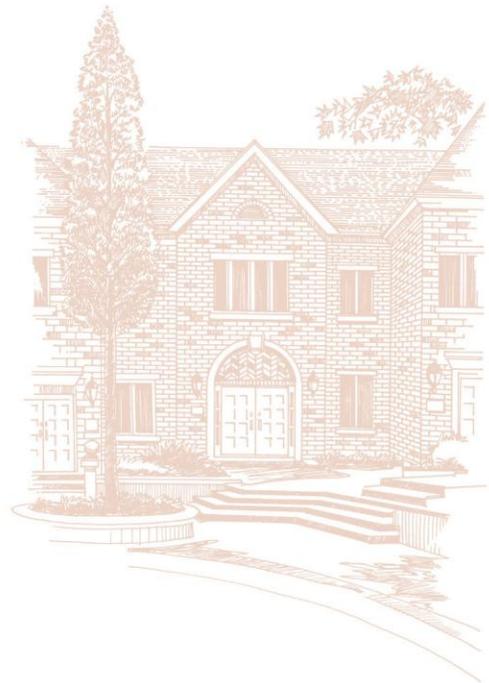


**CITY OF PRINCE ALBERT
POPULATION, HOUSEHOLD AND
EMPLOYMENT FORECAST STUDY**

FINAL

SEPTEMBER 25, 2009



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 **Planning for growth**

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Watson & Associates Economists Ltd. (W&A) was retained in December 2008 by the City of Prince Albert to prepare a comprehensive long-term growth forecast as background to the City's 2009 Development Levies and Servicing Fees Study. The development of a comprehensive long-term growth forecast will also serve as a meaningful tool that will be used for several other purposes, such as land use planning, long-term infrastructure requirements, water and waste water facilities and capital budgeting.

The population, household and employment forecast study is divided into three phases:

Phase 1 - Economic and Demographic Profile

Phase 1 examines recent housing, population and economic trends for the City of Prince Albert within a broader regional and provincial context. Specific attention is given to general housing market trends related to housing form (i.e. density), housing prices and recent construction activity. In many cases, additional analysis has also been provided for the City of Saskatoon and the Province of Saskatchewan for comparative purposes. An overview of historic and current economic trends on a local and broader level is also examined. This analysis was used as a basis to explore how current and future demographic and economic trends would influence future housing and population growth in Prince Albert over a long-term horizon (i.e. 25 years).

Phase 2 - Long-Term Population and Employment Forecast

Building on the results of Phase 1, W&A has generated a medium (base scenario) and high long-term population, housing and employment growth scenario for the City. Each growth scenario provides details with respect to population and housing growth by structure type (i.e. single-detached, semi-detached, townhomes, apartments) and population age structure in five-year increments over a 25-year time horizon. The long-term employment scenarios are provided by major employment sector (i.e. primary, industrial, commercial and institutional) also in five-year increments from 2009 to 2034.

Phase 3 - Review of Recent Population and Housing Forecasts for Prince Albert

Phase 3 of the study involves a comparative review of recent population growth scenarios prepared for Prince Albert compared to the W&A forecast generated in Phase 2. Key areas of focus include base population, population growth rates, housing growth rates and assumptions regarding future housing occupancy trends.

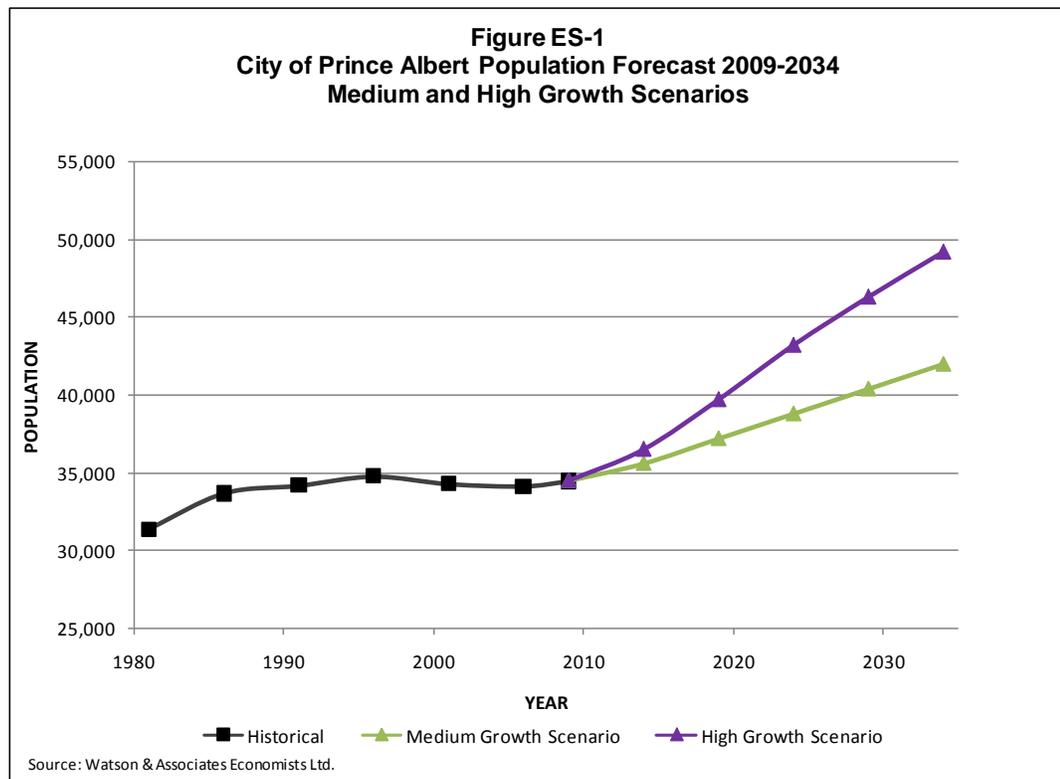
The following provides a brief overview of our key findings:

Population and Housing Growth Trends

- **Historical population growth for the City of Prince Albert has been modest.** Over the 1981 to 2006 Census period, the City's population has increased marginally at an average annual rate of 0.3% per year. The City's long-term annual average population growth rate was pulled down during a period of population decline experienced between the 1996 to 2006 Census periods. Comparatively, the City's historical 25 year population growth rate (i.e. 1981 to 2006) has been slightly above the Provincial average, which was essentially flat during this time period.
- **The City's declining population trend has been reversed in recent years.** Between 2006 and 2008, Prince Albert's population grew slightly at an average annual rate of 0.4%, reversing a decade-long trend of population decline.
- **The future population growth rate for the City of Prince Albert is forecast to exceed historical trends based on a number of identified economic growth drivers. These include:**
 - Continued growth in key commodities sectors namely in oil, uranium, potash and agri-business;
 - Prince Albert's growing importance as a regional centre for retail, government, education and health services;
 - Located at the gateway to northern Saskatchewan, Prince Albert is well poised to attract employment opportunities related to eco-tourism and recreation; and
 - As the provincial hub of the forestry sector, Prince Albert will continue to develop and diversify its forestry cluster.
- **As previously identified, two long-term growth forecasts have been prepared by W&A for the City of Prince Albert including a Medium and High Growth Scenario.**
 - Under the Medium Growth Scenario, Prince Albert's population is forecast to reach 42,000 by 2034. This represents an average population growth rate of 0.8% per year. In terms of housing activity, an average of 140 housing units would be constructed annually under the Medium Growth Scenario.
 - Under the High Growth Scenario, Prince Albert's population is forecast to reach 49,200 by 2034. This represents an average population growth rate of 1.5% per

year. In terms of housing activity, an average of 269 housing units would be constructed annually under the High Growth Scenario.

- **Figure ES-1 summarizes the Medium and High Population Growth Scenarios for the City of Prince Albert from 2009 to 2034 in comparison to historical trends experienced from 1981 to 2006.**

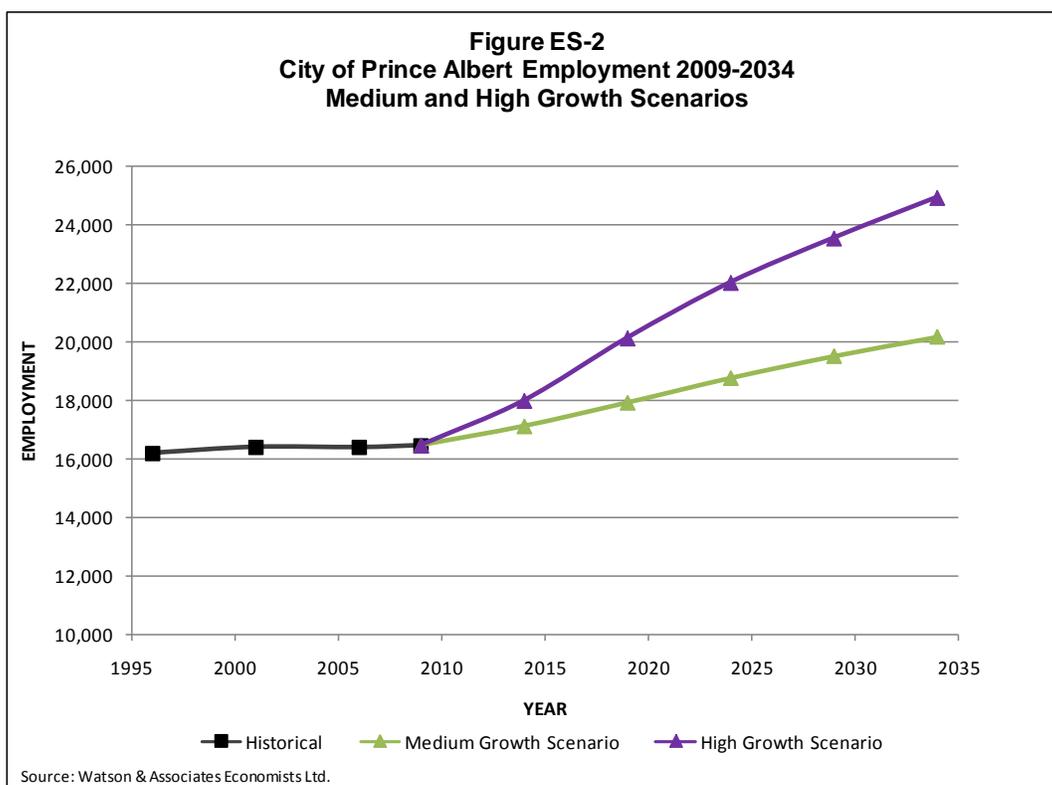


Employment Growth Trends

- **Historical employment growth for the City of Prince Albert has been modest.** Between the 1996 and 2006 Census period, the City added approximately 195 employees to its base. This represents an average annual growth rate of 0.1%. Comparatively, the City's historical employment growth rate (i.e. 1996 to 2006) has been below the Provincial average of 0.6%.
- **While the City of Prince Albert will continue to benefit from economic growth in the resource sector throughout the region, local employment growth opportunities will be felt largely through "spin-off" employment in the service sector economy.** Prince Albert's local economic base is gradually shifting, and will

continue to shift, from the resource sector (particularly forestry) towards retail, business services, education, health, social services and tourism.

- **Over the 2009 to 2034 forecast period, all employment sectors, except primary (i.e. forestry, agriculture), are anticipated to experience steady employment growth.** Under the Medium Growth Scenario, total employment is forecast to reach 20,165, by 2034, which represents incremental growth of 3,720 over the 2009 to 2034 period. Under the High Growth Scenario, total employment is forecast to reach 24,930, by 2034, which represents a growth increment of 8,485 over the 2009 to 2034 period. In terms of average annual employment growth rates, the Medium and High Growth employment forecasts represent a range of 0.8% to 1.7% over the 2009 to 2034 forecast period.
- **Figure ES-2 summarizes both the Medium and High Employment Growth Scenarios for the City of Prince Albert.**



Recommended Long-term Growth Scenario

- Based on historical population and housing growth trends, recent development trends and the long-term growth outlook for the City of Prince Albert and the Province of

Saskatchewan, the Medium Population and Employment Growth Scenario represents the “most likely” long-term growth forecast for the City.

- As such, the Medium Growth Scenario is recommended as the basis for the City’s 2009 Development Levies and Servicing Fees Study, as well as other long-term land use planning, infrastructure and capital budgeting requirements.
- In an effort to illustrate the impact of higher population and employment growth on the City’s on long-term residential and non-residential land needs, both the Medium and High Growth Scenarios have been considered.
- It is recommended that the City review its long-term population, housing and employment forecasts on a five-year basis.

City of Prince Albert Residential Land Needs

- **The City of Prince Albert has a potential housing supply of 11,457 units on vacant residential designated lands north and south of the North Saskatchewan River.** The City has identified a land area totalling 1,657 gross acres immediately outside the City’s current municipal boundary located in the southeast quadrant of the municipality.
- **The City of Prince Albert has a more than sufficient supply of designated residential lands south of the North Saskatchewan River to accommodate forecast population and housing growth to 2034.** Table ES-1 summarizes the City’s forecast housing surplus by 2034 under both the Medium and High Growth Scenarios.

Table ES-1
Residential Land Needs Summary, 2009-2034
Medium and High Growth Scenarios

Medium Growth Scenario

	Residential Units			
	Low Density	Medium Density	High Density	Total
Housing Supply (Units)	5,780	1,481	4,196	11,457
Demand for Housing Units	2,360	320	830	3,510
Surplus (Shortfall) in Housing Units	3,420	1,161	3,366	7,947

High Growth Scenario

	Residential Units			
	Low Density	Medium Density	High Density	Total
Housing Supply (Units)	5,780	1,481	4,196	11,457
Demand for Housing Units	3,590	790	2,340	6,730
Surplus (Shortfall) in Housing Units	2,190	691	1,856	4,727

Source: Watson & Associates, Economists Ltd.

- The City of Prince Albert can accommodate approximately 79 years of future housing growth under the Medium Growth Scenario and 42 years of future housing growth under the High Growth Scenario.

Forecast Non-Residential Land Needs

- Table ES-2 summarizes forecast non-residential land needs under the Medium and High Growth Scenarios in accordance with net developable supply and forecast long-term demand for the City of Prince Albert from 2009 to 2034. Under each of these long-term growth scenarios, the following land supply surplus/deficits have been identified by employment sector by 2034:
 - Industrial Lands – A deficit ranging from 80 to 402 net acres;
 - Commercial Lands – A deficit ranging from 1 to 45 net acres; and
 - Institutional Lands – A surplus of 46 net acres to a deficit of 23 net acres.

Table ES-2
City of Prince Albert
Medium and High Growth Scenarios
Non-Residential Land Needs, 2009-2034

Medium Growth Scenario

	Industrial		Commercial/Population Related		Institutional	
	Acres	Hectares	Acres	Hectares	Acres	Hectares
Net Vacant and Developable Land Supply	44	18	55	22	106	43
Land Need 2009-2034	124	50	55	22	60	24
Surplus/ (Deficit) of Land	(80)	(32)	(1)	(0)	46	19

High Growth Scenario

	Industrial		Commercial/Population Related		Institutional	
	Acres	Hectares	Acres	Hectares	Acres	Hectares
Net Vacant and Developable Land Supply	44	18	55	22	106	43
Land Need 2009-2034	445	180	100	40	129	52
Surplus/ (Deficit) of Land	(402)	(163)	(45)	(18)	(23)	(9)

Source: Watson & Associates Economists Ltd.

- As identified above, under both growth scenarios, the City is faced with a deficit of industrial and commercial lands by 2034. The City needs to address and plan for the expansion of its non-residential land base in the near term. The City has a limited

supply of designated non-residential land available for development (i.e. within the City limits) south of the North Saskatchewan River. W&A recommends that:

- Expansion areas for future industrial and commercial development south of the City limits should be pursued;
- The South Commercial Area-west side presents an optimal location for commercial land uses. As a gateway to the City, along the main highway connection into Prince Albert, this area should be a priority area for future commercial development; and
- Industrial lands within the South Industrial Expansion area should also be developed. These lands represent a logical extension of the South Industrial Area. The future expansion area should be focused around similar uses to the designated and built area to the north, namely light industry, office, construction, warehousing and distribution.

Comparative Review of Recent Forecasts

- A review of past forecasts for the City of Prince Albert concluded that for the most part, the Medium and High Growth Scenarios prepared by W&A forecast higher population and housing growth for the City of Prince Albert over the 25-year period (2009-2034) than presented in previous forecasts.

1. INTRODUCTION

1. INTRODUCTION

The City of Prince Albert, with a population of 34,138,¹ is the third largest City in Saskatchewan, after Saskatoon and Regina. Located in central Saskatchewan, approximately 140 kilometres north-east of Saskatoon, Prince Albert serves as the economic hub of the north-central part of the Province (Figure 1-1). As Saskatchewan's most northerly City, Prince Albert is often referred to as the "Gateway to the North." The City is situated in the transition zone between the agricultural belt to the south and the boreal forest to the north.

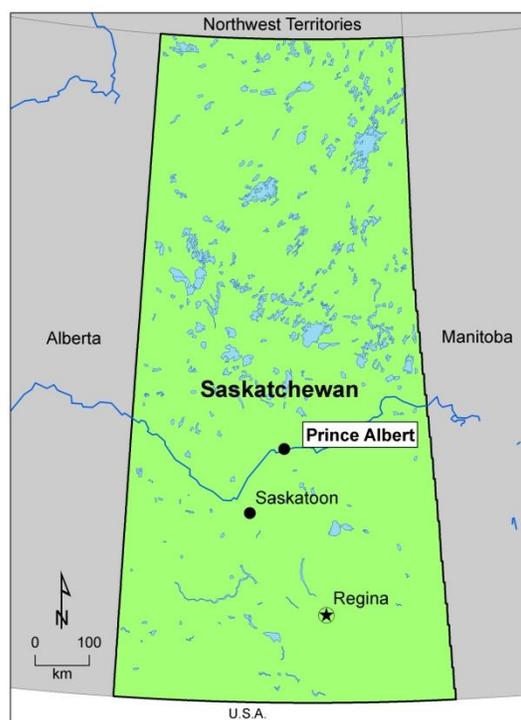
Located on the North Saskatchewan River, the City of Prince Albert covers an area of 65.7 square kilometers, with the majority of the urban area situated on the south side of the river. As the oldest settlement in Saskatchewan, the City's history dates back more than a century. During this time, the City has evolved from a small frontier Town to a medium-sized regional centre, while experiencing a number of boom and bust periods along the way.

1.1 Terms of Reference

Watson & Associates Economists Ltd. (W&A) was retained in December 2008 by the City of Prince Albert to prepare a comprehensive long-term growth forecast as background to the City's 2009 Development Levies and Servicing Fees Study. The development of a comprehensive long-term growth forecast will also serve as a meaningful tool that will be used for several other purposes, such as land use planning, long-term infrastructure requirements, water and waste water facilities and capital budgeting.

