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County-wide Industrial and Commercial Growth Assessment

Submitted to:

Rocky View County

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1. Executive Summary

Rocky View County (the County) is in the process of updating its Municipal Development Plan (MDP). Bordering a large urban center (the City of Calgary) on three sides, the County hosts a vibrant combination of residential acreages, agricultural operations, natural resource activities, and commercial and light industrial activities. Understanding the drivers of historical growth and forecasting potential paths of future development will be key to ensuring the County continues to grow in an efficient, fiscally responsible way. To this end, the County engaged Nichols Applied Management Inc. (Nichols) to conduct a County-wide assessment of industrial and commercial growth to help inform the preparation of community growth strategies in the County which will guide the new MDP.

Industrial and commercial land projections for the County are built up in two stages. First, we develop status quo projections for non-residential lands driven by growth in employment of County residents, with adjustments made to account for those who work from home, do not have a fixed place of work, and commuters in and out of the County. Next, we describe how regional growth in the County, as envisioned by the CMRB Employment Forecast (Applications Management 2020), may contribute to industrial and commercial land development over the next several decades. Thirdly, we develop a recommended growth scenario that bridges the gap between the status quo and the CMRB forecast. The CMRB Employment Forecast and Growth Plan contemplate a substantial amount of non-residential development in the County over the next several decades. Indeed, growth of roughly 525 gross acres per year is significantly greater than the rate of non-residential development in the status quo projections (about 45 gross acres/year) as well as the high-growth (i.e., recommended) projections (about 135 gross acres/year).

The CMRB Employment Forecast suggests that the County may require a total of roughly 20,260 gross acres of industrial and commercial lands to support the growth in job activity in the County by 2054 (Author's Calculations); this represents a need for about 16,780 gross acres of additional non-residential lands beyond what has already been developed as of 2022. Fortunately, the County has no shortage of land availability. According to the County's draft 2022 Land Use Inventory (Rocky View County Personal Communication 2023), there are over 16,000 gross acres of undeveloped, policy supported non-residential lands remaining in the County (Table 7-1). However, there are fewer available gross acres in the County that are currently designated for business land use (about 8,140 overall, and 4,000 within PGAs). As such, the County will likely need to continue approving industrial and commercial land-uses on unabsorbed lands over the coming years should the CMRB projection of job development in the County come to fruition.

In terms of the location of the projected non-residential land development, the cluster analysis presented in this report identifies potential industrial and commercial opportunities for various PGA and non-PGA growth nodes in the County. The CMRB Employment Forecast and Growth Plan suggests a substantial amount of industrial development in the County over the next several decades. As such, the CMRB projection would be relatively more in line with cluster opportunities that are geared toward large, potentially higher-density activities. For example, there appears to be alignment with respect to the magnitude and nature of growth in regard to the vision for East and West Balzac which emphasize the potential for heavy industrial development and possible mega-sites. This is not to suggest that smaller developments such as speciality retail or speciality tourism opportunities should not be pursued, but achieving the significant growth projected by the CMRB will primarily require a substantial amount of large-scale industrial activities, with commercial activities such as retail being emphasized much less in the CMRB projection. Much of this type of development will fit well within the County's PGAs.

The extent to which the County will be successful in capturing the development contemplated in the CMRB Employment Forecast and Growth Plan depends largely on its competitiveness with respect to non-residential

activities. Several characteristics of the County that may attract non-residential development (i.e., the “Rocky View Advantage”) include:

- relatively low non-residential mill rates, and
- ideal location in terms of transportation access/infrastructure.

However, there are areas where the County may make some changes to improve its attractiveness. For example, building and development permits in the County are relatively high. In addition (and perhaps more importantly) the County has relatively long permitting timelines (not factoring in any recent improvements with staffing or departmental enhancements). Having said this, we emphasize that there are many situation-specific needs for individual developers that play a role in site selection that are less quantitative in nature.

Overall, the rate of growth that is implied in the CMRB forecast is extraordinary when compared to the historic rates of growth in the County. Indeed, the implied rate of land absorption in the CMRB Employment Forecast (525 gross acres per year) is nearly 12 times the rate of employment growth of County residents and current in-commuting patterns. This change in regional growth patterns is being driven by two key changes:

- An increase in the proportion of people commuting into the County to work. The estimated rate of non-residential land absorption based on the CMRB Employment Forecast suggests that there will be substantial demand for non-residential lands from businesses who employ people who live elsewhere in the region and commute into the County each day.
- A shift in the type of industries that constitute significant portions of the economic activity in the County. A pronounced shift in the concentration of jobs across industries in the County's economy between the 2021 census and the 2054 CMRB Employment Forecast is noted. Specifically:
 - An increase in the proportion of employment in the mining, quarrying, and oil and gas sector from 2% to 15%.
 - An increase in the proportion of employment in construction sector from 6% to 17%.
 - An increase in the proportion of employment in manufacturing sector from 7% to 10%.
 - A decrease in the proportion of employment in the retail sector from 27% to 6%
 - A decrease in the proportion of employment in the transportation and warehouse sector from 19% to 6%.

The implication of these changes is that non-residential development in the County will grow faster than it has previously and with a particular focus on sectors that have not historically driven the local economy. It should be noted that:

- The increased emphasis on quarrying is somewhat curious given the challenges faced by new aggregate projects in recent history.
- The shift away from retail to more industrial sectors represents a departure from the type of growth that has contributed to the success of the County in recent years.

There is also an implied shift in the growth of the Calgary region overall – the County's share of growth in terms of jobs hosted in the community is expected to increase in the CMRB Employment Forecast, while the City of Calgary's is expected to decline. Specifically:

- In the CMRB's Employment Forecast, it is estimated that the County hosted approximately 2% of the regional jobs in 2018 and the City of Calgary was home to 90%.
- By the end of the CMRB Employment Forecast period (2054), the County's share is set to rise to 8% while the City of Calgary's share will decline to 82%.

The above-described dynamic represents a tremendous shift in regional dynamics and has a particularly severe implication with respect to the financial situation of the City of Calgary and County. The shift of employment growth implies a shift in the development of new non-residential assessment – the financial lifeblood of municipalities. The CMRB Employment Forecast appears to imply a substantial strengthening of the County's financial position whereas that of the City of Calgary which is, at best, remaining as is.

Given the disconnect between historic growth patterns and the CMRB forecast, Nichols recommends focusing on the high-growth scenario contained in the body of this report (e.g. 135 gross acres/year) for planning purposes. If the geographic distribution of growth implied in the CMRB Employment Forecast comes to pass, there will likely be a considerable increase in the need for joint development areas between the County and the City of Calgary as the latter will continue to face the financial burden of acting as a regional service centre without capturing the amount of non-residential growth that previously allowed the City of Calgary to carry that burden. For example, the recent decision to explore a joint understanding between Shephard Development, CP Rail, and the two municipalities represents an opportunity to jointly support non-residential development that will financially benefit both the City of Calgary and the County.

2. Introduction

Rocky View County (the County) is in the process of updating its Municipal Development Plan (MDP). Bordering a large urban center (the City of Calgary) on three sides, the County hosts a vibrant combination of residential acreages, agricultural operations, natural resource activities, and commercial and light industrial activities. Understanding the drivers of historical growth and forecasting potential paths of future development will be key to ensuring the County continues to grow in an efficient, fiscally responsible way. To this end, the County engaged Nichols Applied Management Inc. (Nichols) to conduct a County-wide assessment of industrial and commercial growth to help inform the preparation of community growth strategies in the County which will guide the new MDP.

The balance of this report includes:

- **Section 3:** An overview of historical growth in the County including a community profile, discussion of growth drivers, and macroeconomic trends and forecasts.
- **Section 4:** A competitiveness analysis of the County with respect to key comparators municipalities.
- **Section 5:** A cluster analysis for Preferred Growth Areas (PGAs), as well as some areas outside of PGAs, in the County that identifies potential employment activities that may spur non-residential growth.
- **Section 6:** High-level growth projections of industrial and commercial land absorption in the County including a detailed description of methods, assumptions, and results.
- **Section 7:** A final summary and discussion of key findings and policy recommendations.

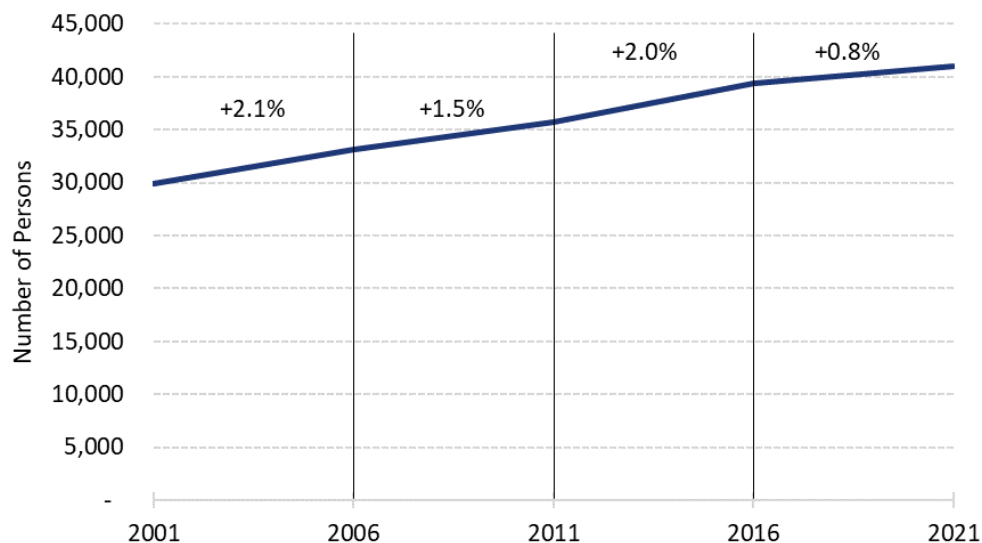
3. Historical Growth in Rocky View County

3.1 Community Profile

3.1.1 Population and Demographics

In 2021, Rocky View County (the County) was home to 41,028 people, a considerable increase of nearly 11,000 people (approximately 36%) since 2001 (Statistics Canada 2021a). The rate of population growth in the County has fluctuated over a narrow, but positive, range over the past 20 years (Figure 3-1), beginning with a period of high growth (2.1% per year) between 2001 and 2006 and concluding with a period of low growth (0.8% per year) between 2016 and 2021. Over the entire 2001 to 2021 period, annual population growth in the City has averaged approximately 1.4%, slightly below that of the Calgary Metropolitan Region (CMR)¹, which has experienced population growth of about 2% per year over the last two decades.

Figure 3-1 Population and Annual Growth, Rocky View County, 2001-2021



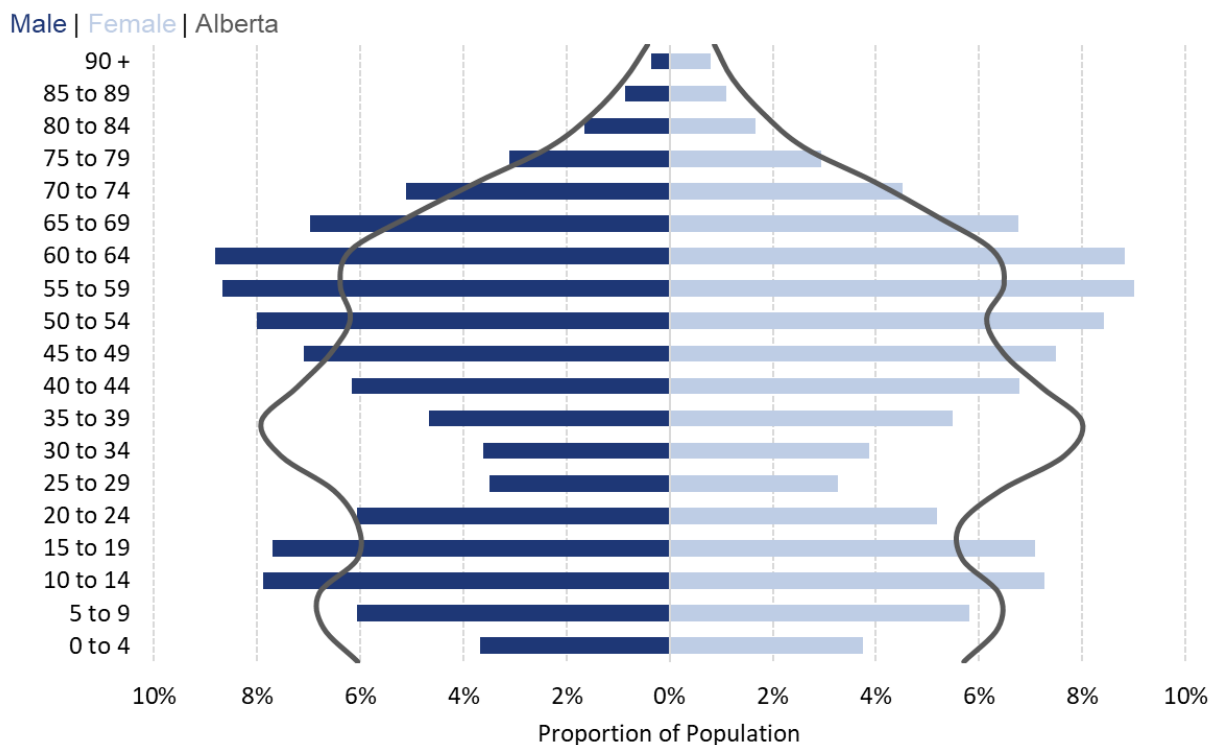
Source: Statistics Canada 2001, 2006, 2011a, 2016, and 2021a.

Notes: Growth rates presented are compound annual growth rates (CAGR).

Today, the County hosts a relatively older population as compared to the CMR and province overall. With a median age of 45.6, the County's population is amongst the oldest in the CMR and as compared to the provincial population, the County hosts a relatively larger proportion of 45-79 year olds, and a relatively smaller proportion of 20-44 year olds (Figure 3-2).

