Housing Needs Assessment

Rocky View County (MD)

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Preface

Canada's Housing Plan and Budget 2024 both signaled the Government of Canada's intent to use Housing Needs Assessments (HNAs) as a key tool in its evidence-based long-term approach to addressing housing needs across the country. This includes the renewal of the Canada Community-Building Fund and the previously announced permanent transit funding.

As the federal government strives to become a more informed investor, evidence-based tools that provide a clear assessment of local needs and gaps will be required to inform decision making. HNAs will help all levels of government understand the local housing needs of communities - how they may relate to infrastructure priorities - by providing the data necessary to determine what kind of housing needs to be built and where. The intent is to promote systematic planning of infrastructure that takes into consideration current and future housing needs.

Funding Requirement

Under the Housing Accelerator Fund, the Government of Canada currently requires funding recipients to complete an HNA by year 3 of the program, if one has not already been completed within two years of the 2022 federal budget announcement (April 7, 2022).

Going forward, HNAs that meet the federal HNA standard will be required for:

- Communities with a population of 30,000 and over receiving funding through the Canada Community-Building Fund;
- Communities with a population of 30,000 and over receiving funding through permanent transit funding; and,
- Future federal infrastructure funding applicants as required.

Once an HNA has been completed as a federal program requirement, a community will not be required to complete a new one for other Housing, Infrastructure and Communities Canada programs, other than to update it every five years.

Purpose

When done properly and regularly, an HNA will allow a community to answer fundamental questions such as:

- Where does the greatest housing need exist in our community?
- How can we set meaningful housing targets and measure progress to support the right kind of housing for all residents?
- How much housing, which size and at what price point do we need to ensure that all current and future households can live in suitable, adequate and affordable housing?

HNAs will allow all levels of government (federal, provincial/territorial and municipal) to use this evidence base to inform their investments in enabling and supportive infrastructure as well as guide their policy and regulatory decision-making. HNAs as a tool can help communities plan for and build housing more effectively to address the needs of their residents and instill transparency and accountability across the board.

This HNA template has been informed by best practices from jurisdictions across Canada, consultations with experts, and engagements with provinces and territories. These include the City of Vancouver's *Housing Needs Report* and the City of Edmonton's *Affordable Housing Needs Assessment* (for the affordable housing side of needs assessments), as well as the Housing Research Collaborative at the University of British Columbia which brought together a national network of researchers and experts to develop the Housing Assessment Resource Tool (HART). The HART project provides formatted data from Statistics Canada on key housing indices such as core housing need for a wide variety of jurisdictions and geographic levels.

Based on these best practices, this guidance document includes the following necessary information, explained in more detail below.

1. Development and use of Housing Needs Assessments
2. Community profiles and trends
3. Household profiles and economic characteristics
4. Priority groups
5. Housing profiles
6. Projected housing needs and next steps

Communities completing an HNA as a requirement for federal infrastructure programming will be expected to complete all sections outlined in this template. Communities may use a previously completed HNA if an updated version is available; however, communities would be expected to address any gaps related to any of the sections of the guidance document – both qualitative and quantitative – between their existing HNA and this federal template. Additional details about the timelines for completion and submission of HNAs will be provided with specific infrastructure funding programs (e.g. Canada Community-Building Fund).

While responding to the written questions, please use as much space as required.

1. Methodology

In this section, applicants should outline the research methodology used to inform the completion of the assessment, where the methodology is derived from, any assumptions used, and any necessary justification. While different assessments may incorporate unique methodological elements or considerations depending on context, the following methods should generally be outlined:

- **Quantitative research** such as economic data, population and household forecasts; and,
- **Qualitative research** such as interviews, policy analysis and stakeholder engagement.

Both qualitative and quantitative aspects of this guidance document are equally important.

Communities will be required to engage with key stakeholders in the housing sector, including non-profit housing providers, developers, and public entities, as well as those with specific lived experiences, to develop a comprehensive Housing Needs Assessment (HNA). This section should include what forms of engagement were conducted, with whom, how learnings were incorporated into or informed the HNA's findings, and what engagement opportunities may exist to share findings with the community.

To the extent possible, publicly available data from the following sources will be prepopulated to facilitate automated completion of the quantitative components of the assessments:

- Statistics Canada Census Data
- CMHC Housing Market Information Portal
- Statistics Canada Housing Statistics Dashboard
- CMHC Demographic Projections: Housing Market Insights, June 2022
- CMHC Proximity Measures Database
- Housing Assessment Resource Tool Dashboard
- Canadian Housing Evidence Collaborative – Housing Intelligence Platform

In addition to this data, communities are required to incorporate internal and non-public facing, non-confidential data, into their HNAs in order to more fully capture local contexts and realities as needed.

Data fields highlighted in yellow identify where municipalities will have to source the data.

If this data is unavailable at the time of completion of the first HNA, communities are expected to collect these data points for future iterations. Other fields will be pre-populated. Fields marked with an asterisk (*) indicate data points which are unavailable from the source or suppressed due to low counts.

Please provide data from the latest census except where otherwise indicated.

1.1 Please provide an overview of the methodology and assumptions used to develop this Housing Needs Assessment, using the guidelines above. This should include both quantitative and qualitative methods. Please also identify the publicly available data sources used to complete this assessment beyond the sources listed above, if applicable.

The Housing Needs Assessment (HNA) for Rocky View County was developed using a blended quantitative and qualitative methodology, supported by regional data sources, internal expertise, and targeted local studies. This approach reflects the County's unique context as a large, predominantly rural municipality (3,829 km²) surrounding the City of Calgary, where housing demand, affordability, and supply are closely tied to broader regional market conditions.

From a quantitative perspective, the analysis focused on establishing a baseline understanding of population growth, housing supply, and market dynamics using publicly available datasets and regional indicators. This included demographic trends, household composition, and commuting patterns, recognizing the strong relationship between Rocky View County and the Calgary metropolitan labour and housing market. Regional data sources such as the Alberta Regional Dashboard (Calgary CMA vacancy rates) and the *HART Community Housing Report: Calgary Metropolitan Region (April 2024)* were used to provide a broader market context and to supplement limited County-specific housing data.

Additional quantitative insight was drawn from localized studies, including the Bragg Creek Residential Demand Study, which assessed projected housing demand and unit types over a 20-year horizon within a hamlet context. The Rocky View County – Senior Housing Needs Assessment (2015) was also referenced to inform long-term trends related to an aging population and specialized housing needs. Land supply and development capacity were reviewed at a high level using the County's Land Use Inventory (currently being updated in 2026), along with development trends and planned growth areas aligned with the Municipal Development Plan. Workforce considerations were incorporated using the *Community Futures Wild Rose – Regional Workforce Development Study (April 2024)*.

The qualitative component was critical in addressing data gaps and grounding the analysis in local context. Internal meetings and discussions were held with key County departments, including: Planning, Community Services, Economic Development, and FCSS. Their insights were on housing challenges, affordability pressures, and observed trends across different community types (hamlets, rural residential, and employment areas). These discussions also helped identify service delivery impacts and emerging needs that are not captured in traditional datasets.

Qualitative insights were further strengthened through existing community-based studies. The Bragg Creek ASP – Social Needs Assessment provided valuable input through interviews with residents and local organizations, highlighting lived experiences, housing challenges, and service gaps in a rural hamlet setting. More broadly, regional collaboration and alignment with partners such as the Calgary Metropolitan Region Board and the City of Calgary helped ensure the assessment reflects shared housing pressures and intermunicipal dynamics. The Rocky View County FCSS Diversity Profile was also used to better understand demographic diversity and vulnerable populations. Qualitative information gathered through public engagement initiatives was also used to inform analysis of trends and needs as identified by community members.

Several key assumptions were applied in developing the HNA. Most notably, it is assumed that housing demand and affordability in Rocky View County are significantly influenced by the Calgary housing market. Due to limited local rental data, regional indicators are used as a proxy for rental trends. Future housing demand is assumed to align with the County's growth strategy and planned development areas, and the analysis recognizes that rural and non-traditional housing forms (e.g., country residential, farmstead dwellings) are not always fully captured in standard datasets. Existing studies, such as the Bragg Creek analyses and the 2015 Senior Housing Needs Assessment, are considered directionally relevant and are supplemented with current regional data and internal insights.

In addition to the core resources identified, the HNA draws from a range of publicly available and internal sources, including:

- Regional datasets and reports from the Calgary Metropolitan Region Board
- Municipal data and housing indicators from the City of Calgary
- Provincial open data portals and dashboards
- Rocky View County internal data, including the Land Use Inventory (2026 update), development activity, and internal engagement findings

Overall, the methodology reflects a regional, data-informed, and context-sensitive approach, combining quantitative analysis with qualitative insights to ensure the Housing Needs Assessment is both evidence-based and responsive to the realities of Rocky View County's diverse communities.

1.2 Please provide an overview of the methodology and assumptions used to engage with stakeholder groups, e.g. non-profit housing organizations, in the development of this Housing Needs Assessment. This should include qualitative and quantitative methods. Please provide a description of who was engaged, the type of engagement that took place, and the nature of the engagement (e.g. interviews, consultations)

Stakeholder engagement for the Housing Needs Assessment (HNA) was internal and qualitative in nature, reflecting the there are no non-profit housing providers operating directly within Rocky View County.

Engagement focused on internal departments, including Planning, Regional and Intergovernmental Services, Family and Community Support Services (FCSS), and Economic Development, through meetings and discussions to gather insights on housing challenges, affordability, service impacts, and observed trends across the County. This internal expertise was a key input, given staff's direct experience working with residents, developers, and community organizations.

To supplement this, the HNA also draws on existing studies and regional work that incorporated stakeholder input, including the Bragg Creek Social Needs Assessment (which involved interviews with residents and local organizations), as well as regional reports and intermunicipal collaboration with partners such as the Calgary Metropolitan Region Board and the City of Calgary.

Overall, the approach assumes that internal expertise and regional studies provide a proxy for direct stakeholder engagement, and that housing needs in Rocky View County are best understood within the broader regional context.

1.3 Please provide an overview of the methodology and assumptions used to conduct engagement with the priority groups (identified in Section 4) in the development of this Housing Needs Assessment. This should include qualitative and quantitative methods. Please provide a description of who was engaged, the type of engagement that took place, and the nature of the engagement (e.g. interviews, consultations). If a private individual has been engaged, please anonymize and remove any identifying features from the narrative.

As mentioned in 1.2, direct engagement with priority groups was not undertaken as part of this Housing Needs Assessment HNA).

Instead, the HNA relies on a combination of internal expertise, existing studies, and quantitative data to understand the needs of priority populations. Internal discussions with departments including Planning, Regional and Intergovernmental Services, Family and Community Support Services (FCSS), and Economic Development, through meetings and discussions to gather insights on housing challenges, affordability, service impacts, and observed trends across the County. This internal expertise was a key input, given staff's direct experience working with residents, developers, and community organizations.

2. Community Profile and Trends

In this section, communities are expected to tell their housing story through the lenses of their community and household profiles using both qualitative and quantitative data. Communities may structure this information in different ways, including by providing past benchmarks, present figures, future projections, and current growth rates at a local, regional and provincial level.

