The Capital Region Board Housing Needs Assessment summarizes housing need and demand to inform planning for housing options within the Capital Region. Six detailed Sub-Region Housing Needs Assessments support this document.
Foreword

This Capital Region Board Housing Needs Assessment Summary provides a high-level overview of the market to inform current and anticipated housing needs in the Capital Region. The Capital Region Board (CRB) developed the Housing Assessment Tool (HAT) used in this assessment as an important first step in providing an analysis of the current housing situation, recent trends, and future needs in each of its six housing sub-regions. These Needs Assessments will inform and support the creation of future integrated regional housing plans within the Capital Region.

Household Core Need Analysis

- There are currently 30,720 renter households estimated to be in core housing need.
- The primary core housing need challenge across the region is affordability, especially among renters, who are five times as likely as owners to be in core need.
- Lone-parent families and seniors who rent have the highest incidence and number of households in need of Non-Market Housing.
- There are 30,163 Non-Market Housing units in the Capital Region.
- On average, 49% of households in core need are served by the Non-Market housing portfolio. Only Edmonton (50%) and Lamont (73%) have service levels above the region average. Sturgeon and Parkland have the lowest percent of households in need (43%) served by the existing Non-Market housing portfolio.
- Future housing demand is growing at an average annual rate of 12,791 units: 1,593 of those units are for households in core need, 1,892 units are for households requiring Market Affordable housing, and 9,306 units are households requiring Pure Market housing.
• Household maintainers 65+ years of age are increasing as a share of the total need and those below 65 years of age are decreasing over the coming six years.

**Housing Stock Considerations**

• The predominant form of housing supply is detached single-family homes, which meet the requirements of families with children.

• The growing population of single person and senior households require smaller, more appropriate form of rental housing such as apartments and other options.

• The limited supply of smaller apartment options, especially in the suburban sub-regions, can lead to high rents.

• Lack of smaller apartment options will lead to young singles, as well as some seniors, moving from their current community.
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Glossary and Acronyms

**Affordable Housing Program**
The Province of Alberta’s Affordable Housing Program provides one-time capital grants for the construction/acquisition of rental housing units. Grant recipients are required to provide rents that are at least 10% below market. Units are targeted at households with incomes at or below HILs. There are no operating subsidies for these units.

**Canada Mortgage and Housing Corporation (CMHC)**
CMHC is Canada’s national housing agency. Established as a government-owned corporation in 1946 to address Canada’s post-war housing shortage, the agency has grown into a major national institution. CMHC is Canada’s premier provider of mortgage loan insurance, mortgage-backed securities, housing policy and programs, and housing research.

**Capital Region**
The Capital Region includes lands lying within the boundaries of the participating municipalities: Beaumont, Bon Accord, Bruderheim, Calmar, Devon, Edmonton, Fort Saskatchewan, Gibbons, Lamont, Lamont County, Leduc, Leduc County, Legal, Morinville, Parkland County, Redwater, Spruce Grove, St. Albert, Stony Plain, Strathcona County, Sturgeon County, Thorsby, Wabamun, and Warburg.

**Capital Region Board**
The Capital Region Board was established in 2008, under Capital Region Board Regulation 38/2012, of the Municipal Government Act. The Capital Region Board is a non-profit corporation comprised of 24 member municipalities from within the Region.

**Co-Operative Housing (Co-op)**
Co-op housing is collectively owned and managed by its members who live in the housing. Co-op members actively participate in decision-making and share the work involved in managing the building and housing community.

**Community Amenities**
Community amenities are capital facilities or improvements needed to service a growing population or to create a more complete community such as leisure centres, police buildings, cultural centres, libraries, parks, and playgrounds. Some definitions also include the natural amenities of rivers, lakes, and walking trails. Other definitions include access to commercial amenities such as shopping centres, medical facilities, and restaurants.

**Community Housing Program**
The Province of Alberta’s Community Housing Program provides subsidized rental housing to low-income households who cannot afford private sector accommodation. Applicants whose income falls below CNITS are eligible to apply. Management and tenant selection is delegated to the local housing operators (usually a Management Body). Applicants are given priority based on need, as determined by income, assets, and current housing condition. A tenant’s rent, which
includes heat, water and sewer expenses, is based on 30% of a household’s adjusted income. The tenant is responsible for electricity, telephone and cable television, as well as any additional services they may request (such as parking). Operating deficits are cost-shared with Canada Mortgage and Housing Corporation. One of the orders of government owns the units.

**Core Housing Need (Core Need)**
This is a concept developed in the 1980’s to define housing need and involves a two-step assessment. First, does a household experience any one or combination of housing problems covering suitability (crowding), adequacy (building condition) or affordability (paying greater than 30% for shelter)? Second, is their income below a defined income threshold that varies by market/city and by household size?

**CMA**
Census Metropolitan Area.

**CNIT (Core Need Income Threshold)**
Canada Mortgage and Housing Corporation establishes local income limits each year. Households with annual incomes equal to or less than the HIL are said to have insufficient income to afford the on-going costs of suitable and adequate rental units in their area. Incomes below this level may be eligible for various rental subsidy programs.

**Condominium (Condo)**
This is a form of tenure that creates title and ownership rights in virtual three dimensions, as opposed to land title. The term refers to a legal ownership structure and should not be confused with built form. For example, an apartment that is owned may be a condominium, but an apartment may also be rented.

**Diversification of Housing Types**
This is a range of housing types, including single-family dwellings, duplex, townhome, condominium and apartment types, mixed throughout neighborhoods to serve a broad range of residents of varied age and income.

**EREB**
The Edmonton Real Estate Board is an Association of realtors and provides data and statistics on home sales and prices in the Edmonton area.

**Garage Suites**
A garage suite is a self-contained dwelling located above a rear attached garage which is accessory to a single detached dwelling. It must have an entrance separate from the vehicle entrance, either from the interior or exterior of the structure, and include cooking facilities, a bathroom and bedroom(s).

**Habitat for Humanity Homes**
Housing units are built with voluntary labour, using cash and material donations. When completed the units are sold to qualifying, working, low and moderate income households. The household is provided an interest free mortgage and the mortgage is amortized to 25% of the household’s income. When the recipient household decides to sell the unit, it is sold back to Habitat for Humanity and another qualifying household receives a place to live.

**HAT**
Housing Assessment Tool. The HAT is the tool developed for the Capital Region to assess housing need across all Sub-Regions.
**HICO**
Housing In Canada Online. A CMHC interactive data file providing historic data and core need estimates for a wide geography of cities and census areas.

**HIL**
Housing Income Limits (new label for former CNITs, as above).

**Home Program**
Through education, financial assistance and one-on-one counselling, the Home Program helps low income people become homeowners. Education sessions are available to anyone interested in owning a home. Participants do not have to be first time buyers or low-income buyers. Low-income buyers (below CNITs) who have completed education sessions can apply for down payment assistance.