¹ The CMR includes Airdrie, Calgary, Chestermere, Cochrane, Foothills County, High River, Okotoks, and Rocky View County.

Figure 3-2 Population Distribution by Age, Rocky View County and Alberta, 2021



Source: Statistics Canada 2021a.

The County's older demographics are, in part, a result of its large agricultural base. As of 2021, there are over 1,500 farm operators in the County with a median age of 61. Historically, much of the County's population has resided on farmsteads or within one of the County's small hamlet communities. In recent years, residential development has been slightly more concentrated in small, semi-urbanized centers (e.g., Cochrane Lake, Harmony). This trend toward urban-village style communities is likely to draw a younger demographic to the County.

3.1.2 Labour Force

The County's older population distribution has contributed to slightly lower rates of labour force participation as compared to the rest of the CMR (Table 3-1). Labour force participation in the County has been in line with the province overall until more recently, where it is now about 2.6 percentage points lower. Overall, labour force participation in the County, the rest of the CMR, and the province overall has been declining over the last two decades as the baby-boomer generation reaches retirement age.

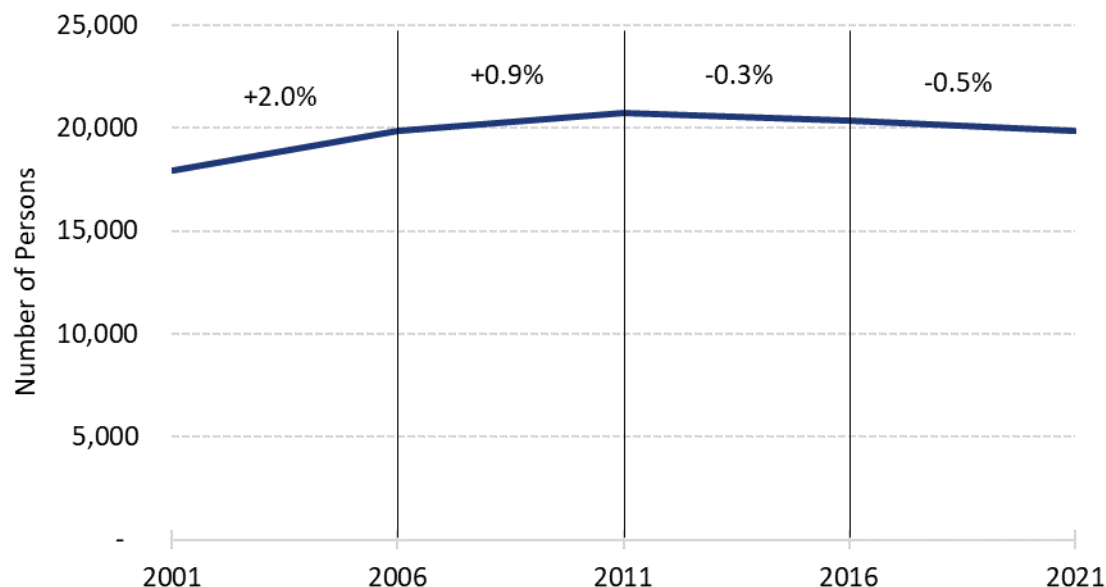
Table 3-1 Labour Force Participation Rates, Rocky View County, Rest of CMR, and Alberta, 2006-2021

Geography	2006	2011	2016	2021
	Labour Force Participation Rate			
Rocky View County	75.7%	73.4%	69.6%	65.4%
Rest of CMR	76.3%	74.9%	72.8%	68.4%
Alberta	74.0%	73.2%	71.8%	68.0%

Source: Statistics Canada 2006, 2011a, 2016, and 2021a.

Like its population, employment growth amongst the County's labour force has fluctuated over time, with the highest rate of growth occurring between 2001 and 2006 (2%) (Figure 3-3). Conversely, the most recent census data suggests that the County's labour force experienced slightly negative employment growth between 2016 and 2021 (-0.5%). This is likely a result of the widespread unemployment that occurred during the COVID-19 pandemic. Over the entire 2001 to 2021 period, annual employment growth in the County's labour force was about 0.5%, slightly below that of the Region (1.5%).

Figure 3-3 Employment and Compound Annual Growth, Rocky View County, 2001-2021



Source: Statistics Canada 2001, 2006, 2011a, 2016, and 2021a.

Notes:

-Growth rates presented are compound annual growth rates (CAGR).

-This figure depicts employment growth of those residing within the County (whether they work within the County or elsewhere).

Unemployment in the County has been slightly lower than that of the rest of the CMR and the province overall (Table 3-2). The 2021 census data suggests that the employed labour force within the County experienced less of a disruption during the COVID-19 pandemic as compared to the rest of the CMR and the province overall, with unemployment rates remaining one to two percentage points lower, respectively.

Table 3-2 Unemployment Rates, Rocky View County, Rest of CMR, and Alberta, 2006-2021

Geography	2006	2011	2016	2021
	Unemployment Rate			
Rocky View County	2.5%	3.7%	7.7%	9.3%
Rest of CMR	3.1%	5.1%	7.9%	10.3%
Alberta	4.3%	5.8%	9.0%	11.5%

Source: Statistics Canada 2006, 2011a, 2016, and 2021a.

Notes:

-High unemployment rates in 2021 are likely a result of the COVID-19 pandemic.

As of 2021, the County hosts a labour force that is predominantly active in the following industries:

- professional, scientific, and technical services (12%);
- construction (11%);
- health care (10%);
- retail trade (9%);
- mining, quarrying, and oil and gas extraction (7%);
- agriculture, forestry, fishing, and hunting (6%); and
- transportation and warehousing (5%).

Other sectors each host less than 5% of the County's labour force.

Figure 3-4 Labour Force by Sector, Rocky View County and Rest of CMR, 2021



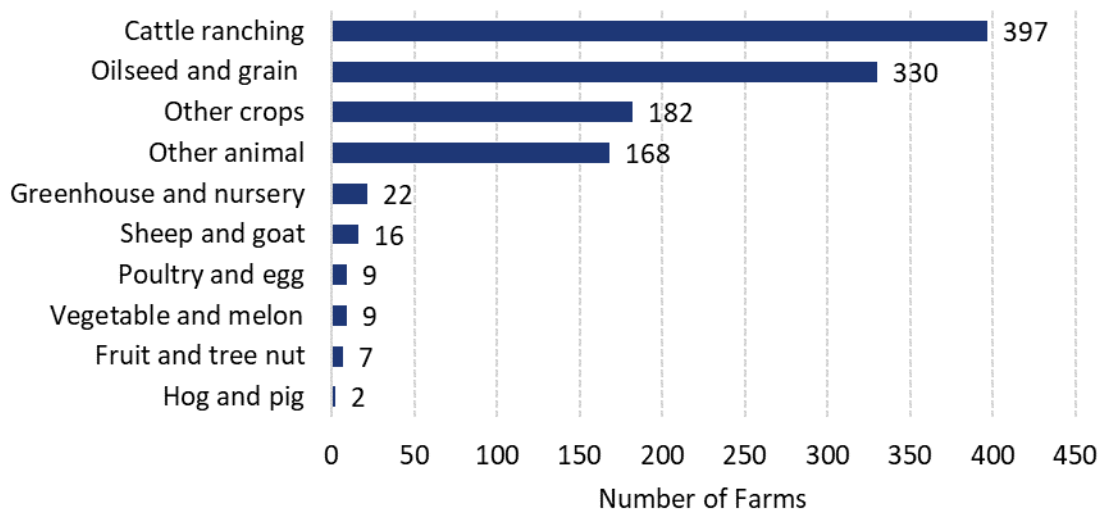
Source: Statistics Canada 2021a.

3.2 Growth Drivers

When considered in isolation, the natural population growth in the County (births less deaths) is not sufficiently high to maintain current population levels. As is the case in most communities across Canada, birth rates have fallen to levels below the replacement rate – a trend that has been attributed to number of factors, such as the increase in women participating in the workforce as well as the increase in the average birth age of Canadian women. This trend has left most Canadian communities, including the County, in a position where in-migration driven by local job creation is the primary mechanism through which the community is likely to grow. In the County, some of this job growth has been driven by non-residential development within the County itself, as well as development in surrounding municipalities (particularly within the CMR).

Historically, the County's economic foundation has been rooted in agriculture. Home to 1,142 farms (Statistics Canada 2021b), the County ranks 3rd in the province with respect to the total number of farms. Like much of southern Alberta, farming activities in the County focus primarily on crop production and ranching (Figure 3-5). Since 2011, the total number of farms in the County has declined slightly by about 130 farms (Statistics Canada 2011b; 2021b).

Figure 3-5 Farms by Farm Type, Rocky View County, 2021



Source: Statistics Canada 2021c.

While agriculture remains a key component of the County's socio-economic profile, development within the County has occurred across other industrial and commercial sectors. Non-residential development in the County has been concentrated within three types of business areas (Rocky View County 2018), including:

- **Regional Business Centres:** These centres are intended to provide regional business services. Regional Business Centres are home to existing businesses in the County, have sufficient connection to the provincial highway network, are significant in terms of scale and scope of activities, and host sufficient infrastructure to service new developments.
- **Highway Business Areas:** These areas are intended to be more limited development areas located in close proximity to highway intersections/interchanges. Highway Business Areas should offer destination commercial services, provide services to travellers passing through, and offer local employment opportunities.
- **Hamlet Business Areas:** These areas provide local employment opportunities and key local services to Hamlets in the County. Hamlet Business Areas host a variety of retail, office, and light industrial operations.

To date, non-residential growth in these business areas has been dominated by commercial and light industrial activities. Some of the major existing non-residential activity in the County includes (but is not limited to):

- Large-scale retail operations such as Costco Wholesale, Cross Iron Mills shopping center, and New Horizons shopping mall (Balzac East).
- Distribution facilities for major retailers including Amazon, Wal-Mart, Sobey's, Gordon Food Services, Princess Auto, Whirlpool, and more (Balzac East).
- A plethora of transportation, warehousing, and logistics activities (Janet Area).
- RV retailers and storage sites (Balzac West, North Springbank Area).
- Agri-food processing facilities including the Enterra Feed facility (blackfly larvae production) and the Sunterra and Harmony Beef Processing Facility (Balzac East).

The County has also seen a variety of small- to medium-scale retail and office development, some major automotive retail operations (particularly related to RV sales and storage), and recreation-related development (e.g., golf courses, Century Downs Racetrack and Casino) (Rocky View County 2018).

Non-residential development within the County, though important, is not the only growth driver for the community. The County is highly dependent upon regional development as well. Almost 40% of employees residing in the County commute outside the County for work (Table 3-3). As such, population growth in the County is highly dependent on employment opportunities in neighbouring municipalities, particularly Calgary.

Table 3-3 Place of Work, Employees Residing in Rocky View County, 2021

Place of Work	Employed Labour Force	Proportion of Employment Labour Force (%)
At home ^a	6,895	35%
Within Rocky View County	2,185	11%
Outside Rocky View County, within Alberta	7,605	38%
Outside Alberta, within Canada	165	1%
Outside Canada	60	0%
No fixed place of work	2,945	15%

Source: Statistics Canada 2021a.

Notes:

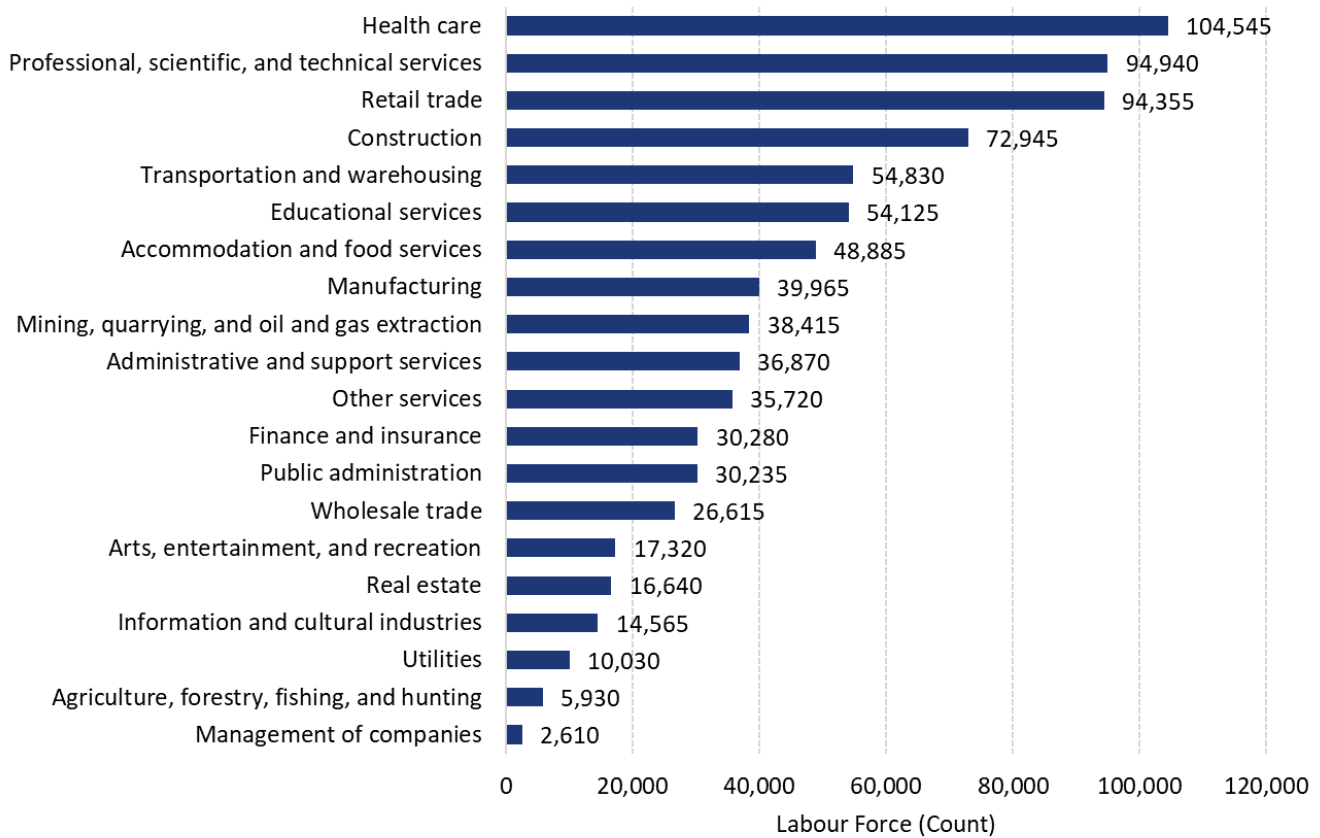
^a Employees are considered to work at home if their job is located in the same building as their place of residence, if they live and work on the same farm, or if they telecommute and spend most of their week working at home (Statistics Canada 2021a).