2.1 Please detail the existing municipal housing policy and regulatory context, such as approved housing strategies, action plans and policies within Official Community Plans.

Rocky View County does not currently have a standalone housing strategy or dedicated housing action plan. Instead, housing policy direction is primarily established through the County's statutory planning framework, most notably the Rocky View County Municipal Development Plan (MDP), along with supporting Area Structure Plans (ASPs), Land Use Bylaw, and related policy documents.

The MDP, adopted in September 2025, is the County's highest-order statutory plan and provides a 20-year vision for growth and development. Housing is addressed within a broader land use and growth management framework, with policies that:

- Support a range of housing types and densities within appropriate locations, particularly in hamlets and planned growth areas
- Encourage complete communities that integrate residential development with services, employment, and amenities
- Align housing growth with infrastructure capacity and servicing availability
- Recognize the importance of regional coordination, given the County's relationship with the City of Calgary and surrounding municipalities

At the local level, Area Structure Plans (ASPs) provide more detailed policy direction for specific communities and growth areas. These plans guide the type, form, and distribution of residential development, including density, phasing, and servicing considerations. In some cases, ASPs are supported by additional studies (e.g., social needs or market demand assessments) that help inform housing-related decisions in specific communities such as Bragg Creek.

The County's Land Use Bylaw implements these policy directions through zoning districts and development regulations, which establish where different housing types are permitted and under what conditions. This includes provisions for various residential forms such as country residential development, hamlet residential, and limited higher-density or mixed-use development in appropriate locations.

While there are no current County-specific housing strategies, previous work such as the Rocky View County Senior Housing Needs Assessment (2015) and community-level studies (e.g., Bragg Creek) provide supplementary context on specific housing needs.

Overall, Rocky View County’s housing policy framework is integrated within its broader growth management and land use planning system, with an emphasis on aligning housing with infrastructure, supporting a range of housing forms in appropriate locations, and coordinating with regional partners.

2.2 Community Profile

2.2.1 Population		
Characteristic	**Data**	**Value**
Total Population (Number)	2016	39,407
	2021	41,028
Population Growth (Number)	Total	1,621
	Percentage	4.1%
Age (Years)	Average	42.4
	Median	45.6
Age Distribution	0 - 14 years	7,065
	15 - 64 years	26,605
	65+ years	7,355
Mobility	Non-movers	36,720
	Non-migrants	1,640
	Migrants	1,890

2.2.2 Demographic Information		
Characteristic	**Data**	**Value**
Immigrants	Total	6,610
Non-Immigrants	Total	33,700
Recent Immigrants (2016-2021)	Total	380
Interprovincial migrants (2016-2021)	Total	935
Indigenous Identity	Total	1,245

2.3 How have population changes in your community as illustrated by the above data impacted your housing market?

Population changes in Rocky View County and the broader region have had a direct influence on housing demand, supply, and affordability, although there are limitations in isolating these impacts at a local level. Rocky View County does not maintain records sufficient to fully evaluate the relationship between population change and housing market outcomes specific to the County alone. However, available data indicates that housing growth has generally occurred at a similar magnitude to population growth, suggesting that supply has expanded in step with overall growth, but not necessarily with changing housing needs or affordability pressures.

As a municipality surrounding the City of Calgary, the County is strongly influenced by regional population trends. The *HART Community Housing Report: Calgary Metropolitan Region* identifies a significant increase in Alberta's population, with growth of approximately 4.3% (194,000 people) between October 2022 and October 2023, following a 2.5% increase the previous year. This growth has been largely driven by international migration, resulting in heightened demand for housing across the region.

It is important to note that much of the available local housing and demographic data (e.g., 2021 Census) predates this recent surge in population. As a result, there are limitations in fully capturing the housing impacts of this rapid growth, particularly related to rental availability, affordability, and emerging demand pressures.

Regional housing pressures, particularly within Calgary, have contributed to increased development activity in Rocky View County, as the County helps accommodate regional housing demand. This includes growth in country residential and hamlet areas, as well as development associated with employment nodes. At the same time, evolving population characteristics, including an aging population and workforce growth, are contributing to demand for a broader range of housing types that may not be fully reflected in the County's current housing stock.

Overall, population changes reinforce the County's role within a highly interconnected regional housing system, where growth and migration trends in Calgary and the surrounding region continue to shape housing demand, development patterns, and affordability in Rocky View County.

3. Household Profiles and Economic Characteristics

This section should provide a general overview of income, housing and economic characteristics of the community being studied. Understanding this data will make it easier to observe the incidence of housing need among different socio-economic groups within the community. Income categories could be used for this analysis and can be completed in accordance with the HART methodology and CMHC data.

Area Median Household Income (AMHI) can be used as the primary basis for determining income brackets (as a percentage of AMHI) and corresponding housing cost ceilings.

This section should also outline the percentage of households that currently fall into each of the income categories previously established. This will allow a better understanding of how municipalities compare to Canadian averages, and the proportion of households that fall into each household income category. This will also allow for a better understanding of drop-off levels between total households and the number of units required to meet anticipated need or demand in each category. Housing tenures allow for the comparison of renter and owner-occupied households experiences and is important for understanding a community's housing context.

Using a stratified, income-based approach to assessing current housing needs can enable communities to target new housing development in a broader and more inclusive and equitable way, resulting in housing that can respond to specific households in core housing need. This is shown in the next section.

3.1 Household Profiles

3.1.1 Household Income and Profile		
Characteristic	**Data**	**Value**
Total number of households	2016	13,042
	2021	13,905
Household income (Canadian dollars per year)	Average	228,600
	Median	150,000
Tenant Household Income (Canadian dollars per year, only available at CMA or CA Level) - Data from Calgary (CMA), Alta.	Average	79,400
	Median	66,000
Owner household income (Canadian dollars per year, only available at CMA or CA Level) - Data from Calgary (CMA), Alta.	Average	153,400
	Median	119,000
Average household size (Number of members)	Total	2.9
Breakdown of household by size (Number of households)	Total	13,905
	1 person	1,785
	2 persons	5,435
	3 persons	2,080
	4 persons	2,680
	5 or more persons	1,925
Tenant households (Number of households)	Total	1,100
	Percentage	7.9%
	Total	12,805

3.1.1 Household Income and Profile		
Characteristic	**Data**	**Value**
Owner households (Number of households)	Percentage	92.1%
Percentage of tenant households in subsidized housing	Percentage	0%
Households within 800m of a higher-order/high frequency transit stop or station (#)	Total	*
	Percentage	0%
Number of one-parent families	Total	855
	Percentage	6.9%
Number of one-parent families in which the parent is a woman+	Total	530
Number of one-parent families in which the parent is a man+	Total	320
Number of households by Income Category	Very Low (up to 20% below Area Median Household Income (AMHI)	650
	Low (21% – 50% AMHI)	2,080
	Moderate (51 – 80% AMHI)	2,420
	Median (81% - 120% AMHI)	2,675
	High (>120% AMHI)	5,365

3.2 Please provide context to the data above to situate it within your municipality. For example, is there a significant number of one-parent families? Are owner household incomes far surpassing tenant household incomes?

Housing and demographic data for Rocky View County must be understood within the context of a predominantly rural municipality with high homeownership rates, relatively high household incomes, and limited rental supply, shaped by its proximity to the City of Calgary.

Between 2016 and 2021, the total number of households increased from 13,042 to 13,905, indicating steady growth. The County's average household income ($228,600) and median income ($150,000) are comparatively high, which aligns with the prevalence of larger, ownership-based housing forms such as country residential development. Household sizes (2.9 persons) and the strong presence of two-person and family households reinforce a family-oriented demographic profile.

A defining characteristic of the local housing system is the dominance of homeownership, with approximately 92.1% of households owning and only 7.9% renting. This limited rental market constrains housing options for lower- and moderate-income households and those seeking more flexible or entry-level housing. There is also no reported subsidized housing supply, and virtually no households are located within walking distance of higher-order transit, reinforcing reliance on private vehicles and limiting accessibility for some groups.

Income disparities between tenure types are significant. Based on Calgary CMA data, median tenant incomes ($66,000) are approximately 44% lower than median owner incomes ($119,000), indicating a substantial gap between renters and homeowners. This suggests that transitioning from rental housing to homeownership may be challenging, particularly given the limited supply of more attainable ownership options within the County.

In terms of household composition, one-parent families represent approximately 6.9% (855 households), which is consistent with surrounding municipalities (generally ranging from 6% to 8%) and does not indicate a disproportionately large segment of the population. However, as in other jurisdictions, these households, particularly those led by women, may face increased affordability pressures due to income constraints and limited housing diversity.

The income distribution further highlights potential housing need. While a large share of households fall within the high-income category, there remains a notable number in lower income brackets (very low, low, and moderate income), indicating that a meaningful portion of the population may experience affordability challenges despite overall high average incomes. Previous qualitative work, such as the County's social needs assessments, identified housing challenges and service gaps but did not include detailed income analysis, limiting direct correlation between income and need.

Overall, the data illustrates a housing market that is strongly ownership-driven and relatively affluent on average, but with limited diversity in housing forms and tenure. These conditions contribute to affordability and accessibility challenges for certain groups, particularly renters, lower-income households, and those requiring alternative housing types, within the broader regional housing system.

3.3 Suppression of household formation (e.g., younger people living with their parents due to affordability pressures) and housing demand (e.g., "driving until you qualify") can both indicate strained local housing market conditions. Please provide any data or information that speaks to how suppression of the formation of new households and suppression of housing demand has impacted your community since 2016, and how projected formation patterns are expected to be impacted over the next 5 to 10 years. Please indicate methods used to determine expected household formation, such as calculating headship rates broken down by specific age estimate impacts.[1]

3.3.1 Household Formation						
HH* Head Age Category	2016			2021		
	Pop.	Headship Rate (%)	HHs*	Pop.	Headship Rate (%)	HHs*
15 to 24	5,425	2.2%	120	5,370	1.3%	70
25 to 34	3,005	26.1%	785	2,915	23.2%	675
35 to 44	4,770	47.3%	2,255	4,720	45.6%	2,150
45 to 54	6,880	49.3%	3,395	6,350	52%	3,300
55 to 64	6,720	53.5%	3,595	7,240	52.6%	3,805
65 to 74	3,565	56.4%	2,010	4,785	52%	2,490
75 to 84	1,335	54.7%	730	1,920	59.9%	1,150
85 plus	430	34.9%	150	650	40.8%	265

*Household/Households

[1] *We recognize that some municipalities may not have this data available at the time of completion, but encourage them to do their best in addressing this question. Municipalities will be expected to build this expertise in subsequent iterations of their Housing Needs Assessments.*

3.3.2 Household suppression							
HH* Head Age Category	**2006 Actual**		**2021 Actual**		**2021 Household Suppression**		
	Pop.	**HHs***	**Pop.**	**HHs***	**Headship Rate (%, 2006)**	**Potential HHs* (2021)**	**Suppressed HHs* (2021)**
15 to 24	4,795	105	5,370	70	2.2%	117.6	47.6
25 to 34	2,340	770	2,915	675	32.9%	959.2	284.2
35 to 44	5,345	2,485	4,720	2,150	46.5%	2,194.4	44.4
45 to 54	7,220	3,855	6,350	3,300	53.4%	3,390.5	90.5
55 to 64	4,390	2,250	7,240	3,805	51.3%	3,710.7	0
65 to 74	1,950	1,170	4,785	2,490	60%	2,871	381
75 plus	945	555	2,570	1,415	58.7%	1,509.4	94.4
Total							942.1

*Household/Households

Household formation trends in Rocky View County indicate moderate suppression among younger age groups, consistent with broader affordability pressures in the regional housing market influenced by the City of Calgary.