**Household**
Refers to a person or a group of persons (other than foreign residents) who occupy the same dwelling and do not have a usual place of residence elsewhere in Canada. It may consist of a family group (census family) with or without other persons, of two or more families sharing a dwelling, of a group of unrelated persons, or of one person living alone. When age is cross-tabulated with households, this uses the reported age of the household maintainer.

**Housing Allowance**
This is housing assistance to help households manage high shelter cost burden and is distinct from the Rent Supplement. Payments are made to the household, not to the property owner, and the Housing Allowance is therefore portable. A Housing Allowance may be structured to pay a fixed monthly allowance or can pay based on the RGI-market rent difference.

**Housing Continuum**
This is a conceptual framework used to describe a range of housing options from homeless supports to independent market rate housing.

**Incidence of Need**
The frequency (or incidence) of need refers to the tendency that a particular household will experience housing need. For example, if 60 lone-parent households out of 100 lone-parent households experience affordability problems, the incidence (or chance) of need among lone-parents is 60%. In the assessment, incidence refers to affordability need only.

**Inclusive Communities**
Inclusive communities have a variety of housing, commerce, recreational, institutional, social, and public amenities within their boundary. Inclusive communities provide a physical and social environment where residents can live, learn, work, and play without having to travel beyond the community boundary.

**Infill Development**
Development or redevelopment in existing developed areas includes building on vacant or underutilized lands, or re-development of a developed site to a higher density.

**Intensification**
This is the development of a property, site or area at a higher density than currently exists. For example, this includes redevelopment (including the reuse of brownfield sites), development of vacant and/or underutilized lots, the conversion or expansion of existing buildings, and infill development, and may include greenfield sites with development densities higher than historical norms.
Major Repairs Needed
This includes dwellings needing major repairs such as defective plumbing, electrical wiring, and structural repairs to walls, floors, or ceilings.

Market Housing
Market Housing is defined as housing supplied by the private market, without direct government subsidies. Under Market Housing, two sub-categories — Market Affordable Housing and Pure Market Housing — have been further delineated:

Market Affordable Housing is defined as rental or ownership housing that is modest in form and specification and is capable of being produced for moderate income households without upfront or on-going direct government subsidies (such as through regulatory relaxations, efficient design, or tax incentives). This applies to households earning moderate incomes between 100% and 150% of median income.

Pure Market is used to further delineate housing that is affordable to those with incomes greater than median income.

Minor Repairs Needed
This includes dwellings needing minor repairs such as missing or loose floor tiles, bricks, shingles, defective steps, railing, or siding.

Mixed-Income Development
This is a type of development that includes families at various income levels. Mixed-income developments are intended to promote de-concentration of poverty and give lower-income households access to improved amenities.

Mixed-Use Development
This development mixes compatible residential, commercial, institutional, and recreational land uses. The development may exist within an area of land, and/or within buildings, in order to increase density, reduce development footprint through intensification of land use, and to improve public accessibility to the range of mixed land uses.

Multi-family Housing
A building constructed for residential purposes for use by two or more families, such as duplexes, townhomes, and row house developments, multistory, and high-rise apartments.

NHS
National Household Survey (the replacement for the Statistics Canada long form census), administered in May 2011.

Non-Market Housing
Non-Market Housing is defined as housing that is operated and funded, or created, through direct government subsidies. It includes categories of housing based on the associated services needed by the clients. Non-Market Housing is further segmented into the categories of Affordable Housing and Social Housing:

Affordable Housing is rental or ownership housing that generally does not require on-going (operating) subsidies. It is both affordable and targeted for long-term occupancy to households with incomes between 100% and 80% of the median renter income for their household size.

Social Housing is rental housing that requires on-going operating subsidies to make it affordable on a long-term basis to households with
incomes between 80% and 65% or less of the median renter income for their household size.\(^1\)

**Other Non-Profit**
These are non-profit organizations providing rental housing at rents below market rates who do not receive housing subsidies from government.

**Provincial Private Non-Profit Program**
This program provides monthly subsidies to non-profit organizations to cover operating deficits, including a reserve allocation and the mortgage principal and interest payment based on eligible capital costs. Individuals who currently occupy a crowded or inadequate dwelling would be eligible for housing in these units owned by private non-profit groups. The operating deficits are cost-shared with Canada Mortgage and Housing Corporation. Rents are based on 30% of a household’s adjusted income.

**RGI**
Rent Geared to Income.

**Rent Supplement Program**
A subsidy is provided to reduce the market rent for a household with income below CNITs. There is a variety of rent supplement programs, some providing subsidies directly to the property owner, others directly to the tenant. The subsidy can be a fixed rate or based on the income of the household. Typically, these subsidies are funded by the province and administered by a management body.

**Rural and Native Housing Program**
This provincial program funds the construction of a small number of housing units throughout Alberta. Management bodies typically rent out the units in the same manner as the Community Housing Program defined above.

**Secondary Suites**
A secondary suite is a separate and subordinate dwelling unit contained within a detached dwelling. A secondary suite must have a separate entrance from the entrance to the principal dwelling and include a cooking facility, bathroom and bedroom(s) that are separate from those of the principal dwelling.

**Seniors Self-Contained Program**
The Alberta Government provides apartment style accommodation to low and moderate income seniors who are functionally independent with or without assistance from existing community services. Rent, which includes water, heat and sewer expenses, is based on 30% of a household’s adjusted income. The Province owns most of the apartments funded under this program and any operating deficits are fully funded by the Alberta Government. Household income must be below the CNITs to qualify for the program.

**Emergency Shelters**
These are temporary places for people to live until housing that is more permanent is found. An emergency shelter supports people fleeing a specific situation, such as natural or man-made disasters, domestic

\(^1\) “Non-Market Housing” also includes “Emergency Shelters”, “Transitional Housing” and “Supportive Housing”, and requires deeper capital and operating subsidies provided under government programs to enable affordability to households with considerably lower incomes or no incomes at all.
violence or sexual abuse. Emergency shelters sometimes facilitate support groups, and provide meals.

**Special Needs Housing**
Special needs housing are dwellings that have been modified with special features to help people live independently in the community. For example, a unit may be adapted for wheelchair access.

**Supportive Housing**
Supportive housing offers support services onsite to assist tenants to live independently. For example, some providers will offer support for youth or people with substance abuse problems.

**Support Services**
Housing support services help people live independently, regardless of their tenure. They support people who want to stay in their own home. A wide range of people with particular needs can receive housing support services, including homeless people, refugees, women escaping domestic violence, people with a chronic illness, people with a physical impairment or learning disability, seniors, ex-offenders, people with drug and alcohol related problems, and others. They may use these services when their accommodation is temporary (for example, in a crisis) or when they are being re-housed.