The population, household and employment forecast study is divided into three phases:

Figure 1-1



¹ Statistics Canada 2006 Census.

Phase 1 - Economic and Demographic Profile

Phase 1 examines recent housing, population and economic trends for the City of Prince Albert within a broader regional and provincial context. Specific attention is given to general housing market trends related to housing form (i.e. density), housing prices and recent construction activity. In many cases, additional analysis has also been provided for the City of Saskatoon and the Province of Saskatchewan for comparative purposes. An overview of historic and current economic trends on a local and broader level is also examined. This analysis was used as a basis to explore how current and future demographic and economic trends would influence future housing and population growth in Prince Albert over a long-term horizon (i.e. 25 years).

Phase 2 - Long-Term Population and Employment Forecast

Building on the results of Phase 1, W&A presents two population, housing and employment forecasts for the City, a Base Scenario (Medium Growth Scenario) and a High Growth Scenario. The growth forecasts provide details with respect to population and housing growth by structure type (i.e. single-detached, semi-detached, townhomes, apartments) and population age structure in five-year increments over a 25-year time horizon. The long-term employment forecasts provide details by major employment sector (i.e. primary, industrial, commercial and institutional) in five-year increments.

Phase 3 - Review of Recent Population and Housing Forecasts for Prince Albert

Phase 3 of the study involves a comparative review of recent population growth scenarios for Prince Albert compared to the W&A forecast prepared in Phase 2. Key areas of focus include base population, population growth rates, housing growth rates and assumptions regarding future housing occupancy trends.

1.2 Report Structure

This report has been summarized into the following chapters:

1. Introduction;
2. Approach and Methodology;
3. Population, Housing and Demographics;
4. Economics and Socio-Economics;
5. Residential and Non-Residential Land Supply;
6. Policy Context;
7. Population, Housing and Employment Forecast;
8. Land Needs Analysis;
9. Comparative Analysis of Prince Albert Growth Forecasts;
10. Conclusions.

2. APPROACH AND METHODOLOGY

2. APPROACH AND METHODOLOGY

2.1 Population and Household Forecast Methodology

The population and household forecast methodology is based on a combined approach, using W&A's in-house cohort-survival and housing market-based growth forecasting methodologies as shown graphically in Figure 2-1. The following provides a discussion on each of the above-mentioned approaches to residential growth forecasting.

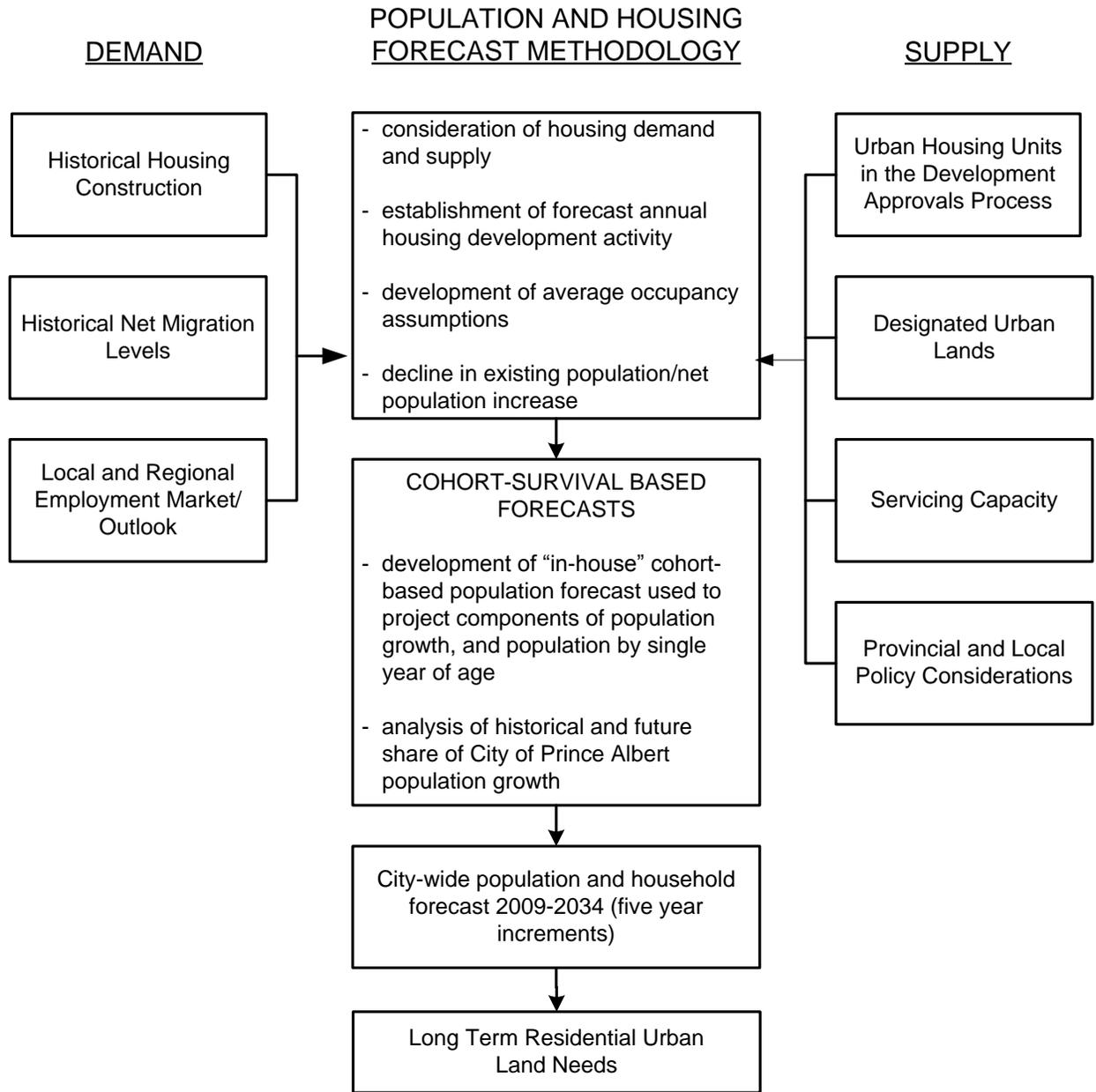
- i) ***Housing Market Forecast Methodology*** - This “bottom-up” approach focuses on the rate of historical housing construction in the municipality and surrounding area, adjusted to incorporate factors such as servicing constraints and units in the development process. The population is then forecast by developing assumptions on average household size by unit type, taking into consideration the higher average occupancy of new units and the decline in persons per unit over time within existing households.
- ii) ***Cohort-Survival Forecast Methodology*** - This “top-down” approach uses as its base, five-year population age groups by sex, and ages each group over time, taking into consideration age-specific death rates and age-specific fertility rates for the female population in the appropriate years (to generate new births). To this total, an estimated rate of net migration is added (in-migration to the municipality less out-migration, by age group).

Forecast population and housing growth is provided in five-year increments from 2009 to 2034. Based on forecast demand and current designated supply, the timing of urban buildout and additional future residential land needs (if any) will be determined. The attached schematic diagram (Figure 2-1) graphically illustrates the residential growth forecast methodology.

2.2 Employment Forecast Methodology

The employment forecast is partially based on the activity rate method (an activity rate is defined as the number of local jobs in the municipality, divided by the resident population). Historical employment trends and forecast employment growth prospects by major employment sector are also considered in the development of the long-term non-residential growth forecast. The employment forecast is based on full-time and part-time employment by place of work, using historical Census data (1991 to 2006).

**Figure 2-1
City of Prince Albert**



The employment categories set out as the basis for this forecast, are as follows:

- **Employment Lands Employment (Basic Jobs)** – jobs that have traditionally been called ‘industrial’ and are found in specifically designated industrial or business parks. This would include a portion of office commercial employment in accordance with permitted land uses in industrial areas as per the City’s current zoning by-law.
- **Population-Related Employment (Non-Basic Jobs)** – jobs that provide direct services to meet the personal needs of the population, located in commercial and office areas, in residential areas (i.e. local plazas, schools), and increasingly, in industrial areas (dependent, in part, on zoning provisions). Population-related employment is also further subdivided into commercial and institutional employment.
- **Primary and Home-Based Employment** – agriculture and resource-based employment, as well as home-based workers.

When forecasting long-term employment, it is important to understand how growth in the above three employment categories will be impacted by forecast population growth for the municipality. Population-related employment (i.e. retail, schools, service, commercial) is generally automatically attracted to locations convenient to local residents. Typically, as the population grows, the demand for population-related employment also increases to service the needs of the local community. Forecast commercial and institutional activity rates have been based on historical activity rate and employment trends, as well as future commercial and institutional employment prospects within a local and regional context. Similar to population-related employment, home-based employment is also anticipated to generally increase in direct proportion to population growth.¹

Industrial and primary employment (basic employment), on the other hand, is not closely linked to population growth and tends to be more influenced by broader market conditions (i.e. economic competitiveness, transportation access, distance to employment markets), as well as local site characteristics, such as servicing, highway access and exposure, site size/configuration, physical conditions and site location. As a result, industrial employment is not necessarily anticipated to increase in direct proportion to population growth and has been based on the following key economic indicators:

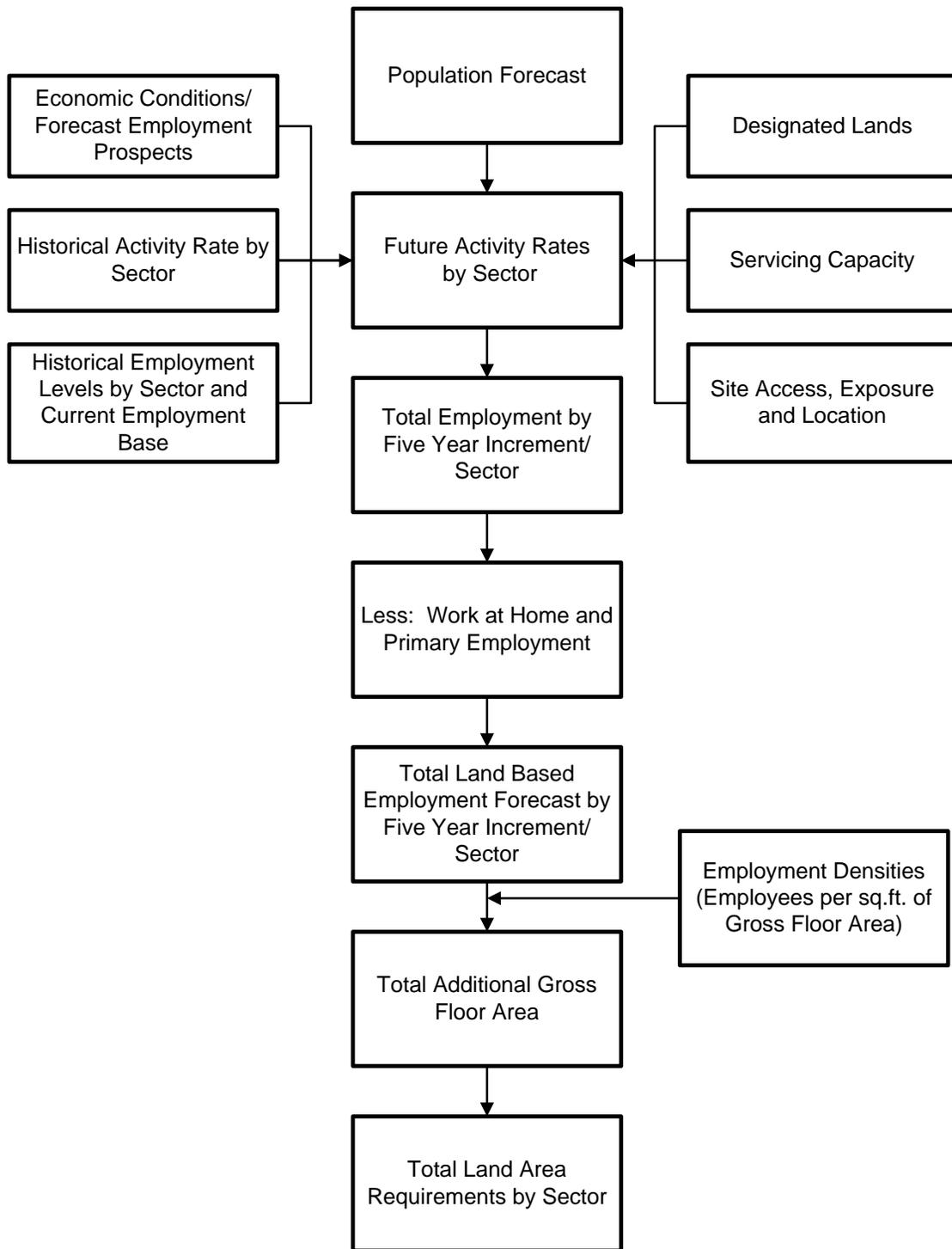
- historical local industrial employment growth and absorption rates;
- available serviced and serviceable net developable industrial land supply; and
- anticipated drivers of industrial employment growth and future absorption rates.

¹ Due to further advancements in telecommunications technology, it is anticipated that the City’s home-based employment activity rates may increase over the forecast period.

Based on the analysis identified above, industrial activity rates are then calculated for the purposes of illustrating industrial employment to population growth ratios within the City from 2009 to 2034. For each major employment sector (i.e. primary, industrial, commercial and institutional) plus work-at-home, forecast activity rates are used to generate employment growth in five-year increments from 2009 to 2034. Non-residential land needs are then determined from forecast land-based employment growth using an average employment density by employment sector (i.e. employees per acre/ha or sq. ft. per employee x coverage). Based on forecast non-residential land demand and current designated supply, the timing of urban buildout and additional future non-residential land needs (if any) will also be determined.

Figure 2-2 illustrates the approach graphically.

**Figure 2-2
Schematic Approach to Non-residential Forecasting Method**



3. POPULATION, HOUSING AND DEMOGRAPHICS

3. POPULATION, HOUSING AND DEMOGRAPHICS

3.1 Housing

The following section explores local and provincial housing growth trends over the past 15 years. This review is based on various data sources including Statistics Canada, the Canada Mortgage and Housing Corporation (CMHC) and the Canadian Real Estate Board (CREA).

3.1.1 Housing Growth 1991-2008

Table 3-1 summarizes permanent housing¹ growth for the City of Prince Albert over the 1991 to 2006 Census periods, with an estimate provided for 2008.

- During the 1991 to 2006 period, the City of Prince Albert's housing stock grew at an annual rate of 0.3%, which is comparable to the pace of the provincial average but less than half the rate of Saskatoon;
- Over the 2001 to 2006 Census period, the City of Prince Albert added a net total of 225 new units to its housing stock, an average of 45 units annually. Comparatively, this level of housing growth is well above the previous 1996 to 2001 period, but lower than that experienced during the 1991 to 1996 period; and
- Prince Albert has recently experienced resurgence in housing growth. Between 2006 and 2008, housing growth averaged 0.6% annually, double the rate of the 1996 to 2006 period, but slightly less than the 0.7% experienced between 1991 and 1996.

¹ Seasonal housing units have not been considered as part of this analysis.

Table 3-1
City of Prince Albert
Permanent Housing Units, 1991 to 2008

Year	Prince Albert (City)	Saskatoon (City)	Saskatchewan (Province)
1991	12,405	71,840	363,150
1996	12,875	76,295	372,820
2001	13,010	81,275	379,680
2006	13,235	84,405	387,140
2008	13,400	N/A	N/A
Average Annual Housing Growth			
1991-1996	94	891	1,934
1996-2001	27	996	1,372
2001-2006	45	626	1,492
2006-2008	83		
Average Annual Growth Rate			
1991-1996	0.7%	1.2%	0.5%
1996-2001	0.2%	1.3%	0.4%
2001-2006	0.3%	0.8%	0.4%
2006-2008	0.6%		
1991-2006	0.3%	0.8%	0.3%

Source: 1991, 1996, 2001 and 2006 Census, unless otherwise noted.

Saskatchewan data, CMHC Canadian Housing Observer (Statistics Canada data).

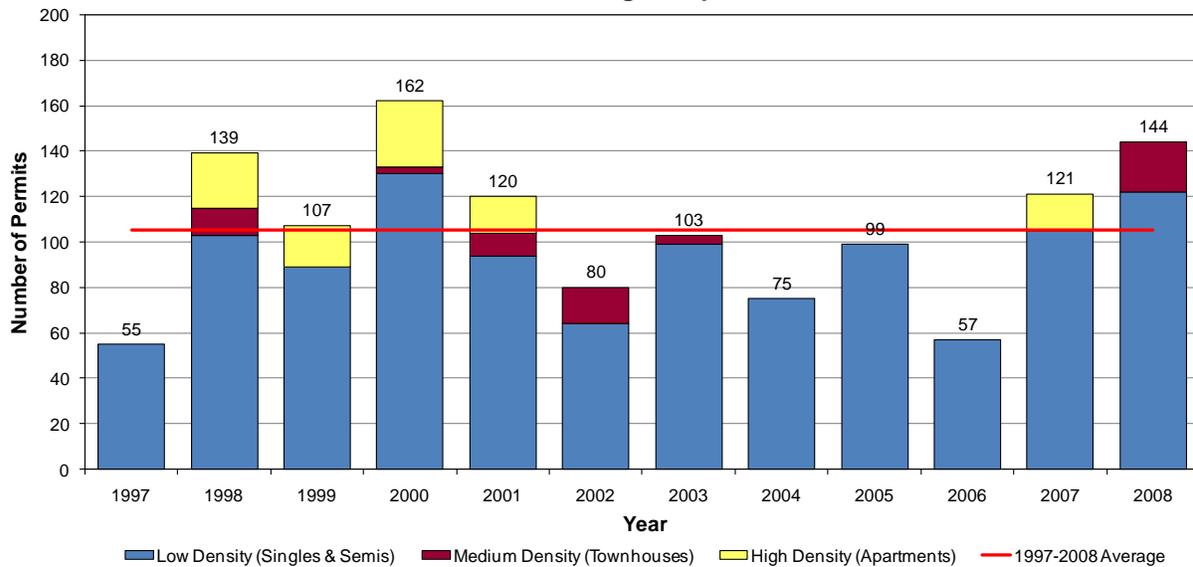
2008 Prince Albert housing units, Watson & Associates Economists Ltd.

3.1.2 Housing Completions by Unit Type, 1997-2008

Figure 3-1 summarizes housing completions (new dwellings) by unit type from 1997 to 2008 based on CMHC data for the City of Prince Albert. Key observations include:

- Over the 1997-2008 period, Prince Albert averaged 105 residential completions per year;
- Total housing completions have increased considerably since 2006, rising from a low of 57 units that year to 144 units in 2008, close to levels not seen since the year 2000; and
- New housing is predominantly single-family type. Between 1997 and 2008, 87% of completions were low density (single detached, semi-detached), 5% were medium density (townhouses, row houses) and 8% were high density (apartments, condos).