Between 2016 and 2021, headship rates declined for younger cohorts, particularly:

- Ages 15–24 (2.2% to 1.3%)
- Ages 25–34 (26.1% to 23.2%)

This suggests delayed household formation, often associated with affordability constraints, limited rental supply, or individuals remaining in shared or family living arrangements longer.

Using a headship rate methodology, 2006 rates were applied to 2021 population levels to estimate potential household formation. This analysis indicates approximately 942 “suppressed” households in 2021, with the largest impacts in:

- Ages 25–34 (~284 households)
- Ages 65–74 (~381 households)
- Ages 45–54 (~90 households)

While suppression among younger groups is typically linked to affordability and access, suppression in older cohorts may reflect limited downsizing options or lack of alternative housing forms, such as smaller or supportive housing.

Looking ahead, household formation is expected to continue being shaped by:

- Regional affordability pressures
- Limited housing diversity and rental availability in the County
- Ongoing population growth and migration

As a result, suppression among younger households is likely to persist over the next 5–10 years without increased supply of attainable and diverse housing options.

3.4 Economic Conditions

3.4.1 Economy and Labour Force		
Characteristic	**Data**	**Value**
Number of workers in the Labour Force	Total	21,885
Number of workers by industry (Top 10 only)	Professional, scientific and technical services	2,545
	Construction	2,350
	Health care and social assistance	2,150
	Retail trade	1,820
	Mining, quarrying, and oil and gas extraction	1,405
	Agriculture, forestry, fishing and hunting	1,225
	Transportation and warehousing	1,080
	Educational services	1,045
	Administrative and support, waste management and remediation services	960
	Other services (except public administration)	935
Unemployment rate and participation rate (Percent)	Unemployment rate	9.3%
	Participation rate	65.4%
All classes of workers (Number)	Total	21,300
Employees (Number)	Total	14,890
Permanent position (Number)	Total	12,215

3.4.1 Economy and Labour Force		
Characteristic	**Data**	**Value**
Temporary position (Number)	Total	2,675
Fixed term (1 year or more, Number)	Total	580
Casual, seasonal or short-term position (less than 1 year, Number)	Total	2,100
Self-employed (Number)	Total	6,410
Number of commuters by commuting destination	Within census subdivision	2,185
	To different census subdivision	7,240
	To different census division	365
	To another province/territory	165
Number of commuters by main mode of commuting for the employed labour force with a usual place of work or no fixed workplace address	Car, truck or van	12,035
	Public transit	140
	Walked	335
	Bicycle	35
	Other method	350

3.5 How have labour conditions (e.g., prevalence of precarious employment, temporary or seasonal workforces, reliance on sectors such as natural resources, agriculture, tourism, etc.) in your community impacted housing supply and demand?

Labour conditions in Rocky View County are closely tied to housing demand and highlight growing pressures within the regional economy. The County has a diverse labour base, including professional services, construction, agriculture, and energy sectors, and is highly integrated with the Calgary regional labour market, with a large portion of residents commuting to the City of Calgary.

A key trend identified in the *Regional Workforce Development Study (April 2024)* by Community Futures Wild Rose is that businesses across the region are experiencing significant labour shortages, which have been exacerbated by the COVID-19 pandemic. While traditional sectors such as agriculture and oil and gas are projected to decline, major new investments. including Phyto Organix, CGC Inc., and the De Havilland Aircraft facility are expected to generate nearly 3,000 new jobs in the region.

These changes are expected to further intensify labour market pressures, particularly as many of these new roles require access to affordable and attainable housing to support a stable workforce. The study identifies that the lack of affordable housing is already impacting labour force supply, as well as businesses' ability to attract and retain employees.

Additional labour force characteristics reinforce these pressures:

- A high number of commuters, reflecting reliance on regional employment
- A notable share of temporary (2,675) and self-employed workers (6,410), contributing to income variability
- Limited access to transit, with most workers commuting by private vehicle

Together, these factors contribute to:

- Increased demand for workforce and rental housing, particularly near employment areas
- Affordability challenges for workers in lower- or moderate-income roles
- Continued reliance on housing in nearby municipalities where more options may be available

Overall, labour conditions in Rocky View County are creating growing demand for diverse and affordable housing options, and without additional supply, housing constraints may continue to limit economic growth and workforce sustainability in the region.

3.6 Households in Core Housing Need

A household is considered to be in core housing need if it meets two criteria:

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

Housing is considered to be affordable when housing costs less than 30% of before-tax household income. Housing is considered to be suitable when there are enough bedrooms for the size and make-up of the household. Housing is considered to be adequate when it is not in need of major repairs. Determining the percentage of core housing need would facilitate comparison with forecasts of population growth and household formation, in turn enabling more accurate projection of anticipated housing needs broken down by different factors such as income, household size and priority population, as explained below. It is important to note that official measures of those in core housing need exclude key groups, including those experiencing homelessness, students living independently of their guardians, people living in congregate housing, and migrant farm workers. This means that core housing need figures may underestimate overall housing need. Due to this, communities should also strive to include as much information as possible about these groups in the Priority Groups section below, in order to provide a comprehensive picture of who is affected by core housing need.

The following section includes data from the Housing Assessment Resource Tool (Housing Needs Assessment Tool | Housing Assessment Resource Project)

Income Categories and Affordable Shelter Costs:

3.6.1 Income Categories and Affordable Shelter Costs		
Income Category, relative to Area Median Household Income (AMHI)	**Annual Household Income (Canadian Dollars per Year)**	**Affordable Shelter Cost (Canadian Dollars per Month)**
Very Low Income (20% or less of AMHI)	<= $30,600	<= $765
Low Income (21% to 50% of AMHI)	$30,600 - $76,500	$765 - $1,913
Moderate Income (51% to 80% of AMHI)	$76,500 - $122,400	$1,913 - $3,060
Median Income (81% to 120% of AMHI)	$122,400 - $183,600	$3,060 - $4,590
High Income (121% or more of AMHI)	>= $183,601	>= $4,591

Percentage of Households in Core Housing Need, by Income Category and Household Size:

3.6.2 Percentage of Households (HH) in Core Housing Need (CHN), by Income Category and Household Size						
Income Category	**Affordable Shelter Cost (Canadian Dollars per Month)**	**1 Person HH**	**2 Person HH**	**3 Person HH**	**4 Person HH**	**5+ Person HH**
Very Low Income (20% or less of AMHI)	<= $765	67.3%	23.1%	9.6%	0%	0%
Low Income (21% to 50% of AMHI)	$765 - $1,913	8.9%	53.3%	13.3%	13.3%	11.1%
Moderate Income (51% to 80% of AMHI)	$1,913 - $3,060	*	*	*	*	*
Median Income (81% to 120% of AMHI)	$3,060 - $4,590	*	*	*	*	*
High Income (121% or more of AMHI)	>= $4,591	*	*	*	*	*

2021 Affordable Housing Deficit:

3.6.3 2021 Affordable Housing Deficit by Household (HH)						
Income Category	**Affordable Shelter Cost (Canadian Dollars per Month)**	**1 Person HH**	**2 Person HH**	**3 Person HH**	**4 Person HH**	**5+ Person HH**
Very Low Income (20% or less of AMHI)	<= $765	175	60	25	0	0
Low Income (21% to 50% of AMHI)	$765 - $1,913	20	120	30	30	25
Moderate Income (51% to 80% of AMHI)	$1,913 - $3,060	0	0	0	0	0
Median Income (81% to 120% of AMHI)	$3,060 - $4,590	0	0	0	0	0
High Income (121% or more of AMHI)	>= $4,591	0	0	0	0	0
Total		200	180	60	35	40

3.6.4 Households in Core Housing Need		
Characteristic	**Data**	**Value**
Affordability – Owner and tenant households spending 30% or more on shelter costs (# and %)	Total	2,265
	Percentage	17.2%
Affordability – Owner and tenant households spending 30% or more on shelter costs and in core need (# and %)	Total	480
	Percentage	3.8%
Affordability – Tenant households spending 30% or more of income on shelter costs (# and %)	Total	295
	Percentage	28.9%
Affordability – Tenant households spending 30% or more of income on shelter costs and in core need (# and %)	Total	110
	Percentage	0.9%
Affordability – Owner households spending 30% or more of income on shelter costs (# and %)	Total	1,965
	Percentage	16.2%
Affordability – Owner households spending 30% or more of income on shelter costs and in core need (# and %)	Total	370
	Percentage	2.9%
Adequacy – Owner and tenant households in dwellings requiring major repair (# and %)	Total	695
	Percentage	5%
Adequacy – Owner and tenant households in dwellings requiring major repair and in core need (# and %)	Total	50
	Percentage	0.4%
Adequacy – Tenant households in dwellings requiring major repairs (# and %)	Total	80
	Percentage	7.3%
	Total	0

3.6.4 Households in Core Housing Need		
Characteristic	**Data**	**Value**
Adequacy – Tenant households in dwellings requiring major repairs and in core need (# and %)	Percentage	0%
Adequacy – Owner households in dwellings requiring major repairs (# and %)	Total	615
	Percentage	4.8%
Adequacy – Owner households in dwellings requiring major repairs and in core need (# and %)	Total	40
	Percentage	0.3%
Suitability – Owner and tenant households in unsuitable dwellings (# and %)	Total	270
	Percentage	1.9%
Suitability – Owner and tenant households in unsuitable dwellings and in core need (# and %)	Total	20
	Percentage	0.2%
Suitability – Tenant households in unsuitable dwellings (# and %)	Total	60
	Percentage	5.5%
Suitability – Tenant households in unsuitable dwellings and in core need (# and %)	Total	0
	Percentage	0%
Suitability – Owner households in unsuitable dwellings (# and %)	Total	210
	Percentage	1.6%
Suitability – Owner households in unsuitable dwellings and in core need (# and %)	Total	0
	Percentage	0%
Total households in core housing need	Total	515
Percentage of tenant households in core housing need	Percentage	13.1%

3.6.4 Households in Core Housing Need		
Characteristic	**Data**	**Value**
Percentage of owner households in core housing need	Percentage	3.3%

3.7 Please provide any other available data or information that may further expand on, illustrate or contextualize the data provided above.

Additional context from regional and local sources helps further interpret the housing data for Rocky View County.

The *HART Community Housing Report* (page 29) identifies that core housing need is most concentrated among very low-income households, reinforcing that affordability challenges are not evenly distributed across the population. The report also notes that core housing need in the City of Calgary decreased between 2016 and 2021; however, these results may be temporarily skewed due to income supports provided during COVID-19, suggesting that current levels of need may be understated.