A wide range of supported accommodation models exist and some examples include:
- Sheltered housing with 30 or 40 self-contained units of accommodation with on-site support
- Communal facilities and call systems
- Homeless hostels
- Group homes where people share accommodation supported by residential or visiting housing support workers
- Individual scattered or clustered dwellings with floating (flexible) support
- Wet houses for people with substance misuse problems

**Supported Housing**
Rental housing for less than median income households for whom outreach services are accessed from an off-site source (e.g. homecare, aids to daily living, etc.).

**Supportive Living Lodge**
Supportive living settings are operated under the *Alberta Housing Act* (usually by a Management Body) and are designed to provide room and board for seniors who are functionally independent with or without the assistance of community-based services.
Acknowledgements

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The Capital Region Board Needs Assessments acknowledges the significant amount of work that has been, and continues to be, done with respect to homelessness. The current work being completed on homelessness is intended to complement the regional and sub-regional needs assessments.
1.0 Introduction

The Capital Region Board Housing Needs Assessment identifies housing need and demand to support planning for a diverse range of housing options within the Capital Region. Needs Assessments have been completed for six sub-regions: the Edmonton, Lamont, Leduc, Parkland, Strathcona/Fort Saskatchewan and Sturgeon Sub-Regions.

The following names are used in this document to refer to the individual sub-regions. The sub-region name should be interpreted to be inclusive of all municipalities in that sub-region.

### Sub-Region Name | Municipalities in Sub-Region
--- | ---
Edmonton (Sub-Region) | Edmonton
Lamont (Sub-Region) | Lamont County, Bruderheim, Town of Lamont
Leduc (Sub-Region) | Leduc County, City of Leduc, Beaumont, Calmar, Devon, Thorsby, Warburg
Parkland (Sub-Region) | Parkland County, Spruce Grove, Stony Plain, Wabamun
Strathcona/Fort Saskatchewan (Sub-Region) | Strathcona County, Fort Saskatchewan
Sturgeon (Sub-Region) | Sturgeon County, St. Albert, Bon Accord, Gibbons, Legal, Morinville, Redwater

Diagram 1: CRB Housing Sub-Regions
The purpose of the Needs Assessment is to:

- Inform the Capital Region Board of existing and projected Non-Market Housing need and Market Affordable Housing supply, need and demand conditions, and trends;
- Support an integrated planning approach to meet the housing need and demand through a sufficient supply and balanced mix of dwelling types across the housing continuum in each sub-region; and
- Inform sub-regional housing plans that are part of the Capital Region Board Regional Housing Plan (Figure 1).

The Housing Needs Assessments are not intended to assess community amenities and support services. Amenities and services required by households in need will be addressed as part of the sub-regional housing plans.

*Figure 1: Capital Region Board (CRB) Regional Housing Development Process Diagram*
The focus of the region-wide assessment is to examine both how the market is, or is not, meeting housing requirements. The assessments identify core need and Non-Market housing stock across the region to enable a comparison of the state of housing need across the region for program and policy decision-making.

The Capital Region Board Housing Needs Assessment follows the nine-step approach outlined in the Capital Region Board Housing Needs Assessment Framework. The Framework includes a Housing Assessment Tool (HAT) that extrapolates key data to assess the current housing situation, recent trends, and future patterns of development across the region.

**Report Structure**

This Needs Assessment Report provides key data in four main sections:

- **Housing Market Overview** — Housing stock, prices, and household characteristics;
- **Households in Need** — Core housing need estimates;
- **Future Housing Market** — Housing, rental market continuum, housing need and demand 2015–2021;
- **Gap Analysis** — Existing and future housing need gaps, Non-Market and Market Affordable Housing.

Data sources include Canada Census, mainly the National Household Survey (NHS) for 2011 and the Long Form Census for previous years, Canada Mortgage and Housing Corporation (CMHC), and Edmonton Real Estate Board.
2.0 Housing Market Overview

The Housing Market Overview focuses on trends in market supply and demand across the region. How well the market functions directly impacts the residual role of the Non-Market sector. A thorough understanding of the local housing market and conditions is fundamental to develop effective policy and program responses for Non-Market need. Indicators used in this section will form the baseline to measure the effectiveness of future housing plans.

2.1 Housing Stock Characteristics: Current State (2011)

Description
Housing stock characteristics include dwelling type, tenure, age, and condition of supply. This establishes the context for housing options and trends.

Findings
- The region contains more than 450,000 housing options for residents, 72% of which reside in Edmonton (see Table 1, below).
- Just over half (51%) of the housing stock in Edmonton is single-family detached (SFD) housing compared to, 78% in the rest of region.
- 33% of the housing stock in Edmonton is made up of apartments compared to 8–9% for the other sub-regions.

Assessment
- The housing stock outside of Edmonton is dominated by single detached dwellings, which skews tenure mix toward ownership. The rural areas within these sub-regions, where SFDs and moveable dwellings are the normal house type, influence the high proportion of SFDs.
- In the sub-regions surrounding Edmonton, a small rental sector and few apartments provide limited options for smaller and lower income households. Many rentals are SFDs and moveable dwellings in smaller sub-regions, which generally provide more housing than required, resulting in higher rental rates.

T1: Capital Region Board Housing Stock Dwelling Type

<table>
<thead>
<tr>
<th></th>
<th>Edmonton</th>
<th>Lamont</th>
<th>Leduc</th>
<th>Parkland</th>
<th>Strath/ Ft Sask</th>
<th>Sturgeon</th>
<th>Region Percent</th>
<th>Region No.</th>
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<tbody>
<tr>
<td>SFD</td>
<td>51%</td>
<td>93%</td>
<td>77%</td>
<td>77%</td>
<td>79%</td>
<td>78%</td>
<td>59%</td>
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<tr>
<td>Semi-Detached</td>
<td>5%</td>
<td>1%</td>
<td>4%</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>23,715</td>
</tr>
<tr>
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<td>4%</td>
<td>6%</td>
<td>8%</td>
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</tr>
<tr>
<td>Apartment</td>
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<td>9%</td>
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<tr>
<td>Other</td>
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<td>5%</td>
<td>7%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>7,270</td>
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<tr>
<td>Total</td>
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<td>2,630</td>
<td>22,455</td>
<td>26,640</td>
<td>40,460</td>
<td>34,970</td>
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<tr>
<td>Share</td>
<td>72%</td>
<td>1%</td>
<td>5%</td>
<td>6%</td>
<td>9%</td>
<td>8%</td>
<td>25%</td>
<td>451,915</td>
</tr>
</tbody>
</table>
Description
Housing stock characteristics include dwelling type, tenure, age, and condition of supply. This establishes the context for housing options and trends.