**Figure 3-1
City of Prince Albert
1997-2008 Housing Completions**



3.1.3 City of Prince Albert Residential Land Sales by Subdivision, 1995-2008

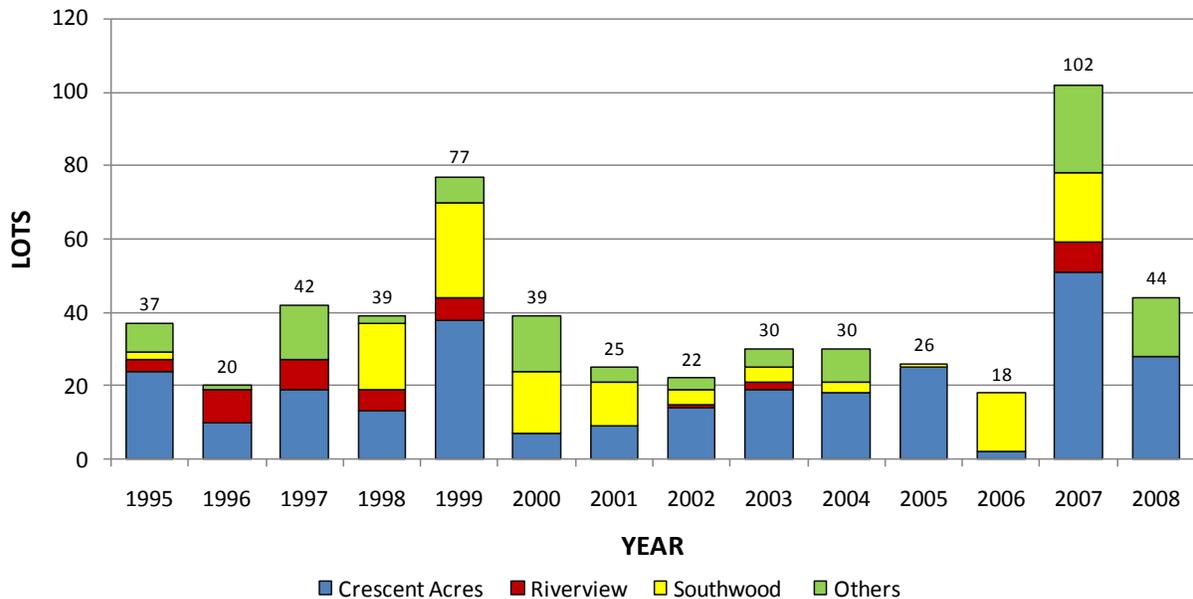
The City of Prince Albert is the primary land developer in the City, assembling and servicing residential land. The City is responsible for subdivision design, infrastructure development, and land sales and marketing. The City guides development through subdivision phasing and sells land parcels to private developers and individuals as demand warrants. Development of land is required within a designated time period (6 months and 12 months from time of purchase for individuals and developers, respectively) though extensions are often granted.

The City's land development activity accounts for a substantial portion of total residential building activity. The remainder is from concurrent development of privately owned lands.

Figure 3-2 illustrates the City of Prince Albert's residential lot sales between 1995 and 2008.

- Residential lot sales were relatively strong in 2007 and 2008, with 102 and 44 units sold, respectively;
- In contrast, between 2000 and 2006, sales averaged 27 units per year; and
- In 2007 and 2008, lot sales were primarily in the Crescent Acres, Southwood and Riverview subdivisions.

Figure 3-2
City of Prince Albert
Residential Lot Sales by Subdivision 1995-2008



Source: City of Prince Albert

3.1.4 Housing Mix By Unit Type, 1991-2006

Table 3-2 summarizes historical housing trends for the City of Prince Albert, City of Saskatoon and the Province of Saskatchewan by housing type (i.e. density) from 1991 to 2006. Key observations include:

- Over the 15-year period, the City of Prince Albert housing mix has remained largely unchanged;
- In contrast, the housing mix in Saskatoon has shifted slightly towards medium and higher densities during the same period;
- In 2006, low-density dwellings (single detached, semi-detached) comprised 68% of all dwellings in Prince Albert, medium density (townhouses, row houses) comprised 6%, and high density (apartments, condos) comprised 25%;
- The City of Prince Albert has a greater portion of low density housing than Saskatoon, but less than Saskatchewan as a whole; and
- It is anticipated that the demand for medium- and high-density housing will increase slightly in Prince Albert over the next 25 years, largely subject to future trends regarding housing affordability and population age structure.

Table 3-2
City of Prince Albert
Households By Density (1991-2006)

City of Prince Albert								
Density	Number of Households				Percentage			
	1991	1996	2001	2006	1991	1996	2001	2006
Low Density ¹	8,410	8,550	9,170	9,035	67.8%	66.4%	70.5%	68.2%
Medium Density ²	890	1,070	820	825	7.2%	8.3%	6.3%	6.2%
High Density ³	3,090	3,230	3,000	3,355	24.9%	25.1%	23.1%	25.3%
Other ⁴	15	20	20	20	0.1%	0.2%	0.2%	0.2%
Total	12,410	12,875	13,010	13,240	100.0%	100.0%	100.0%	100.0%
City of Saskatoon								
Density	Number of Households				Percentage			
	1991	1996	2001	2006	1991	1996	2001	2006
Low Density ¹	46,030	47,585	49,460	50,670	64.1%	62.4%	60.9%	60.0%
Medium Density ²	5,245	5,655	6,705	8,390	7.3%	7.4%	8.2%	9.9%
High Density ³	20,020	22,580	22,700	24,920	27.9%	29.6%	27.9%	29.5%
Other	540	470	410	425	0.8%	0.6%	0.5%	0.5%
Total	71,845	76,295	81,275	84,405	100.0%	100.0%	100.0%	100.0%
Province of Saskatchewan								
Density	Number of Households				Percentage			
	1991	1996	2001	2006	1991	1996	2001	2006
Low Density ¹	285,390	291,370	298,990	298,625	78.6%	78.2%	78.7%	77.1%
Medium Density ²	15,500	16,825	16,560	19,960	4.3%	4.5%	4.4%	5.2%
High Density ³	51,495	56,455	56,400	60,785	14.2%	15.1%	14.9%	15.7%
Other	10,760	8,160	7,725	7,770	3.0%	2.2%	2.0%	2.0%
Total	363,145	372,820	379,680	387,145	100.0%	100.0%	100.0%	100.0%

1. Single and Semi-detached
2. Townhomes and Apartments in Duplex
3. Triplexes and Apartments
4. Movable Dwellings and other detached

Figures may not add up due to rounding

Source:

2006 data, Statistics Canada - Catalogue Number 97-554-XCB2006028

2001 data, unless otherwise noted, Statistics Canada - Cat. No. 95F0327XCB2001004

1991, 1996 and 2001 Saskatoon data, City of Saskatoon Planning Department Neighbourhood Profiles data (1991, 1996, 2001 Census data)

1996 Prince Albert data, Prince Albert Community Profile, City of Prince Albert

1991 Prince Albert data, 1991 Census Profile, Statistics Canada

1991, 1996 Saskatchewan data, Canadian Housing Observer, Occupied Housing Stock by Structure Type and Tenure

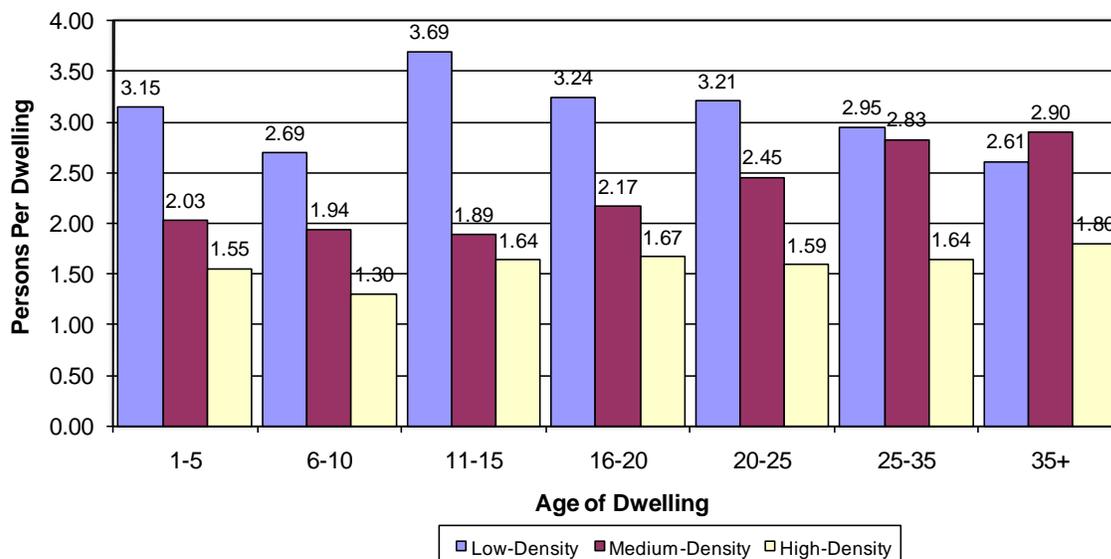
3.1.5 Housing Occupancy, 2006

Figure 3-3 shows the average number of persons per dwelling unit (PPU) for the City of Prince Albert by housing type (i.e. low, medium and high density) and by age (i.e. dwellings aged 1-5 years to 35+ years). Based on 2006 Census data, the average PPU for newer units in Prince Albert aged 1-20 years is:

- Low Density – 3.19
- Medium Density – 2.01
- High Density – 1.54

Generally, it is observed that for new housing units, housing occupancy levels tend to increase in the shorter term (i.e. 1-20 years) as new home buyers form families, followed by a decline over the medium term (i.e. 20-30 years) as children age and leave home. This is then followed by a period of stabilization over the longer term (i.e. 35+ years) as older units are regenerated by new families. The result of this pattern is that more-recently constructed housing units (particularly those constructed during the past 15 years) typically have a higher PPU average in comparison to older units (i.e. more than 25 years).

**FIGURE 3-3
PERSONS PER UNIT BY STRUCTURAL TYPE AND AGE OF DWELLING
(2006 CENSUS)
FOR THE CITY OF PRINCE ALBERT**



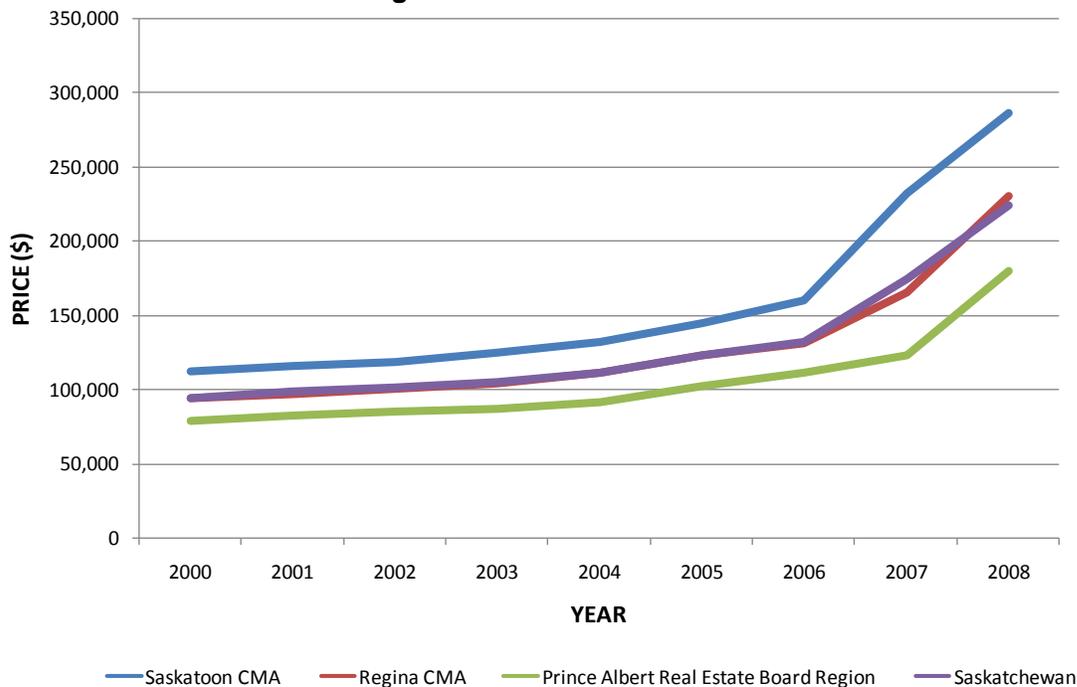
Note: Due to insufficient data, Saskatoon data used to determine medium density 1-20 year dwelling PPU and high density 1-5 year dwelling PPU
Source: 2006 Census custom tabulation

3.1.6 Comparative Housing Prices

Figure 3-4 provides a comparative summary of average MLS¹ home resale prices from 2000 to 2008 for Prince Albert (encompasses Prince Albert Real Estate Board Region), Saskatoon CMA,² Regina CMA, and the Province.

- The average resale price for a dwelling in Prince Albert was just over \$180,000 in 2008;
- In Prince Albert, prices in 2008 were 45% higher than in 2007 and nearly double that of 2004;
- The appreciation in home values has been observed not only in Prince Albert but also in Saskatoon, Regina and Province-wide; and
- Average home prices in Prince Albert remain comparatively low, about one-third less than in Saskatoon and about 20% less than the provincial average.

Figure 3-4
MLS Average Annual Home Sales Price 2000-2008



Source: CREA and CMHC

¹ Multiple Listing Service (MLS), Canadian Real Estate Association.

² Census Metropolitan Area (CMA).

Table 3-3 provides a comparative summary of MLS unit sales/new listings ratio from 2000 and 2008. This ratio provides a measure of the availability of homes on the market in relation to demand.

- The surveyed markets all experienced a tightening of supply (increase in the unit sales/new listings ratio) beginning in 2006 which fuelled, in part, the price increases noted in Figure 3-4; and
- The unit sales/new listings ratio in Prince Albert and the Province peaked in 2007 with the ratio declining in 2008 to a more balanced level.

Table 3-3
City of Prince Albert and Selected Saskatchewan Communities
MLS Unit Sales/New Listings Ratio 2000-2008

	Year								
	2000	2001	2002	2003	2004	2005	2006	2007	2008
Prince Albert ¹	48.3	46.8	49.3	53.8	61.1	50.4	60.7	84.2	55.8
Saskatoon CMA	57.3	60.1	69.1	65.0	63.9	66.1	74.0	76.4	N/A
Regina CMA	67.3	68.0	69.2	75.3	71.4	67.1	70.4	84.9	N/A
Saskatchewan	59.3	58.6	62.9	64.2	64.4	62.7	70.5	81.4	49.4

1. Data for Prince Albert Real Estate Board region

Source: Canada Mortgage and Housing Corporation (CMHC) and Canadian Real Estate Association (CREA)

Preliminary 2009 data suggests that the real estate market will retreat from the peaks of 2007-2008. Province-wide January, 2009 sales were 35.1% lower than in January, 2008, though prices rose 11% during the same period.¹

3.1.7 Housing Affordability

Table 3-4a provides a summary of housing affordability in Prince Albert compared to Saskatoon and the provincial average in 2006. Table 3-4b provides a summary of housing affordability in Prince Albert from 1996 to 2006. Affordability is measured by housing expenditures relative to household income. Statistics Canada defines households spending 30% or more of household income on housing costs as possibly facing housing affordability problems.

- In 2006, 26% of Prince Albert households spent 30% or more of household income on housing costs, which is comparable to Saskatoon but marginally higher than the provincial average;
- In Prince Albert, 44% of tenant-occupied households spent 30% or more of household income on housing costs compared to 14% of owner-occupied households; and

¹ TD Economics, Saskatchewan's Economic and Fiscal Outlook, February 23, 2009.

- Between 1996 and 2006, the proportion of owner-occupied households which spent 30% or more of household income on housing costs increased from 10% to 14% in Prince Albert. In contrast, the proportion of tenant-occupied households remained virtually unchanged during the same period.

Table 3-4a
City of Prince Albert Housing Affordability-2006
Households Spending 30% or More of Household Income on Housing Costs

Tenure	Households Spending 30% or more of Household Income on Housing Costs					
	Number of Households			Proportion of Total Households		
	Prince Albert (City)	Saskatoon (City)	Saskatchewan (Province)	Prince Albert (City)	Saskatoon (City)	Saskatchewan (Province)
Owned	1,115	9,450	33,955	14%	15%	13%
Rented	2,325	14,190	38,715	44%	45%	40%
Total	3,440	23,640	72,670	26%	25%	20%

Source: 2006 Census, Cat. No. 97-554-X2006039

Table 3-4b
City of Prince Albert Housing Affordability 1996-2006
Households Spending 30% or More of Household Income on Housing Costs

Tenure	City of Prince Albert					
	Number of Households			Proportion of Total Households		
	1996	2001	2006	1996	2001	2006
Owned	735	1,005	1,115	10%	13%	14%
Rented	2,430	2,185	2,325	44%	43%	44%
Total	3,165	3,190	3,440	25%	25%	26%

Source: 2006 data, 2006 Census, Cat. No. 97-554-X2006039; 1996 and 2001 data, City of Prince Albert Community Profiles

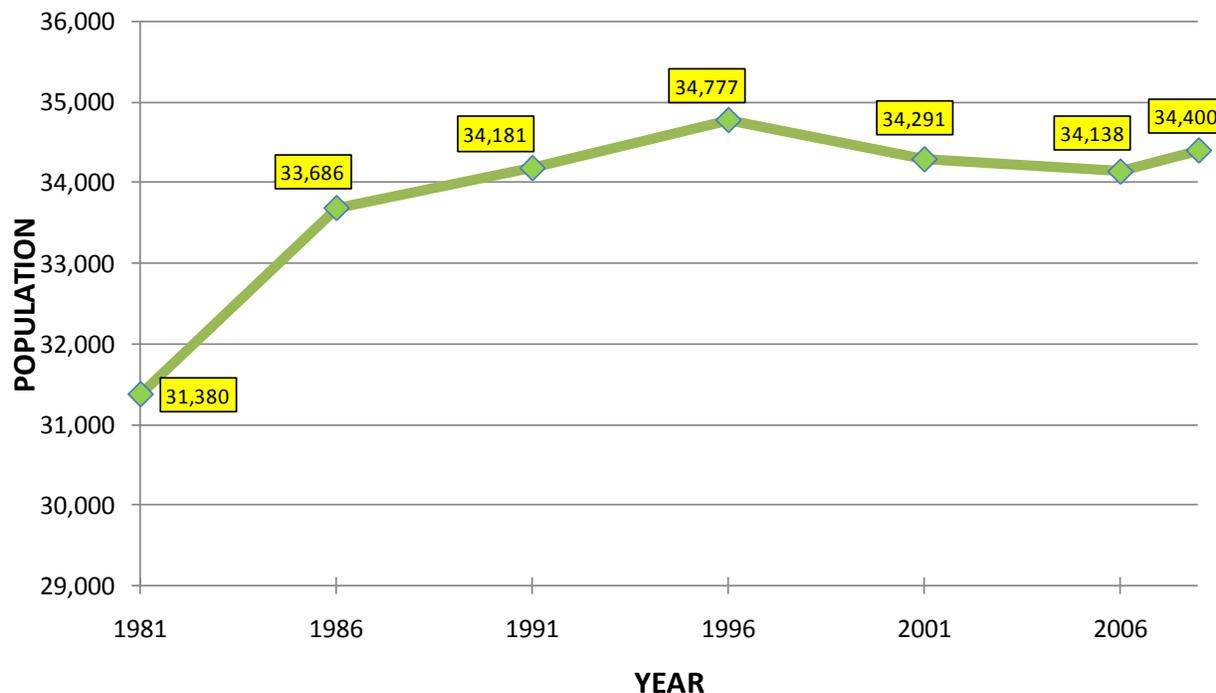
3.2 Population and Demographics

The following section explores population growth trends for the City of Prince Albert. An analysis of historical population by major age group is also provided. This review is based on various Statistics Canada data sources.