At a local level, Rocky View County does not independently collect detailed data on core housing need, which limits the ability to fully assess housing challenges specific to the County. While the County supports a range of programs through Family and Community Support Services (FCSS), these programs are primarily preventative rather than crisis-focused, and detailed housing need data is not consistently captured or reported.

Some insights may be available through FCSS-funded organizations; however, collection and reporting of core housing need data is not a requirement of funding agreements, and therefore is not systematically available for analysis. As a result, understanding of housing need within the County relies on a combination of regional data, existing studies, and qualitative insights, rather than comprehensive local datasets.

Overall, this context highlights that while available data provides a useful baseline, there are limitations in local data collection, and actual housing need (particularly among lower-income and vulnerable populations) may be greater than currently reflected in the data.

4. Priority Groups

There are 12 groups that CMHC defines as priority populations for affordable homes: groups who face a proportionally far greater housing need than the general population. There is also a 13th group, women-led households and specifically single mothers, implied in the National Housing Strategy which targets 33% (with a minimum of 25%) of funding going to housing for women-led households. Priority population groups are:

- Women and children fleeing domestic violence
- Women-led households, especially single mothers
- Seniors 65+
- Young adults aged 18-29
- Indigenous Peoples
- Racialized people
- Recent immigrants, especially refugees
- LGBTQ2S+
- People with physical health or mobility challenges
- People with developmental disabilities
- People dealing with mental health and addictions issues
- Veterans
- People experiencing homelessness

Census data does not disaggregate core housing need data by all priority populations, including veterans, individuals who identify as LGBTQ2S+, survivors of domestic violence, and individuals experiencing homelessness. Many households may have members in multiple priority categories which may also not be represented in the data. With these limitations in mind, information on housing need by priority population would be helpful for developing inclusive housing policies.

4.1 What information is available that reflects the housing need or challenges of priority populations in your community? If data is available, please report on the incidence of core housing need by CMHC priority population groups in your community. If no quantitative data is available, please use qualitative information to describe the need for these priority populations.

4.1.1 Core Housing Need (CHN) by CMHC Priority Groups		
Characteristic	**Data**	**Value**
All households experiencing CHN	Total (Households)	510
	Percentage (of all households)	4%
CHN in households with women and/or children fleeing domestic violence	Total (Households)	Unavailable
	Percentage (of priority group)	Unavailable
CHN in households led by women	Total (Households)	235
	Percentage (of priority group)	5.9%
CHN in households led by single mothers	Total (Households)	50
	Percentage (of priority group)	14.1%
CHN in households led by senior(s) aged 65-84	Total (Households)	220
	Percentage (of priority group)	6.2%
CHN in households led by senior(s) aged 85+	Total (Households)	35
	Percentage (of priority group)	14.9%
CHN in households led by young adult(s) aged 18-29	Total (Households)	20
	Percentage (of priority group)	7.8%
CHN in Indigenous-led households	Total (Households)	20
	Percentage (of priority group)	3.4%
	Total (Households)	65

4.1.1 Core Housing Need (CHN) by CMHC Priority Groups		
Characteristic	**Data**	**Value**
CHN in visible minority-led households	Percentage (of priority group)	3.7%
CHN in Black-led households	Total (Households)	0
	Percentage (of priority group)	0%
CHN in new-immigrant-led households	Total (Households)	0
	Percentage (of priority group)	0%
CHN in refugee-led households	Total (Households)	0
	Percentage (of priority group)	0%
CHN in households with a same-sex couple	Total (Households)	*
	Percentage (of priority group)	*
CHN in households with Transgender member(s)	Total (Households)	0
	Percentage (of priority group)	0%
CHN in households with Non-Binary member(s)	Total (Households)	Unavailable
	Percentage (of priority group)	Unavailable
CHN in households with member(s) with physical health and/or mobility challenges	Total (Households)	150
	Percentage (of priority group)	3.7%
CHN in households with member(s) with developmental disabilities	Total (Households)	80
	Percentage (of priority group)	4.1%
CHN in households with member(s) dealing with mental	Total (Households)	40
	Percentage (of priority group)	3.3%

4.1.1 Core Housing Need (CHN) by CMHC Priority Groups		
Characteristic	**Data**	**Value**
health and addictions issues		
CHN in households with Veteran member(s)	Total (Households)	0
	Percentage (of priority group)	0%
CHN in people experiencing homelessness	Total (people)	Unavailable
	Percentage (of priority group)	Unavailable

Available data indicates that while overall core housing need (CHN) in Rocky View County is relatively low at approximately 4% of households (510 households), certain priority populations experience disproportionately higher levels of need.

Based on the data provided, the following groups show elevated levels of CHN:

- Single mothers: 14.1%
- Seniors aged 85+: 14.9%
- Young adults (18–29): 7.8%
- Households led by women: 5.9%
- Seniors aged 65–84: 6.2%

These trends are consistent with broader regional findings. The *HART Community Housing Report* identifies single mothers and seniors (particularly 85+) as having the highest levels of core housing need across the Calgary region, with demand expected to increase as the population ages.

For seniors, local context is particularly important. A previous County Senior Housing Needs Assessment (2015) identified that the majority of housing stock consists of detached single dwellings, which may not be suitable for seniors with limited mobility or fixed incomes. While nearby municipalities, including the City of Calgary, offer more diverse senior housing options, these are experiencing high demand and waitlists, limiting accessibility for County residents.

Other priority groups show lower reported levels of CHN; however, this may reflect data limitations rather than absence of need. For example:

- Indigenous-led households: 3.4% CHN
- Visible minority-led households: 3.7% CHN

- Households with physical or mobility challenges: 3.7%
- Households with developmental disabilities: 4.1%

The FCSS Rocky View County Diversity Profile (2023) indicates that approximately 16% of residents identify as immigrants (including 1% refugees) and 3% identify as Indigenous. While this data is not directly linked to housing outcomes, it provides important context on the presence of priority populations within the County.

It is important to note that Rocky View County does not currently collect comprehensive, independent data on the housing needs of priority populations. The County primarily supports external organizations that deliver housing and social services, rather than directly providing these services. As a result, much of the understanding of need is based on regional data, existing studies, and qualitative insights, rather than direct local measurement.

Overall, the available information suggests that housing challenges are most acute for seniors, single-parent households (particularly single mothers), and younger adults, while other priority groups may face barriers that are less visible in the data but still present, particularly given the County's limited housing diversity and reliance on regional service systems.

4.2 Please describe the incidence and severity of homelessness in your community, including an estimated number of individuals and/or families experiencing homelessness (hidden, visible, chronic, living in encampments, and episodic). If available, please include recent Point-in-Time counts.

Rocky View County does not currently track or maintain formal data on the incidence or severity of homelessness within the municipality, and there are no recent Point-in-Time (PiT) counts specific to the County.

Due to its predominantly rural context, homelessness in Rocky View County is more likely to be hidden or episodic in nature, rather than visible or concentrated in encampments. Individuals and families experiencing housing instability may rely on informal arrangements, temporary accommodations, or relocate to nearby urban centres (particularly the City of Calgary) to access services and supports.

While quantitative data is limited, there are isolated examples that illustrate the presence of housing instability. For example, the County has recently supported two families who were living in trailers within a campground north of Cochrane, indicating instances of precarious or temporary living situations within the County.

Overall, the available information suggests that homelessness in Rocky View County is present but not well-documented, and is likely underrepresented in available data due to its dispersed, rural nature and reliance on regional service systems.

4.3 Please describe local factors that are believed to contribute to homelessness in your community (e.g., the closing of a mental health facility, high numbers of refugee claimants, etc.).

Rocky View County does not currently collect detailed data on homelessness rates within the municipality; however, available information and program-level insights point to several local and regional factors that may contribute to housing instability and risk of homelessness.

Through County-supported granting programs, there has been an identified increase in demand for subsidized and affordable housing, suggesting that some households are experiencing affordability pressures that could lead to housing instability if unmet.

Key contributing factors include:

- Limited housing diversity and rental supply within the County, which reduces options for lower-income households and those requiring more flexible or transitional housing
- Affordability pressures driven by the regional housing market, particularly in the nearby City of Calgary, which can displace households or limit access to housing across the region
- Rural context and service access, where individuals experiencing housing instability may have limited access to local supports and may rely on services in neighbouring municipalities
- Lack of subsidized and supportive housing options within the County, increasing reliance on external systems
- Economic and workforce dynamics, including income variability for some workers and growing demand for lower-cost housing options

Overall, while direct data is limited, these factors indicate that housing affordability, limited supply of appropriate housing, and regional pressures are the primary contributors to housing instability and potential homelessness in Rocky View County.

4.4 Please identify temporary and emergency relief resources available for individuals experiencing homelessness in your community (e.g., number of shelter beds, resource centres, number of transitional beds available). If possible, please indicate whether capacity levels are commensurate with need. There will be an opportunity to provide information on local permanent solutions and resources further down.

Rocky View County has limited direct emergency shelter or transitional housing resources within its boundaries, reflecting its rural context. As a result, residents experiencing homelessness or housing instability often rely on referral-based supports and access to regional services, particularly in nearby municipalities such as the City of Calgary.

At the local level, the County supports access to housing assistance through the Rocky View Foundation, which administers provincial funding programs to help subsidize housing costs for eligible residents. Individuals must meet provincially defined criteria, and the Foundation oversees the intake, assessment, and distribution of funding. This program provides financial relief to help prevent housing loss, rather than emergency shelter.

In addition, several Family and Community Support Services (FCSS)-funded "Hub Agencies" provide front-line support, information, and referrals, including connections to housing-related services:

- FCSS Cochrane & West Rocky View (west)
- Community Links (Airdrie) (north)
- Synergy (Langdon) (south and east)
- FCSS Irricana (north and east)

These agencies act as access points for residents, helping individuals navigate available supports, including referrals to emergency shelters, transitional housing, and other services typically located outside the County.

There is no available data on the number of shelter beds or transitional housing units within Rocky View County, and capacity is largely dependent on neighbouring municipalities. Based on available information, local resources are not fully commensurate with potential need, particularly for individuals requiring immediate or emergency accommodation, and there is a reliance on the broader regional system to respond to homelessness.

Overall, the County's approach is primarily preventative and referral-based, with limited in-community emergency resources and a strong reliance on regional partnerships to meet acute housing needs.

4.5 Some groups, including students, those in congregate housing, and temporary foreign workers, may be excluded from publicly available core housing need data sources. Communities are encouraged to use this section to describe the housing needs of these respective populations to ensure that all groups are represented in their HNA.

Rocky View County does not currently collect or maintain specific data related to populations that may be excluded from standard core housing need datasets, such as individuals in congregate housing or temporary foreign workers.

However, the Rocky View County Agriculture Master Plan (2025) provides some relevant context. The Plan identifies a need to explore more flexible housing options to support agricultural operations, including accommodations for farm families and workers. Engagement feedback also highlighted the importance of allowing housing on agricultural parcels to support family succession and workforce needs, indicating that housing tied to agricultural labour is a consideration within the County.

