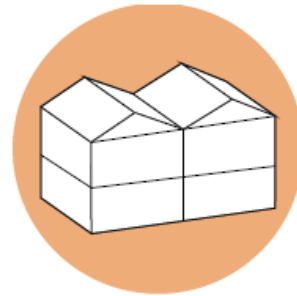


DENSIFICATION MANAGEMENT TYPOLOGY



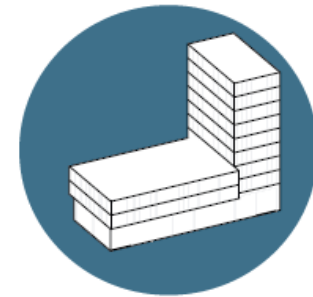
TYPE 1

LOW-DENSITY



TYPE 2

MID-RISE



TYPE 3

HIGH-RISE

Source: Stantec (slides used for Growth Management Strategy Workshop 2023)

RESIDENTIAL TYPOLOGY

TYPE 1



SINGLE UNIT

SCALE	Small
SITTING	On residential street and/or insideblock
HEIGHT	1 storey
NUMBER OF UNITS	1 unit

TYPE 2



PLEX

SCALE	Small
SITTING	On residential street and/or insideblock
HEIGHT	2-3 stories
NUMBER OF UNITS	1-2 units

TYPE 3



TOWNHOUSE

SCALE	Small
SITTING	On residential street and/or insideblock
HEIGHT	2-3 stories
NUMBER OF UNITS	2-6 units

TYPE 4



PLEX

SCALE	Small - Medium
SITTING	On residential street and/or insideblock
HEIGHT	3-4 stories
NUMBER OF UNITS	3-6 units

Source: Stantec (slides used for Growth Management Strategy Workshop 2023)

RESIDENTIAL TYPOLOGY

TYPE 5



PLEX

SCALE	Small - Medium
SITTING	On residential street and/or insideblock
HEIGHT	3 - 4 stories
NUMBER OF UNITS	3 - 6 units

TYPE 6



MULTIFAMILY

SCALE	Medium
SITTING	On residential street and/or insideblock
HEIGHT	3 - 5 stories
NUMBER OF UNITS	8 - 12 units

TYPE 7



MULTIFAMILY

SCALE	Medium - Large
SITTING	On residential street and/or insideblock
HEIGHT	3 - 5 stories
NUMBER OF UNITS	-

TYPE 8



MIXED USE

SCALE	Large
SITTING	Adjacent street - highway
HEIGHT	3 - 7 stories
NUMBER OF UNITS	-

Source: Stantec (slides used for Growth Management Strategy Workshop 2023)

CMHC Housing Continuum

THE HOUSING CONTINUUM



Source: CMHC <https://www.cmhc-schl.gc.ca/en/professionals/industry-innovation-and-leadership/industry-expertise/affordable-housing/about-affordable-housing/affordable-housing-in-canada>