3.2.1 *Population Growth, 1981-2008*

Figure 3-5 illustrates the City of Prince Albert population since 1981. Table 3-5 provides a summary of population growth for the City of Prince Albert, Saskatoon, and the Province over the 1981 to 2006 Census periods. A 2008 population estimate for Prince Albert is also provided, which is based on W&A housing market forecasting model.

**Figure 3-5
City of Prince Albert
Population 1981-2008**



Source: 1981-2006, Statistics Canada Census data; 2008 estimate, Watson & Associates Economists Ltd.

- Between 1981 and 2006, the City of Prince Albert's population grew at an annual rate of 0.3%, which was lower than Saskatoon (1.1%) but slightly higher than the Province which had virtually no growth during this time period;
- The majority of growth in Prince Albert during this period occurred between 1981 and 1986, when the average annual rate of growth was 1.4%. During the following 10-year period, 1986 to 1996, growth slowed to an average of 0.3% per year with the population peaking at 34,777 in 1996;
- Between 1996 and 2006, Prince Albert experienced a population decline (average annual growth of -0.2%), which followed the provincial trend (a period of high out-migration);
- Prince Albert's population grew slightly between 2006 and 2008, at an average annual rate of 0.4%, reversing a decade long trend of population decline;
- Similarly, the provincial population also grew between 2006 and 2008, at an annual average rate of 1.2%; and

- The recent provincial population growth has been fuelled by strong interprovincial migration. In 2008, Saskatchewan posted the second highest level of interprovincial migration in Canada, after Alberta.¹

Table 3-5
City of Prince Albert
Historic Population Growth, 1986 to 2008¹

Year	Prince Albert (City)	Saskatoon (City)	Saskatchewan (Province)
1981	31,380	154,210	968,313
1986	33,686	175,465	1,009,615
1991	34,181	184,020	988,930
1996	34,777	193,647	990,237
2001	34,291	196,845	978,933
2006	34,138	202,340	968,157
2008	34,400	N/A	991,500
Average Annual Population Growth			
1981-1986	461	4,251	8,260
1986-1991	99	1,711	-4,137
1991-1996	119	1,925	261
1996-2001	-97	640	-2,261
2001-2006	-31	1,099	-2,155
2006-2008	131	N/A	11,672
1981-2006	110	1,925	-6
Average Annual Growth Rate			
1981-1986	1.4%	2.6%	0.8%
1986-1991	0.3%	1.0%	-0.4%
1991-1996	0.3%	1.0%	0.0%
1996-2001	-0.3%	0.3%	-0.2%
2001-2006	-0.1%	0.6%	-0.2%
2006-2008	0.4%	N/A	1.2%
1981-2006	0.3%	1.1%	0.0%

1. Excludes Census undercount.

Source: Statistics Canada 1981 to 2006 Census, except where noted.

2008 Prince Albert population, Watson & Associates Economists Ltd.

2008 Saskatchewan population, Statistics Canada, Quarterly Demographics Estimates, July 1, 2008, adjusted to exclude Census undercount (undercount percent based on 2006 Census).

¹ Saskatchewan Quarterly Population Report, Third Quarter 2008, Saskatchewan Bureau of Statistics.

3.2.2 Historical Population by Age, 1986-2006

Table 3-6 summarizes historical trends in population structure over the past 20 years. Based on this analysis, the following observations have been made:

- In 2006, the 0-19 age cohort accounted for 31% (or 10,535 persons) of the total population. Proportionately, the population share of this age cohort has decreased slightly from 33% in 1986;
- Prince Albert's working age population (20-54) also declined slightly from 48% to 46% over the same time period:
 - the 20-34 age cohort, which comprised 19% of the population in 2006, has decreased from 27% in 1986;
 - the 35-44 age group has remained relatively steady (13% in 2006) over the same period; and
 - 45-54 year olds accounted for 14% of the 2006 population, up from 9% in 1986;
- The 55-74 age cohort's proportion of the population, which comprised 5,460 persons in 2006, increased by 2% between 1986 and 2006, from 14% to 16%; and
- The 75+ age cohort accounted for 2,500 persons in 2006 or 7% of the total population, up from 5% in 1986.

Table 3-6
City of Prince Albert
Historical Census Population by Selected Age-Cohort 1986 - 2006¹

Age Cohort	1986 Total	1991 Total	1996 Total	2001 Total	2006 Total	1986 % Total	1991 % Total	1996 % Total	2001 %Total	2006 %Total
0-19	11,125	11,450	11,625	10,845	10,535	33%	33%	34%	32%	31%
20-34	9,035	8,170	7,450	6,700	6,390	27%	24%	22%	20%	19%
35-44	4,080	4,775	5,065	4,985	4,550	12%	14%	15%	15%	13%
45-54	2,870	3,070	3,610	4,195	4,685	9%	9%	11%	13%	14%
55-74	4,770	4,725	4,585	4,730	5,460	14%	14%	13%	14%	16%
75+	1,795	1,995	1,890	1,985	2,500	5%	6%	6%	6%	7%
55-64	2,585	2,530	2,440	2,595	3,245	8%	7%	7%	8%	10%
65+	3,980	4,190	4,035	4,120	4,715	12%	12%	12%	12%	14%
Total	33,685	34,180	34,240	33,435	34,140	100%	100%	100%	100%	100%

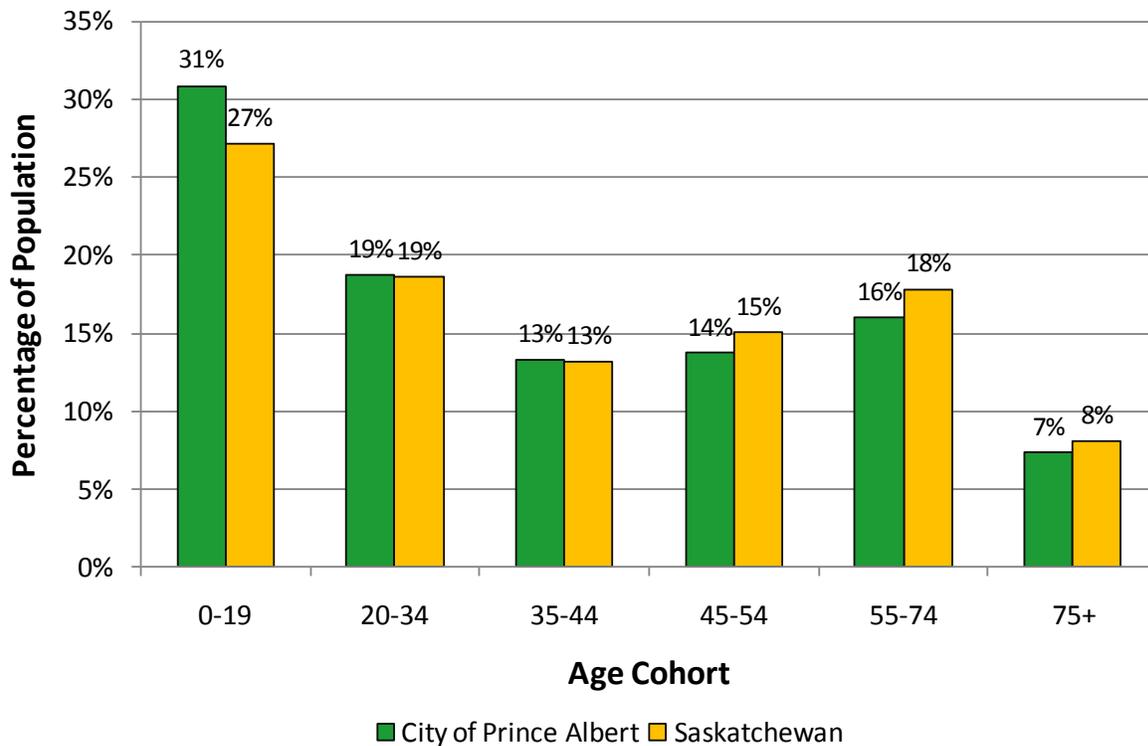
¹ Population excludes net census undercount.

Source: Statistics Canada 1986-2006 Census. Note population figures have been rounded.

Figure 3-6 illustrates the age cohort profile of Prince Albert and Saskatchewan in 2006.

- Prince Albert's youth population (0-19) is proportionally larger than the provincial average, at 31% compared to 27%; and
- In contrast, Prince Albert's 55+ age cohort is proportionally smaller than the provincial average, 23% vs. 26%.

Figure 3-6
Percentage of Population by Age Cohort
City of Prince Albert and Saskatchewan, 2006



Source: Statistics Canada 2006 Census

3.2.3 Aboriginal Population

While Saskatchewan's total population saw virtually no growth between 1996 and 2006, the Province's Aboriginal population (consisting of both First Nations and Métis) grew by 27.5%.¹ An increasing share of the Aboriginal population is also choosing to become urban dwellers and living off the reserves. In 2006, 54% of the Canada's Aboriginal population lived in urban areas, compared to 50% in 1996². The Aboriginal population is a significant and growing share of the total population of many Canadian cities, including Prince Albert.

Table 3-7 illustrates the Aboriginal population's share of the total population in Prince Albert, Saskatoon and the Province in 2006, in accordance with recent Census data, as follows:

¹ 2006 Census. Statistics Canada Catalogue no. 97-558-XWE2006002.

² Statistics Canada, 2006 Census Analysis Series – Aboriginal Population.

- 36.3% of the City of Prince Albert's population identify themselves as Aboriginal; a considerably larger share than the 9.3% and 14.9% in Saskatoon and the Province, respectively; and
- The City of Prince Albert's Aboriginal population of 12,140 includes 6,130 First Nations people and 5,835 Métis.

Table 3-7
City of Prince Albert
Aboriginal and Non-Aboriginal Population 2006

Jurisdiction	Identity				Total Aboriginal	Total Population	Percent Aboriginal
	Non-Aboriginal	First Nations	Métis	Other or Multiple Response			
Prince Albert (City)	21,310	6,130	5,835	170	12,140	33,445	36.3%
Saskatoon (CMA)	209,315	11,510	9,610	415	21,535	230,855	9.3%
Saskatchewan (Province)	811,960	91,400	48,115	2,370	141,890	953,850	14.9%

Source: City of Prince Albert data, 2006 Census Profile, unless otherwise noted.

Saskatoon CMA data, Statistics Canada Catalogue no. 97-558-XWE2006002.

Saskatchewan Data, Statistics Canada - 2006 Census. Catalogue Number 97-558-XCB2006006.

Table 3-8 illustrates the size of Prince Albert's Aboriginal population between the 1996 and 2006 Census periods. During this period:

- The Aboriginal population, as a share of the total population, increased from 26.8% in 1996 to 36.3% in 2006 (2.8% average annual growth), an increase of 2,950; and
- During this same period, the total number of non-Aboriginal people declined by 3,740 (average annual growth of -1.6%).

Table 3-8
City of Prince Albert
Aboriginal and Non-Aboriginal Population 1996-2006

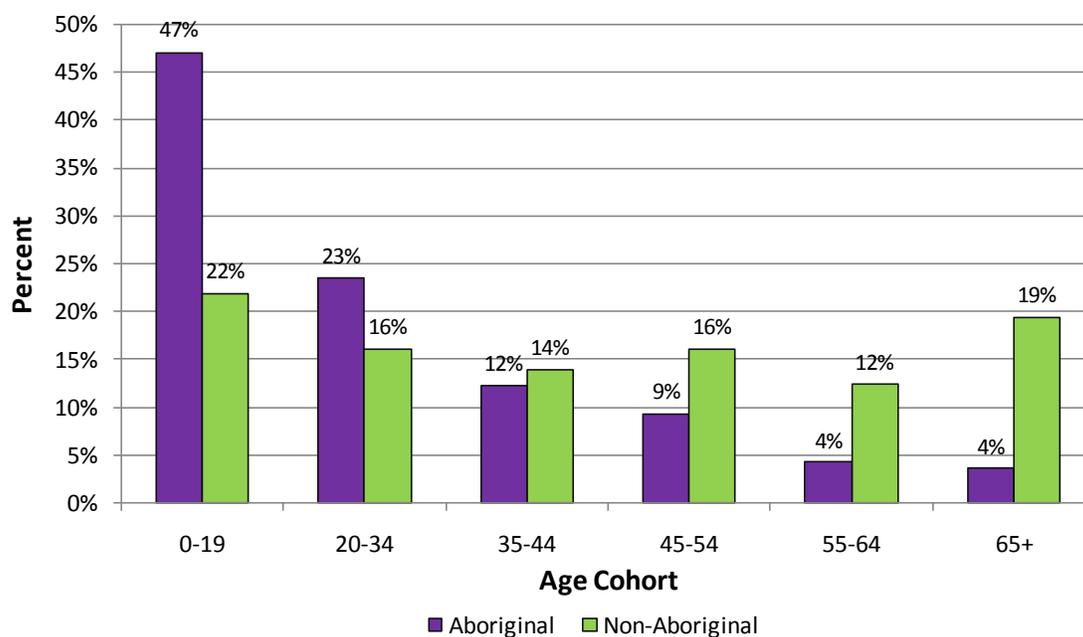
City of Prince Albert	Census Year			Average Annual Growth		Average Annual Growth Rate		
	1996	2001	2006	96-01	01-06	96-01	01-06	96-06
Non-Aboriginal	25,050	23,245	21,310	(1,805)	(1,935)	-1.5%	-1.7%	-1.6%
First Nations	4,355	4,955	6,130	600	1,175	2.6%	4.3%	3.5%
Métis	4,555	4,950	5,835	395	885	1.7%	3.3%	2.5%
Other or Multiple Response	280	280	170	-	(110)	0.0%	-9.5%	-4.9%
Total Aboriginal	9,190	10,185	12,140	995	1,955	2.1%	3.6%	2.8%
Total Population	34,240	33,430	33,445					
Aboriginal as % of Total Population	26.8%	30.5%	36.3%					

Source: 1996 and 2001 data, Prince Albert Economic and Demographic Profile, 2006; 2006 data, 2006 Census Profile

Figure 3-7 illustrates the age cohort profile of Prince Albert's Aboriginal and non-Aboriginal population. Key observations include:

- 70% of Prince Albert's Aboriginal population is under the age of 35, compared to only 38% of the non-Aboriginal population; and
- 8% of the Aboriginal population is 55 years or older, compared to 31% of the non-Aboriginal population.

Figure 3-7
City of Prince Albert
2006 Population by Age Cohort
Aboriginal and Non-Aboriginal Population



3.2.4 Historical Net Migration, 1996-2006

Table 3-9 summarizes the overall net migration levels over the 10-year period from 1996 to 2006. The detailed net migration analysis is provided in Appendix A. The results of this analysis indicate the following:

- During this period, the City of Prince Albert posted a positive natural increase (total births less total deaths) of 2,793; and
- The total net out-migration for Prince Albert was approximately 3,742 persons (i.e. 3,742 more people moved out of the City than moved in) which offset the natural increase by 949, resulting in a population decline.

Table 3-9
City of Prince Albert
Historical Net Migration 1996-2006

Time Period	Start Population ¹	Total Births	Total Deaths	Natural Increase	Calculated Population ²	Actual Population ¹	Calculated Net Migration
1996-2001	35,817	3,156	1,616	1,540	37,357	35,024	-2,333
2001-2006	35,024	2,915	1,662	1,253	36,277	34,868	-1,409
1996-2006 Total		6,071	3,278	2,793			-3,742

1. Population figures are adjusted for the population undercount of approximately 2.1%.

2. Adjusted for Migrant Births and Deaths.

Source: Watson & Associates Economists Ltd.; Based on Statistics Canada Census and Saskatchewan Registrar of Vital Statistics data

Table 3-10 summarizes the net-migration in Prince Albert by major age cohort between 1996 and 2006. During this time period:

- The large net out-migration between 1996 and 2006 was largely by persons aged 19-54 (2,805) followed by those under 19 years of age (1,450); and
- The City experienced a net in-migration of 513 in the 55 and older age cohort.

Table 3-10
City of Prince Albert
Net Migration by Major Age Cohort, 1996-2006

Major Cohort	1996-2001	2001-2006	Total
0-18	(1,096)	(354)	(1,450)
19-54	(1,248)	(1,556)	(2,805)
55-74	(14)	254	240
75+	26	247	273
Total	(2,333)	(1,409)	(3,742)

Source: Watson & Associates Economists Ltd. estimates based on Statistics Canada population and Saskatchewan Registrar of Vital Statistics

3.3 Conclusions

Some key observations regarding the City of Prince Albert's housing, population and demographics are, as follows:

- The City of Prince Albert housing stock growth was relatively modest between 1991-2006;
- More than two-thirds of the existing housing stock is low density type (i.e. single family, semi-detached);

- The City has experienced an increase in housing activity since 2006, reflected in housing completions and residential land sales;
- Housing prices have increased considerably since 2006 but remain comparatively lower than the provincial average, and housing remains relatively affordable;
- The population has remained relatively stable for the past 20+ years, with minimal growth or decline since 1986;
- The City has a relatively large and growing Aboriginal population;
- Prince Albert has two very distinct age cohort profiles, one typified by an older, aging non-Aboriginal population typical of provincial and national trends, and second, a younger Aboriginal population; and
- Despite a relatively strong natural increase (births less deaths) between 1996 and 2006, the City's population declined slightly due to a high out-migration of the working-age population.