With a population of 1.48 million, the Calgary Metropolitan Area (CMA)² is the fifth largest CMA in Canada (Statistics Canada 2021a). The Calgary CMA is also one of the largest CMAs in the country in terms of GDP output, producing roughly one third of the provincial GDP (over \$110 billion) (Statistics Canada 2022). Like most of Alberta, development in and around Calgary has been driven largely by the energy sector. The City of Calgary itself has developed into the central hub for head office activities for oil and gas companies in the province. Calgary also acts as a host to key institutional services and amenities (e.g., hospitals, post-secondary education, etc.) as well as a variety of commercial development, creating substantial job opportunities for not only residents of the City of Calgary but those located in other communities in the region.

The labour force across all NAICS sectors within the CMR in 2021 is presented in Figure 3-6 below.

² The Calgary CMA includes Airdrie, Beiseker, Calgary, Chestermere, Cochrane, Crossfield, Irricana, Rocky View County, and Tsuu T'ina Nation 145.

Figure 3-6 Labour Force by Sector, CMR, 2021



Source: Statistics Canada 2021a.

The Calgary Metropolitan Region Board (CMRB) 2022 Growth Plan (CMRB 2022) identifies industries that are expected to drive employment growth in the immediate, short, medium, and long term in the CMR (Table 3-4). In the immediate to short term, transportation and logistics, value-added agriculture, and construction are expected to drive much of the employment in the CMR. In the longer term, industries like tourism, tv and film, and alternative energy are expected to spur employment as well.

Table 3-4 CMRB 2022 Growth Plan Employment Drivers

Time Frame	Industries
Immediate (1-2 years)	Transportation and logistics Value-added agriculture Construction projects
Short term (2-5 years)	Transportation and logistics Value-added agriculture Construction projects
Medium term (6-10 years)	Value-added agriculture Tourism TV/Film production Oil and gas
Long term (11-30 years)	Research Technology Alternative energy Oil and gas

Source: CMRB 2022.

3.3 Macroeconomic Trends and Forecasts

Economic outlooks for Canada suggest that the national economy will slow during 2023 as compared to 2022 but pick up again slightly in 2024. The OECD projects this change as a decrease in real GDP growth from 3.2% in 2022 to 1.0% in 2023, followed by a slight increase to 1.3% in 2024 (OECD 2023). The Government of Canada projects a similar increase in real GDP growth in 2024 of 1.5% (Government of Canada 2023). Unemployment across Canada, which has eased since the COVID-19 pandemic, is expected to remain around 6% in 2024, while inflation is anticipated to decrease to roughly 2-2.4% (Government of Canada 2023, OECD 2023).

Alberta's 2023 Fiscal Plan (Alberta Treasury Board and Finance 2023) contemplates real GDP growth of roughly 2.8-3% over the 2023-2026 period, with slightly lower employment growth of 2.3-2.7% (Table 3-5). Economic growth in the short-term is expected to be led by the province's energy sector. In the medium-term, Alberta Treasury Board and Finance expects the quintessential Alberta advantages, such as our relatively young population and low cost of living, to spur broader business investment and consumer spending and support population and economic growth.

Other provincial economic forecasts published by ATB (2023), RBC (2023), and TD Economics (2023), suggest relatively similar unemployment rates and growth in the Consumer Price Index (CPI) in the province in the short-term (Table 3-5). However, forecasts related to real GDP and employment are noticeably lower from these financial institutions as compared to the forecasts outlined in the provincial budget. Having said this, Alberta is still expected to be one of the top performing provinces in the Country in terms of short-term growth, and in-migration is anticipated to continue support population growth and consumer spending in the province over the next several years (RBC 2023).

Table 3-5 Provincial Economic Outlooks, 2020-2026

Indicator	2020	2021	2022	2023	2024	2025	2026
Real GDP (% change)							
Government of Alberta (Budget 2023)	-8.0%	4.8%	4.8%	2.8%	3.0%	2.9%	2.8%
ATB	-	4.8%	5.0%	2.6%	2.3%	-	-
RBC	-8.0%	4.8%	4.3%	1.9%	2.0%	-	-
TD Economics	-	-	4.7%	2.0%	0.9%	-	-
Employment (% change)							
Government of Alberta (Budget 2023)	-7.1%	5.4%	5.2%	2.3%	2.7%	2.5%	2.3%
ATB	-	5.4%	5.2%	1.7%	1.8%	-	-
RBC	-7.1%	5.4%	5.2%	1.8%	0.9%	-	-
TD Economics	-	-	5.2%	2.3%	0.2%	-	-
Unemployment rate (%)							
Government of Alberta (Budget 2023)	11.3%	8.6%	5.8%	6.4%	6.3%	6.1%	5.7%
ATB	-	8.6%	5.8%	5.9%	5.8%	-	-
RBC	11.3%	8.6%	5.8%	6.1%	5.6%	-	-
TD Economics	-	-	5.8%	6.2%	6.7%	-	-
CPI (% change)							
Government of Alberta (Budget 2023)	1.1%	3.2%	6.4%	3.3%	2.2%	2.2%	2.2%
ATB	-	3.2%	6.4%	3.9%	2.3%	-	-
RBC	1.1%	3.2%	6.5%	3.0%	2.0%	-	-
TD Economics	-	-	4.8%	-4.2%	2.6%	-	-

Source: Alberta Treasury Board and Finance 2023, ATB 2023, RBC 2023, TD Economics 2023.

The regional economic outlook published by the City of Calgary suggests similar economic growth as the Government of Alberta provincial outlook (Table 3-6). The City expects real GDP growth in the CMR to ease following the COVID-19 pandemic recovery, reaching roughly 2.3% per year by 2028. Annual employment growth is expected to normalize as well to roughly 1.9% by 2028. Short-term unemployment is anticipated to remain around the 6.5% range, decreasing to 5.6% by 2028. High inflation experienced over the 2022-2023 period is forecasted to decline to about 2.2% by 2028 (City of Calgary 2023a).

Table 3-6 Calgary Region Economic Outlook, 2020-2028

Indicator	2020	2021	2022	2023	2024	2025	2026	2027	2028
Real GDP (% change)	-6.7%	3.5%	5.0%	2.6%	3.1%	3.1%	2.4%	2.3%	2.3%
Employment (% change)	-6.2%	4.1%	7.3%	3.1%	2.3%	2.5%	2.1%	2.0%	1.9%
Unemployment rate (%)	11.6%	9.0%	6.0%	6.4%	6.4%	6.1%	5.9%	5.7%	5.6%
CPI (% change)	1.1%	3.2%	7.2%	3.8%	2.1%	2.0%	2.0%	2.1%	2.2%

Source: City of Calgary 2023a.

Short-term economic growth in the CMR is projected to be supported primarily by growth in key exporting industries including:

- mining, quarrying, and oil and gas;
- transportation and warehousing; and
- wholesale trade.

Growth in these sectors is expected to create employment opportunities and ultimately spur in-migration to the region. The City of Calgary also anticipates an increase in major investment over the next several years, particularly with respect to mixed-use and residential construction, as well as business headquarters for oil and gas as well as pipeline projects. The CMR is also slated to host a \$1.2 billion Future Energy Park project, a bioethanol plant that will use wheat waste (non-food grade) to produce renewable natural gas, ethanol, and cattle feed (Calgary Herald 2023).

The CMRB's Regional Employment Forecast (Applications Management 2020) describes a substantial growth in employment in the County over the next several decades.³ Between 2018 and 2054, employment in the CMRB is projected to increase by roughly 640,000 at a compound annual growth rate (CAGR) of 1.6%. The County is expected to realize a large proportion of this employment growth, with a projected increase of over 98,000 at a compound annual growth rate of 5.0%. Sectors anticipated to see high growth in the County include:

- agriculture;
- mining and oil and gas;
- transportation and warehousing; and
- utilities.

³ Note that it is unclear whether the CMRB Employment Forecast refers to employment of residents of the County or jobs hosted within the County. We assume the forecast refers to jobs hosted within the County (whether they are held by residents of the County or those commuting in for work from other communities).

Table 3-7 CMRB Regional Employment Forecast, 2018 – 2054

Sector	CMRB	Rocky View County	CMRB	Rocky View County
	Employment Growth (2018 to 2054)		CAGR Growth (2018 to 2054)	
Accommodation and food services	42,765	3,860	1.6%	3.3%
Administrative and support, waste management and remediation services	30,211	2,882	1.7%	3.4%
Agriculture, forestry, fishing and hunting	1,858	794	1.6%	9.9%
Arts, entertainment and recreation	13,461	1,578	1.4%	3.4%
Construction	74,156	17,815	1.8%	6.3%
Educational services	31,243	2,649	1.4%	4.0%
Finance and insurance	26,167	2,812	1.7%	5.3%
Health care and social assistance	81,015	4,926	2.0%	3.1%
Information and cultural industries	5,953	1,668	0.8%	3.9%
Management of companies and enterprises	1,504	136	1.2%	2.6%
Manufacturing	32,735	10,433	1.5%	6.4%
Mining, quarrying, and oil and gas extraction	43,994	16,260	1.8%	8.2%
Other services (except public administration)	28,851	3,595	1.3%	3.4%
Professional, scientific and technical services	74,194	6,032	1.6%	4.3%
Public administration	13,953	3,566	1.3%	5.3%
Real estate and rental and leasing	9,574	1,907	1.5%	6.5%
Retail trade	54,223	4,478	1.3%	2.7%
Transportation and warehousing	51,913	6,835	1.6%	7.5%
Utilities	9,871	3,034	1.8%	7.0%
Wholesale trade	14,335	2,748	1.5%	6.8%
Total	641,974	98,007	1.6%	5.0%

4. Municipal Competitiveness Analysis

There are a number of factors to consider when evaluating a municipality's ability to attract industrial or commercial development from external investors. In this section, we provide an overview of the County's competitiveness across several key parameters relative to comparator jurisdictions. This analysis is intended to provide valuable information on the County's potential strengths and weaknesses as they pertain to non-residential development.

4.1 Comparative Parameters

In selecting comparative parameters, the Study Team focused on common denominators that, in our experience, often influence the decisions of investors and/or developments to locate in a community. These include:

- tax rates and related levies,
- land costs,
- access to appropriate transportation infrastructure,
- development and permitting costs,
- service levels,
- utility rates, and
- interprovincial considerations.

It is worth noting that the degree of influence a local government can exert on each of the above-listed parameters will vary. For some parameters (e.g., permit costs) the County has a high degree of control, while for other parameters (e.g., land costs), the County has less influence. Furthermore, there is a plethora of situation-specific needs for individual developers that play a role in site selection that are less quantitative in nature. For example, a community's effort in creating a reputation for having a "welcoming environment" for business, or prioritizing effective communication with interested developers, can go a long way in attracting development beyond the metrics listed above.

4.2 Comparator Selection

In consultation with County representatives, the following municipalities have been identified as being in direct competition with the County for industrial and/or commercial development:

- **City of Calgary** – The immediate competitors to the County are the municipalities in the CMR, most notably the City of Calgary itself. The City of Calgary is a major hub city in Western Canada, with the largest labour force in Alberta and the highest GDP per capita of major Canadian cities. As such, Calgary continuously attracts a plethora of high quality industrial and commercial investment (City of Calgary 2023b). Furthermore, Calgary hosts the highest head office concentration per capita in Canada, making it an ideal location for white collar commercial development (City of Calgary 2023b).
- **City of Airdrie** – The City of Airdrie is also in competition for investors with interest in Southern Alberta. The City of Airdrie has recently developed a plan for development in their East Points Industrial Area which encompasses over 300 acres of light, medium, and heavy industrial land prime for attracting new investors (City of Airdrie 2023a).

- **Red Deer County** – Located north of the County between Edmonton and Calgary, Red Deer County is a competing municipality at the heart of the busiest transportation corridor in Alberta. Of note is the Gasoline Alley Business Park alongside the QE II Highway, home to 1-acre to 15-acre lots for light industrial and commercial business (Red Deer County 2023a), as well as Junction 42, an upcoming 290-acre site slated for commercial, industrial, and agri-business development. (Red Deer County 2023b).
- **Parkland County** – Parkland County, located just west of the City of Edmonton, is a rural municipality that hosts a variety of industrial and commercial development, particularly in the areas of manufacturing, transportation, distribution, and logistics. Parkland County's largest industrial park in Acheson is home to over 300 businesses and has an expansion capacity of 180 acres of developed space (Parkland County 2023a).

Two jurisdictions in neighbouring provinces have also been identified as key comparators, especially for large-scale developments. These two inland ports serve as major industrial hubs and were chosen for comparison based on the County's past economic development work. They are:

- **Global Transportation Hub (GTH) (City of Regina)** – The GTH is based out of Regina, Saskatchewan, and is being advertised as western Canada's newest and fastest growing inland port. It is an 1,800-acre greenfield environment with 460 service-ready acres available (GTH 2023a).
- **CentrePort Canada (City of Winnipeg / Rural Municipality of Rosser)** – CentrePort Canada is located in Manitoba within both the City of Winnipeg and the Rural Municipality of Rosser. This inland port has been touted as North America's largest trimodal inland port and Foreign Trade Zone (CentrePort Canada 2023). Having already attracted over 1,000 companies to its industrial parks, the site has over 20,000 acres of industrial land and is continually growing, with a new rail park in development (CentrePort Canada 2023).