Findings
- Only 65% of Edmonton’s dwellings are owner occupied, compared to over 80% in the remaining five sub-regions.
- On average, major repairs are needed on 9% of regional housing stock. The percentage is slightly higher in Edmonton and significantly higher in Lamont.

Assessment
- Edmonton and Lamont have a higher than average proportion of dwellings in need of major repair, suggesting older stock and opportunities for redevelopment.

Description
Housing supply is assessed by examining trends in residential construction activity, including built form (dwelling type) and intended tenure at time of construction of new starts.

Findings
- Housing starts dipped during the 2008 recession and have been increasing ever since.
- Apartment starts are growing as semi-detached and SFD starts have stabilised.
- Most housing construction has been targeted to owners. There has been limited construction aimed at the rental market, especially in 2009 and 2010.
- Rental construction (apartments) has recently increased, particularly in Edmonton. Edmonton also experienced most of the rental starts over the past five or six years that were not stimulated by an Affordable Housing grant.

Assessment
- The shift toward more multiple starts (semi, row, and apartment) over the decade is an encouraging sign of a more diversified housing market. Although these multiple starts do not satisfy housing need and demand, they show that supply is responding to demand.
2.3 Household Characteristics: Type and Size (2011)

**Description**
Type and size of household characteristics are assessed to help identify the size and type of housing needed across the region.

**Findings**
- Couples and two-parent families are the prevalent type of household and account for more than 66% of households in the five sub-regions and 48% in Edmonton.
- Non-family households represent 36% of total households in Edmonton compared to 20% in the region.
- Most non-family households are single person households; this group accounts for a larger proportion in Edmonton compared to the region.
- 29% of Edmonton households are single person while the other sub-regions have 17–19% single person households.

**Assessment**
- Edmonton has substantially different household types and size than the other five sub-regions. Edmonton has fewer families and more small households. Lamont, Leduc, and Strathcona have larger household sizes.
- Edmonton has a greater proportion of one-person households (29%) compared to the other sub-regions (17–19%), which is partly a result of fewer small housing options in the sub-regions.
2.4 Household Characteristics: Age of Household Maintainer (2011)

Description
Age of the household maintainer identifies both the availability of housing for different age groups and the overall demographics of the region.

Findings
- First time buyers are typically those aged under 39. This age cohort represents 36% of household maintainers in Edmonton and 28% of household maintainers in the remaining five sub-regions.
- 31% of household maintainers in Edmonton and 35% of household maintainers in the remaining five sub-regions are 40–54 years of age.
- 17% of household maintainers in Edmonton and 18% of household maintainers in the remaining five sub-regions are over 65 years of age.

Assessment
- Edmonton has a younger overall age of household maintainer, a factor likely related to urban lifestyle and housing availability.
- Edmonton also has a higher proportion of young renter household maintainers compared to the other five sub-regions.
- There are a higher proportion of older renters in the other five sub-regions.

![F7: Age of Household Maintainer](image)

![F8: Renter Household Maintainer Age](image)
2.5 Household Income Profile (2011)

Description
Household income provides a base indicator to determine affordability. Median household income is used to determine a household’s ability to find housing in their community at an affordable price.

Findings
- As is the case everywhere, owners have much higher incomes than renters.
- Incomes for both owners and renters in Edmonton and Lamont tend to be lower than the median income in the region.
- Higher household incomes in Sturgeon and Strathcona/Fort Saskatchewan Sub-Regions are reflected in the following:
  - More two-earner, older, established households;
  - Fewer renters, which on average have much lower household incomes, than the region;
  - Higher ownership rate.
- Sturgeon and Strathcona/Fort Saskatchewan households are wealthier than households in other sub-regions.
- The high median income in both these sub-regions is influenced by a large proportion of households (more than 50%) earning more than $100,000 (compared to 33% for Edmonton).
- More than 40% of households in Edmonton earn less than $60,000 per year.

Assessment
- The high median incomes are partly a reflection of the high percentage of owners, who have higher incomes than renter households do.
- Higher renter incomes may reflect demand for large sized rental homes among families.
3.0 Households in Need

Determining need and demand for Non-Market Housing and Market Affordable Housing is one of several reasons for undertaking a housing needs assessment. Comparing the distribution of the households in Non-Market Housing need and Market Affordable Housing demand across the region will point to current and future gaps. Consistent and reliable data is required to develop integrated plans to address housing imbalances in the sub-regions and region. Canada Mortgage and Housing Corporation (CMHC) has developed a Core Housing Need measure, which uses a two-step process to identify the number and incidence of households in need of housing:

- Does a household experience any one of or a combination of problems based on three standard measures of suitability (number of bedrooms compared to household composition), condition (need for major repair) and affordability (paying greater than 30% of income for housing)? And,
- Is the household’s gross income below a specified threshold (which is calculated separately for each Census Metropolitan Area [CMA] and for each household size, such as one person or two-person households)?

Another approach is to examine households experiencing severe shelter cost burdens. This is represented by housing costs in excess of 50% of income from the 2011 National Households Survey (NHS). This measure of acute need is used alongside core need (which uses 30% of income) as a way to help understand which households face a significant housing cost challenge.

As mentioned in the discussion on the housing continuum, the homeless are included in the Non-Market Housing category. Although the homeless are not included in the core need data, they are an important aspect of need in all of the sub-regions, most significantly in Edmonton. Edmonton, the only Sub-Region to have undertaken a homeless count to date, found 2,252 homeless people in 2012, about 8.3% of core housing need. Work to research the problem of homelessness is ongoing in many of the other sub-regions.

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2 Core Housing Need estimates are derived from the Canada Census every five years, which does not count the homeless.
3.1 Core Housing Need Estimates (2011)

Description
Core housing need is estimated using magnitude (number of households) and incidence or tendency to be in need. The CMHC data provides insight into the characteristics (tenure, age, and family type) of households in need.

Findings
- Affordability is consistently the most significant problem. Core need totals in Figure 11 exceed 100% due to some households experiencing two or three of the problems.
- After affordability, the next largest problem is condition (suitability), which reflects need for major repairs. This is especially notable in Lamont, which has an older housing stock.
- Crowding is not a significant issue, although is slightly higher in Edmonton than the other sub-regions.
- In absolute counts, a significant number of owners (17,755) are found to be in core need. This represents quite a small proportion (6%) of all owners. Owners have an asset in their property that provides financial security not available to renters.
- Renters, by contrast, have no property asset and, across all the sub-regions, experience a much higher incidence of need.
- Renters total 30,720 households across the region and experience core housing need at about five times (26%) the rate of homeowners (6%) in Edmonton.

Assessment
- Renter households have a much higher incidence and severity of need than owner households.
- Actions to address core need should focus on the affordability of renter households, which experience far more severe challenges than owners do.
Description
Renters have a high incidence of core need. The charts focus on renter households to identify those in greatest need.