4. ECONOMICS AND SOCIO-ECONOMICS

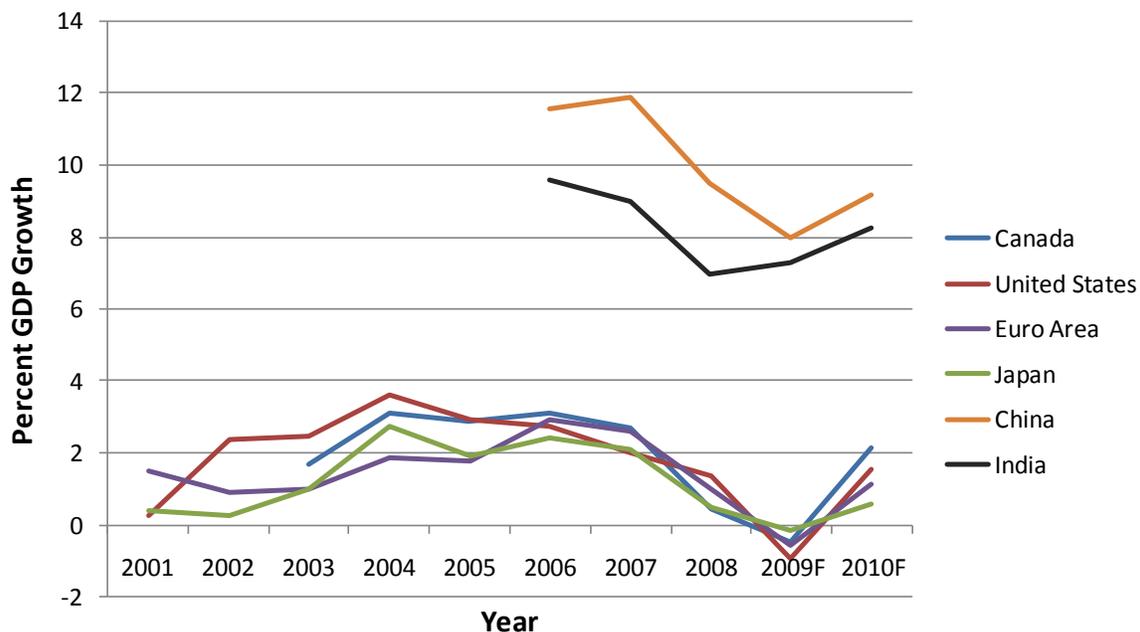
4. ECONOMICS AND SOCIO-ECONOMICS

4.1 Global Economic Overview

Figure 4-1 illustrates annual gross domestic product (GDP) growth of select countries/regions between 2001 and 2008 and forecast growth for 2009 and 2010. Key observations include:

- After the last recession of early 2000-2001, industrialized economies of Canada, the United States, Japan and the Euro Zone experienced a long uninterrupted period of relatively strong GDP growth between 2003 and 2007;
- In mid-2008, with the onset of the “credit crisis” and weakness in the U.S. housing market, GDP growth began to slow in industrialized economies and emerging markets;
- In 2009, the GDP of industrialized economies, including Canada, the United States, Japan, and the Euro Zone has contracted (negative GDP growth); and
- Industrialized economies are expected to have modest growth in 2010 and the emerging markets of China and India are expected to see stronger growth than in 2008-2009.

Figure 4-1
Annual GDP Growth of Select Countries/Regions
2001-2010



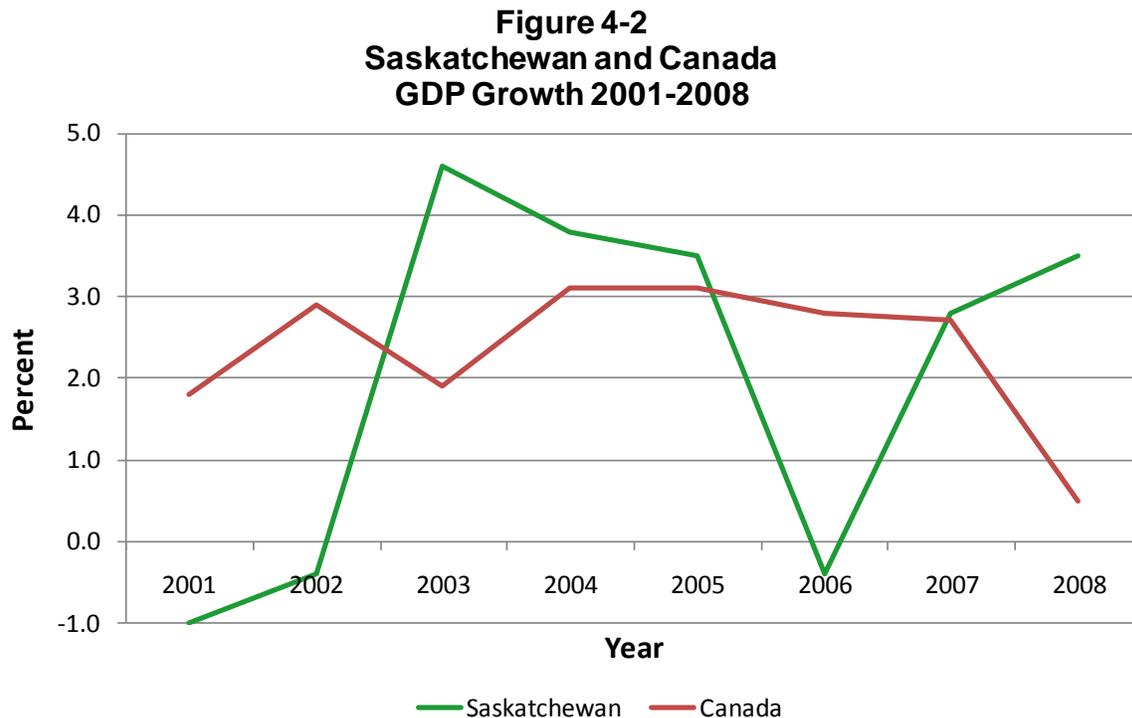
Source: OECD

4.2 Provincial Economic Overview

4.2.1 *Provincial GDP Growth*

Figure 4-2 illustrates Saskatchewan's 2001-2008 annual GDP growth in relation to Canada's over this period.

- Saskatchewan's economy experienced relatively strong GDP growth between 2003 and 2008, with the exception of 2006 when GDP contracted slightly; and
- Since 2006, Saskatchewan's GDP growth has out-performed Canada's; Canada's GDP growth slowed dramatically in 2008 to just 0.5%, while Saskatchewan's GDP growth increased to 3.5%.



Source: Statistics Canada and RBC Economics

Saskatchewan is forecast to be the only Canadian province to post positive GDP growth in 2009, at a modest 0.6%.¹ In contrast, Canada's GDP is expected to contract by 0.5% during the

¹ TD Economics, Saskatchewan's Economic and Fiscal Outlook, February 23, 2009.

same period.¹ Saskatchewan's economy is expected to strengthen in 2010 with GDP growth rising to 1.4%.²

4.2.2 Structure of Provincial Economy

Saskatchewan's economy is largely export-driven. In 2007, Saskatchewan's leading exports were crude oil, accounting for 35% of the total, followed by agricultural products (30%), uranium (15%), and potash (5%).³ Forestry is also an important sector in the northern-half of the Province, with total exports of \$400 million in 2004.⁴

Saskatchewan's GDP growth from 2006 through 2008 was fuelled by an unprecedented global demand for oil and gas, uranium, and potash, which lead to dramatic prices increases and pushed up provincial production and development activity in these sectors. Though most commodity prices have pulled back since mid-2008, prices are expected to stay at reasonable levels to maintain healthy growth in the Province.⁵

Crude Oil

Saskatchewan is the second largest oil producer in Canada after Alberta, accounting for 20% of domestic production.⁶ Oil production (through conventional well extraction) is centered along the western edge and south-east corner of the Province.

Figure 4-3 illustrates the historical price of crude oil (in U.S. dollars) between January, 2001 and February, 2009.

- Between 2001 and 2003, the price was relatively low, ranging between \$17 and \$32 per barrel;
- In early 2004, the price began to rise, reaching nearly \$70/barrel by mid-2006. The price rise accelerated in 2007, with the price peaking at nearly \$140/barrel in mid-2008;
- In the second half of 2008, the price of crude oil sharply declined, falling to below \$35 per barrel in early January, 2009. The price stabilized somewhat in February, 2009 to approximately \$40 per barrel and has rebounded to over \$60 per barrel as of May, 2009;
- The price of crude oil is expected to remain flat for the remainder of 2009, and rise to \$80 per barrel by 2010;⁷ and

¹ OECD Economic Outlook, November, 2008.

² RBC Economics Provincial Outlook, December, 2008.

³ Canadian Economic Observer, Feature Article, May, 2008.

⁴ Natural Resources Canada, Canada's Forests, Profiles Across the Nation website.

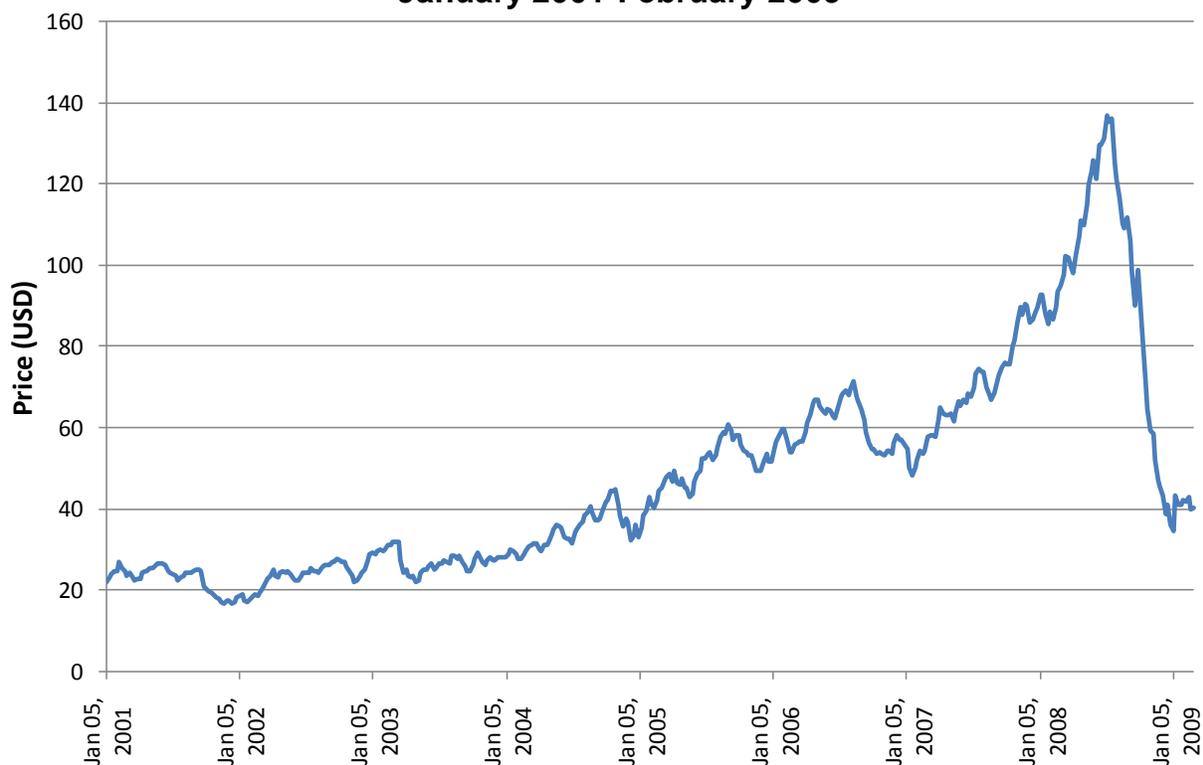
⁵ RBC Economics Provincial Outlook, December, 2008.

⁶ Government of Saskatchewan website.

⁷ EIA, Official Energy Statistics, U.S. Government.

- The high price of crude oil during 2007-2008 was a boon to the Saskatchewan economy. The recent price drop and short-term price outlook will undoubtedly have some negative impact on the provincial economy; the most immediate impact will be on provincial government oil revenues which are price/production sensitive. However, given that the oil production is of conventional well extraction, and not oil sands-type, it is expected that a reasonable level of production will continue so long as the price of crude oil remains above \$20 per barrel.¹

Figure 4-3
Weekly Spot Price of Crude Oil Price (USD per Barrel)
January 2001-February 2009



Source: EIA, Official Energy Statistics, U.S. Government

Agriculture

The agricultural sector has traditionally been one of Saskatchewan's primary economic engines. The sector has been performing strongly since 2007, thanks to strong prices for such products as wheat, flaxseed and lentils, combined with favourable weather conditions that yielded good harvests. Prices increased substantially in 2007, peaking in early 2008, and have since

¹ Government of Saskatchewan, Ministry of Energy and Resources.

declined moderately, but remain well above pre-2007 levels.¹ It is anticipated that agricultural production will remain relatively strong in the near term, barring weather-related factors.

Uranium

The primary use of uranium is to fuel nuclear reactors to produce electricity. Uranium mining is centered in the Athabasca Basin, located in northern Saskatchewan, which contains the largest high grade deposits in the world.² All uranium produced in Saskatchewan is exported in its raw form for processing and usage elsewhere.

The price of uranium (U_3O_8) hovered around \$10/lb in the early 2000's, reached over \$70/lb by 2006 and peaked just under \$140/lb in late 2007.³ The price softened quickly in early 2008, sliding downward to \$47/lb by February, 2009, but remains far above the historical lows.

It is expected that the market for uranium will remain balanced until 2017, with an average price of \$60/lb in 2009, rising to \$75/lb in 2011 and \$80/lb by 2013.⁴ The long-term outlook for uranium also looks favourable. Nuclear energy is expected to remain an important part of the world's energy mix for at least the next 50 years, with an expected annual growth rate in nuclear power demand of 1-3% per year for that period.⁵

Potash

Saskatchewan is the world's largest producer of potash, accounting for 25% of global production.⁶ Saskatchewan's vast potash reserves are located in the south-central part of the Province. Two-thirds of production is exported to the United States.⁷ Emerging economies of China, Russia and Brazil are growing markets for the commodity.

The price of potash in the first half of the 2000's was relatively flat at just over \$100/lb. Prices slowly started to rise in 2005 and took a jump in late 2007, rising to over \$700/lb by the end of 2008.⁸ As of early 2009, the price of potash had not been affected by the economic downturn the way most other commodities have been. The price of potash has been resilient, due to a tight market with continued strong demand from emerging markets such as China. As of January, 2009, potash prices remain at record high levels at over \$800/lb.⁹

¹ TD Economics Special Report, November 6, 2008.

² Analysis of Uranium Supply to 2050, International Atomic Energy Agency, 2001.

³ RBC Economics Provincial Outlook, December 2008, figures quoted in US dollars.

⁴ RBC Capital Markets, January 2009.

⁵ Analysis of Uranium Supply to 2050, International Atomic Energy Agency, 2001.

⁶ Government of Saskatchewan website.

⁷ Government of Saskatchewan website.

⁸ RBC Economics Provincial Outlook, December 2008, figures quoted in US dollars.

⁹ Scotiabank Commodity Price Index, January 29, 2009, figures quoted in US dollars.

Forestry

The northern half of Saskatchewan, accounting for more than 50% of the Province's land mass, is covered by forest.¹ Forestry has traditionally been an important sector in Northern Saskatchewan, contributing more than \$1 billion annually to the economy.² The sector is divided into two main activities: harvesting/hauling and the production of wood products, namely lumber, pulp and paper, plywood and oriented strand board.

Canada's forestry industry has been in decline since 2004.³ This is largely due to the stronger Canadian dollar (in relation to the U.S. dollar), weaker U.S. housing construction (one of the principal export markets), increased global competition and the "Softwood Lumber Deal" which puts the Canadian forestry industry at a disadvantage to their U.S. counterparts.⁴

Province-Wide Economic Expansion

This latest economic growth period has benefited all regions of the Province, including smaller communities and rural areas.⁵ Prince Albert is no exception, benefiting from employment opportunities in the mining sector outside the City (e.g. uranium mines in northern Saskatchewan), serving as a service hub for the resource sector, and benefiting from greater public sector expenditures as provincial revenues have increased.

4.3 Regional Economic Overview

Prince Albert and the surrounding area belong to the North Central Economic Region which geographically extends to Duck Lake in the south, White Fox in the east, Spiritwood in the west, and Candle Lake to the north. Covering an area of over 25,000 sq.km the Region had a population of 75,800 in 2001.⁶ Outside of Prince Albert, the Region is mostly rural, comprised of a few small towns, including Big River, Birch Hills, Spiritwood and Shellbrook, and a number of Indian Reservations.

Agriculture and forestry are the main economic sectors and are the backbone of many communities in the Region. The Region's forestry sector revolves around a number of saw mills

¹ Minister's Task Force Report on Forest Sector Competitiveness, 2006.

² Minister's Task Force Report on Forest Sector Competitiveness, 2006.

³ Natural Resources Canada website.

⁴ Minister's Task Force Report on Forest Sector Competitiveness, 2006.

⁵ TD Economics Special Report, The Saskatchewan Economy of 2008, June 4, 2008

⁶ Regional Economic and Cooperative Development Regional Profile – North Central, May 2006, Enterprise Saskatchewan.

and the harvesting/hauling of logs. Meanwhile, agriculture, including grain and mixed farming, is centered in the southern half of the Region.

The Region is not endowed with oil and gas, uranium or potash resources; however, it is home to the Fort a la Corne Diamond Province, considered one of the largest diamond deposits in the world.¹ Extensive diamond exploration in the Fort a la Corne area, located 60 km east of Prince Albert, started in the mid-1990s. Shore Gold Inc., a junior-mining company is the main explorer in the area actively developing the Star-Orion South Project. The Project consists of the Company's 100% owned Star-Diamond Property and the Orion South Property, a joint venture with Newmont Mining, a large multinational mining company. Shore Gold plans to bring the Project into the development and mining phase; this would encompass two large open pit mines which would include a processing plant and related infrastructure.² The Project is currently in the Environmental Impact Assessment process (submitted to the Saskatchewan Ministry of the Environment in November 2008). However, the economic downturn has also had an impact on the diamond industry. Citing turmoil in the diamond and financial markets, in early 2009 the Company cut its annual budget to \$17.9 million, from \$106.8 million in 2008 and laid off 89 of its 100 on-site employees.³

4.4 City of Prince Albert Economic Overview

Prince Albert's economic roots have been in the resource sector, in particular forestry. Over the past decade, with the decline of the forestry sector, Prince Albert's economic base has shifted towards retail, higher education, health and social services and tourism. The City has become an increasingly important regional centre for retail, education, health and transportation.