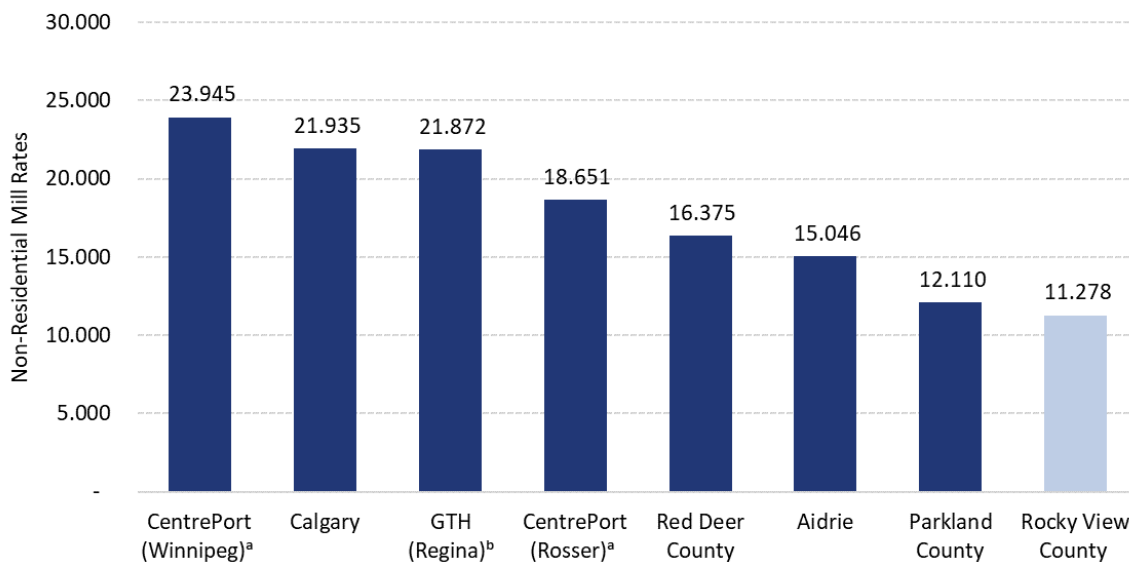
4.3 Competitive Analysis

The analysis in this section will support the overall value proposition of investing in the County rather than its competitive counterparts. Identified strengths and weaknesses are outlined and discussed.

4.3.1 Municipal Tax Rates

The non-residential mill rates in 2022 for the County and its comparators are presented below in Figure 4-1. The County has the lowest non-residential mill rate of all comparators. The lower mill rate reflects lower development and service standards, which is typical for rural municipalities compared to large urbans like Calgary. Other supplementary taxation from like-sized municipalities, which includes protective services, community services, and policing levies, account for the difference in mill rates between the County, Airdrie, and Red Deer County, which otherwise have comparable general municipal tax rates.

Figure 4-1 Non-Residential Mill Rates, County and Comparators



Source: City of Winnipeg 2023a, 2023b, 2023c; City of Calgary 2022; City of Regina 2022a; Rural Municipality of Rosser 2022a; Red Deer County 2022; City of Airdrie 2022; Parkland County 2022; Rocky View County 2022a.

Notes:

^aNet mill rates as per Manitoba's portioned assessment system.

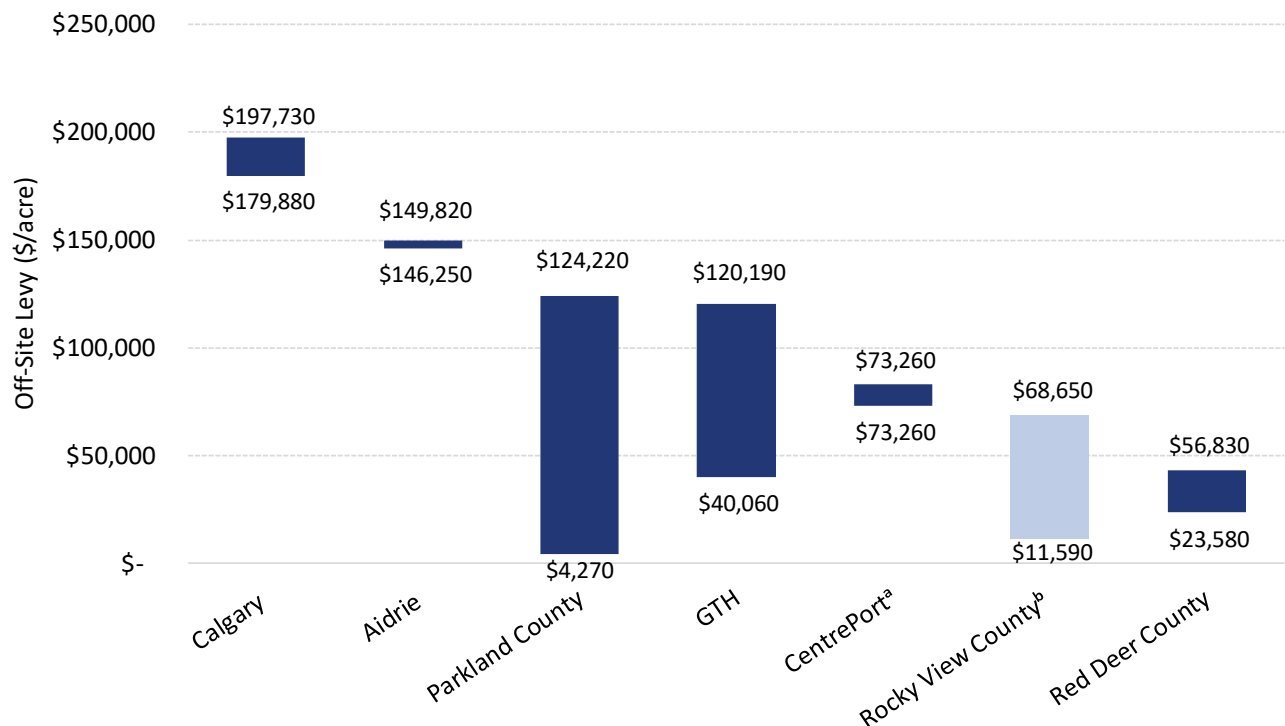
^bNet mill rates as per Regina's mill rate factor for commercial/industrial.

4.3.2 Off-Site Levies

An overview of off-site levies (OSLs) for the County and its comparators are presented below in Figure 4-2. It is difficult to compare OSLs across municipalities as these levies typically vary depending on the specific location of a development and/or service usage. For example, OSLs for water services in the County are a function of cubic meters used per day as opposed to a flat levy for each development basin. As such, we provide high-level estimates of OSL ranges for each comparator. The numbers shown in Figure 4-2 should thus be interpreted in terms of magnitude and general scale.

Transportation and water/wastewater levies make up most off-site levy costs, with only a few comparators charging for community services such as public libraries or emergency response stations. In terms of total costs, the County is one of the most competitive, with Calgary at the costlier end and Red Deer County being most affordable.

Figure 4-2 Off-Site Levy Rates, County and Comparators



Source: Rocky View County 2020a, 2020b, 2020c, 2023a; City of Calgary 2016; City of Airdrie 2019a; City of Regina 2023a; Rural Municipality of Rosser 2022b; Parkland County 2015; Red Deer County 2017a, 2017b.

Notes:

^aCentrePort off-site levies are taken from the Rural Municipality of Rosser. The only record of levies for the City of Winnipeg is in the form of frontage levies (which are costs based on the length of the boundaries (frontage) of the property that fronts or abuts any portion of a sewer main or water main (City of Winnipeg 2023d).

^b Rocky View County water and wastewater levies shown here as per hectare rates are for comparison purposes only. The County's actual water and wastewater levy rates are based on usage as per Bylaw C-8009-2020. The per hectare rate is calculated by taking the levies charged for commercial and industrial development in East Balzac divided by the respective parcel size.

4.3.3 Cost of Land

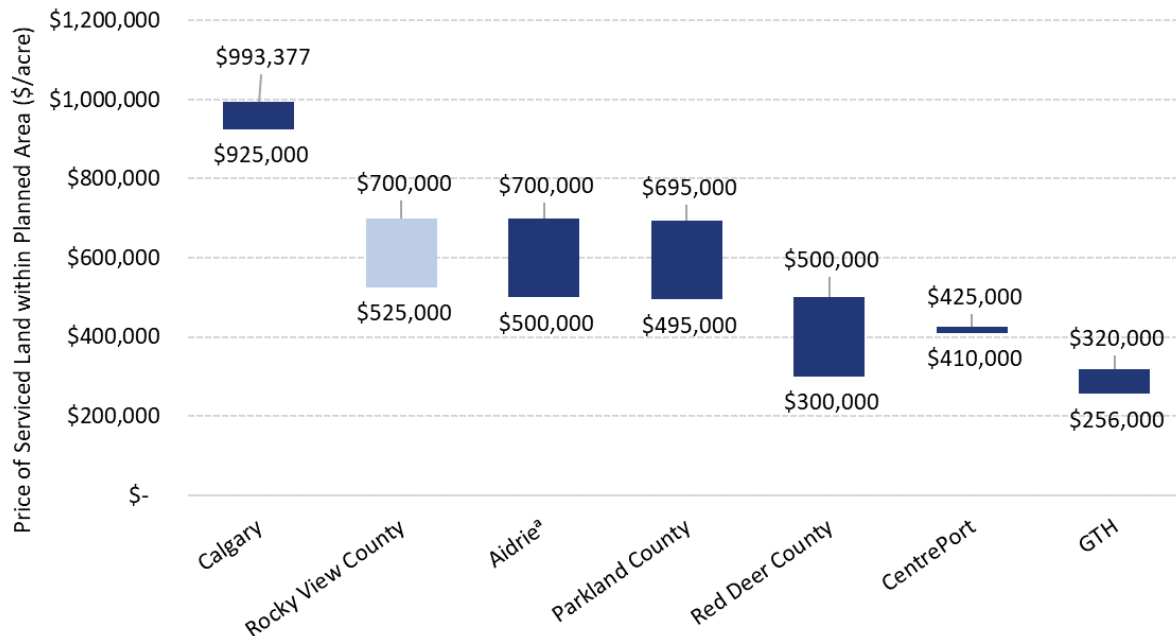
The cost of serviced land per acre for selected sites is presented below in Figure 4-3. The prices shown are from select listings taken as a representation of undeveloped land in each comparator jurisdiction. Market prices are constantly changing and will depend on factors such as location and property size. As such, the numbers shown in Figure 4-3 should be interpreted in terms of magnitude and general scale rather than exact numbers.

The listings selected are in existing industrial areas of interest. The CN Logistics Park and the Wagon Wheel Business Park serve as relevant sites for comparison within the County. Land prices for CentrePort Canada and the GTH are for allotted lots within their specific sites. Land prices for Parkland County are for Acheson's Highlands Business Park, while prices for Red Deer County are for the Junction 42 site. Calgary land prices are represented by listings for vacant land opportunities in the southeast part of the city, at or less than 3 acres. The most reasonable representation for non-residential land prices in the City of Airdrie is the East Points development area, which has been designated for future industrial development. The current price for an 80-acre plot of land, currently zoned for farmland but outlined for industrial future use, is \$77,000 per acre (JLL 2022). In

discussion with an experienced local broker serving the Airdrie and Northern Calgary area, an estimated cost of between \$500,000 to \$700,000 was derived as an approximation for the price of serviced land.

As depicted in Figure 4-3, the County is competitive with its regional comparators, and an attractive alternative to the higher cost of land in the City of Calgary.

Figure 4-3 Land Prices (serviced), County and Comparators



Source: Calgary Industrial Group 2023a, 2023b; CDN Global 2023a, 2023b; NAI Advent 2023; JLL 2022; Avison Young 2023; Red Deer County 2023b; Whiteland 2023; GTH 2023.

Notes:

^aEstimated cost based off of discussion with local experienced broker.

4.3.4 Transportation Infrastructure

Access to appropriate transportation infrastructure is a key factor in attracting industrial and commercial development in a community. Key modes of transportation for many business developments include air, rail, and road. Table 4-1 below provides an overview of transportation infrastructure access for the County and its comparators.

The County is located in close proximity to two air transportation options: the Calgary International Airport (just 10 km south of Balzac), and the Springbank Airport.⁴ Aside from large metropolitan areas with international airports inside their boundaries, the County has two options within close distance, serving as an advantage over more rural communities.

⁴ We note that a separate industrial and commercial demand study for the Springbank Area Structure Plan is being prepared by the Study Team and will be submitted under separate cover. As such, we do not go into great detail with respect to non-residential development in the Springbank area in this report.

For rail transportation, the County has direct access to the CN Calgary Logistics Park, located within the County near the Hamlet of Conrich. This industrial park also has industrial land ready for development within the area and is the only rural comparator with direct access to an intermodal terminal. The CP Railway Calgary Intermodal Terminal is also within close distance to the County. Of all large metropolitans, Winnipeg is the only city on the Canadian prairies with access to three Class 1 railways: CP, CN and BNSF (CentrePort 2023a).

The County is also highly accessible from a network of highways classified as high load corridors. Other comparators within the CMR including Calgary and Airdrie have similar accessibility to this highway network. Both the GTH and CentrePort Canada have access to primary weight highways. All major cities also connect onto the Trans-Canada Highway (Highway 1).

Public transportation is another consideration for location decisions by certain businesses, particularly as it relates to the accessibility of a site to the local workforce. The County, like many large, rural communities, does not have its own public transit system. Of all comparators, the City of Calgary has the most comprehensive public transit infrastructure. The GTH has access to Regina public transit and CentrePort Canada has access to Winnipeg public transit.