Findings
- Core housing need is most prevalent among lone-parent families and non-family households.
- While lone-parents total a small number of households, many of them are in need: this ranges from a high of 49% of lone-parent families in Edmonton to 37% in Strathcona/Fort Saskatchewan.
- One-quarter to one-third of non-family households are in core need and is most prominent in Sturgeon. 6,785 couple families (17% of all couple families) are in need in Edmonton.
- Share of need varies by age cohort. In Lamont, where total numbers are quite small, the incidence of need for the 30–44 year cohorts is 41%. The incidence of need for the same age cohorts in Edmonton is 34%.
- In other sub-regions, the age cohort with the highest incidence of need tends to be seniors 65 years of age and over. The need ranges from 34% in Sturgeon to 39% in Parkland and 40% in Leduc.

Assessment
- The greatest need is among lone-parents and senior renter households. In part, this need reflects low household incomes. Also, lone-parents require larger, and therefore higher-priced, homes to accommodate children.
- Non-elderly singles also require a significant number of Non-Market Housing units to meet their needs.
- The low number and cost of small sized rental units in the market results in limited options for singles and small households of all ages.
3.2 Acute Need

Description
The 2011 National Household Survey (NHS) identifies households who pay more than 50% of their income for housing and are experiencing acute housing needs*.

Findings
- Of all household types, single non-families experience the highest incidence of acute need at 22% in Edmonton and Lamont, and just below 20% in the region.
- Lone-parent families have the second highest incidence of acute need at 20% in Edmonton and between 15% and 17% in the other five sub-regions.
- Acute affordability is less significant for lone-parents in absolute count, but as a proportion of all lone-parents, they rank high. 17% of lone-parents pay over 50% for housing and are in acute need.
- As in core need, acute need is significant among renters.

Assessment
- 50,765 households are in acute need across the region. 41,124 (more than 80%) households in acute need are in Edmonton.
- Singles and lone-parent families are the largest household type in need.

*Almost 5% of all households (8.5% of renters) in the region pay over 100% of their income for housing. This is a statistical anomaly caused, in part, by change in household composition or status in prior years. It occurs because NHS collects shelter cost in April 2011, but income data is for the prior year (2010). While included here, this data should be treated with caution.
3.3 Non-Market Housing Portfolio

Description
The type of units in the Non-Market Housing Portfolio and relative level of access to those units by different household types is an important component of determining the priority for addressing current households in need.

Assessment
- The Region’s 30,163 Non-Market Housing units are evenly distributed between singles (33%), families (34%), and seniors (33%).

T2: Region Non-Market Housing Portfolio Summary*

<table>
<thead>
<tr>
<th>Type of Housing/Program</th>
<th>Singles</th>
<th>Families</th>
<th>Seniors</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Emergency Shelters</td>
<td>778</td>
<td>67</td>
<td>7</td>
<td>852</td>
</tr>
<tr>
<td>2. Transitional Accommodation</td>
<td>1,094</td>
<td>44</td>
<td>62</td>
<td>1,200</td>
</tr>
<tr>
<td>3. Permanent Supportive Housing (Lodge)*</td>
<td>1,290</td>
<td>0</td>
<td>2,829</td>
<td>4,119</td>
</tr>
<tr>
<td>4. Supported Housing — Semi-independent</td>
<td>2,818</td>
<td>999</td>
<td>1,094</td>
<td>4,911</td>
</tr>
<tr>
<td>5. Non-Profit Housing</td>
<td>980</td>
<td>172</td>
<td>518</td>
<td>1,670</td>
</tr>
<tr>
<td>6. Community Housing</td>
<td>274</td>
<td>4,292</td>
<td>48</td>
<td>4,614</td>
</tr>
<tr>
<td>7. Seniors’ Self-Contained Housing</td>
<td>0</td>
<td>0</td>
<td>3,778</td>
<td>3,778</td>
</tr>
<tr>
<td>8. Rent Supplements</td>
<td>720</td>
<td>843</td>
<td>0</td>
<td>1,563</td>
</tr>
<tr>
<td>9. Affordable Housing</td>
<td>1,275</td>
<td>2,200</td>
<td>1,451</td>
<td>4,926</td>
</tr>
<tr>
<td>10. Co-op Housing</td>
<td>78</td>
<td>1,305</td>
<td>114</td>
<td>1,497</td>
</tr>
<tr>
<td>11. Habitat for Humanity</td>
<td>0</td>
<td>251</td>
<td>0</td>
<td>251</td>
</tr>
<tr>
<td>12. Secondary Suites</td>
<td>698</td>
<td>182</td>
<td>0</td>
<td>780</td>
</tr>
<tr>
<td>13. Other (Specify)</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>9,905</td>
<td>10,357</td>
<td>9,901</td>
<td>30,163</td>
</tr>
</tbody>
</table>

* Share of Region Portfolio

* There is a wide range of supportive living facilities designed to serve health and related accommodation and nutritional needs. SL2 (Lodge level accommodation) is included in the Non-Market Housing portfolio, but the SL-3 (Assisted Living), SL-4 (Enhanced Assisted Living), SL-4d (Dementia Care) and Continuing Care accommodation are not included mainly because they are health (not income) related and must qualify through Alberta Health Services for entry. Also, the majority of beds/units are not subsidized at any given point in time and should not be included in the Non-Market housing portfolio.
Description
The Non-Market Housing portfolio is assessed to determine the share of Non-Market Housing provided across the sub-regions.

Findings
- Edmonton has 89% of the region’s Non-Market Housing portfolio with 26,869 units.
- Leduc, Sturgeon, and Strathcona/Fort Saskatchewan Sub-Regions have a relatively diversified portfolio with 2.6%, 2.5%, and 3.1% of the region’s units, respectively.

Assessment
- Other than Edmonton, there is a limited diversity of Non-Market Housing programs in the sub-regions.
- Of all the sub-regions, Edmonton has the greatest number of Non-Market Housing programs and facilities.