While these insights suggest that temporary and seasonal workers may require on-site or nearby housing, the County does not currently track the scale, conditions, or specific needs of these populations. Housing for these groups is likely informal, employer-provided, or integrated into farm operations, and is not systematically monitored.

Overall, while data is limited, the Agriculture Master Plan indicates that housing for agricultural workers and multi-generational farm households is an emerging consideration, though not yet formally quantified within the Housing Needs Assessment.

5. Housing Profile

5.1 Key Trends in Housing Stock:

This section should tell a story of housing changes over time in a community through trends in net change of affordable or below-market housing. This should be expressed through illustrations of net losses or net gains in affordable and non-market housing over the previous three census periods.

5.2 Please provide a brief history of how housing in the community has been shaped by forces such as employment growth and economic development, infrastructure, transportation, climate impacts, and migration. Please include any long-term housing challenges the community has faced:

Rocky View County's housing pattern has been significantly influenced by its role within the Calgary Metropolitan Area as a municipality that provides a range of rural and small-community living options. Demand has tended to rise and fall with regional economic conditions and employment growth, and the market response has often reinforced low-density residential forms associated with a rural lifestyle choice. At the same time, the County's evolving business community - particularly along key corridors and in employment-focused areas - has created periodic pressure for housing that is closer to jobs, but the supply that emerges does not always translate into a full range of housing opportunities across income levels and life stages.

A consistent theme in Rocky View is that infrastructure and servicing capacity function as a primary determinant of the pace, location, and form of residential growth. Where piped water and wastewater are limited, residential development has typically relied on private servicing approaches and has trended toward more dispersed patterns. Where servicing can be supported or expanded, the County has greater capacity to direct growth in a more focused manner and to enable a broader range of housing forms in appropriate locations. In practice, decisions around servicing standards, drainage and stormwater management, and the timing and funding of off-site improvements can be as influential as land use policy in shaping what housing is feasible and the timing of development.

Transportation and regional mobility have also shaped housing outcomes, particularly given the County's relationship to Calgary and the reality that many residents commute to employment and services outside the County. In addition to this reality, a larger proportion of those working in the County are commuting from nearby communities, and not residing in the County. Highway access and the reliance on private vehicles have historically enabled a decentralization of residential choice, supporting country residential demand and reinforcing development patterns that are difficult to serve with regional transit. Over time, this car-oriented context has contributed to a structural challenge: even where housing may appear more attainable than in the city, the combined cost of housing and transportation can reduce overall affordability and limit options for residents who do not drive.

Climate impacts and environmental constraints are increasingly central to growth management and land use decision-making. Flood risk management, drainage and stormwater capacity, drought and water security considerations, and wildfire/grassfire exposure influence where growth can occur, what mitigation is required, and the long-term risk profile of new development. This has direct implications for developable land supply, for subdivision and development standards, and for long-term infrastructure lifecycle costs and emergency management demands. In MDP terms, these issues sit squarely within "*maintaining healthy land and water*" and ensure growth is aligned with effective services.

Long-term housing challenges have been persistent within this overall context. The County's housing supply has often been dominated by single-detached and larger-lot forms, which can limit housing diversity and reduce the availability of options such as smaller-scale multi-unit housing, rental housing, and housing that supports aging in place. From a municipal operations standpoint, dispersed residential growth can also drive higher per-unit servicing and road lifecycle costs and complicate efficient service delivery. Finally, balancing residential growth with the long-term viability of agriculture remains an enduring policy issue, including the cumulative effects of land fragmentation and the potential for land use compatibility challenges between residential uses and agricultural operations. The County's more recent Agriculture Master Plan messaging explicitly recognizes fragmentation pressures and the need to explore more flexible housing approaches that can support farm viability, and evolving housing needs.

5.2.1 Housing Units: Currently Occupied/Available		
Characteristic	**Data**	**Value**
Total private dwellings	Total	13,905
Breakdown by structural types of units (number of units)	Single-detached	12,975
	Semi-detached	585
	Row house	125
	Apartment/flat in a duplex	20
	Apartment in a building that has fewer than 5 storeys	10
	Apartment in a building that has 5 or more storeys	0
	Other single attached	25
	Movable dwelling	150
Breakdown by size (number of units)	Total	13,905
	No bedrooms	40
	1 bedroom	255
	2 bedrooms	1,010
	3 bedrooms	4,590
	4 or more bedrooms	8,010
Breakdown by date built (number of units)	Total	13,905
	1960 or before	890
	1961 to 1980	2,395
	1981 to 1990	1,340
	1991 to 2000	3,435
	2001 to 2005	1,800

5.2.1 Housing Units: Currently Occupied/Available		
Characteristic	**Data**	**Value**
	2006 to 2010	1,640
	2011 to 2015	1,330
	2016 to 2021	1,080
Rental vacancy rate (Percent)	Total	*
	Bachelor	*
	1 bedroom	*
	2 bedrooms	*
	3 bedrooms+	*
Number of primary and secondary rental units	Primary	*
	Secondary	*
Number of short-term rental units	Total	Unavailable

5.3 In the last five years, how many affordable units for low and very low-income households have been built, and how many have been lost? If data is not available, please describe how the loss of affordable housing units may have impacted your community.

5.3.1 Change in Units Affordable to Low-Income Households		
Characteristic	**Data**	**Value**
Affordable units built (number of units)	2016 to 2021	0
Change in number of affordable units built before 2016 (number of units)	2016 to 2021	-115
Change in number of affordable units (number of units)	2016 to 2021	-115

Available data indicates that no new affordable housing units for low-income households were built between 2016 and 2021, while there was a net loss of approximately 115 affordable units over the same period.

This decline suggests that units which were previously affordable may have been lost due to market pressures, such as rising housing costs, conversion to higher-value uses, or turnover in ownership leading to increased rents or prices. In a housing system like Rocky View County, characterized by limited rental supply and high homeownership, even modest losses in affordable units can have a disproportionate impact on lower-income households.

The reduction in affordable units has likely contributed to:

- Increased affordability pressures for low- and very low-income households
- Greater reliance on regional housing options, particularly in nearby municipalities such as the City of Calgary
- Limited pathways into housing, especially for renters or those seeking entry-level options
- Increased demand for subsidies and support programs, as reflected in local funding and referral services

Given that no new affordable units were added during this period, the data indicates a widening gap between housing need and available supply for lower-income households. Over time, this can contribute to increased housing instability, delayed household formation, and greater pressure on both local and regional support systems.

Overall, the loss of affordable housing units combined with limited new supply has likely intensified affordability challenges within Rocky View County, particularly for vulnerable and lower-income populations.

5.4 How have average rents changed over time in your community? What factors (economic, social, national, local, etc.) have influenced these changes?

5.4.1 Average Rent by Year		
Characteristic	**Data**	**Value**
Average Monthly Rent (number, by year)	2016	*
	2017	*
	2018	*
	2019	*
	2020	*
	2021	*
	2022	*
	2023	*
Change in Average Monthly Rent (percent, by year)	2016-2017	*
	2017-2018	*
	2018-2019	*
	2019-2020	*
	2020-2021	*
	2021-2022	*
	2022-2023	*

Quantitative data on average rents over time is not available for Rocky View County, reflecting the limited size and visibility of the local rental market. As a predominantly rural municipality with a small and dispersed rental supply, rental data is not consistently tracked at a local level.

Despite this limitation, qualitative evidence from service providers and FCSS-funded programs indicates increasing rental pressures in recent years. Local agencies report:

- Rising demand for affordable rental options, particularly among families
- Seniors needing to relocate to find housing within their financial means

- Increased reliance on subsidized housing supports

These trends suggest that rents and overall housing costs have increased, even if precise local data is not available.

Several broader factors have influenced these changes:

- Regional market pressures: Rental trends in the nearby City of Calgary have a direct impact on Rocky View County. Rising rents and low vacancy rates in Calgary can push demand outward into surrounding areas.
- Population growth and migration: Strong population growth across Alberta, particularly driven by international migration, has increased demand for rental housing across the region.
- Limited local rental supply: With only a small proportion of housing stock dedicated to rental, even modest increases in demand can result in significant pressure on available units and pricing.
- Aging population: Seniors seeking to downsize or transition out of ownership may increase demand for rental or supportive housing, which is limited within the County.
- Economic conditions and cost of living: Inflation, interest rates, and broader cost-of-living increases have impacted both renters and landlords, contributing to upward pressure on rents.

Overall, while specific rent data is unavailable, service provider insights and regional trends clearly indicate increasing rental affordability challenges in Rocky View County. These pressures are expected to persist without an increase in the supply and diversity of rental housing options.

5.5 How have vacancy rates changed over time? What factors have influenced this change?

5.5.1 Rental Vacancy Rate by Year		
Characteristic	**Data**	**Value**
Rental vacancy rate (percent, by year)	2016	*
	2017	*
	2018	*
	2019	*
	2020	*
	2021	*
	2022	*
	2023	*

Rental vacancy rate data is not available at the municipal level for Rocky View County due to the limited and dispersed nature of the rental market. As a result, vacancy trends are best understood using regional data and qualitative inputs.

At the regional level, the Calgary Census Metropolitan Area (CMA) which includes Rocky View County indicates that vacancy rates increased from approximately 1.4% in 2023 to 4.6% in 2024, based on the Alberta Regional Dashboard. This suggests a recent easing of rental market pressures following a period of extremely low vacancy.

However, local conditions in Rocky View County may differ due to:

- Very limited rental supply, meaning small changes in unit availability can significantly affect vacancy conditions
- A housing stock that is predominantly ownership-based, reducing the size and stability of the rental market
- Dispersed settlement patterns, which limit the formation of a typical rental market structure

While regional data suggests that vacancy rates are beginning to increase, the limited rental supply in Rocky View County means that rental availability remains constrained, and vacancy trends may not reflect broader regional improvements.

Quantitative data on rental vacancy rates specific to Rocky View County is not available, reflecting the limited size and tracking of the local rental market. As a result, vacancy trends are best understood through regional data and qualitative context.

At the regional level, the Calgary Census Metropolitan Area (CMA) which includes Rocky View County shows that vacancy rates increased from approximately 1.4% in 2023 to 4.6% in 2024, based on the Alberta Regional Dashboard. This suggests a partial easing of rental market pressures following a period of very low vacancy and high demand.

Despite this regional increase, vacancy conditions within Rocky View County may differ due to its limited and dispersed rental supply, where even small changes in unit availability can significantly affect local conditions.

Several factors have influenced vacancy trends:

- Regional market dynamics: Vacancy rates in the City of Calgary strongly influence surrounding areas. Periods of low vacancy in Calgary tend to increase demand in Rocky View County, while rising vacancy can ease some pressure.
- Population growth and migration: Strong population growth in Alberta, particularly driven by international and interprovincial migration, has increased demand for rental housing, contributing to lower vacancy rates in recent years.
- Limited rental supply: The small number of rental units within the County means vacancy rates can fluctuate quickly and may not reflect broader regional trends.
- Location and accessibility: Proximity to employment, schools, and services, as well as access to transportation, influences demand for rental units and therefore vacancy levels.
- Cost and affordability: Rising housing costs can impact both demand and turnover, affecting vacancy rates as households adjust their housing choices.