Table 4-1 Transportation Infrastructure, County and Comparators

Transportation Category	Rocky View County	City of Calgary	City of Airdrie	Red Deer County	Parkland County	GTH	CentrePort Canada
Airports	Calgary YYC (10km to Balzac)	Calgary YYC	Calgary YYC (20km to Airdrie)	Calgary YYC (100+ km to Junction 42)	Edmonton YEG (40 km to Acheson)	Regina YQR	Winnipeg YWG
	Springbank Airport		Airdrie Airpark	Red Deer Regional Airport	Parkland Airport		
Intermodal Terminals	CN Calgary	CN Calgary (20 km to Calgary)	CN Calgary (30 km to Airdrie)	CN Calgary (100+ km to Junction 42)	CN Edmonton (10 km to Acheson)	CN Regina	CN Winnipeg
	CP Rail Calgary (40km to Balzac)	CP Rail Calgary	CP Rail Calgary (50km to Airdrie)	CP Rail Calgary (100+ km to Junction 42)	CP Rail Edmonton (30km to Acheson)		
Primary Weight Corridors	Highways 22, 567, 772, 566, 9	Highway 560 (with access to Highway 1)	Highway 566 (nearby)	Indirect.	Indirect.	Highway 11 (with access to Highway 1)	Highway 101 (with access to Highway 1)
Public Transit	Bus (limited)	CTrain and Bus	Bus (limited)	Bus (limited)	Bus (limited)	Bus	Bus

Source: Government of Alberta 2023a; Government of Manitoba 2023; Government of Saskatchewan 2023; Rocky View County 2023b; City of Airdrie 2023b; Red Deer County 2023c; Parkland County 2023b; City of Calgary 2023c; City of Regina 2023b; City of Winnipeg 2023e.

4.3.5 Development Permits and Costs

While there are many permits involved with industrial projects, here we focus on development permits and building permits administered by the municipality. Development permit timelines are a key consideration in the planning process for development projects.

Table 4-2 outlines the estimated completion time for processing development permit applications once a complete application has been received across comparators. The County is comparable to other Albertan municipalities, with out of province comparators having a significant advantage.

Table 4-2 Development Permit Processing Timelines, County and Comparators

	City of Calgary	Rocky View County	City of Airdrie	Red Deer County	Parkland County	GTH	CentrePort ^a
Timeline	8 to 9 weeks	5 to 9 weeks	5 to 7 weeks	5 to 6 weeks	5 to 6 weeks	4 weeks	4 weeks

Source: City of Calgary Personal Communication 2023; Rocky View County 2023c; City of Airdrie Personal Communication 2023; Red Deer County 2023d; Parkland County 2023c; GTH 2023b; City of Winnipeg 2023g.

Notes:

^aCentrePort development permit timelines are taken from the City of Winnipeg (City of Winnipeg 2023g).

The following tables outline costs for both development permits and building permits. It is worth noting that there are many factors that influence how these permit costs were calculated. Each municipality structures and applies their permit fees differently, and a project-by-project assessment of services and cost structures would be required to properly assess and compare permit fees. For example, the County has stated that they set higher non-residential permits fines to offset the cost for minor residential permits that residents would pay. Without looking at a specific project, it is difficult to identify and evaluate the magnitude of the competitive advantage. As such, the comparison below strictly looks at the face value costs of permits for non-residential developments.

Table 4-3 shows the cost of development permits for the County and each comparator. The County's fee structure is split by development size. Costs are much higher for the County than the average competitor except for the GTH. Of note, the GTH has its own fee schedules (outside of Regina) which are significantly higher than all other comparators.

Table 4-3 Development Permit Costs, County and Comparators

Cost Category	Rocky View County	City of Calgary	City of Airdrie	Red Deer County	Parkland County	GTH	CentrePort (Winnipeg)	CentrePort (Rosser)
Flat Fee	\$1,000 ($\leq 600\text{m}^2$) \$2,150 (601m-1,499m ²) \$3,150 ($\geq 1,500\text{m}^2$)	\$263 ^a	\$500	\$250	\$529	\$10,000	\$695	\$177
Variable Fee (\$/m ²)	\$1.00 ($\geq 1,500\text{m}^2$)	\$0.76	\$0.25	\$0.30				
Minimum Total Fee		\$1,732						

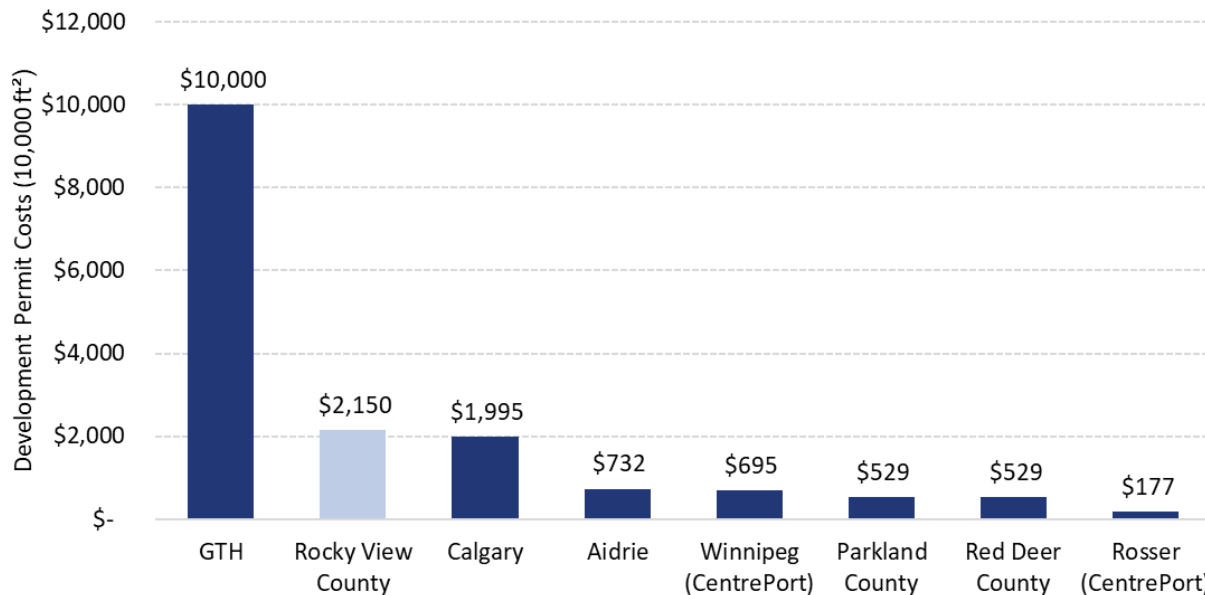
Source: Rocky View County 2022c; City of Calgary 2023d; City of Airdrie 2019b; Red Deer County 2023e; Parkland County 2023d; GTH 2015; City of Winnipeg 2023h; SIPD 2022.

Notes:

^aConsists of \$233 Development Completion Permits (DCP) fee and \$30 admin fee.

The total development permit costs associated with a 10,000 ft² development (i.e., 929 m²) has been provided as an example in Figure 4-4.

Figure 4-4 Sample Development Permit Costs (10,000 ft²), County and Comparators



Source: Rocky View County 2022b; City of Calgary 2023d; City of Airdrie 2019b; Red Deer County 2023e; Parkland County 2023d; GTH 2015; City of Winnipeg 2023f; SIPD 2022.

Table 4-4 shows the cost of building permits for the County and each comparator. The County has the highest fee structure out of all its competitors, although costs for CentrePort are not in a comparable unit of measure. Of note, all Alberta building permits are charged a safety code levy fee on top of the total permit cost (4% of permit fee with a minimum of \$4.50 and maximum of \$560). Table 4-4 shows the base rates, excluding the safety code levy fee.

Table 4-4 Building Permit Costs, County and Comparators

Cost Category	Rocky View County	City of Calgary	City of Airdrie	Red Deer County	Parkland County	GTH	CentrePort (Winnipeg)	CentrePort (Rosser)
Variable (per \$1,000 construction value)	\$10.50	\$10.14 +\$112.00 (flat)	\$10.00	\$7.50 (<\$5M) \$3.75 (≥\$5M)	\$9.25 (first \$1M) \$7.20 (thereafter)	\$6.60 (<\$20M) \$6.00 (\$20M-\$50M) \$5.40 (\$50M-\$100M) \$4.80 (>\$100M)	\$11.60 (per m ²) ^a +\$925.00 (flat)	\$1.42 (per ft ²) ^a +\$946.0 (flat)
Minimum Total Fee		\$116.50	\$130.00	\$250.00	\$317.00	\$5,000.00		

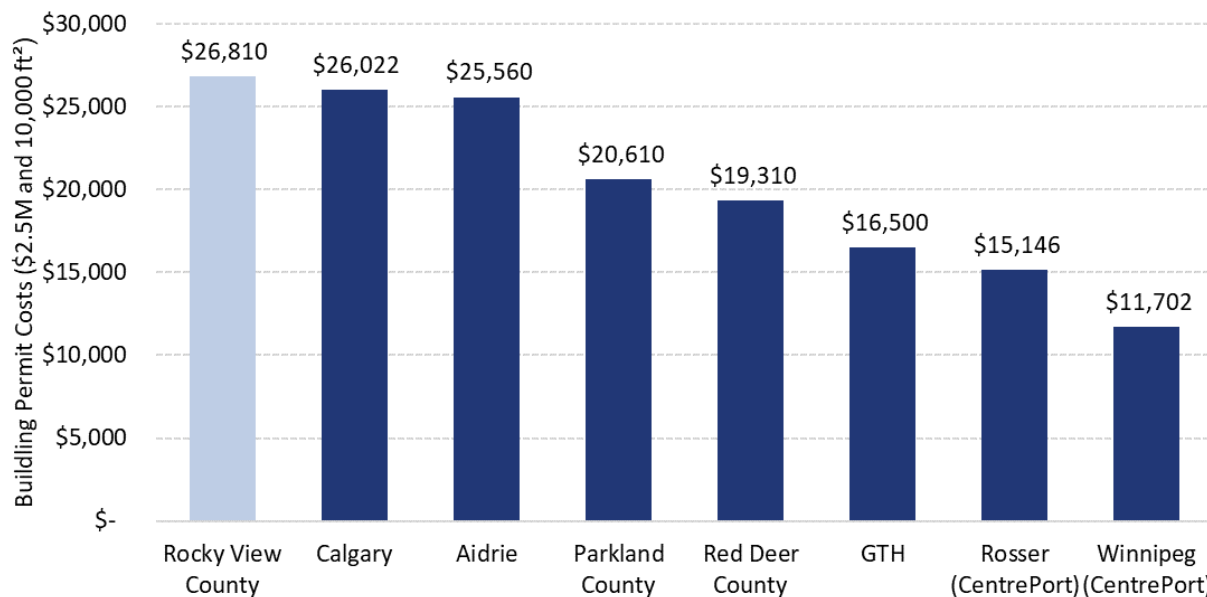
Source: Rocky View County 2022b; City of Calgary 2023e; City of Airdrie 2023c; Red Deer County 2023e; Parkland County 2023d; GTH 2015; City of Winnipeg 2023f; SIPD 2022.

Notes:

^a Building group F-2 (medium hazard industrial) is assumed. Also note different fee structure (per area rather than cost).

The total cost associated with a 10,000 ft² development (i.e., 929 m²) at a construction cost of \$250/ft² (i.e., \$2.5 million construction cost) has been provided as an example in Figure 4-5. The safety code levy fee has been included to capture total costs.

Figure 4-5 Sample Building Permit Costs, County and Comparators



Source: Rocky View County 2022b; City of Calgary 2023e; City of Airdrie 2023c; Red Deer County 2023e; Parkland County 2023d; GTH 2015; City of Winnipeg 2023f; SIPD 2022.

4.3.6 Utilities

The County and other comparator jurisdictions have access to standard utilities such as drinking water, natural gas, and electricity. All comparators have their own water supply except for Airdrie which purchases its water from Calgary's Glenmore Water Treatment Plant (Airdrie 2023d, Calgary 2023f). Most Albertan comparators have natural gas distributed by ATCO and electricity distributed by Fortis Alberta (UCA 2023), with Sask Energy and Sask Power for the GTH, and Manitoba Hydro for both natural gas and electricity for CentrePort Canada.

Access to high-speed internet is also available in all comparator municipalities, but to varying extents. Rural regions are typically limited to fixed wireless, mobile, DSL, and/or satellite. Large metropolitans typically have access to fiber optic internet (ISED Canada 2023a). This is common for municipalities across Canada, with only 62.8% of rural Canadian households having access to high-speed internet as of 2021 (ISED Canada 2023b). As part of its economic development initiatives, Red Deer County has made advances in recent years to upgrade most of its region to fiber optic internet (Red Deer County 2023f).

Table 4-5 and Table 4-6 below describe the utility costs for water and wastewater in the County and comparator jurisdictions. Typical charges are split between fixed and variable costs. Some jurisdictions have additional factors that impact utility rates such as water meter diameter. In consultation with local municipalities, our assumption is that the typical maximum diameter size for industrial sites would be at 50mm (2"), with retail sites closer to or at 15mm (5/8"). Where applicable Table 4-5 and Table 4-6 state the range between these two measures of 15mm (5/8") to 50mm (2").

Some comparators also have different utility rates for different parts of their jurisdiction. For the comparisons provided in Table 4-5 and Table 4-6, East Rocky View (Balzac) was used as a reference point for the County, and Junction 42 was used as a reference point for Red Deer County. Daily rates were also converted to monthly rates assuming 30 days per month.

Overall, the County is close to its competitors in terms of water and wastewater costs. The variable water rates are the highest amongst all comparators however, as seen in Table 4-5.