T3: Sub-Region Non-Market Housing Portfolio

<table>
<thead>
<tr>
<th>Type of Housing/Program</th>
<th>Edmonton</th>
<th>Lamont</th>
<th>Leduc</th>
<th>Parkland</th>
<th>Strathcona/Fort Sask</th>
<th>Sturgeon</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Emergency Shelters</td>
<td>817</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>35</td>
<td>0</td>
<td>852</td>
</tr>
<tr>
<td>2. Transitional Accommodation</td>
<td>1,200</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1,200</td>
</tr>
<tr>
<td>3. Permanent Supportive Housing (Lodge)*</td>
<td>3,289</td>
<td>98</td>
<td>181</td>
<td>57</td>
<td>238</td>
<td>256</td>
<td>4,119</td>
</tr>
<tr>
<td>4. Supported Housing — Semi-Independent</td>
<td>4,845</td>
<td>0</td>
<td>0</td>
<td>42</td>
<td>0</td>
<td>24</td>
<td>4,911</td>
</tr>
<tr>
<td>5. Non-Profit Housing</td>
<td>1,395</td>
<td>42</td>
<td>0</td>
<td>37</td>
<td>12</td>
<td>4</td>
<td>1,670</td>
</tr>
<tr>
<td>6. Community Housing</td>
<td>4,569</td>
<td>2</td>
<td>42</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>4,614</td>
</tr>
<tr>
<td>7. Seniors’ Self-Contained Housing</td>
<td>3,136</td>
<td>66</td>
<td>170</td>
<td>135</td>
<td>158</td>
<td>113</td>
<td>3,778</td>
</tr>
<tr>
<td>8. Rent Supplements</td>
<td>1,224</td>
<td>4</td>
<td>188</td>
<td>54</td>
<td>35</td>
<td>58</td>
<td>1,563</td>
</tr>
<tr>
<td>9. Affordable Housing</td>
<td>4,336</td>
<td>0</td>
<td>205</td>
<td>178</td>
<td>129</td>
<td>78</td>
<td>4,926</td>
</tr>
<tr>
<td>10. Co-op Housing</td>
<td>1,205</td>
<td>0</td>
<td>0</td>
<td>89</td>
<td>110</td>
<td>93</td>
<td>1,497</td>
</tr>
<tr>
<td>11. Habitat for Humanity</td>
<td>163</td>
<td>0</td>
<td>5</td>
<td>24</td>
<td>24</td>
<td>35</td>
<td>251</td>
</tr>
<tr>
<td>12. Secondary Suites</td>
<td>690</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>10</td>
<td>80</td>
<td>780</td>
</tr>
<tr>
<td>13. Other (Specify)</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Total</td>
<td>26,869</td>
<td>214</td>
<td>791</td>
<td>616</td>
<td>931</td>
<td>742</td>
<td>30,163</td>
</tr>
</tbody>
</table>

Share of Region Portfolio

<table>
<thead>
<tr>
<th>Description</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Emergency Shelters</td>
<td>89.0%</td>
</tr>
<tr>
<td>2. Transitional Accommodation</td>
<td>0.7%</td>
</tr>
<tr>
<td>3. Permanent Supportive Housing (Lodge)*</td>
<td>2.6%</td>
</tr>
<tr>
<td>4. Supported Housing — Semi-Independent</td>
<td>2.0%</td>
</tr>
<tr>
<td>5. Non-Profit Housing</td>
<td>3.1%</td>
</tr>
<tr>
<td>6. Community Housing</td>
<td>2.5%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
</tr>
</tbody>
</table>
Description
The relative service level is assessed to show the proportion of households in need that are being serviced by the availability of Non-Market housing.

Findings
- Edmonton provides Non-Market Housing service to 50% (26,869) of households in core need (53,889).
- Sturgeon and Parkland provide a lower level of Non-Market Housing service compared to other sub-regions. Both provide Non-Market Housing service to 43% of households in core need.

Assessment
- Non-Market Housing Initiatives need to bring the service levels by household type more in line with the share of core housing need.

<table>
<thead>
<tr>
<th></th>
<th>Edmonton</th>
<th>Lamont</th>
<th>Leduc</th>
<th>Parkland</th>
<th>Strathcona/Fort Sask</th>
<th>Sturgeon</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>NMH Portfolio (1)</td>
<td>26,869</td>
<td>214</td>
<td>791</td>
<td>616</td>
<td>931</td>
<td>742</td>
<td>30,163</td>
</tr>
<tr>
<td>HHs in Core Need</td>
<td>27,020</td>
<td>85</td>
<td>835</td>
<td>830</td>
<td>990</td>
<td>975</td>
<td>30,720</td>
</tr>
<tr>
<td>Total (2)</td>
<td>53,889</td>
<td>299</td>
<td>1,626</td>
<td>1,446</td>
<td>1,921</td>
<td>1,717</td>
<td>60,893</td>
</tr>
<tr>
<td>Service Level* (1/2)</td>
<td>50%</td>
<td>73%</td>
<td>47%</td>
<td>43%</td>
<td>48%</td>
<td>43%</td>
<td>49%</td>
</tr>
</tbody>
</table>

* The Service Level (SL) refers to the proportion of households in need that are served by the existing Non-Market Housing portfolio. The SL is calculated for the main household types and is useful for establishing priorities and ensuring a balanced portfolio.

Note: While totals may not add up exactly due to rounding, there is no material change to the service level percentages.
4.0 Future Housing Market

How housing requirements and needs change over time draws on population and household projections for the region. The method used to generate the projections includes historic fertility, mortality, and household formation rates within each sub-region. Population projections include the number of households by age cohort from the growth.

Total household growth under the low and high estimate for the region was examined to assess the implications for future growth in housing requirements. It revealed that, across the region, household growth over the next seven years (2015–2021) is anticipated to average between 10,200 and 12,800 households per year.

The high projection is used in this assessment to estimate the housing requirements resulting from population and employment growth sorted by Non-Market and Market Affordable Housing need and demand. This future need assessment assumes that each sub-region continues to maintain its current share of the region’s population and households. It also assumes that the 2011 incidence of core housing need remains constant.

T5: Projected Annual Growth in Housing Requirements — Low and High Scenarios

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Low Growth Scenario</td>
<td>10,743</td>
<td>10,599</td>
<td>10,205</td>
<td>10,040</td>
<td>9,973</td>
<td>9,911</td>
<td>9,985</td>
<td>10,208</td>
</tr>
<tr>
<td>High Growth Scenario</td>
<td>13,116</td>
<td>13,093</td>
<td>12,747</td>
<td>12,622</td>
<td>12,660</td>
<td>12,598</td>
<td>12,699</td>
<td>12,791</td>
</tr>
</tbody>
</table>

Note: Projecting long-term population and household growth cannot predict economic downturns and the impact on the number of households in need.

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3 The population projections used here do not include the adjustment made from the Capital Region Board Growth Plan Update with 2014 municipal census results as this needs assessment requires detailed projections by age and year to project annual housing requirements. The adjustment made for the Growth Plan Update included the total population in 2014 and 2044 only.
4.1 Future Non-Market Housing Needs

Description
The annual growth in housing requirement and need over the next six years is forecasted to assist future housing plans. The growth in core need draws on an allocation of overall growth from the regions’ high growth projection, using the incidence of core need by age cohort from 2011. This estimates what proportion of the total household growth (12,971) will be in core need.