4.4.1 Employment Structure – Based on Location Quotient Analysis

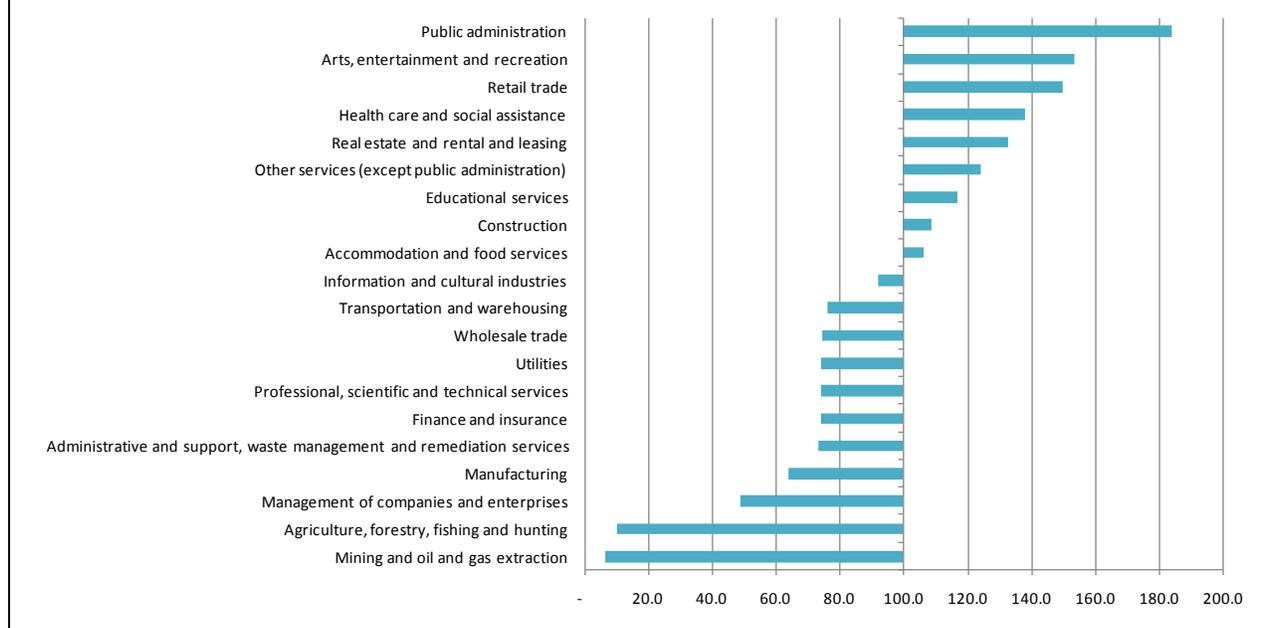
Figure 4-4 illustrates the strength of employment sectors in Prince Albert relative to the Province using Location Quotients (LQ).

¹ Government of Saskatchewan website.

² Shore Gold corporate Press Release, November 3, 2008.

³ Saskatoon StarPhoenix newspaper, January 8, 2009.

Figure 4-4
Prince Albert Location Quotients Relative to Saskatchewan, 2006



Location Quotients are a commonly used tool in regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. The LQ for a given municipality is calculated by dividing the percentage of total local employment represented by a sector, with the percentage of the total provincial employment represented by the sector. An LQ of 100% identifies that the concentration of employment by sector is consistent with the provincial average. An LQ of greater than 100% identifies that the concentration of employment in a given employment sector is higher than the provincial average, which suggests a relatively high concentration of a particular employment sector or “cluster.” Employment sectors with a relatively high LQ generally serve both the local population base as well as employment markets which extend beyond the boundaries of the municipality. On the other hand, employment sectors with an LQ of less than 100% identify particular employment sectors which have relatively lower concentrations (as compared with the provincial average) and are generally under-servicing the needs of the local market. Key observations from the location quotient analysis include:

- Prince Albert’s economy is highly oriented towards service providing sectors including public administration, arts, entertainment, recreation, retail trade, health care and social assistance, real estate, and educational sectors;
- On the other hand, Prince Albert has a low concentration of employment in primary industries such as mining/oil/gas extraction, agricultural/forestry, management companies and manufacturing; and

- In relation to the provincial average, Prince Albert is more balanced in employment sectors related to construction, accommodation and food services, and information and cultural industries.

4.4.2 Primary Resource Sector

Prince Albert is the hub of the Province's forestry sector, servicing the industry in the Region and beyond. The City's role in this sector was strengthened with the opening of the Saskatchewan Forestry Centre, which opened in 2005 with the mandate to advance the forestry sector in the Province.

4.4.3 Commercial/Retail Sector

The City of Prince Albert is a growing regional retail centre for Central and North Central Saskatchewan, with a trade area of over 102,000 people.¹ Prince Albert's strength in the retail sector is reflected in its per capita retail sales; the City had \$17,700 in retail sales per capita in 2008 compared to \$13,200 in Saskatoon and \$12,400 for the Province.² The City has a relatively large number and wide mix of retail establishments. Recent development of large format type retail stores strengthens its regional draw.

4.4.4 Institutional Sector

Prince Albert has become a regional centre for education and health services. The City is home to a number of schools of higher education, including the Saskatchewan Institute of Advanced Science and Technology (SIASST) Woodland Campus, First Nations University (Northern Campus) and the Saskatchewan Indian Institute of Technologies. In 2007-08, SIASST Woodland Campus had a total enrolment of 2,231.³

Prince Albert houses a number of health-related facilities which serve the Region, including the Victoria Hospital and various special care homes. The City is also home to the Saskatchewan Federal Penitentiary and Riverbend Institution (located outside the City limits) and the Prince Albert Provincial Correctional Centre.

¹ Prince Albert Market Area Analysis, City of Prince Albert Planning and Economic Development, 2005.

² FPmarkets Canadian Demographics 2008, Financial Post.

³ SIASST Census Student Statistics for Academic Year 2007-08.

4.4.5 Industrial Sector

Prince Albert's industrial base is centered on forestry products and mining and transportation-related secondary industries comprised of small- to medium-size enterprises. The City has two saw mills which produce lumber products, one operated by Carrier Forest Products and the other operated by Domtar/Woodlands Cree joint venture called Wapawekka Lumber Ltd. In 2006, the Weyerhaeuser pulp and paper mill closed, which resulted in 690 direct job losses and another 1,380 indirect job losses throughout the Province.¹

4.4.6 Transportation Sector

Prince Albert is the transportation hub of the Region, with major highway and rail connections. The City is connected to Saskatoon and Regina via Highway 11, one of the Province's major highway corridors. The Prince Albert Airport is served by three regional airlines, including Transwest Airlines, with connections to Saskatoon and northern communities. The City is also home to 26 trucking companies that service industries throughout the Region.²

4.5 Employment Trends, 1996 to 2006

Table 4-1 summarizes employment trends for the City of Prince Albert over the 1996-2006 Census period. During this ten-year period:

- Employment in Prince Albert grew at an annual rate of 0.1% between 1996 and 2006, which is significantly less than the Province-wide growth rate of 0.6% and the 1.2% growth rate in Saskatoon;
- Total jobs in Prince Albert grew modestly by 195 from 1996-2006; and
- During the 2001-2006 period, Prince Albert experienced a slight decline in employment.

Table 4-1
City of Prince Albert
Employment Growth, 1996-2006

	Total Employment by Census			Average Annual		Average Annual Growth Rate			Total Growth
	1996	2001	2006	96-01	01-06	96-01	01-06	96-06	1996-2006
Prince Albert (City)	16,185	16,390	16,380	41	-2	0.3%	0.0%	0.1%	195
Saskatoon (City)	94,235	98,935	105,710	940	1,355	1.0%	1.3%	1.2%	11,475
Saskatchewan (Province)	467,285	479,735	494,900	2,490	3,033	0.5%	0.6%	0.6%	27,615

Source: 1996, 2001 and 2006 Census employment.

¹ History of Forest Industry in Canada/Prince Albert, City of Prince Albert, March 2008.

² Prince Albert Regional Economic Development Authority website.

4.6 Employment Activity Rate, 1996-2006

An employment activity rate is defined as the number of local jobs in a municipality divided by the resident population. Table 4-2 summarizes the City's historic employment activity rates. An increasing employment activity rate indicates that the local employment base is increasing at a faster rate than the local population. On the other hand, a declining activity rate indicates the opposite trend.

Key findings are:

- The employment activity rate grew by 1.5 percentage points between 1996 and 2006;
- Total employment increased slightly, even as population decreased over the 1996-2006 period; and
- In 2006, Prince Albert's activity rate of 48% was close to the provincial average of 46%.

Table 4-2
City of Prince Albert
Employment Activity Rate 1996-2006

Year	Population	Employment	Employment Activity Rate
1996	34,777	16,185	46.5%
2001	34,291	16,390	47.8%
2006	34,138	16,380	48.0%
Increase (1996-2006)	-639	195	
% Increase (1996-2006)	-1.8%	1.2%	

Source: 1996, 2001, 2006 Census.

Employment excludes employees with no fixed place of work (NFPOW).

4.7 Full-time Employment, 2001-2006

Table 4-3 summarizes full-time versus part-time employment during the 2001 to 2006 Census period. During this period, the ratio of full-time employment grew slightly from 56% to 58%.

Table 4-3
City of Prince Albert
Full-time Versus Part-time Employment 2001-2006

YEAR	Full-time	Part-time	Did Not Work in Census Period	Total Employment	% Full-time
2001	9,165	6,755	470	16,395	56%
2006	9,545	6,255	575	16,375	58%

Source: 2001, 2006 Census.

4.8 Employment by Sector, 1996-2006

Table 4-4 summarizes employment growth by major sector for Prince Albert for 1996, 2001 and 2006. During this period:

- Primary industry employment declined from 4.2% of total employment in 1996 to 1.4% in 2006, a decrease of 450 jobs;
- Industrial sector employment declined from 22% of total employment in 1996 to 14.4% in 2006, a decline of 1,200 jobs;
- Commercial/Population-related employment increased between 1996 and 2006, rising from 39.7% of total employment to 44.8%, an increase of 910 jobs;
- Institutional employment rose from 34% to 39.3% between 2001 and 2006, a gain of 870 jobs; and
- Of the total 2006 employment base, only 4% of the employment base works at home.

Table 4-4
City of Prince Albert
Historical Employment by Sector 1996-2006¹

Employment Sector	1996		2001		2006	
	Employment	% of Employment	Employment	% of Employment	Employment	% of Employment
Primary ²	685	4.2%	260	1.6%	235	1.4%
Industrial	3,565	22.0%	2,923	17.8%	2,365	14.4%
Commercial/Population-Related ³	6,430	39.7%	7,638	46.6%	7,340	44.8%
Institutional	5,505	34.0%	5,570	34.0%	6,440	39.3%
Total	16,185	100.0%	16,390	100.0%	16,380	100.0%

1. Excludes No Fixed Place of Employment (NFPOW).

2. Primary employment is generally related to agriculture and resource based industries.

3. Commercial/Population-Related employment is generally related to commercial and service industries.

As summarized, Prince Albert's economic base has shifted considerably over the past ten years from traditional goods producing sectors (i.e. industrial/primary) to service producing sectors (i.e. commercial/institutional).

4.9 Prince Albert Largest Employers

Prince Albert's largest employers are in the public sector, which include school boards, health-related institutions and government agencies including the Saskatchewan Rivers School Division No. 119, Parkland Health Authority and City of Prince Albert (Table 4-5). The largest private sector employers include the Northern Lights Casino, CONEXUS Credit Union, Transwest Air and large format retailers Wal-Mart and Real Canadian Superstore.

**Table 4-5
City of Prince Albert
Largest Employers**

Name	Employment	Type
Saskatchewan Rivers School Division No. 119	1000	Education
Prince Albert Parkland Regional Health Region-Victoria Hosp.	550	Health
City Of Prince Albert	500	Local Government
Northern Lights Casino	400	Tourism/Recreation
Prince Albert Roman Catholic Separate School Division No. 6	300	Education
CONEXUS Credit Union - South Hill	200	Finance
Prince Albert Parkland Health Region (Home Care)	200	Health
Prince Albert Parkland Regional Health Region-Herb Bassett	200	Health
The Real Canadian Superstore	200	Retail
Transwest Air (Prince Albert - Head Office)	200	Transportation

Source: Enterprise Saskatchewan, Government of Saskatchewan

4.10 Prince Albert Commuting Trends

Table 4-6 illustrates the strength of the employment base in Prince Albert by summarizing the location of employment relative to location of residence.

- In 2006, three-quarters of the jobs in Prince Albert (11,595) were held by persons who also reside in Prince Albert;
- Of the 3,660 people who worked in Prince Albert and resided outside of City, most lived in the neighbouring communities of Prince Albert RM 461 or Buckland RM 491; and
- 1,440 Prince Albert residents worked outside of Prince Albert.

**Table 4-6
City of Prince Albert
Place of Work/Place of Residence, 2006**

	2006
Total Employment in Prince Albert ¹	15,255
Reside in Prince Albert/Work in Prince Albert	11,595
Percent of Prince Albert jobs held by residents of Prince Albert	76%
Reside outside of Prince Albert/Work in Prince Albert	3,660
Reside in Prince Albert/Work outside of Prince Albert	1,440
Net draw of outside residents to work in Prince Albert	2,220

1. Excludes Work at Home employment and excludes commuting flow data
(Census subdivision to Census subdivision) where values are less than 20.

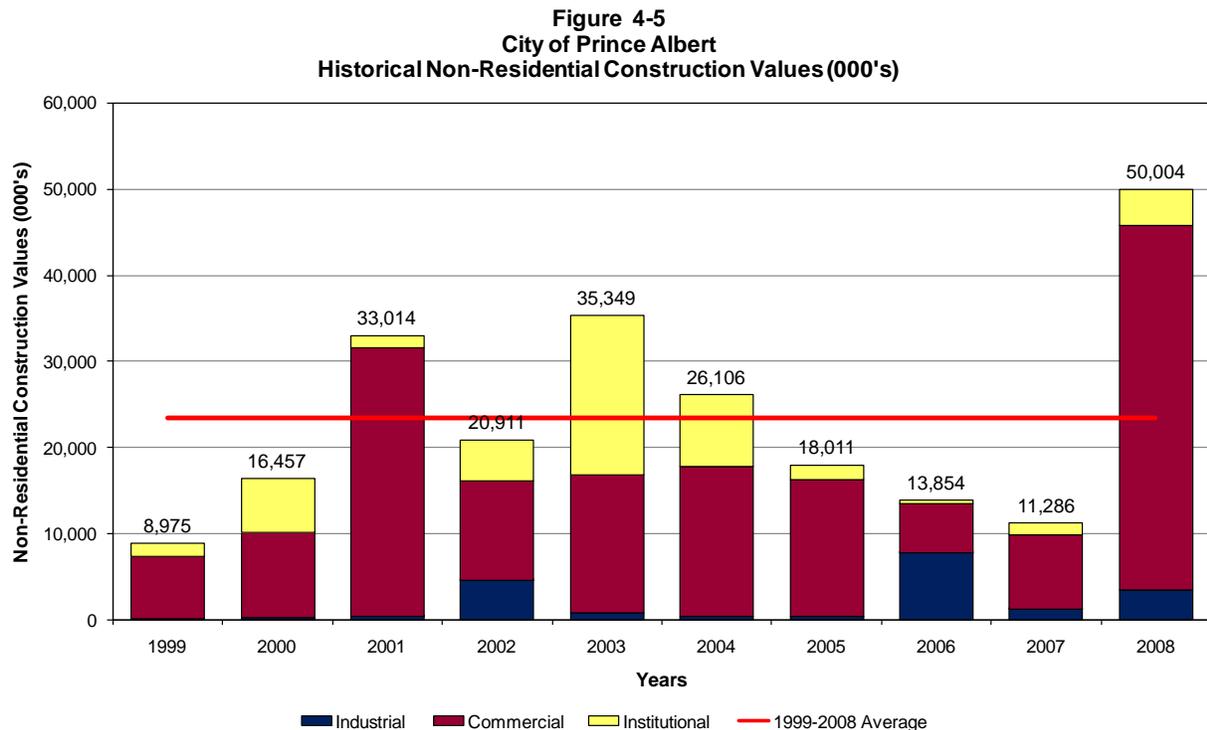
Source: Statistics Canada - 2006 data: 2006 Census. Catalogue Number 97-561-XCB2006011.

4.11 Non-Residential Construction Activity, 1999-2008

Figure 4-5 illustrates non-residential construction (in thousands of dollars) by type from 1999 to 2008 in the City of Prince Albert.

Key observations include:

- During 1999-2008, Prince Albert averaged \$24,400,000 in non-residential building permit activity annually, dominated by the commercial sector;
- The non-residential sector showed strength through the years 2001 to 2004;
- During 2005-2007, non-residential construction was well below the period average; and
- 2008 was a strong year with \$50,000,000 in construction value, more than double the period average.



Source: Statistics Canada

4.12 Household Income, 1996-2006

Table 4-7 summarizes average household income growth for Prince Albert over the 1996 to 2006 Census periods. During this ten-year period:

- The City's average household income grew at an annual rate of 2.9%, which is below the provincial growth rate of 3.4%, as well as that of Saskatoon (3.7%); and
- While Prince Albert's average household income growth during 1996-2001 was comparable to the provincial average, 2001-06 saw the gap widen as Prince Albert's annual growth remained largely unchanged while the provincial average increased.

Table 4-7
City of Prince Albert
Average Household Income Growth, 1996-2006

	Census Year			Average Annual Growth		Average Annual Growth Rate		
	1996	2001	2006	96-01	01-06	96-01	01-06	96-06
Prince Albert (City)	\$42,449	\$49,011	\$56,759	\$6,562	\$7,748	2.9%	3.0%	2.9%
Saskatoon (City)	\$44,636	\$51,941	\$64,254	\$7,305	\$12,313	3.1%	4.3%	3.7%
Saskatchewan (Province)	\$42,685	\$49,068	\$59,455	\$6,383	\$10,387	2.8%	3.9%	3.4%

Source: Prince Albert and Saskatchewan 1996, 2001 and 2006 Census Profile

Saskatoon data, City of Saskatoon Planning Department community profiles (based on Census data)

4.13 Educational Attainment

Table 4-8 summarizes the highest level of education achieved by Prince Albert residents aged 25-64 years of age compared to the provincial average and Saskatoon in 2006. Key findings include:

- Prince Albert compares favourably with the provincial average in terms of educational attainment; and
- Prince Albert has a less educated population than Saskatoon CMA; 18% of Prince Albert residents 25-64 years of age have no certificate or diploma compared to only 13% in Saskatoon CMA. Meanwhile, 29% of Saskatoon CMA population 25-64 years of age have a University certificate, diploma or degree, compared to only 21% in Prince Albert.