Table 4-5 Monthly Water Utility Costs, County and Comparators

Cost Category	Rocky View County ^a	City of Calgary	City of Airdrie ^b	Red Deer County ^c	Parkland County	GTH (Regina) ^b	CentrePort (Winnipeg) ^b	CentrePort (Rosser)
Fixed	\$20.00 (0m ³ -49m ³)	\$14.14 (15mm)	\$22.20 (15mm)	\$49.68 (15mm)	\$31.69	\$28.80 (15mm)	\$21.90 (15mm)	\$39.00 ^d
	\$50.00 (50m ³ -499m ³)	\$86.49 (50mm)	\$178.20 (50mm)	\$310.49 (50mm)		\$83.40 (50mm)	\$42.30 (50mm)	
	\$150.00 (≥500m ³)							
Variable (per m ³)	\$4.6750	\$1.4018 (<75mm)	\$1.4999	\$2.1100	\$3.2600	\$2.310	\$2.000	\$3.210
		\$1.3512 (>75mm)						

Source: Rocky View County 2022b; City of Calgary 2023g; City of Airdrie 2023e; Red Deer County 2023e; Parkland County 2023d; City of Regina 2022c; City of Winnipeg 2023h; Rural Municipality of Rosser 2023c.

Notes:

^a East Rocky View (Balzac) was used as a reference point for the County.

^b Fixed rates were converted from daily to monthly (30 days).

^c Junction 42 was used as a reference point for Red Deer County.

^d The \$39 service fee is for both water and wastewater.

Table 4-6 Monthly Wastewater Utility Costs, County and Comparators

	Rocky View County ^a	City of Calgary	City of Airdrie ^b	Red Deer County ^c	Parkland County	GTH (Regina) ^b	CentrePort (Winnipeg) ^b	CentrePort (Rosser)
Fixed	\$45.00	\$27.10	\$48.30 (15mm) \$385.80 (50mm)	\$52.67 (15mm) \$219.48 (50mm)	\$41.81	\$22.20 (15mm) \$64.50 (50mm)	\$5.71 ^d	\$39.00 ^e
Variable (per m ³)	\$2.5410	\$2.1182	\$2.0573	\$3.3800	\$1.9600	\$2.040	\$2.960	\$3.810

Source: Rocky View County 2022b; City of Calgary 2023h; City of Airdrie 2023e; Red Deer County 2023e; Parkland County 2023d; City of Regina 2022d; City of Winnipeg 2023h; Rural Municipality of Rosser 2023c.

Notes:

^a East Rocky View (Balzac) was used as a reference point for the County.

^b Fixed rates were converted from daily to monthly (30 days).

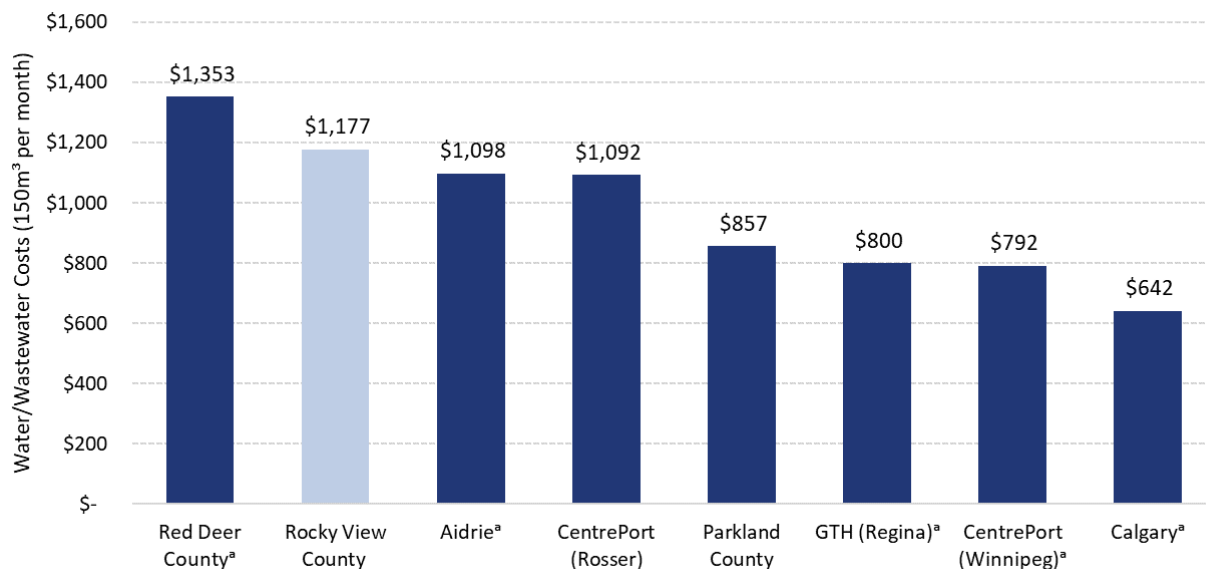
^c Junction 42 was used as a reference point for Red Deer County.

^d Waste diversion fee.

^e The \$39 service fee is for both water and wastewater.

The total costs associated with a monthly usage of 150 m³ has been provided as an example in Figure 4-6. The more conservative rates (i.e., water meter diameter size of 50mm) were used where applicable.

Figure 4-6 Sample Water and Wastewater Total Costs, County and Comparators



Source: Rocky View County 2022b; City of Calgary 2023g, 2023h; City of Airdrie 2023e; Red Deer County 2023e; Parkland County 2023d; City of Regina 2022d; City of Winnipeg 2023h; Rural Municipality of Rosser 2023c.

Notes:

^a Rates for water meter diameter of 50mm applied.

4.3.7 Interprovincial Considerations

Two of the comparators selected for the competitiveness analysis are jurisdictions located outside of Alberta, specifically Centreport in Manitoba and GTH in Saskatchewan. As such, there may be several key provincial-level competitiveness factors that pertain to these comparators, in addition to the factors considered above in Sections 4.3.1 to 4.3.6. For instance, Alberta has the lowest general corporate income tax rate in the Country at just 8% (Government of Alberta 2023); Saskatchewan and Manitoba both have 12% corporate income tax rates (Government of Canada 2022). Conversely, production costs in Alberta are often relatively higher than other provinces in Canada, particularly with respect to wages and salaries. The median income of individuals in Alberta in 2020 was roughly \$44,800, as compared to \$42,400 in Saskatchewan, and \$39,200 in Manitoba.

4.3.8 Summary

Rocky View County is a competitive option for non-residential development, especially within Alberta. There are several characteristics that may attract non-residential investments, i.e., the “Rocky View Advantage.” The County has the lowest general non-residential mill rate of all its comparators, making it financially appealing to long-term investments. The County is also in a great location with extensive transportation infrastructure, comparable to that of other inland ports within the region. However, the County may make some strategic changes to improve its competitiveness.

For example, initial costs such as building permits and development permits are some of the highest amongst comparator jurisdictions. In addition (and perhaps more importantly) the County has relatively long permitting timelines. However, the County has recently taken steps to improve application thru-puts by increasing staff and through a variety of other enhancements the County’s Planning and Building Services teams are currently implementing. Finally, while the price of serviced land in the County is relatively competitive in Southern Alberta, jurisdictions in Manitoba and Saskatchewan appear to have relatively less expensive land costs.

5. Future Growth: Cluster Analysis

The CMRB Growth Plan outlines Preferred Growth Areas (PGAs) to direct growth in the Region in an efficient manner. The Growth Plan also encourages growth within existing ASPs that were approved prior to the adoption of the Plan. Within the County, PGAs include Joint Planning Areas (JPAs) and Hamlet Growth Areas (HGAs).

Joint Planning Areas

There are two JPAs within the County:

- JPA 1: City of Airdrie/Rocky View County/City of Calgary
 - Balzac East ASP
 - Balzac West ASP
- JPA 2: City of Chestermere/Rocky View County/City of Calgary
 - Conrich ASP
 - Janet ASP
 - Omni ASP

Hamlet Growth Areas

There are three HGAs within the Growth Plan, including:

- Bragg Creek
- Harmony
- Langdon

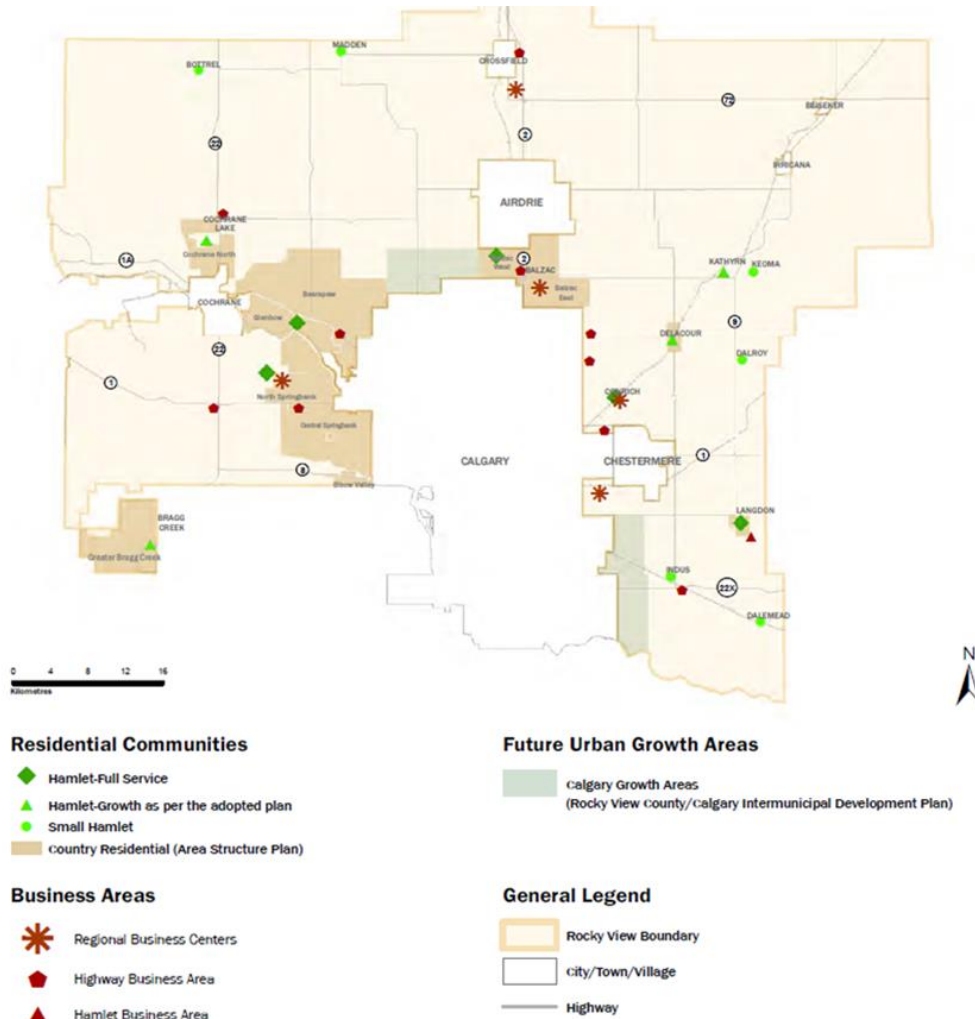
The cluster analysis presented below includes growth nodes centered around the County's current County Plan.⁵ These growth nodes include JPAs and HGAs within the County, as well as several nodes that exist outside of the County's PGAs (i.e., Hamlet of Cochrane Lake, Springbank Airport, Crossfield South).

In the analysis presented below, we define **Cluster Drivers** as existing economic development that, from a market-based approach, could drive additional growth (as seen by developers, brokerage professionals, and investors). **Additional Cluster Opportunities** are defined as potential developments and uses that might fit the growth areas or could be attracted, considering factors such as location, novelty, and broader regional or provincial trends.

It is important to note that any activity towards exploring or pursuing the concepts identified in **Additional Cluster Opportunities** will need to be first directed by Council and subsequently supported by Administration with targeted economic development, investment attraction, and planning supports.

⁵ Rocky View County Plan Bylaw C-7280-2013 amended 06/23 2022.

Figure 5-1 Rocky View County Map



Source: Rocky View County Plan C-7280-2013.

5.1 Business Use Areas

5.1.1 Balzac (East and West)

Balzac acts as a bridge between two large urban neighbours: the City of Calgary and the City of Airdrie. The Hamlet currently supports some business development along the QEII Highway. This growth node will serve a significant regional function and will be part of a regional transit system. In the East Balzac Node, the current and planned availability of water and sewer services, combined with superb transport accessibility and visibility, will foster relatively high valued and intensive development in the area. The area is strategically located to serve as the initial and core magnet for further commercial, industrial, and mixed-use development in the municipality. The Balzac node is likely to provide the strongest focus of new high-valued business development in the County.

Table 5-1 Cluster Analysis, Balzac (East and West)

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> • Cross Iron Mills: 9.4 million visitors annually across 1.4 million sq. ft. of developed space. <ul style="list-style-type: none"> ○ 550 acres of unused retail development area remain. 	<ul style="list-style-type: none"> • New retail fronts with warehouse-in-back combinations. • Next generation auto/RV mall. • Expansion of agriculture technology services. <ul style="list-style-type: none"> ○ E.g., Kubota, John Deere, Case, New Holland, etc. • Potential to create attraction for heavier industrial footprint. • Potential to develop a “megasite” in the East Balzac. <ul style="list-style-type: none"> ○ Megasites are defined as standalone areas over 500 acres with: <ul style="list-style-type: none"> ▪ Power>100MW ▪ Water>1B litres/year, 300 mm line ▪ Sewer>760M litres/year, 300 mm line ▪ Natural gas>12,000MMBTU/day. ○ Megasites attract large single users (e.g., Tesla, VW, Stellantis, BASF, etc.)

5.1.2 Conrich

A community strategically located immediately east of the City of Calgary, Conrich is the focus of a number of existing development proposals that will be consolidated through a Community Development Strategy. Located adjacent to major sour gas infrastructure, as well as the northeast ring road which surrounds the City of Calgary, this node is well-positioned to link to the provincial highway system and could be supported by municipal and regional infrastructure.