Findings
- The number of households in core housing need is projected to grow on average by almost 1,600 annually over the next six years. During the same time period, growth by age cohort varies considerably, as evidenced below:
  - The 15–24 age cohort will decrease slightly, on average, by 21 households every year;
  - The 25–44 age cohort will increase by 584 households every year;
  - The 45–64 age cohort will increase by 290 households every year;
  - The 65–74 age cohort will increase on average by 575 households every year;
  - The 75 and over age cohort will increase by 165 households every year.

Assessment
- Over the next six years, the 65 and over age cohort will rapidly grow as a share of the total. In 2015, this cohort will account for 36% of the growth in core need. By 2021, this cohort will account for 56% of the growth in core need.
- Affordable housing units, such as bachelor and one-bedroom units, will be required to meet the needs of this older age cohort.
4.2 Future Market Housing Requirements

**Description**
Future Market Affordable Housing requirements are calculated using the overall share of households with incomes above the eligible range for Non-Market Housing but below median income and thus less able to access ownership. These requirements should be compared to earlier data of the form and type of new homes being constructed.

**Findings**
- On average, 1,892 new Market Affordable Housing units are required annually to accommodate future growth. A breakdown of the annual housing requirements by age are:
  - 15–24 will decline until 2019 with minimal growth thereafter;
  - 25–44 will increase, on average by 749 households (40% of the growth);
  - 45–64 will increase by 485 households (26% of the growth);
  - 65–74 will increase by 531 households (28% of the growth);
  - 75+ will increase by 152 households (8% of the growth).
- Over the next six years, the 65 and over age cohort will grow more quickly, expanding from 27% to 36% of the total Market Affordable demand, and adding 856 households in 2021.

**Assessment**
- The decline in the 15–24 age cohort and slow growth of the 25–44 age cohort will influence housing requirements and require a shift in the type of homes developed by the construction industry. Growth in non-family and smaller households will require appropriately sized units with a variety of built form and tenure choices.
- With the large growth of the 65+ cohorts, there is a need to examine the changing housing preferences and needs of an aging population. Again, small sized housing units for seniors and more rental options will be needed.
- These trends are important in terms of built forms; families tend to have 3+ people and non-families are mostly one and some two-person households.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>15–24</td>
<td>-86</td>
<td>-74</td>
<td>-49</td>
<td>-16</td>
<td>3</td>
<td>19</td>
<td>26</td>
<td>-25</td>
<td>-1%</td>
</tr>
<tr>
<td>25–44</td>
<td>893</td>
<td>815</td>
<td>824</td>
<td>743</td>
<td>714</td>
<td>665</td>
<td>591</td>
<td>749</td>
<td>40%</td>
</tr>
<tr>
<td>45–64</td>
<td>601</td>
<td>616</td>
<td>514</td>
<td>482</td>
<td>404</td>
<td>371</td>
<td>406</td>
<td>485</td>
<td>26%</td>
</tr>
<tr>
<td>65–74</td>
<td>427</td>
<td>454</td>
<td>482</td>
<td>497</td>
<td>596</td>
<td>626</td>
<td>638</td>
<td>531</td>
<td>28%</td>
</tr>
<tr>
<td>75+</td>
<td>106</td>
<td>126</td>
<td>115</td>
<td>162</td>
<td>156</td>
<td>182</td>
<td>218</td>
<td>152</td>
<td>8%</td>
</tr>
<tr>
<td>Total</td>
<td>1,941</td>
<td>1,937</td>
<td>1,886</td>
<td>1,868</td>
<td>1,873</td>
<td>1,864</td>
<td>1,879</td>
<td>1,892</td>
<td>100%</td>
</tr>
</tbody>
</table>
5.0  Gap Analysis

This section summarizes the gaps and potential implications for the Capital Region in view of the overall housing continuum. The data and information from the needs assessment is the foundation for assisting decision making across the region.

5.1  Non-Market Housing Gaps

Description
Non-Market Housing gaps include both an existing backlog in core need and future growth of households in core need. The prioritization of these gaps, based on age and household type, should form the basis for allocating any funding for new Non-Market Housing. This analysis considers only renters, for whom need is high.

Findings

- Renter Households with the highest incidence of need are:
  - Lone-parent renters, 15–29 years of age (66%);
  - Lone-parent renters, 30–44 years of age (54%);
  - Non-family renters, 65 years of age and over (57%).

- Renter Households with the highest number in unmet need are:
  - Lone-parent families, 30–44 years of age (3,840);
  - Non-family households, 45–64 years of age (5,475);
  - Non-family households, 65 years of age and over (5,015).

- Lone-parent families and seniors rank high in terms of numbers and incidence of need, now and into the future.

T7: Growth of Renters in Core Need, 2015–21

<table>
<thead>
<tr>
<th>Age</th>
<th>Renters</th>
<th>Share %</th>
</tr>
</thead>
<tbody>
<tr>
<td>15–24</td>
<td>-21</td>
<td>-1%</td>
</tr>
<tr>
<td>25–44</td>
<td>584</td>
<td>37%</td>
</tr>
<tr>
<td>45–64</td>
<td>290</td>
<td>18%</td>
</tr>
<tr>
<td>65–74</td>
<td>575</td>
<td>36%</td>
</tr>
<tr>
<td>75+</td>
<td>165</td>
<td>10%</td>
</tr>
<tr>
<td>Total</td>
<td>1,593</td>
<td>100%</td>
</tr>
</tbody>
</table>
T8: Renters in Core Need by Household Type and Age, 2011

<table>
<thead>
<tr>
<th>Household</th>
<th>15–29</th>
<th>30–44</th>
<th>45–64</th>
<th>65+</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Families</td>
<td>3,765</td>
<td>6,880</td>
<td>3,285</td>
<td>765</td>
<td>14,695</td>
</tr>
<tr>
<td>Couples</td>
<td>2,025</td>
<td>2,970</td>
<td>1,480</td>
<td>315</td>
<td>6,790</td>
</tr>
<tr>
<td>Lone-Parents</td>
<td>1,715</td>
<td>3,840</td>
<td>1,765</td>
<td>440</td>
<td>7,760</td>
</tr>
<tr>
<td>Non-Family</td>
<td>2,335</td>
<td>3,195</td>
<td>5,475</td>
<td>5,015</td>
<td>16,020</td>
</tr>
<tr>
<td>Total</td>
<td>6,100</td>
<td>10,080</td>
<td>8,755</td>
<td>5,785</td>
<td>30,720</td>
</tr>
</tbody>
</table>

Note: Data may not add due to rounding by Statistics Canada.

**Assessment**

- Over the next six years, 37% of the growth in need will be from household maintainers between 30–44 years of age and 36% will come from households between 65–74 years of age. 10% of growth in need will come from households 75 years of age and over.