Table 4-8
City of Prince Albert
Population 25-64 Years of Age-Highest Level of Education (2006)

Highest Level of Education	Total			Percent		
	Prince Albert (City)	Saskatoon (City)	Saskatchewan (Province)	Prince Albert (City)	Saskatoon (City)	Saskatchewan (Province)
No certificate, diploma or degree	2,860	16,265	94,105	18%	13%	19%
High School certificate or equivalent	4,290	29,780	129,555	26%	24%	27%
Apprenticeship or trades certificate or diploma	2,360	14,955	66,340	14%	12%	14%
College certificate or diploma	3,465	25,220	89,630	21%	21%	18%
University Certificate, Diploma, or Degree	3,350	35,360	105,935	21%	29%	22%
Total	16,325	121,575	485,555	100%	100%	100%

Source: Prince Albert, 2006 Census Profile; Saskatoon and Saskatchewan data from Cat. No. 97-560-XCB2006007

4.14 Conclusions

Key economic and socio-economic findings are:

- The global economy, after six years of strong GDP growth, saw growth slow in 2008;
- Industrialized economies experienced a contraction in GDP in 2009, which is anticipated to be followed by a mild recovery in 2010;
- Between 2007 and 2008, Saskatchewan's GDP growth was quite strong, averaging 3.2% annually;
- GDP growth in Saskatchewan is anticipated to soften in 2009 and 2010 but remain well above the national average;
- Between 2006 and 2008, Saskatchewan benefited from an unprecedented commodities boom; prices for crude oil, potash, and uranium rose to record highs;
- Prince Albert, though not a centre of production for these commodities, benefited indirectly from this economic activity;
- The Prince Albert regional economy is largely rooted in forestry and agriculture. The forestry sector has been in decline for a number of years and did not benefit from the recent commodities boom. Agriculture, in comparison, performed relatively well which benefited the Region;
- The City of Prince Albert's economic base has shifted from forestry and other industrial sector jobs toward retail, higher education, health and social services and tourism;
- A significant share of the City's employment base is in the public sector (health, education, government) and in retail;
- Total employment growth between 1996 and 2006 has been marginal, though the activity rate increased, because the total population declined over that period;
- In spite of a slight decline in local population levels from 1996 to 2006, Prince Albert's commercial/institutional employment base steadily increased over this period driven by growing demand both locally and throughout the surrounding trade area;
- Between 1996 and 2006, the employment base shifted towards a greater share of institutional and commercial/ population-related jobs from primary and industrial jobs;
- Non-residential building construction had a strong year in 2008, after many years of below-average performance;
- Household income growth between 1996 and 2006 was moderate but below the provincial rate; and
- Prince Albert's working-age population's education levels are comparable to the provincial average.

5. RESIDENTIAL AND NON-RESIDENTIAL LAND SUPPLY

5. RESIDENTIAL AND NON-RESIDENTIAL LAND SUPPLY

5.1 Housing Supply

The City of Prince Albert has a potential housing supply of 11,457, of which 7,677 units are located exclusively on the south side of the North Saskatchewan River (Table 5-1). This supply represents lands which are in the development process or are designated for residential development. Designated residential lands on the north side of the River, totalling 1,298 gross¹ acres (633 net acres) with an estimated unit yield of 3,780 are considered developable in the longer term (i.e. when lands on the south side approach buildout). This analysis also identifies Future Expansion Area lands located outside the City limits which are situated southeast of the City and cover 1,657 gross acres.

Table 5-1
City of Prince Albert
Residential Supply Inventory and Long-Term Potential Lands

Residential Supply Inventory	Total Units
South of North Saskatchewan River	7,677
North of North Saskatchewan River (Designated Lands)	3,780
Total Residential Supply Inventory	11,457
Future Expansion Area (outside of City Limits)	1657 gross acres (671 gross ha)

Source: Watson & Associates Economists Ltd., based on data provided by City of Prince Albert, February 2009.

Figure 5-1 geographically illustrates the location of potential future housing supply on designated lands by development approval status as well as the future expansion area outside the City limits. Appendix B provides further details with respect to the location of housing supply by development/area, approval status and housing type.

5.1.1 **Total Residential Units by Status**

Table 5-2 summarizes potential housing units within the planning approvals process (i.e. registered but not built and applications under review) and potential housing units on designated, developable, vacant lands within the City of Prince Albert.

- As summarized in Table 5-2, 211 housing units or 2% of the City's total potential housing supply is registered but not built, while 594 housing units (5% of total) are under review; and

¹ Gross refers to total land area unadjusted for environmental features and local infrastructure.

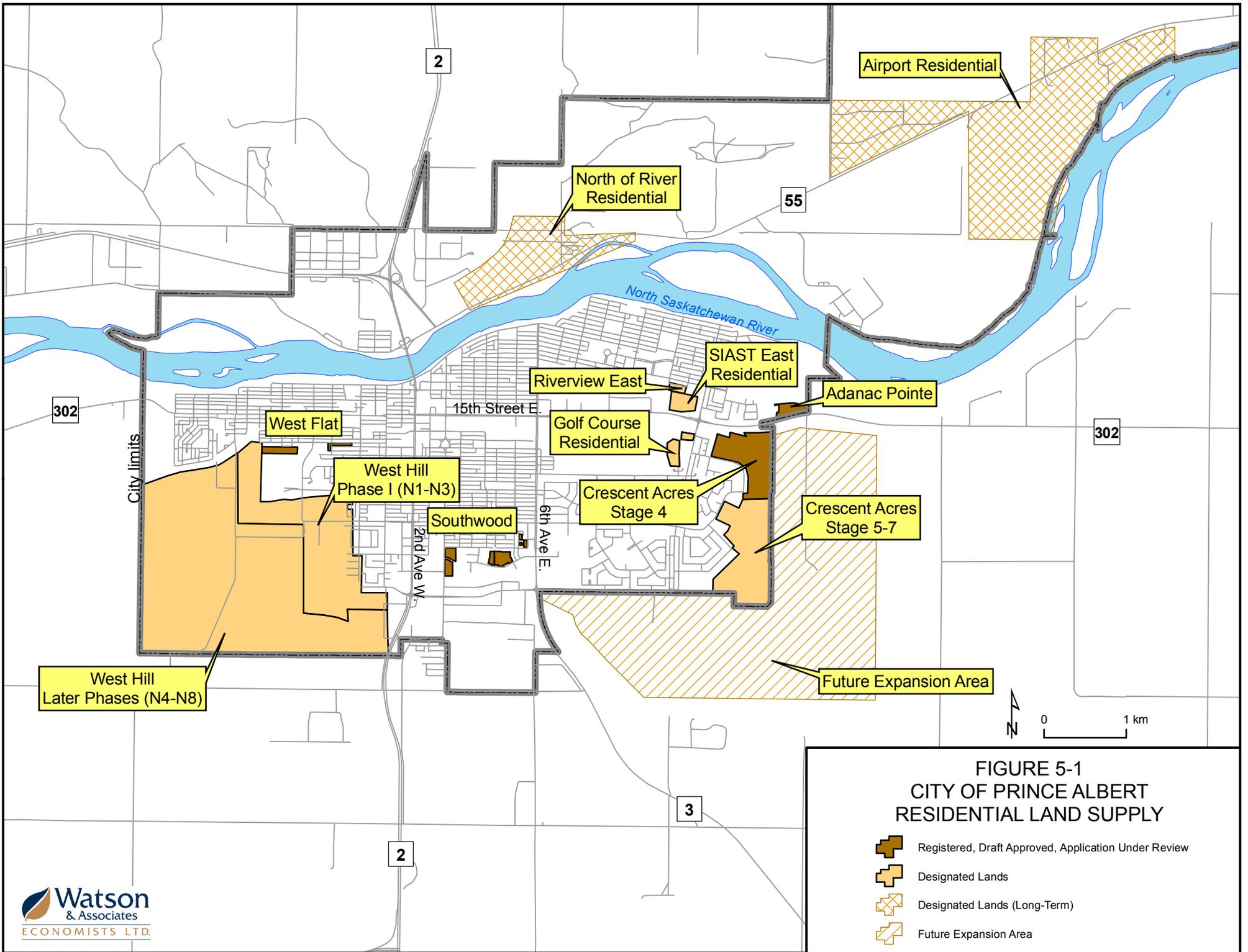


FIGURE 5-1
CITY OF PRINCE ALBERT
RESIDENTIAL LAND SUPPLY

-  Registered, Draft Approved, Application Under Review
-  Designated Lands
-  Designated Lands (Long-Term)
-  Future Expansion Area

- The remaining 10,652 potential housing units, or 93% of the City's total potential urban housing supply, have been designated as future residential on developable vacant lands, of which about two-thirds is located south of the North Saskatchewan River.

Table 5-2
City of Prince Albert
Residential Supply by Status

Status	Residential Units				
	Low Density	Medium Density	High Density	Total	% of Total
Registered - Not Built	156	55	0	211	2%
Applications Under Review	95	122	377	594	5%
Designated (South of North Saskatchewan River)	3696	924	2252	6,872	60%
Designated (North of North Saskatchewan River) ¹	1,833	380	1,567	3,780	33%
Total	5,780	1,481	4,196	11,457	100%

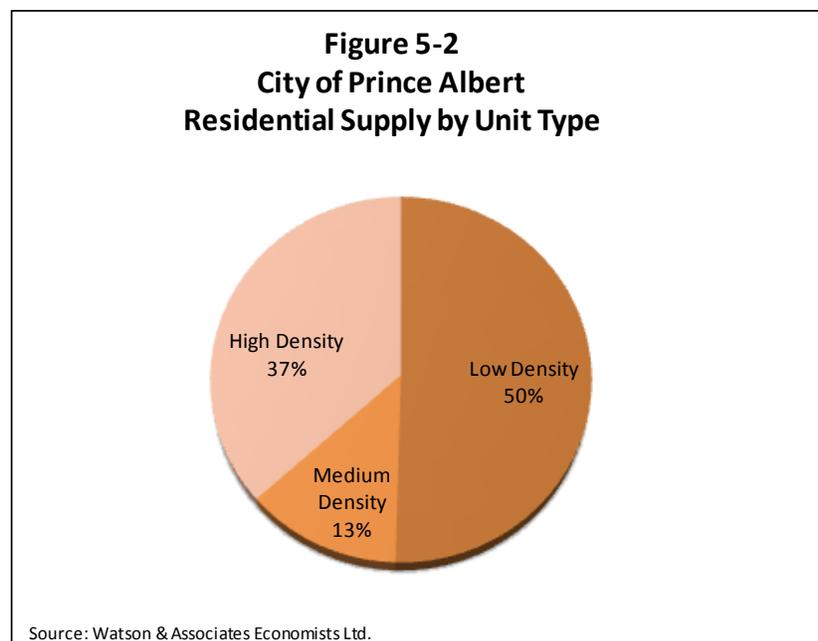
Source: Watson & Associates Economists Ltd., based on data provided by City of Prince Albert, February 2009.

1. Housing units based on assumed average density and housing mix reflecting City-wide trends. Density and housing mix is anticipated to vary by geographic area with some higher and some lower than the average.

5.1.2 Total Residential Units by Type

Figure 5-2 illustrates the residential supply unit mix. Key observations include:

- The majority of development is oriented towards low density, single-family homes;
- Of the 11,457 units, 50% are low density, 13% medium density and 37% high density; and
- The share of low density units in the supply inventory is lower than what has been constructed during the 1997-2008 period, as highlighted in Chapter 3.



5.1.3 Total Residential Units by Development/Area

Table 5-3 summarizes the residential supply by development area. Residential lands available in the short term (e.g. registered but not built and applications pending review) are concentrated in three development areas: Crescent Acres, Adanac Pointe-Riverview and Southwood area. The City is also moving forward with the 600-acre West Hill master planned community.

- Crescent Acres accounts for 18% of total residential supply;
- Southwood and Adanac Pointe-Riverview are relatively small, accounting for 2% each, however, they represent a significant share of short-term supply;
- West Hill accounts for 33% of total inventory and will be the most significant area for residential development in the medium to long term; and
- Designated residential lands north of the North Saskatchewan River account for one-third of total residential unit supply.

Table 5-3
City of Prince Albert
Residential Supply by Area

Area	Residential Units				
	Low Density	Medium Density	High Density	Total	% of Total
Crescent Acres	747	317	978	2,042	18%
Southwood	65	96	0	161	1%
Adanac Pointe-Riverview	67	21	96	184	2%
Riverview East	0	0	187	187	2%
Golf Course Residential Area	34	0	124	158	1%
SIASST East Residential	0	271	836	1,107	10%
West Flat	82	0	0	82	1%
West Hill	2,952	396	408	3,756	33%
Designated Lands north of North Saskatchewan River ¹	1,833	380	1,567	3,780	33%
Total	5,780	1,481	4,196	11,457	100%

Source: Watson & Associates Economists Ltd., based on data provided by City of Prince Albert, February 2009.

1. Housing units based on assumed average density and housing mix reflecting City-wide trends. Density and housing mix is anticipated to vary by geographic area with some higher and some lower than the average.

The following provides further details on the main residential development areas.

Crescent Acres

Crescent Acres is a multi-phase development situated on the City's southeast side. Stages 1 through 3 are built out and Stage 4, covering an area of 100 acres, is in active development. Stage 4, Phase 1 has 75 registered but not built lots. In 2008, the City finalized one of the largest combined land sales in its history, a sale of 33 acres in Phase 2, with two private developers to construct 66 single family homes. Phases 1 and 2 combined bring the total number of lots (for low density development) under application review to 84. There are also additional lands under application review which will accommodate 122 medium density units and 377 high density dwelling units. It is anticipated that some of these parcels will be available

for development in 2009. In addition, another 135 single family homes are to be built on designated lands. A total of 793 units are to be built in Stage 4 (Table 5-4).

Stages 5 through 7, located immediately south of Stage 4 on a 159 acre site, are in the planning phase. This phase of development will accommodate a total of 1,249 units. The combined Stages 4 through 7 has a combined residential supply of 2,042 units, of which 747 (36%) are low density (single family), 317 (16%) are medium density and 978 (48%) are high density.

Table 5-4
City of Prince Albert
Crescent Acres Residential Supply Inventory

	Residential Units				
	Low Density	Medium Density	High Density	Total Units	% of Total
Stage 4 (in development)	294	122	377	793	39%
Stages 5-7 (planned)	453	195	601	1,249	61%
Total	747	317	978	2,042	100%

Source: Watson & Associates Economists Ltd., based on data provided by City of Prince Albert, February 2009.

Adanac Pointe-Riverview

Adanac Pointe-Riverview is Prince Albert's first gated community. The community is situated on the eastern edge of the City and will be constructed in three phases. Phase 1, currently under construction, contains 41 single family lots (30 registered lots and 11 lots under application review) and a 21-unit townhouse complex called Adanac Gate Villas. Phase 2 and 3 of the project are in the planning stage and will include an additional 26 single family homes and 96 condo units.

Southwood Area

The Southwood area, situated in the south central part of the City, is located east of 2nd Avenue West, west of 6th Avenue East and south of 28th Street East. The subdivision has 51 lots registered for low-density housing and 34 units for medium-density development. The subdivision also has designated lands which can accommodate 14 low density units and 62 medium density units. The area is nearing buildout with no additional lands available for development.

West Hill

West Hill is a 600-acre master planned community located in the southwest quadrant of the City. The community is intended to accommodate the majority of the City's medium- and long-term residential growth. The blueprint for the community was set in the West Hill Master Plan of 1999. The community is to be developed in phases as the demand for residential land

warrants. In 2008, the City initiated site development of Phase 1 of the project which includes construction of three retention ponds, servicing infrastructure and roadways. This phase of work is expected to be finished in the fall of 2009.

As outlined in the Master Plan, West Hill consists of eight neighbourhoods (N-1 through N-8) with a mix of residential development, a suburban commercial centre, institutional (schools, health-related services, places of worship, etc.), and recreational amenities. As summarized in Table 5-5, Phase 1, which encompasses neighbourhoods N1 through N3, will accommodate 956 residential units, representing 25% of the total development. Of the 956 units, 480 (50%) will be low density, 109 (12%) medium density and 367 (38%) high density. The remaining neighbourhoods, N-4 through N-8, which will accommodate 2,800 residential units, will be developed in the longer term.

Table 5-5
City of Prince Albert
West Hill Residential Supply Inventory

Phase	Residential Units				
	Low Density	Medium Density	High Density	Total Units	% of Total
Phase 1 (N-1 to N-3)	480	109	367	956	25%
Future (N-4 to N-8)	2,472	287	41	2,800	75%
Total	2,952	396	408	3,756	100%

Source: Watson & Associates Economists Ltd., based on West Hill Master Plan land use concept plan, 1999

Other Areas of Residential Development

Other significant development areas with residential development potential include:

- **West Flat** – a redevelopment area on the west side of the City with potential for 82 low-density dwellings;
- **Golf Course Residential** – consists of designated lands with potential for 34 single-family and 124 high-density dwellings;
- **SIAST (Saskatchewan Institute of Applied Science and Technology) East Residential** – consists of designated lands with potential for 271 medium density dwellings and 836 high-density dwellings; and
- **Riverview East** – consists of designated lands with potential for 187 high-density dwellings.

5.1.4 Long Term Potential Residential Lands

North of the North Saskatchewan River

The City has two designated areas on the north side of the North Saskatchewan River for residential development known as North of River Residential and Airport Residential, totalling

1,298 gross acres. The North of River Residential and Airport Residential areas cover an area of 264 gross acres and 1,034 gross acres, respectively.

It should be noted that the gross residential lands north of the North Saskatchewan River have not been adjusted for environmental features (i.e. environmentally significant/sensitive lands). It is recommended that the City of Prince Albert conduct a study to identify the location of significant environmental areas which will be removed from the net developable land area. In the absence of a detailed study, a 75% net to gross ratio has been assumed in this report.

Further to the above adjustments, an additional net to gross adjustment of 65% has been applied to account for local infrastructure features such as internal and arterial roads, rail, easements, storm water management facilities and open space. In accordance with the above adjustments, the net developable land area for the designated lands north of the North Saskatchewan River is 633 acres.

These lands have been identified by the City as being developable in the long term.¹ Chapter 8 provides further discussion on these lands within the context of long-term residential needs.

5.2 Non-Residential Land Supply

Non-residential land supply includes commercial, industrial and institutional registered but not built lots and designated lands. They are summarized as follows.

5.2.1 *Commercial Land Supply*

Figure 5-3 illustrates the City of Prince Albert's potential commercial vacant lands. Table 5-6 summarizes the total by gross acres and net acres by development area. The City currently has 61 net acres of vacant commercial lands located both north and south of the North Saskatchewan River. The short- to medium-term commercial development is focused in the 14th Street Subdivision and 15th Street East (South Cornerstone) areas. The West Hill community also has some designated commercial lands.

¹ Development of the North of River Residential area will require the approval of the Pêhonân Parkway Board.