Table 5-2 Cluster Analysis, Conrich

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> • CN Logistics Park (284 acres: 125 acres developed, 160 acres vacant). • Princess Auto Distribution Centre. • Whirlpool Logistics Centre. 	<ul style="list-style-type: none"> • CP Inland Port expansion; transload complex. • Warehousing as complementary storage and inventory management aspects of logistics. • Value-added services packaging, labelling, product customization, reverse logistics (returns management), after-sales support, etc. • Supply chain consulting professional services – co-location. • Order fulfillment. <ul style="list-style-type: none"> ○ E.g., order processing, picking and packing, and shipment preparation, etc.

5.1.3 Janet

Located southeast of Calgary, this node contains much of Rocky View's existing business development, benefiting from excellent road and rail access, land cost competitiveness, and the synergistic benefits of established and expanding complementary industries. The Growth Management Strategy recognizes the significant potential in this area for further light industrial and medium industrial expansion.

Table 5-3 Cluster Analysis, Janet

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> Building products/construction materials. Logistics services, trucking, and support services. 	<ul style="list-style-type: none"> Warehousing as complementary storage and inventory management aspects of logistics. Advanced trucking/fleet supports (e-vehicle, hydrogen). Building pre-fab developments and components.

5.1.4 Omni

The proposed Omni mixed-use development is a master planned commercial destination and hub within the County that will serve Calgary's thriving upper-northeast quadrant. With unparalleled frontage for national and boutique retailers, it is planned to include 600,000 square feet of retail space, a 325,000 square foot outlet centre, 3 boutique hotels, 250 senior active living units, 500,000 square feet of office space, a children's creativity zone, restaurants, and more.

Table 5-4 Cluster Analysis, Omni

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> Residential development (supporting population growth/in-migration). Large transportation infrastructure expansion (i.e., LRT) 	<ul style="list-style-type: none"> Business activities that primarily serve a growing residential base (over time). <ul style="list-style-type: none"> E.g., retail offerings, grocery stores, restaurants/café's, theatres, entertainment offerings, vehicle services, hardware store, convenience retail, etc.

5.2 Hamlet Growth Areas

5.2.1 Bragg Creek

The Hamlet of Bragg Creek is located approximately 30 km southwest of the City of Calgary. The County's Municipal Development Plan (the County Plan) supports the development of Bragg Creek as a small rural community with basic services in accordance with the local plan.

Table 5-5 Cluster Analysis, Bragg Creek

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> • Superb recreation attraction (e.g., hiking, biking, horseback). • Small and attractive dining/restaurant scene. 	<ul style="list-style-type: none"> • Create a specialty retail destination. <ul style="list-style-type: none"> ◦ E.g., “western fair”, furniture, home décor, etc. • Work-from-home opportunities/attracting relocating professionals (Canmore example). • Spa and wellness cluster with Airbnb/B&B overnight stay integration. • Medical and wellness activities/alternative healthcare. • Culinary arts services and offerings. • Wedding and small events industry. • Art gallery/classes/gift shop.

5.2.2 Springbank Airport/Harmony

We note that while Harmony is considered an HGA, the Springbank Airport area is outside of the County’s PGAs. Strategically located to service airport-related commercial growth, this business node will complement a business campus proposed as part of the urban village at Harmony. A comprehensively planned community designed to be a live-work-play environment for residents.

Table 5-6 Cluster Analysis, Springbank Airport/Harmony

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> • Private aviation and associated services. • Flight schooling and administration. • Lifestyle/wellness. • Air service support. <ul style="list-style-type: none"> ◦ E.g., fixed wing, rotary wing, emergency services, SAR, etc. 	<ul style="list-style-type: none"> • Aero-space and related industry supply chain and servicing (De Havilland). • Retail services. • Car storage/activities associated with motorsport. • Arts and events complex with a destination focus (potential festival hosting). • Spa and wellness cluster. <ul style="list-style-type: none"> ◦ E.g., medical and wellness complex, alternative healthcare, private delivery within public health, etc. • Golf and retirement recreation; possible year-round (e.g., Top Golf). • Culinary arts services and offerings.

5.2.3 Langdon

An existing residential hamlet containing a significant population. The current infrastructure and community services can act as a foundation for expanding the community. Housing and residential development, commuting proximity, and relative affordability will continue to drive interest and demand in the community.

Table 5-7 Cluster Analysis, Langdon

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> Retail activities based on expanding local demand. Additional associated services with local population demands. <ul style="list-style-type: none"> E.g., grocery store, diner/café, bakery, vehicle services, hardware store, convenience retail, etc. 	<ul style="list-style-type: none"> Light industrial manufacturing E.g., wood working shop, metal work, etc. Retail activities based on expanding local demand.

5.3 Other Nodes

5.3.1 Cochrane Lake

Cochrane Lake is a developing hamlet that will continue to expand by taking advantage of significant natural features in the western region of the County. A proposed Hamlet Plan envisions the community developing into a compact urban village.

Table 5-8 Cluster Analysis, Cochrane Lake

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> Retail activities based on expanding local demand. Additional associated services with local population demands. <ul style="list-style-type: none"> E.g., grocery store, diner/café, bakery, vehicle services, hardware store, convenience retail, etc. 	<ul style="list-style-type: none"> Create a specialty retail destination. <ul style="list-style-type: none"> E.g., “western fair”, furniture, home décor, etc. Create a destination market venue. <ul style="list-style-type: none"> E.g., farmers market (year-round opportunity). Freelance or consulting services, combined residential/work-from-home professional services development. Artisan or craft business activities. <ul style="list-style-type: none"> E.g., jewelry, pottery, woodworking, textiles, etc. These retailers could sell their products online, at local markets, or through boutique stores. Health and wellness services. <ul style="list-style-type: none"> E.g., yoga studios, personal training services, wellness coaching, etc.

5.3.2 Crossfield South

Located within the QEII Highway and Highway 2A corridor, the Crossfield South node has excellent access to existing highway interchanges and rail lines. Furthermore, the benefit of being competitive in terms of land costs raises the potential for business expansion in this area.

Table 5-9 Cluster Analysis, Crossfield South

Cluster Drivers	Additional Cluster Opportunities
<ul style="list-style-type: none"> • Retail activities based on expanding local demand. • Highway services. 	<ul style="list-style-type: none"> • Create a specialty retail destination. <ul style="list-style-type: none"> ○ E.g., “western fair”, furniture, home décor, etc. • Create a destination market venue. <ul style="list-style-type: none"> ○ E.g., farmers market (year-round opportunity).

5.3.3 Shepard Industrial

The Shepard Industrial Area is an industrial and employment hub near Calgary. This area exists within the JPA 2 PGA but is not a DBA. This area hosts a significant presence of redistribution and logistics operators including a state-of-the-art transload facility on the CP (now CPKC) Class 1 mainline. We note that the Shepard Industrial Area is subject to a separate Rocky View County/City of Calgary SE Industrial Corridor Initiative. As such, the development of this area will be discussed in depth as part of that work.

6. Growth Projections

When forecasting industrial and commercial growth in the County, the Study Team took an approach that allows for the delineation of growth in the County related primarily to the local economy and distinct from growth in the County driven by the broader regional economy.⁶

Forecasting industrial and commercial land growth in the County was completed using a two-staged approach. Firstly, population and employment forecasts for the County were developed and secondly, these forecasts were translated into the future need for non-residential land.

The balance of this section describes:

- the conceptual approach to non-residential land growth forecasting,
- the data and assumptions used in the growth projections, and
- resulting industrial and commercial land projections under various growth scenarios.

6.1 Growth Forecasting Overview

Nichols has developed a unique and rigorous approach to forecasting the future growth of municipalities. The approach is predicated on the understanding that population growth in communities generally consists of two core components:

- the natural rate of population growth, reflective of the fertility and mortality rates of the population; and
- in- or out-migration related to the prevailing economic conditions and the associated need for labour in the community.

Developing projected growth in the County was undertaken using an integrated labour force and age-cohort survival model. Conceptually, this approach consists of:

- developing a demographic model using community specific population figures and birth and mortality rates to emulate the natural population dynamics of the County;
- developing a labour market model that reflects prevailing local, regional, and provincial economic conditions and the relative labour demand and supply in the County that subsequently drives in or out migration; and
- combining the natural rate of population change with the net migration reflective of local economic conditions to arrive at future population and employment figures.

We note that Rocky View County is one of many communities that constitutes the broader Calgary Metropolitan Region (CMR). As such, some residents may work in other municipalities and vice versa. Accordingly, the above-described analytical approach was adjusted to reflect commuting patterns and employment locations of regional residents.

To reflect the uncertainty that is inherent in estimating future demographic parameters and economic conditions, the Study Team incorporated a Monte Carlo simulation into the forecasts to identify a distribution of possible future outcomes as key variables such as fertility and mortality rates vary across historic ranges and trends.

⁶ In-commuting to the County and out-commuting from the County is assumed to occur at a constant ratio over time. As such, growth in non-residential lands in the County is not driven by a relative increase in in-commuters in the status-quo scenario.

The final output of this analysis (see Section 6.3) is a forecast of jobs hosted within the County and associated industrial and commercial land needs disaggregated to specific NAICS codes as used by Statistics Canada for census purposes.

6.2 Key Inputs and Assumptions

Employment projections for the County were developed under the following assumptions:

- Fertility and mortality rates in the County are projected using a Monte Carlo procedure and historical age-specific fertility and mortality rate data for the 2006 to 2021 period (fertility rate data) and the 2002 to 2021 period (mortality rate data) (Alberta Health 2023).
- Labour force participation in the County is assumed to be 65.4% (as per the 2021 census).
 - We note that the County has seen higher labour force participation in previous years, but this rate has been steadily declining since 2001. As such, we rely on the most recent rate (65.4% in the 2021 census) while acknowledging that the downward trend in labour force participation in the County may continue into the future.
- In 2020, the COVID-19 pandemic caused unemployment in the Calgary CMA to rise to over 15% (specifically in June/July 2020) (Statistics Canada 2023). Unemployment in the County in 2021 was roughly 9.3% (Statistics Canada 2021a). By 2022, the average unemployment rate across the Calgary CMA had declined to roughly 6% (Statistics Canada 2023). Historically, the County has seen an unemployment rate of roughly 4.5-5.5%. As such, we assume that the county recovers to a “full employment” unemployment rate of 5% by 2025.
- Employment growth in the County has fluctuated over the last two decades, with annual employment growth in the County’s labour force being about 0.5% between 2001 and 2021 (see Section 3.1.2 for more detail). Outside of the County, employment growth across the rest of the CMR has been roughly 1.5% between 2001 and 2021. We assume that employment in the County is relatively high (1.5% – 2%) during the pandemic recovery period (2023 – 2026), before stabilizing to a long-term growth rate of 1%.
- Using projected employment of County residents, we estimate the number of jobs hosted within the County by adjusting for the following factors based on historical census data:
 - *The proportion of employed persons who work at home by NAICS sector:* The COVID-19 pandemic prompted a variety of public health measures that restricted public gatherings and the ability of employees to work in the office. The 2021 census data reflects the work from home trend brought about by the pandemic, with roughly 35% of employees in the County working from home as compared to just 18% in 2016 (Statistics Canada 2016, 2021a). Following the lift in public health restrictions many employees returned to the office, but it is expected that many workers will continue to work from home to a larger degree than before the pandemic. As such, we assume the proportion of employed persons who work at home in the County to be the average of 2016 and 2021 census data (roughly 26% overall).
 - *The proportion of employed persons who do not have a fixed workplace or who work outside of Canada by NAICS sector:* Again, we assume these proportions to be the average of 2016 and 2021 census data.
 - *The commuting patterns of employed persons travelling in and out of the City by NAICS subsector:* We assume commuting patterns of employed residents of the County and surrounding municipalities based on 2021 census data. The ratio of out-commuters to in-commuters stays constant over the forecast

period; as such, growth is not driven by employment demand by in-commuters from surrounding municipalities.

For 2022, the number of jobs hosted in the County in industrial and commercial business activities are provided in Table 6-1 below.

Table 6-1 Industrial and Commercial Jobs Hosted in Rocky View County, 2022

Employment Activity	Jobs Hosted in Rocky View County ^a
Industrial	7,950
Commercial	12,550
Total	20,500

Note:

^a These estimates exclude jobs hosted on agricultural lands (i.e., farms) and institutional lands, and employed persons who work from home or do not have a fixed place of work.

To estimate industrial and commercial land absorption in the County, the Study Team developed employment density estimates based on the job estimates provided in Table 6-1 above as well as non-residential land absorption assumptions from the County's 2022 Land Use Inventory data (Rocky View County Personal Communication 2024). Estimates suggest that as of 2022, the County has developed roughly 3,480 gross acres of industrial and commercial lands.⁷

⁷ Note that this is likely an underestimate as the County's draft 2022 Land Use Inventory is missing several non-residential areas (e.g., non-residential lands in Hamlets). As such, the estimates and projections presented in this report may be inexact.

Table 6-2 Absorbed Non-Residential Lands, Rocky View County, 2022

Policy Area	2022 Developed Business Area (Gross Acres)
Balzac East ASP	1,817
Balzac West ASP	97
Conrich ASP	182
Janet ASP	1,075
Langdon ASP	36
North Central Industrial ASP	0
North Springbank ASP	225
Omni ASP	0
Shepard ASP	0
Fulton ASP	47
Total	3,479

Source: Rocky View County Personal Communication 2023.

Furthermore, we assume that the job density (i.e., jobs per gross acre) on industrial lands in the County is half that of the job density on commercial lands. The resulting job density estimates for industrial and commercial lands in provided in Table 6-3 below.

Table 6-3 Industrial and Commercial Job Densities (jobs/gross acres), Rocky View County

Employment Activity	Job Density (jobs/gross acres)
Industrial	8.3 ^a
Commercial	16.6

Note:

^a The industrial job density estimate is relatively in line with that of Watson and Associates in their 2014 Rocky View County Industrial Land Capacity Study.