Overall, while regional data suggests that vacancy rates are beginning to increase and stabilize, local conditions in Rocky View County remain influenced by limited supply and strong regional demand, meaning that rental availability may still be constrained for many households.

5.6 How have trends in core housing need changed over time between both tenant and owner-occupied households?

5.6.1 Core Housing Need by Year and Tenure		
Characteristic	**Data**	**Value**
Owner households in Core Housing Need (number)	2016	390
	2021	390
	Total Change	0
	Percent Change	0%
Tenant households in Core Housing Need (number)	2016	145
	2021	120
	Total Change	-25
	Percent Change	-17.24%
Owner households in Core Housing Need (percentage)	2016	3.62%
	2021	3.29%
Tenant households in Core Housing Need (percentage)	2016	14.95%
	2021	12.57%

Core housing need (CHN) trends in Rocky View County between 2016 and 2021 show relative stability for owner households and a modest decline for tenant households, although renters continue to experience significantly higher levels of need.

For owner households, the number of households in core housing need remained unchanged at 390, with a slight decrease in percentage from 3.62% in 2016 to 3.29% in 2021. This suggests that, despite broader housing market changes, homeowners have remained relatively stable, likely supported by higher incomes and greater housing security.

For tenant households, the number in core housing need decreased from 145 in 2016 to 120 in 2021, representing a 17.2% decline. The percentage also decreased from 14.95% to 12.57%. While this indicates some improvement, tenants still experience substantially higher rates of housing need compared to owners nearly four times higher in 2021.

It is important to interpret these trends with caution. As noted in regional analysis, including findings from the City of Calgary housing market, improvements in core housing need between 2016 and 2021 may be partially influenced by temporary income supports during the COVID-19 period, which could mask underlying affordability challenges.

Overall, the data indicates that:

- Housing need among homeowners has remained stable, with relatively low incidence
- Tenant households continue to face disproportionately higher housing challenges, despite some improvement
- Structural factors, including limited rental supply and lower renter incomes, continue to contribute to higher vulnerability among renters

These trends reinforce the importance of increasing the availability of affordable and rental housing options to better address persistent gaps for tenant households in Rocky View County.

5.7 Non-Market Housing

5.7.1 Current Non-Market Housing Units		
Characteristic	**Data**	**Value**
Number of housing units that are subsidized	Total	0
Number of housing units that are below market rent in the private market (can either be rent or income-based definition)	Total	895
Number of co-operative housing units	Total	0
Number of other non-market housing units (permanent supportive, transitional, etc.)	Total	0

5.8 Please describe any other affordable and community housing options and needs/gaps currently in your community that are not captured in the table above.

Examples can include:

- Are any of these affordable housing units accessible or specifically designed for seniors, including long-term care and assisted living?
- Does your municipality provide rent supplements or other assistance programs that deepen affordability for households?
- Is your community in need of supportive housing units with wrap-around supports, such as for those with disabilities?

The County has few developments that are intended specifically to address affordability or to support those with disabilities, due the distance of the County's residential areas to accompanying supporting services, which are generally located within the City of Calgary.

The Prince of Peace development in the County is designed with a spectrum of housing options, from accessible bungalows (174 units) to supportive living suites (129 units), to allow people to age in place in their community with the opportunity for living assistance.

Anecdotally, the County has attracted community housing in the form of multi-family and multi-generational dwellings. This housing form is characterized by large dwellings that house multiple families, often purpose-built with multiple kitchen facilities and many bedrooms. This type of housing is often aligned with cultural norms around generational living and may not be driven primarily by affordability. The County does not have statistics around this type of housing, as there are no land use definitions specific to this type of use that would be collected through development permits, and any supports provided to residents are incidental and not directly associated with the development.

A gap that is commonly identified in communities via public engagement events for planning initiatives is that existing residents desire opportunities to age in place. As much of the County is developed into large-lot acreage communities (commonly 2-acre or 4-acre 'estate'-style homes), there are often few options for people to downsize into senior-friendly housing forms within those communities. While the demographic of the County is typically affluent enough that housing affordability is not a concern, there are some who would require dedicated affordable housing in order to downsize within the community.

5.9 Housing Trends

5.9.1 Housing Values		
Characteristic	**Data**	**Value**
Median monthly shelter costs for rented dwellings (Canadian dollars)	Median	1,520
Purpose-built rental prices by unit size (Average, Canadian dollars)	Total	*
	Bachelor	*
	1 bedroom	*
	2 bedrooms	*
	3 bedrooms+	*
Purpose-built rental prices by unit size (Median, Canadian dollars per month)	Total	*
	Bachelor	*
	1 bedroom	*
	2 bedrooms	*
	3 bedrooms+	*
Sale prices (Canadian dollars)	Average	~$1.25M (Zolo Real Estate Website)
	Median	$1.4M (REW Real Estate Website)
Sale prices by unit size (Average, Canadian dollars)	Average	~$1.25M (Zolo Real Estate Website)
	Bachelor	Unavailable
	1 bedroom	Unavailable
	2 bedrooms	Unavailable
	3 bedrooms+	Unavailable
Sale prices by unit size (Median, Canadian dollars)	Median	$1.4M
	Bachelor	Unavailable

5.9.1 Housing Values		
Characteristic	**Data**	**Value**
Data Source: REW Real Estate Website	1 bedrooms	$819,000 (only 2 listings)
	2 bedrooms	$719,000 (9 listings)
	3 bedrooms+	$1,188,000

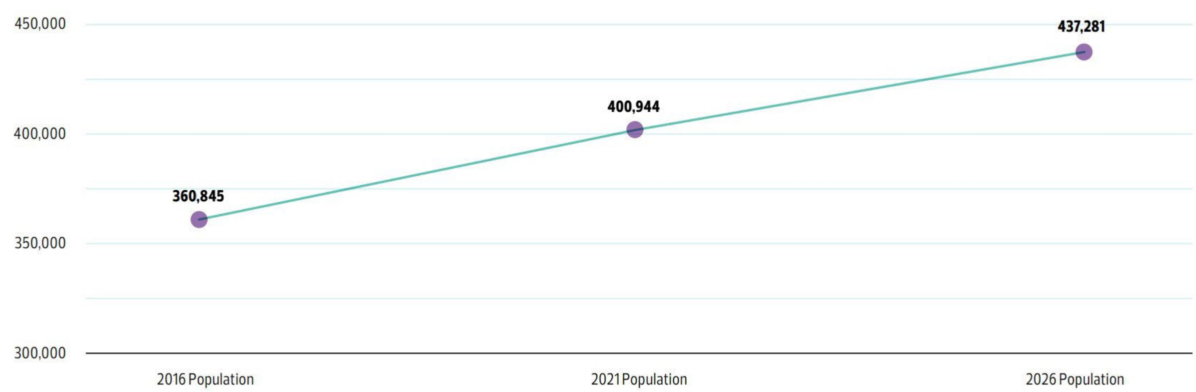
5.9.2 Housing Units: Change in Housing Stock		
Characteristic	**Data**	**Value**
Demolished – breakdown by tenure	Tenant	Unavailable
	Owner	Unavailable
Completed – Overall and breakdown by structural type (annual, number of structures)	Total	*
	Single	*
	Semi-detached	*
	Row	*
	Apartment	*
Completed – Breakdown by tenure (annual, number of structures)	Tenant	*
	Owner	*
	Condo	*
	Coop	*
Starts – Overall and breakdown by structural type (2021, number of structures)	Total	304
	Single	268
	Semi-detached	8
	Row	22
	Apartment	6

5.9.2 Housing Units: Change in Housing Stock		
Characteristic	**Data**	**Value**
Starts – Breakdown by tenure (2021, number of structures)	Tenant	13
	Owner	287
	Condo	4
	Coop	*

6. Projected Housing Needs and Next Steps

This section aims to answer the question, how much and what type of housing is needed to meet the needs of the population over the next 10 years? How will this Housing Needs Assessment (HNA) be meaningfully used in planning and investment decisions?

This section projects population trends from the previous 10 years, dividing by income category and target housing costs while considering migration trends. An example of a benchmarked projection from Edmonton's Affordable Housing Needs Assessment is provided below.



Household Growth Projection 2016- 2026. Source: Edmonton Affordable Housing Needs Assessment – August 2022

HNAs should be able to convey through their data-driven narrative how many housing units are needed by income category, household size and dwelling type over the next 10 years. In completing this section, communities must carefully consider their past growth trends and future demographic projections, including recent immigration patterns, aging population dynamics, and economic trends. Furthermore, it is also crucial for communities to consider any pre-existing housing shortages, as evidenced by indicators such as recent trends in rental vacancy rates, growth in prices/rents, the number of households in core housing need, and the aging of their current housing stock.

6.1 Projection Methodology Guidelines

There are several projection methodologies that can be used to project housing demand, including the HART housing needs projection here. The federal government recommends using the HART methodology as a reference point, with additional considerations and data points to improve the validity of the methodology. These considerations, including economic data integration and supply capacity and gaps as well as steps for calculating the methodology are noted below. Provinces and territories, in consultation with their municipalities/communities, are invited to use a methodology that fits their regional circumstances, ensuring the assumptions that inform their preferred methodology are also clearly explained The federal government will review the HNAs as a requirement for its various funding programs and assess the methodology and assumptions that inform it for their validity and robustness. If needed, further engagements can take place to better align the preferred methodology with the federal government's expectations.

In employing a projection methodology, jurisdictions may find the following list of key considerations and steps useful. The following approach involves first projecting the population into the future, then projecting household formation from headship rates, and then **demand for housing by tenure, dwelling type and size, family type and income groups**. Following the Population Projection, Household Projection and Housing Demand Projection steps, a table is presented of the key considerations for each step in the process.

Step 1: Population Projection

- Conceptually the projected population is calculated as the survived population + births + projected net migrants. An example of an accepted method to calculate population projection is the Cohort-Component population projection method.

Step 2: Household Projection

- Project family and non-family households separately by multiplying the projected population by age group in a given year with projected headship rates (household formation) by age group in a given year.
  - A headship rate represents the probability that a member of a given age group will head (maintain) a household of a given type (family or non-family). Historical headship rates are calculated as the ratio of household heads in an age group to the population of that age group.
  - Total headship rates can be determined by adding family and non-family headship rates together for a given age group and year. An increase in the total headship of any particular age group means that overall a higher proportion of that group heads households than previously. The converse holds true for a decrease in the total headship rate. Thus, the total rate is an overall indication of the propensity to form households in a particular age group.
- Project both family and non-family households by household type (composition), including couples without children, couples with children, lone parents, multiple-family households, one-person households, and other non-family households. This can be achieved by multiplying the projected number of households in a particular age group by the projected household type proportions for that age group.

  - Historical proportions for family households are the ratio of the number of family households of a given type in an age group to the total number of family households headed by that age group.
  - Historical proportions for non-family households are the ratio of the number of non-family households of a given type in an age group to the total number of non-family households headed by that age group.
- Project net household formation according to family and non-family household types by calculating the difference between projected households in successive years.