- All other age cohorts will continue to grow (except the 15–24 age cohort), but will decrease their share of need related to growth.
### 5.2 Market Housing Gaps

**Description**

Market Housing gaps include both the existing and future gaps in the supply and need/demand mismatch related to household incomes and housing costs in the region. Understanding existing and future gaps in the housing market is important for developing policy and program responses to address both Non-Market and Market Affordable Housing requirements.

**Findings**

- The 2011 data indicates a surplus of Market Affordable Housing (based on rent and price). However, these surplus units are occupied by lower income households and should be labeled as a mismatch.
- Separating out renter households reveals there is still a surplus, but it is much smaller. Again, these surplus units are occupied by lower income renter households and should be labeled as a mismatch.
- There is a projected need to add 12,791 homes each year. At least 1,892 of these homes should be modest in form and price to target moderate income households, including newly forming families, singles, and seniors seeking to downsize.

**Assessment**

- The distribution of dwelling units in the Capital Region is skewed in both size and price in favour of larger, higher rent/priced homes.
- There are surpluses, both for singles and families, in the Market Affordable range. However, this is due in part to the absence of lower rent/priced options; lower income households are occupying housing and paying more than 30% of their income.
- The region’s housing stock has likely changed since the 2011 data used in this assessment, with a few years of growth followed by a recent downturn. This needs to be considered in any housing planning.

#### T9: Market Affordable Housing, 2015–21

<table>
<thead>
<tr>
<th>Age</th>
<th>New Households (Annual Average)</th>
<th>Share %</th>
</tr>
</thead>
<tbody>
<tr>
<td>15–24</td>
<td>725</td>
<td>1%</td>
</tr>
<tr>
<td>25–44</td>
<td>749</td>
<td>40%</td>
</tr>
<tr>
<td>45–64</td>
<td>485</td>
<td>26%</td>
</tr>
<tr>
<td>65–74</td>
<td>531</td>
<td>28%</td>
</tr>
<tr>
<td>75+</td>
<td>152</td>
<td>8%</td>
</tr>
<tr>
<td>Total</td>
<td>1,892</td>
<td>100%</td>
</tr>
</tbody>
</table>
5.3 Summary

Non-Market Housing Gaps

- 30,720 households are in core housing need in the region. These households are distributed among couple families, lone-parent families and single (non-elderly) person households. Of those households in core need, seniors represent 19%, couples 21%, lone-parents 24%, and singles 36%.
- To compare to the Non-Market portfolio, 30,163 Non-Market Housing units are fairly evenly distributed between singles (33%), families (34%), and seniors (33%).
- Non-Market Housing needs for seniors will continue to grow as a share of the total need. All other age groups will decline as a share of the total. Future need will continue to be most acute among lone-parent renter households who will require large sized family units.
- The existing Non-Market Housing Portfolio is evenly split between family and non-family households.
- Priority, in the short term, should be given to non-seniors and lone-parent housing to address the backlog of need.

Market Affordable Housing Gaps

- The current supply of housing units is sufficient, with a theoretical surplus of more than 30,000 units. If owners are removed, the surplus is less than 11,000 rental units in this rent range. However, the surplus is theoretical because households from the other income ranges occupy many of these dwellings.
- There is a requirement for about 1,900 units of Market Affordable Housing for families, in particular for three and four-bedroom units.

Pure Market Housing Gaps

- The main gaps in Pure Market Housing are the lack of multi-family housing and traditional rental housing in the sub-regions outside of Edmonton. These gaps result in higher housing costs compared to a more diversified and balanced housing stock of structure types and tenures.
### T10: Annual Growth in Housing Need and Demand, 2015–21

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>Average/Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Housing Requirements</td>
<td>13,116</td>
<td>13,093</td>
<td>12,747</td>
<td>12,622</td>
<td>12,660</td>
<td>12,598</td>
<td>12,699</td>
<td>12,791</td>
</tr>
<tr>
<td>Non-Market</td>
<td>1,561</td>
<td>1,570</td>
<td>1,555</td>
<td>1,567</td>
<td>1,615</td>
<td>1,632</td>
<td>1,652</td>
<td>1,593</td>
</tr>
<tr>
<td>Market Affordable</td>
<td>1,941</td>
<td>1,937</td>
<td>1,886</td>
<td>1,868</td>
<td>1,873</td>
<td>1,864</td>
<td>1,879</td>
<td>1,892</td>
</tr>
<tr>
<td>Pure Market</td>
<td>9,615</td>
<td>9,586</td>
<td>9,306</td>
<td>9,188</td>
<td>9,172</td>
<td>9,102</td>
<td>9,169</td>
<td>9,306</td>
</tr>
</tbody>
</table>

### T11: Projected Annual Growth in Need and Demand by Sub-Region, 2015–21

<table>
<thead>
<tr>
<th></th>
<th>Existing Needs</th>
<th>Household Growth</th>
<th>Non-Market Housing</th>
<th>Market Affordable Housing</th>
<th>Pure Market Housing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edmonton</td>
<td>27,020</td>
<td>9,192</td>
<td>1,293</td>
<td>1,428</td>
<td>6,471</td>
</tr>
<tr>
<td>Lamont</td>
<td>85</td>
<td>74</td>
<td>13</td>
<td>21</td>
<td>40</td>
</tr>
<tr>
<td>Leduc</td>
<td>835</td>
<td>644</td>
<td>74</td>
<td>84</td>
<td>478</td>
</tr>
<tr>
<td>Parkland</td>
<td>830</td>
<td>746</td>
<td>61</td>
<td>106</td>
<td>579</td>
</tr>
<tr>
<td>Strathcona/Fort Saskatchewan</td>
<td>990</td>
<td>1,145</td>
<td>82</td>
<td>133</td>
<td>930</td>
</tr>
<tr>
<td>Sturgeon</td>
<td>975</td>
<td>990</td>
<td>81</td>
<td>127</td>
<td>782</td>
</tr>
<tr>
<td>Region</td>
<td>30,720</td>
<td>12,791</td>
<td>1,593</td>
<td>1,892</td>
<td>9,306</td>
</tr>
</tbody>
</table>

Note: Data may not add due to rounding by Statistics Canada.
6.0 Where To From Here

- Both existing unmet needs and future housing need and demand are used in the development of public policy and planning for Non-Market and Market Affordable Housing across the Capital Region. The development of long-range plans and land use policies can ensure the housing market is balanced and functioning in an inclusive manner, and that it supports initiatives to improve housing affordability, specifically Market Affordable Housing.

- The next step in implementing the Capital Region Board Housing Plan is development of a Regional Planning Model that would incorporate both Non-Market and Market Affordable Housing and build upon the results of the need assessment.

- The result will be a Regional Housing Plan with a 5–10 year timeframe that (1) incorporates changing trends and gaps in the existing supply of housing with future housing need and demand, and (2) directs the supply of Non-Market and Market Affordable Housing throughout the Capital Region.