We note that the above-described modelling approach projects non-residential land needs in the County driven by growth in employment of County residents, with adjustments made to account for those who work from home, do not have a fixed place of work, and commuters in and out of the County. This approach does not capture additional growth in the Region that would stimulate an increase in net-commuting into the County from nearby communities. Industrial and commercial land needs driven by Regional growth factors is explored in more detail in Section 6.3 below.

6.3 Non-Residential Land Projections

As noted previously, industrial and commercial land projections for the County are built up in two stages. First, we develop status quo projections for non-residential lands driven by growth in employment of County residents, with adjustments made to account for those who work from home, do not have a fixed place of work, and commuters in and out of the County. These projections suggest what the County's commercial and industrial land needs may be given the assumptions described in Section 6.2 above. Next, we describe how Regional growth in the County, as envisioned by the CMRB Employment Forecast (Applications Management 2020), may contribute to industrial and commercial land development over the next several decades.

The County's status quo industrial and commercial land projections (i.e., land needs driven by employment growth of County residents) suggest that, by 2054⁸, roughly 2,750 gross acres of industrial land and roughly 2,170 gross acres of commercial land will be required. Growth in non-residential land between 2022 and 2054 is roughly 1% (45 gross acres) per year.

Table 6-4 Status Quo Industrial and Commercial Land Projections, Rocky View County, 2022 – 2054

Employment Activity	2022	2054
	Gross Acres	
Industrial	1,950	2,750
Commercial	1,530	2,170
Total	3,480	4,920

Regional growth projections presented in the CMRB Employment Forecast (Applications Management 2020) suggest that the County will host significantly more jobs, and therefore will require significantly more non-residential land than the status quo projections presented above.⁹ Overall, the CMRB Employment Forecast projects the County as hosting about 118,580 jobs in 2054, as compared to the status quo forecast of 31,865 (Table 6-5). The CMRB employment projection suggests relatively high annual growth in jobs hosted in the County of roughly 5% between 2022 and 2054.

⁸ Note that our growth projections extend to 2054 as this is the latest year of employment projections that inform the CMRB Growth Plan (Applications Management 2020).

⁹ We note that the CMRB Employment Forecast (Applications Management 2020) does not clearly state that the employment projections for each CMRB community represent jobs hosted in the community, and not jobs held by community residents. We assume the projections represent the former (i.e., jobs hosted in the community).

Table 6-5 Projected Jobs Hosted in Rocky View County, 2054

Jobs Hosted in Rocky View County	Status Quo Projection	CMRB Employment Forecast
Jobs (all sectors)	31,865 ^a	118,580
CAGR (2022 ^b – 2054)	1%	5%

Notes:

^a The Nichols projection excludes employees who work from home or do not have a fixed place of work. It is unclear if the CMRB Employment Forecast makes similar adjustments.

^b The CAGR is based on Nichols estimate of jobs hosted in Rocky View County in 2022 (roughly 22,570).

Estimated land needs associated with the CMRB Employment Forecast were developed based on the CMRB's NAICS-specific employment forecast provided by the County (Rocky View County Personal Communication 2023) and the assumed job densities described above in Table 6-3. A summary of the projected industrial and commercial land needs in the County in 2054 for both the status quo projection and the CMRB Employment Forecast is provided below in Table 6-6. Overall, the CMRB Employment Forecast suggests a much larger rate of absorption of industrial and commercial lands in the County as compared to the status quo projection; roughly 525 gross acres/year vs 45 gross acres/year in the status quo projections.

Table 6-6 Industrial and Commercial Land Projections (Status Quo and CMRB), Rocky View County, 2054

Employment Activity	Status Quo Projection	CMRB Employment Forecast (Estimated Land Needs)	Status Quo Projection	CMRB Employment Forecast (Estimated Land Needs)
	Gross Acres (2054)		Gross Acres Per Year (2022 – 2054)	
Industrial	2,750	15,360	25	420
Commercial	2,170	4,900	20	105
Total	4,920	20,260	45	525

The relatively larger need for industrial land as compared to commercial land in the estimated CMRB land projection as compared to the status quo projection reflects the CMRB Employment Forecast's projection of jobs across sectors. Table 6-7 below provides the distribution of jobs hosted in the County across NAICs sectors for the 2021 census, the status quo projection in 2054, and the CMRB Employment Forecast in 2054. The distribution of jobs across sectors for the status quo projection in 2054 is relatively in line with that of the 2021 census data; this is expected, as the status quo projection relies on historical census data and assumptions. The CMRB Employment Forecast projects a much larger proportion of jobs in industrial activities in the County by 2054, such as:

- Mining, quarrying, and oil and gas (15% vs. 3% in the status quo projection).
- Construction (17% vs. 6% in the status quo projection).
- Manufacturing (10% vs. 7% in the status quo projection).

The CMRB Employment Forecast also projects a much smaller proportion of jobs in commercial activities in the County by 2054, name retail trade (6% vs. 27% in the status quo projection).

Table 6-7 Proportion of Jobs by NAICS Sector (2021 Census, Status Quo, and CMRB), Rocky View County

NAICS Sector	2021 Census ^a	Status Quo Projection (2054) ^b	CMRB Employment Forecast (2054) ^c
	Jobs Hosted in Rocky View County (% by Sector)		
Agriculture, forestry, fishing, and hunting	3%	3%	1%
Mining, quarrying, and oil and gas extraction	2%	3%	15%
Utilities	1%	1%	3%
Construction	6%	6%	17%
Manufacturing	7%	7%	10%
Wholesale trade	4%	4%	3%
Retail trade	27%	27%	6%
Transportation and warehousing	19%	18%	6%
Information and cultural industries	1%	1%	2%
Finance and insurance	1%	1%	3%
Real estate	1%	1%	2%
Professional, scientific and technical services	3%	4%	7%
Management of companies and enterprises	0%	0%	0%
Administrative and support services	4%	4%	3%
Educational services	4%	4%	3%
Health care	3%	2%	6%
Arts, entertainment, and recreation	5%	5%	2%
Accommodation and food services	4%	4%	5%
Other services	4%	3%	4%

Sources:

^a Estimated based on data from Statistics Canada 2021a.

^b Authors' calculations.

^c Personal Communication with Rocky View County 2023.

In an effort to reconcile the substantial difference between the status quo forecast and the CMRB forecast, the Study Team developed a high-growth projection underpinned by the following assumptions:

- The County will experience a relatively higher rate of employment growth in the long term as compared to the status quo projection (2%, reflective of the high growth period seen between 2001 and 2006).

- The competitive advantages of Rocky View (i.e., low non-residential mill rates, access to transportation infrastructure) will result in the County absorbing a relatively larger proportion of non-residential growth in the CMR than it has historically. This will lead to an increased demand for non-residential lands to host more in-commuters from residents from surrounding municipalities than what is currently experienced. This demand adjustment is assumed to result in a 20% increase in annual non-residential land needs in the County.

The resulting non-residential land estimates for the high-growth scenario are provided in Table 6-8 below. Roughly 135 gross acres of non-residential land are estimated to be required in the County per year over the 2022 to 2054 period to satisfy the high-growth assumptions. Given the long-term nature of municipal planning and the inefficiencies that can occur when planning estimates are too conservative, we suggest that the high-growth projections be used by the County for future planning purposes.

Table 6-8 Industrial and Commercial Land Projections (High-Growth), Rocky View County, 2054

Employment Activity	Gross Acres (2054)	Gross Acres Per Year (2022 – 2054)
Industrial	4,400	75
Commercial	3,480	60
Total	7,880	135

7. Summary and Discussion

The CMRB Employment Forecast and Growth Plan contemplate a substantial amount of non-residential development in the County over the next several decades. Indeed, growth of roughly 525 gross acres per year is significantly greater than the rate of non-residential development recommended for planning purposes (approximately 135 acres, see Section 6.3). The CMRB Employment Forecast suggests that the County may require a total of roughly 20,260 gross acres of industrial and commercial lands to support the growth in job activity in the County by 2054 (Author's Calculations); this represents a need for about 16,780 gross acres of additional non-residential lands beyond what has already been developed as of 2022. Fortunately, the County has no shortage of land availability. According to the County's draft 2022 Land Use Inventory (Rocky View County Personal Communication 2023), there are over 16,000 gross acres of undeveloped, policy supported non-residential lands remaining in the County (Table 7-1). However, there are fewer available gross acres in the County that are currently supported by land-use policies (about 8,140 overall, and 4,000 within PGAs). As such, the County will likely need to continue approving industrial and commercial land-uses on unabsorbed lands over the coming years should the CMRB projection of job development in the County come to fruition.

Table 7-1 Remaining Non-Residential Lands, Rocky View County, 2022

ASP	Preferred Growth Area (Y/N)	2022 Remaining Policy Supported Gross Area (Gross Acres)
Balzac East ASP	Y	4,017
Balzac West ASP	Y	1,244
Conrich ASP	Y	5,994
Janet ASP	Y	1,430
Langdon ASP	Y	680
North Central Industrial ASP	N	918
North Springbank ASP	N	386
Omni ASP	Y	1,271
Shepard ASP	Y	83
Fulton CS	N	465
Total		16,488

In terms of the location of the projected non-residential land development, the cluster analysis presented in Section 5 identifies potential industrial and commercial opportunities for various PGA and non-PGA growth nodes in the County. The CMRB Employment Forecast and Growth Plan suggests a substantial amount of industrial development in the County over the next several decades. As such, the CMRB projection would be relatively more in line with cluster opportunities that are geared toward large, potentially higher-density activities. For example, there appears to be alignment with respect to the magnitude and nature of growth in regard to the vision for East and West Balzac which emphasize the potential for heavy industrial development and possible mega-sites. This is not to suggest that smaller developments such as speciality retail or speciality tourism opportunities

should not be pursued, particularly in the populated Hamlets within the County, but achieving the significant growth projected by the CMRB will primarily require a substantial amount of large-scale industrial activities, with commercial activities such as retail being emphasized much less in the CMRB projection. As described in Section 5, much of this type of development will fit well within the County's PGAs; however, there are some areas outside of the PGAs that provide opportunities for this development as well, such as the Springbank airport node.

The extent to which the County will be successful in capturing the development contemplated in the CMRB Employment Forecast and Growth Plan depends largely on its competitiveness with respect to non-residential activities. The competitiveness analysis explored in Section 4 highlights several characteristics of the County that may attract non-residential development (i.e., the "Rocky View Advantage") such as:

- relatively low non-residential mill rates, and
- ideal location in terms of transportation access/infrastructure.

However, there are a number of areas where the County may make some changes to improve its attractiveness. For example, building and development permits in the County are relatively high. In addition (and perhaps more importantly) the County has relatively long permitting timelines. Having said this, we emphasize that there are many situation-specific needs for individual developers that play a role in site selection that are less quantitative in nature. For example, a community's effort in creating a reputation for having a "welcoming environment" for business, or prioritizing effective communication with interested developers, can go a long way in attracting development beyond the metrics listed above. The County's ability to market itself as being a reputable community for fast and efficient business development will help to improve its position in attracting the significant non-residential activity suggested by the CMRB Growth Plan.

As noted in Section 6.3, the rate of growth that is implied in the CMRB forecast is extraordinary when compared to the historic rates of growth in the County. Indeed, the implied rate of land absorption in the CMRB Employment Forecast (525 gross acres per year) is nearly 12 times the rate of employment growth of County residents and current in-commuting patterns. This change in regional growth patterns is being driven by two key changes:

- An increase in the proportion of people commuting into the County to work. The estimated rate of non-residential land absorption based on the CMRB Employment Forecast suggest that there will be substantial demand for non-residential lands from businesses who employ people who live elsewhere in the region and commute into the County each day.
- A shift in the type of industries that constitute significant portions of the economic activity in the County. A pronounced shift in the concentration of jobs across industries in the County's economy between the 2021 census and the 2054 CMRB Employment Forecast is noted. Specifically:
 - An increase in the proportion of employment in the mining, quarrying, and oil and gas sector from 2% to 15%.
 - An increase in the proportion of employment in construction sector from 6% to 17%.
 - An increase in the proportion of employment in manufacturing sector from 7% to 10%.
 - A decrease in the proportion of employment in the retail sector from 27% to 6%
 - A decrease in the proportion of employment in the transportation and warehouse sector from 19% to 6%.

The implication of these changes is that non-residential development in the County will grow faster than it has previously and with a particular focus on sectors that have not historically driven the local economy. It should be noted that:

- The increased emphasis on quarrying is somewhat curious given the challenges faced by new aggregate projects in recent history.
- The shift away from retail to more industrial sectors represents a departure from the type of growth that has contributed to the success of the County in recent years.

There is also an implied shift in the growth of the Calgary region overall – the County's share of growth in terms of jobs hosted in the community is expected to increase in the CMRB Employment Forecast, while the City of Calgary's is expected to decline. Specifically:

- In the CMRB's Employment Forecast, it is estimated that the County hosted approximately 2% of the regional jobs in 2018 and the City of Calgary was home to 90%.
- By the end of the CMRB Employment Forecast period (2054), the County's share is set to rise to 8% while the City of Calgary's share will decline to 82%.

The above-described dynamic represents a tremendous shift in regional dynamics and has a particularly severe implication with respect to the financial situation of the City of Calgary and County. The shift of employment growth implies a shift in the development of new non-residential assessment – the financial lifeblood of municipalities. The CMRB Employment Forecast appears to imply a substantial strengthening of the County's financial position whereas that of the City of Calgary which is, at best, remaining as is.

If the geographic distribution of growth implied in the CMRB Employment Forecast comes to pass, there will likely be a considerable increase in the need for joint development areas between the County and the City of Calgary as the latter will continue to face the financial burden of acting as a regional service centre without capturing the amount of non-residential growth that previously allowed the City of Calgary to carry that burden. For example, the recent decision to explore a joint understanding between Shephard Development, CP Rail, and the two municipalities represents an opportunity to jointly support non-residential development that will financially benefit both the City of Calgary and the County.

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