<u>Step 3: Housing Demand (Need) Projection</u>

- Project the number of owner households within a particular age range and household type by multiplying projected household by type (family and non-family) by projected ownership rates.
- Project the number renter households by calculating the difference between projected households and the number of projected owner households.
  - Historical ownership or renter rates are the ratio of the number of owning/ or renter households of a given type and age of head to the total number of households (owners and renters combined) of that type and age of head.
- Project dwelling type (single, semi, row, apartment) by multiplying projected age-specific renter and owner dwelling choice propensities by household type (family and non-family) with the projected number of renter and owner households of the given household type and age group.
  - Historical dwelling choice (occupancy) propensities describe the proportion of a given household type, tenure, and age of head group occupying each of the four dwelling types.
- Finally, communities should integrate assessments of pre-existing housing shortages into their final calculations. This integration should be informed by a thorough review of the preceding quantitative and qualitative analyses within the HNA. Additionally, communities should utilize the data and more advanced methodologies detailed in the Annex to ensure a comprehensive estimation of these shortages.

HART Household Projections – Projected Households by Household Size and Income Category

- The HART methodology estimates the total number of units by type (number of bedrooms) and with reference to income categories that will be needed to house a community's projected population.

Please use the Housing Assessment Resource Tools Households Projections tab to fill out the table below for your jurisdiction – Housing Needs Assessment Tool | HART

6.1.1 Projected Households by Household Size and Income Category, 2031						
HH Income Category	**1 person**	**2 person**	**3 person**	**4 person**	**5+ person**	**Total**
Very Low Income	454	167	58	48	54	781
Low Income	687	1,408	144	104	98	2,441
Moderate Income	441	1,419	301	379	191	2,731
Median Income	122	1,297	467	583	499	2,968
High Income	190	1,704	1,125	1,629	1,258	5,906
Total	1,894	5,995	2,095	2,743	2,100	

Key Considerations

Population

- It is strongly advised to use the updated post-census population estimates for 2022 as your base population provided by Statistics Canada's demographic estimates division. These estimates account for any discrepancies in population counts, whether they are undercounts or overcounts. These estimates also smooth out the sharp downturn in immigration due to the pandemic in 2020/21. Please refer to annex for links to Statistics Canada CSD and CMA estimates.

- If historical fertility, survival and mortality rates by age category are stable and not trending, apply average historical rates to current population by age to project forward. If rates do trend by age over time, estimate the average change in rates in percentage points and add to current rates when projecting forward for the baseline scenario.

- For larger communities and centres where the data exists, disaggregate and project baseline net migration flows for respective components (i.e., net interprovincial, net intra migration and net international). Disaggregate net international migration and project its components further (emigration, returning Canadians, non permanent residents, etc.) and use recent growth trends per flow to project total net international migration. In projecting international migration, it will be important for communities to use the more updated federal immigration targets as an anchor.

- Because of the economic uncertainty triggered by the COVID-19 pandemic and potential future shocks, larger communities are expected to create one additional population scenario (high) to supplement the baseline. Utilize StatsCan projection methodology for fertility, survival, and migration to establish the high scenario. Consult Statistics Canada's population projection report cited in the appendix. Communities should avoid using low population or migration scenarios to prevent housing need undercounting.

- **Smaller Communities:**

  - In smaller centers where population projection scenarios are unavailable from StatsCan, but there is the capacity to generate them, cities can resort to using historically high population growth rates or migration scenarios as alternative methods for projecting future population.
  - One industry communities should also develop multiple population scenarios to manage economic volatility

Household Projections

- Headship rate is commonly defined as the ratio of the number of households by age to the population of adults by age in each community and can be used to project future households.

- If historical headship rates data is not trending or stable by age, apply the average historical census family/non-family headship rates by age group to the corresponding population within each age group.
- If historical headship rates by age is showing a trend over time, include the average historical census family/non-family headship rates percentage point change to the current headship rate. Subsequently, apply these adjusted headship rates by age to the corresponding population within each age group. By incorporating average historical headship rates into household projections, communities can mitigate the impact of potential decreases in recent headship rates that may be due to housing unaffordability, therefore avoiding artificially low household projections.
- **Optional for Smaller Communities:**
  - For the younger population aged 18-34, predict family/non-family headship rates using economic modeling. See UK study in annex for further guidance.
  - Project household composition by family/non-family households using latest census proportions by family type.
  - Project household size by age for family/nonfamily type by dividing population by households.

Housing Demand

To project housing demand by tenure:

- If ownership rates for family/non-family households within specific age groups are not showing a trend over time, apply the average historical ownership rates to projected households by age. The remaining households are considered renter households by age.
- If ownership rates for family/non-family households within specific age groups are trending over time, include the average historical percentage point change to the current ownership rates. Apply these adjusted ownership rates to household counts by age to project tenure by age. The remaining households are considered renter households by age.

To project housing demand by dwelling type:

- If historical dwelling propensities by family type, age, and tenure are not exhibiting a trend, apply the average historical demand propensity by type, age, and tenure to project households by type, age, and tenure.
- If historical demand type propensities are trending, incorporate the average percentage point change in demand type propensities to the current propensities. Apply these adjusted propensities to household types to estimate future dwelling propensities.

Economic Data Integration

- Relying solely on traditional demographic approaches to forecast housing needs can underestimate housing demand.
- Headship rates by age and family type can be projected by considering economic factors as explanatory drivers. These factors could include income, unemployment rates, prices, rents, and vacancy rates.
- CMHC is developing models to project headship rates for household maintainers aged 18-34 in provinces and larger metropolitan areas. Larger communities can benefit from leveraging these projections.
- Using an economic approach to project headship rates and incomes facilitates the estimation of household counts by age, size, tenure, and income. When integrated with dwelling type, price, and rent data, this approach assists in identifying potential households in core housing need.

Supply Capacity & Supply Gaps

- Housing need projections should be adjusted upwards or downwards to account for the **net effects** of conversions, demolitions, and vacant units in each community.
- Where data is available, communities should assess future capacity by compiling data on draft approved serviced lots, categorized by dwelling type and tenure, that will be available for residential development. When combined with household projections by dwelling type and tenure, help estimate supply gaps
- In addition, larger communities can leverage supply gap estimates from CMHC to help inform where need is greatest and to identify housing shortages.
- **Optional for Smaller Communities:**
    - Comparing housing need projections with supply capacity will enable communities to identify potential gaps in supply by dwelling type and tenure.

6.2 Projection Methodology

Please outline the methodology and calculations used to complete the projections here, including any assumptions made.

Population Projection

Recent population growth in Rocky View County has accelerated significantly, increasing from 41,028 in 2021 (Statistics Canada Census) to an estimated ~50,260 by 2025 (Government of Alberta Regional Dashboard), driven largely by strong in-migration and regional economic conditions. However, longer-term census trends indicate more moderate growth, with the population increasing from 39,407 in 2016 to 41,028 in 2021 (~0.8% annually) (Statistics Canada).

Accordingly, a 2.5% annual growth rate is applied as the base projection scenario. This rate represents a balanced and policy-aligned assumption, moderating recent short-term growth spikes while recognizing sustained regional growth pressures and Rocky View County's role within the broader Calgary Metropolitan Region.

Population projections are informed by the Cohort-Component Method, which estimates future population based on births, deaths, and net migration (Statistics Canada, *Population Projections Methodology*). For Rocky View County, recent data indicates approximately 131 births and 103 deaths annually, equivalent to approximately 2.9 births per 1,000 population and 2.3 deaths per 1,000 population (Government of Alberta Regional Dashboard, 2024), resulting in a modest natural increase.

Consistent with regional trends, net migration is the primary driver of population growth, reflecting economic conditions, housing market dynamics, and migration patterns within the Calgary region. In the absence of detailed cohort-specific migration assumptions, this analysis applies a simplified cohort structure and constant annual growth rate, which is consistent with standard municipal-level projection practices (CMHC; Statistics Canada).

Using 2021 census data as the baseline, population by age cohort was projected to 2031 using the 2.5% annual growth rate. This results in a projected population distribution by age cohort, as shown below:

Projected Population distribution by age cohort (2031)

Age Group	2021 Population	2031 Population
0–4	1,577	2,019
5–9	2,464	3,154
10–14	3,103	3,972
15–19	3,124	3,999
20–24	2,525	3,232
25–29	1,541	1,973
30–34	1,637	2,095

Age Group	2021 Population	2031 Population
35–39	2,199	2,815
40–44	2,774	3,551
45–49	3,089	3,954
50–54	3,471	4,443
55–59	3,722	4,764
60–64	3,693	4,727
65–69	2,855	3,655
70–74	2,002	2,563
75–79	1,262	1,615
80–84	687	879
85–89	410	525
90+	243	311

This projection represents a simplified cohort model, in which age cohorts are grown proportionally rather than aged forward over time.

Household Projection

Projected population by age cohort was then converted into households using age-specific total headship rates, derived from 2021 data (see Table 3.3.1 Household Formation).

Households by Age Cohort

Age Group	Pop 2021	Pop 2031	2021 Headship Rate	HH 2021	HH 2031	Net New HH
15–24	5,649	7,231	1.3%	73	94	+21
25–34	3,178	4,068	23.2%	737	944	+207
35–44	4,973	6,366	45.6%	2,268	2,903	+635
45–54	6,560	8,397	52%	3,411	4,366	+955
55–64	7,415	9,492	52.6%	4,301	5,505	+1,204
65-74	7,459	9,548	52%	4,625	5,920	+1,295
75-84	1,949	2,494	59.9%	1,167	1,495	+328
85+	653	836	40.8%	266	341	+75

Application of the 2021 headship rates results in projected household growth from approximately 13,905 households (Actual 2021 Households, Table 3.3.2) to 21,568 households in 2031, representing net growth of approximately 7,623 households. As shown above, the majority of household growth is concentrated in age groups 45 to 74.

Family and Non-Family Household Allocation

In the absence of disaggregated headship rates for family and non-family households, total headship rates were applied and subsequently allocated using age-specific proportions consistent with Statistics Canada and CMHC trends.

These proportions reflect observed Canadian patterns:

- Younger cohorts → higher share of non-family households
- Mid-life cohorts → dominated by family households

Older cohorts → increasing share of non-family households *Limitations and Assumptions*

The projections presented in this analysis are subject to the following limitations:

- A constant annual growth rate (2.5%) is applied, which does not capture year-to-year variability
- The cohort model does not age cohorts forward, and therefore does not fully reflect demographic transitions over time
- Headship rates are assumed to remain constant over the projection period
- Disaggregated family and non-family household distributions are unavailable
- Migration is not explicitly modelled by age cohort, but is reflected within the overall growth rate

As such, these projections should be interpreted as scenario-based estimates, intended to support planning and policy development rather than precise forecasts.

6.2.1 Projections		
Characteristic	**Data/Formula**	**Value**
Women by age distribution (# and %)	0-14	Unavailable
	15-19	Unavailable
	20-24	Unavailable
	25-64	Unavailable
	65-84	Unavailable
	85+	Unavailable
Male Births	Births x Estimated Proportion of Male Births	Unavailable

6.2.1 Projections		
Characteristic	**Data/Formula**	**Value**
Female Births	Total births – Male Births	Unavailable
Survival Rate	Survival rate for those not yet born at the beginning of the census year	Unavailable
Net Migrations	Net migration (in and out) of those not yet born at the beginning of the census year	Unavailable
Projected Family Households	Age-group population x projected age-specific family headship rate	Unavailable
Projected Non-family Households	Age-group population x projected age-specific non-family headship rate	Unavailable
Total Projected Headship Rate	Family headship rates + non-family headship rates	Unavailable
Projected Net Household Formation	Projected households by type (family and non-family) (Year 2) – Projected households by type (family and non-family) (Year 1)	Unavailable
Projected Owner Households	Projected households by type, year and age group x Projected ownership rate by type, year and age group	Unavailable
Projected Renter Households	Projected households by type, year and age group – projected owner	Unavailable

6.2.1 Projections		
Characteristic	**Data/Formula**	**Value**
	households by type, year and age group	
Projected Dwelling Choice	Projected households by type, tenure and age group x projected dwelling choice propensities by type, tenure and age group	Unavailable

6.3 Population and Households Projections

6.3.1 Anticipated Population (Base Case) by 2031		
Characteristic	**Data**	**Value**
Anticipated population	Total	54,247
Anticipated population growth	Total	11,869
	Percentage	~28.1%
Anticipated age	Average	42.4 years
	Median	42.2 years
Anticipated age distribution (# and %)	0-14	9,145 (16.9%)
	15-19	3,999 (7.4%)
	20-24	3,232 (6.0%)
	25-64	28,322 (52.2%)
	65-84	8,712 (16.1%)
	85+	836 (1.5%)

6.3.2 Anticipated Households by 2031		
Characteristic	**Data**	**Value**
Current number of households	Total	13,905 (2021)
Anticipated number of households	Total	21,568 (2031)
Anticipated Household Age	Average	~58 years
	Median	~59 years
Anticipated Households by Tenure	Renter	1,704
	Owner	19,864
Anticipated Units by Type	Total	Unavailable
	Single	Unavailable
	Semi-detached	Unavailable
	Row	Unavailable
	Apartment	Unavailable
Anticipated Units by Number of Bedrooms	1 bedroom	Unavailable
	2 bedroom	Unavailable
	3 bedroom	Unavailable
	4 bedroom	Unavailable
	5 bedroom	Unavailable
Anticipated Households by Income	Average	Unavailable
	Median	Unavailable
	Very Low	Unavailable
	Low	Unavailable
	Moderate	Unavailable

6.3.2 Anticipated Households by 2031		
Characteristic	**Data**	**Value**
	High	Unavailable
Anticipated average household size	Total	Unavailable
Draft approved lots by planned housing type	Total	Unavailable
Draft approved lots by tenure	Tenant	Unavailable
	Owner	Unavailable

7. Use of Housing Needs Assessments in Long-Term Planning

7.1 This final section aims to determine how your community anticipates using the results and findings captured in the Housing Needs Assessment to inform long-term planning as well as concrete actions that can address identified needs. Please use the following questions to describe how those linkages will be made.

How will this HNA inform your official community or development plan, housing policies and/or actions going forward?

Rocky View County is planning to undertake a Social Needs Assessment in 2027, which will build on the HNA by collecting more detailed, community-specific information on social and housing needs. This work is expected to:

- Provide more granular insight into priority populations
- Help validate and refine HNA findings
- Inform future program-level and policy responses

Overall, the HNA will serve as a baseline document to guide future planning efforts, support evidence-based decision-making, and identify opportunities for targeted actions and partnerships to address housing needs across the County.

How will data collected through the HNA help direct those plans and policies as they aim to improve housing locally and regionally, and how will this intersect with major development patterns, growth management strategies, as well as master plans and capital plans that guide infrastructure investments?

The data collected through the Housing Needs Assessment (HNA) will help inform and refine Rocky View County's planning, growth management, and infrastructure investment decisions, both locally and within the broader regional context.

The HNA provides a clearer understanding of housing demand by income, household size, and population group, which can be used to:

- Identify gaps in housing supply and diversity, particularly in serviced areas such as hamlets and growth nodes
- Inform land use planning and Area Structure Plans, ensuring that future development includes a broader mix of housing types where appropriate
- Support growth management strategies by aligning housing needs with planned development areas and infrastructure capacity

A key linkage is with the County's ongoing Growth and Fiscal Impact Analysis model, which is being developed to better understand how future growth will impact infrastructure and service delivery. The HNA will:

- Help identify where additional data or assumptions may be needed, particularly related to housing demand and population characteristics
- Provide context on housing types and affordability needs, which can influence infrastructure requirements (e.g., servicing, transportation, community facilities)
- Support more informed scenario planning, particularly when evaluating different growth patterns or development forms

Overall, the HNA strengthens the County's ability to take a coordinated, evidence-based approach to planning by linking housing needs with land use decisions, infrastructure investments, and long-term growth strategies.

Based on the findings of this HNA, and particularly the projected housing needs, please describe any anticipated growth pressures caused by infrastructure gaps that will need to be prioritized and addressed in order to effectively plan and prepare for forecasted growth. This can relate to any type of enabling infrastructure needed for housing, including fixed and non-fixed assets, as well as social, community or natural infrastructure that your local government has identified as a priority for fostering more complete and resilient communities.

Based on the findings of this Housing Needs Assessment (HNA), Rocky View County anticipates that future housing demand will continue to be closely tied to regional growth pressures, particularly those originating from the City of Calgary. Due to the diversity of the County (i.e. rural areas, hamlets, and employment nodes) housing needs are variable and more difficult to predict, reinforcing the importance of ongoing data collection and monitoring.

A key pressure identified through the HNA is the relationship between housing demand and infrastructure capacity. In many areas of the County, limited availability of piped water and wastewater servicing constrains the ability to support more compact or diverse housing forms. As a result, growth has historically trended toward low-density, privately serviced development, which may not align with projected needs for a broader range of housing types.

Several infrastructure-related pressures are anticipated:

- Servicing capacity (water, wastewater, stormwater)
  Expanding or upgrading servicing infrastructure will be critical to enabling growth in hamlets and other planned development areas where higher-density or more diverse housing could be supported.
- Transportation and mobility infrastructure
  Continued reliance on private vehicles and limited transit options may constrain

housing choice and affordability, particularly for households seeking proximity to employment and services.

- Social and community infrastructure
Limited access to healthcare, social services, and supportive programming within the County affects the feasibility of housing options such as supportive housing, senior housing, and housing for priority populations.

- Natural infrastructure and environmental constraints
Flood risk, water availability, and wildfire exposure will continue to influence where growth can occur and what mitigation measures are required, affecting both land supply and development costs.

- Alignment with employment areas
Growth in employment nodes may create demand for workforce housing, requiring coordinated planning between land use, infrastructure, and economic development strategies.

The County's ongoing Growth and Fiscal Impact Analysis model will be an important tool in further identifying and quantifying these infrastructure gaps, particularly in relation to the costs and timing of servicing expansion needed to support future housing development.

Overall, the HNA highlights that addressing infrastructure constraints particularly servicing and access to services will be critical to enabling a broader range of housing options and supporting more complete and resilient communities. Rocky View County will continue to refine its data and analysis in future iterations of the HNA to better align housing needs with infrastructure planning and investment priorities.

Annex A: Relevant Links for Developing Housing Needs Projections

Data and Analysis

Housing Statistics - Statistics Canada

Population estimates, July 1, by census subdivision, 2016 boundaries (statcan.gc.ca)

Population estimates, July 1, by census metropolitan (statcan.gc.ca)

Population and demography statistics (statcan.gc.ca)

Population Projections for Canada (2021 to 2068), Provinces and Territories (2021 to 2043) (statcan.gc.ca)

Housing Market Information Portal

UrbanSim – Scenario Modeling

Reports & Publications

Housing Markets Insight - CMHC's household projections for 8 of Canada's major urban centres until 2042

CMHC - Housing Shortages in Canada Report

University of British Columbia - Housing Assessment Resource Tools (HART)

University of London - Affordability targets: Implications for Housing Supply

Nova Scotia Housing Needs Assessment Report Methodology

Ontario Land Needs Assessment Methodology

British Columbia Affordable Housing Need Assessment Methodology

Annex B: Glossary

Affordable Housing: A dwelling unit where the cost of shelter, including rent and utilities, is a maximum of 30% of before-tax household income.

Area Median Household Income: The median income of all households in a given area.

Cooperative Housing: A type of residential housing option whereby the owners do not own their units outright. This would include non-profit housing cooperatives, as stand-alone co-operatives or in partnership with another non-profit, including student housing co-ops, as well as Indigenous co-ops, including those in partnership with Indigenous governments and organizations. This does not, however, include homeownership co-ops or equity co-ops that require an investment, which along with any profit earned, is returned to co-op investors.

Core Housing Need: Refers to whether a private household's housing falls below at least one of the indicator thresholds for housing adequacy, affordability or suitability, and would have to spend 30% or more of its total before-tax income to pay the median rent of alternative local housing that is acceptable (attains all three housing indicator thresholds).

- *Adequate* – Does not require any major repairs, according to residents. Major repairs include those to defective plumbing or electrical wiring, or structural repairs to walls, floors or ceilings.
- *Suitable* – Has enough bedrooms for the size and make-up of resident households, according to guidelines outlined in National Occupancy Standard (NOS).
- *Affordable* – All shelter costs total less than 30% of a household's before-tax income.

Household: A person or a group of persons (other than foreign residents) who occupy a private dwelling and do not have a usual place of residence elsewhere in Canada.

Household Formation: The net change in the number of households.

Supportive Housing: Prioritizes people experiencing chronic homelessness and other vulnerable people who have the highest support needs. It provides long-term affordable housing and a diversity of customized support services.

Permanent Supportive Housing: Prioritizes people experiencing chronic homelessness and other vulnerable people who have the highest support needs. It provides long-term affordable housing and a diversity of customized support services.

Purpose-Built Rental: Also known as the primary rental market or secure rentals; multi-unit buildings (three or more units) which are built specifically for the purpose of providing long-term rental accommodations.

Short-Term Rentals: All or part of a dwelling unit rented out for less than 28 consecutive days in exchange for payment. This includes bed and breakfasts (B&Bs) but excludes hotels and motels. It also excludes other accommodations where there is no payment.

Suppressed Household Formation: New households that would have been formed but are not due to a lack of attainable options. The persons who would have formed these households include, but are not limited to, many adults living with family members or roommates and individuals wishing to leave unsafe or unstable environments but cannot due to a lack of places to go.

Missing Middle Housing: Housing that fits the gap between low-rise, primarily single-family homes and mid-rise apartment buildings, typically including secondary and garden suites, duplexes, triplexes, fourplexes, rowhouses and townhouses, courtyard housing, and low-rise apartment buildings of 4 storeys or less. These housing types provide a variety of housing options that add housing stock and meet the growing demand for walkability. The missing middle also refers to the lack of available and affordable housing for middle-income households to rent or own.