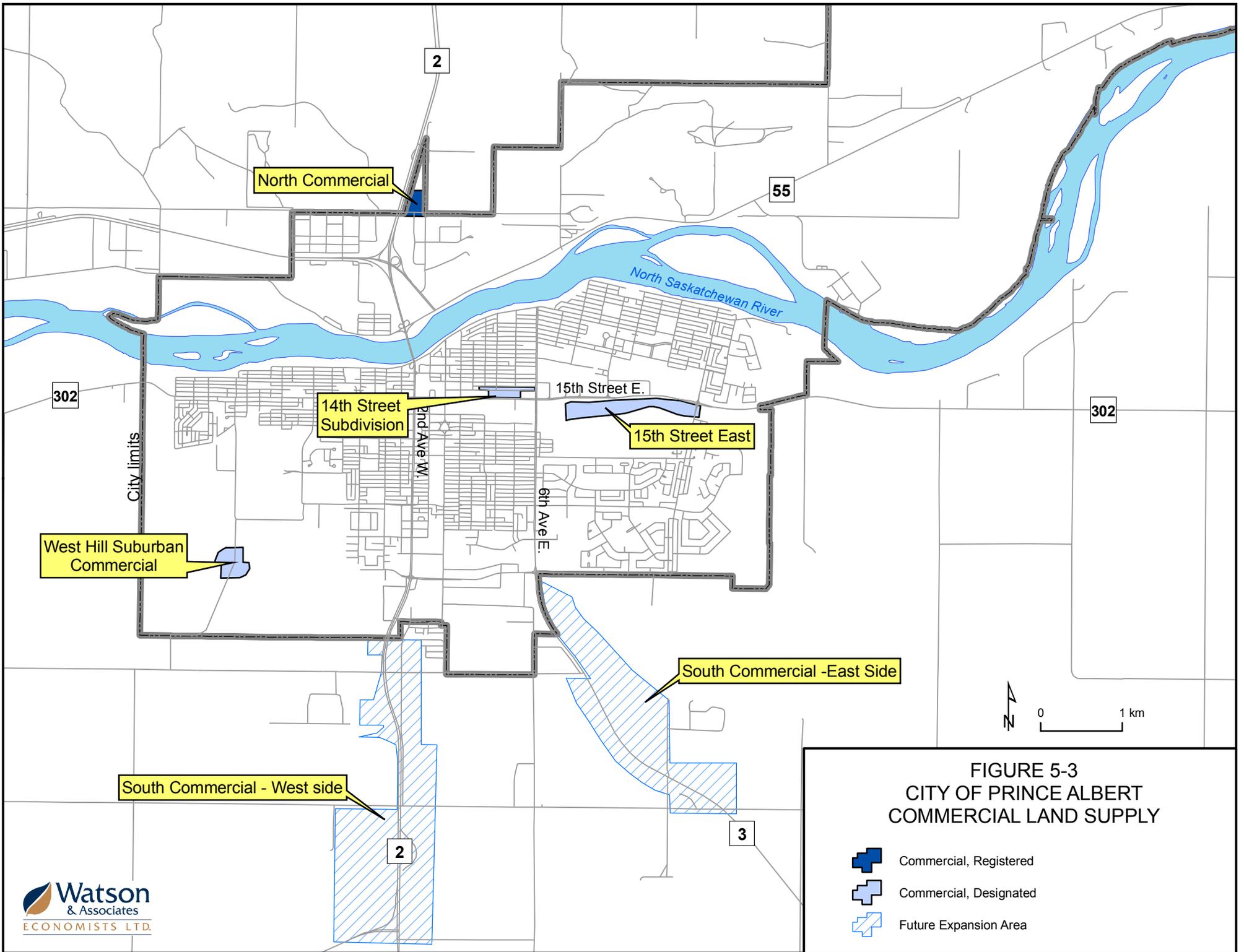


FIGURE 5-3
CITY OF PRINCE ALBERT
COMMERCIAL LAND SUPPLY

-  Commercial, Registered
-  Commercial, Designated
-  Future Expansion Area

Table 5-6
City of Prince Albert
Vacant Commercial Lands

Development/Area	Gross Area		Net Area		
	Acres	Ha	Acres	Ha	
North Commercial	16.7	6.8	12.5	5.1	(1)
14th Street Subdivision	18.5	7.5	13.9	5.6	(1)
15th Street East (Cornerstone South)	21	8.5	15.8	6.4	(1)
West Hill Suburban Commercial	24.7	10.0	18.5	7.5	(1)
Total	80.9	32.7	60.7	24.6	

Source: Watson & Associates Economists Ltd; gross land areas provided by City of Prince Albert

1. Net to gross adjustment of 75% account for internal roads, other infrastructure, buffers.

15th Street East (Cornerstone South)

The 15th Street East (Cornerstone South) lands are zoned C3-Arterial Commercial and have a net developable area of 16 acres. Located on the south side of 15th Street East, between 6th Avenue East and 15th Avenue East, intended land uses would include large format retail, franchise restaurants and smaller scale retailers.

14th Street Subdivision

The 14th Street Subdivision, zoned C3-Arterial Commercial, has a net developable area of 14 acres. The area is intended for retail commercial uses, including large format retail.

North Commercial

The North Commercial area, with a net developable area of 13 acres, is located on the north side of the North Saskatchewan River. Adjacent to Highway 2, the site is ideally located for highway commercial. The lands are zoned C4 – highway commercial.

West Hill Suburban Commercial

The West Hill Suburban Commercial area is planned for the central part of the community. With a net area of 19 acres, the area is intended primarily for neighbourhood commercial (retail and services). The lands are to be developed in the long term, in conjunction with the residential development of neighbourhoods N4 through N8.

5.2.2 Industrial Land Supply

Figure 5-4 illustrates Prince Albert's vacant designated industrial land supply. Table 5-7 summarizes the vacant land supply inventory by development area. Prince Albert's main industrial areas include the South Industrial Area, North Industrial Area, Jail Farm Subdivision, and Downtown Industrial Area, all of which are approaching buildout. Each has only a limited number of relatively small parcels available for development, totalling 51 net acres.

Table 5-7
City of Prince Albert
Vacant Industrial Lands

Development/Area	Gross Area		Net Area		
	Acres	Ha	Acres	Ha	
South Industrial Area	55.4	22.4	44.4	18.0	(1)
North Industrial Subdivision	4.4	1.8	4.4	1.8	
Jail Farm Industrial Subdivision	1.0	0.4	1.0	0.4	
Downtown Industrial	1.7	0.7	1.7	0.7	
Total	62.5	25.3	51.5	20.8	

Source: Watson & Associates Economists Ltd; gross areas provided by City of Prince Albert

1. Parcels greater than 5 ha subject to net to gross adjustment of 75%

The following highlights the key vacant industrial areas:

South Industrial Area

Located in the south end of the City, east of Highway 2 and south of Marquis Road, the South Industrial Area is one of the City's main industrial areas. The area has 44 net acres of serviced vacant industrial land zoned M3 – Light Industrial Medium Density. Main land uses include light industry, warehousing, construction and transportation.

The City has been highly successful at attracting businesses to the area in the past few years. Recent new tenants include:

- Broda Group (heavy construction) which relocated its head office to an 18-acre site;
- Prince Albert Co-Op Bulk Sales;
- SaskPower Service Centre; and
- Barzeele & Burkosky Ltd. Asphalt Paving.

North Industrial Subdivision

The North Industrial Subdivision is situated north of the North Saskatchewan River, just east of Highway 2. The subdivision has four small sites available for development. Zoned M1-Heavy

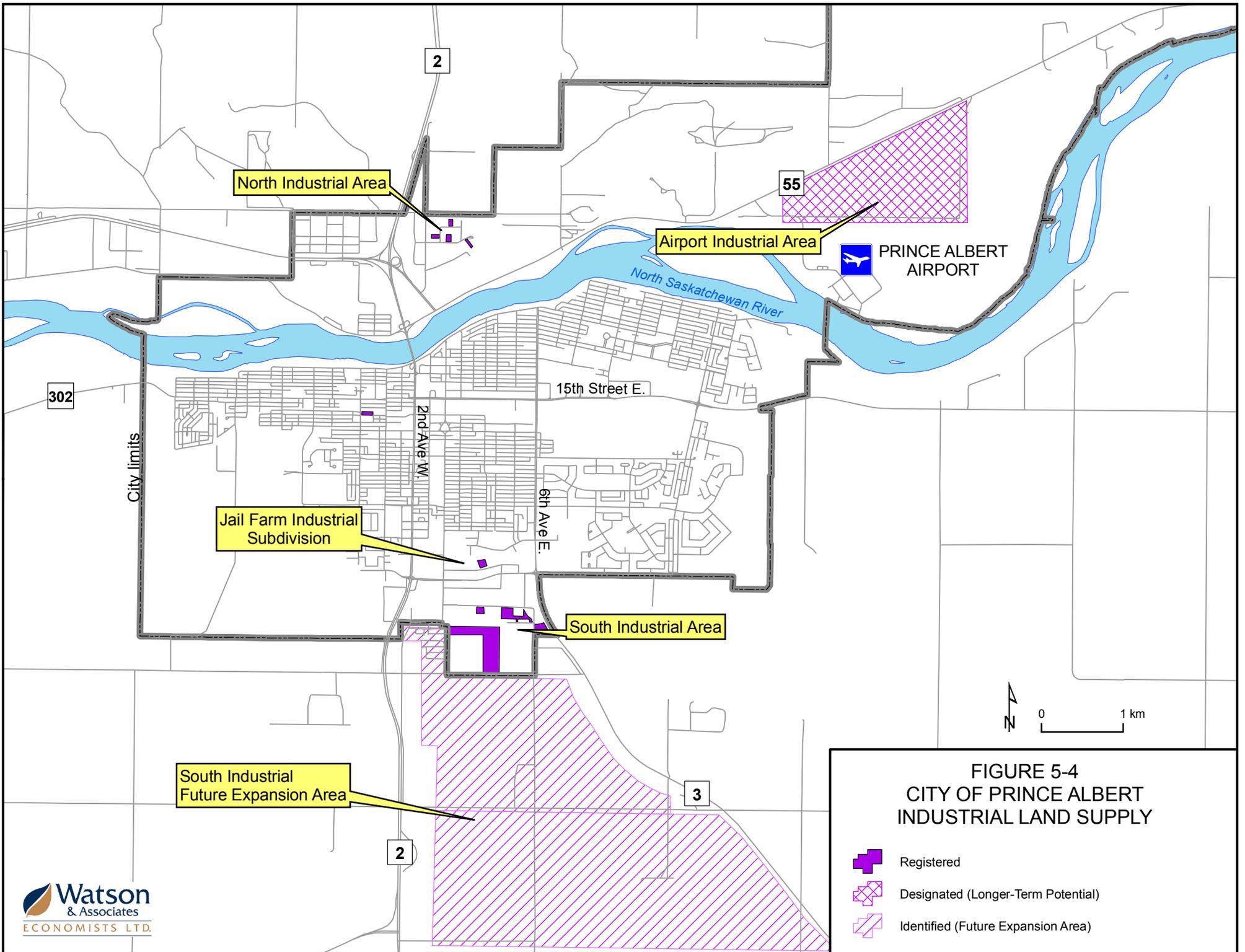


FIGURE 5-4
CITY OF PRINCE ALBERT
INDUSTRIAL LAND SUPPLY

-  Registered
-  Designated (Longer-Term Potential)
-  Identified (Future Expansion Area)

Industry, the parcels are intended for heavy and light industrial uses. The area is on serviced water and private sanitary sewer.

5.2.3 Designated Industrial Lands North of River

The City's has two areas designated for industrial use located north of the North Saskatchewan River known as the Airport Industrial Area and North East Industrial Area. The two areas were excluded from the industrial land inventory for reasons described below.

Airport Industrial Area

The Airport Industrial Area, zoned M4-Airport Industrial, covers a gross area of 526 acres and is situated immediately to the north of the Prince Albert Municipal Airport, in the northeast part of the City.

The Prince Albert Airport is located about 6 km northeast of the urban centre of the City. The airport is served by two regional carriers and charter air services. The charter service caters primarily to the needs of the mining and forestry sector, serving areas in Northern Saskatchewan. The airport is owned and operated by the City and is serviced by municipal water and sanitary sewer.

The Prince Albert Municipal Airport Master Plan, completed in March, 2009, provides guidance to short-term and long-term planning and development of the Airport. The Study identifies that the airport can become a major transportation hub for the City and region and a catalyst for economic development over the longer term. The Study highlights that current airport expansion is constrained due to size of the current airport property and the proximity of North Saskatchewan River prevents expansion to the south, west or east. The study recommends that any major airport expansion and development should take place on the Airport Industrial Area lands directly to the north of the airport. The study recommends that the City should identify and protect some of this land for future airport expansion and additional lands should be set aside for airport-related uses.

Given the uncertainty surrounding the anticipated amount of land required in the future for direct airport uses (i.e. infrastructure, airport-related services) as well as the potential reductions to the developable land area related to environmental sensitive areas, it appears premature to identify a quantum of land to be set aside at the Airport Industrial Area for industrial purposes. Once the direct land needs of the airport are determined, the remaining net developable area for industrial development should be determined through further analysis initiated by the City.

In terms of market potential, the development potential of the Airport Industrial Area for indirect employment uses should be considered a longer-term priority for the City. The lands in the

South Expansion Area, south of the City limits between Highway 2 and 3 represent the most logical area for future industrial development due to their proximity to main highways and location of existing industrial uses in the vicinity. Hence, these lands should take precedence for future industrial development.

North East Industrial Area

North East Industrial Area, covering 1,961 gross acres, is situated in the northeast corner of the City. The area includes the site of the old Weyerhaeuser pulp and paper mill and neighbouring lands. Zoned M1-Heavy Industry, the area is intended for heavy industry and forest-related industry.

Since the closure of the Weyerhaeuser pulp and paper mill in 2006, it has been the City's hope to reopen the mill or use it for an alternative use. There is an opportunity to increase the utilization of these lands, albeit, the land use designation (i.e. heavy industry) limits potential employment density. Technically the land is not fully vacant and for this reason has been excluded from the industrial lands inventory.

5.2.4 Future Commercial and Industrial Expansion Area

The City has identified three future expansion areas to the south of the City (outside of City limits) as future commercial and industrial lands which are not currently designated. As such, these have not been included in the commercial or industrial land inventory. These lands include the South Commercial – West Side located along Highway 2, South Commercial-East Side located along Highway 3, and the South Industrial Expansion Area, situated between the aforementioned commercial lands. The two commercial areas have a combined gross area of 1,304 acres and the industrial lands totals 2,681 gross acres, as summarized in Table 5-8. These lands are discussed further in Chapter 8 in the context of industrial and commercial land needs.

Table 5-8
City of Prince Albert
Commercial/Industrial Future Expansion Area

Development/Area	Gross Area	
	Acres	Ha
<i>Future Commercial Expansion</i>		
South Commercial - West Side	772	312
South Commercial - East Side	532	215
Total Commercial	1,304	528
<i>Future Industrial Expansion</i>		
South Industrial Future Expansion	2,681	1,085
Total Industrial	2,681	1,085

Source: City of Prince Albert

5.2.5 Institutional Land Supply

Vacant Institutional lands are summarized in Table 5-9. This includes 47 net acres (19 net ha) in the SIAST lands, located east of the SIAST campus and 59 net acres (24 net ha) in West Hill. The West Hill institutional lands include lands next to the Victoria Hospital, which are intended for health-related uses, lands adjacent to the suburban commercial centre intended for religious and community-related uses and lands set aside for schools.

Table 5-9
City of Prince Albert
Vacant Designated Institutional Lands

Development/Area	Gross Area		Net Area		
	Acres	Ha	Acres	Ha	
SIAST Lands	62.9	25.5	47.2	19.1	(1)
West Hill Area	78.7	31.8	59.0	23.9	(2)
Total	141.6	57.3	106.2	43.0	

1. Net to gross adjustment of 75% account for internal roads, other infrastructure, buffers.

2. As per West Hill Master Plan Land Use Concept Plan; Net to gross adjustment of 75% account for internal roads, other infrastructure, buffers.

5.3 Conclusions

Some key observations regarding the City of Prince Albert's residential and non-residential land supply are as follows:

- The City of Prince Albert has a total potential housing supply of 11,457 units.
- Two-thirds of the total potential housing supply is situated on the south side of the North Saskatchewan River in subdivisions that are registered but not built, under review, or on designated residential lands;
- One-third of the total potential housing units are on designated residential lands on the north side of the North Saskatchewan River and are considered developable in the long term;
- The City has relatively small amounts of short-term residential supply; 7% is registered but not built or under review while 93% of the residential supply is on designated lands;
- Crescent Acres, Southwood, and Adanac Pointe-Riverview are the main areas of residential development in the short term; the majority of supply is in the form of single family residential;
- Crescent Acres and West Hill will account for the majority of medium- and long-term residential development in the City;
- The housing supply offers a balanced mix of housing types and geographic locations;

- The City's commercial land supply totals 61 net acres located in four distinct areas. The lands are well positioned for commercial use and intended primarily for large format, highway commercial, restaurants, and smaller retailers;
- The industrial land supply totals 52 net acres. The lands are situated in four established industrial areas which are approaching buildout;
- Additional designated industrial lands in the Airport Industrial Area may be developable in the long term; the net developable area of these lands for industrial/commercial development is unknown at this time;
- The City has identified further commercial and industrial lands south of the City limits totalling 1,304 gross acres and 2,681 gross acres, respectively; and
- Prince Albert's designated vacant institutional land supply totals 106 acres.

6. POLICY CONTEXT

6. POLICY CONTEXT

Future residential and non-residential land needs have been assessed in the context of Provincial legislation and planning policy for the Province of Saskatchewan and the local and regional level. This includes the *Planning and Development Act, 2007*, City of Prince Albert Development Plan and the Prince Albert District Community Plan.

The Planning and Development Act, 2007

The Planning & Development Act, 2007 governs all municipal planning and development in the Province of Saskatchewan. This includes providing municipalities with the authority to create a Development Plan which provides a framework to manage land use, subdivision, municipal services and public utilities.

The Planning and Development Act, 2007, received Royal Assent in March 2007. It establishes a community planning framework that promotes economic growth, environmental sustainability, social and cultural development and sustainable communities. The Act gives more authority and autonomy to local municipalities including the provision for two or more municipalities to participate in inter-jurisdictional planning.

City of Prince Albert Development Plan

The City of Prince Albert Development Plan, known as the *City of Prince Albert Official Community Plan* or *Plan Prince Albert* is presently in its final draft and will supersede the 1987 Policy Plan. Plan Prince Albert is a long range plan intended to direct future land use and development for the next 20 to 30 years and supports the objectives of the City's Strategic Plan and integrates various other City plans/studies.

Plan Prince Albert identifies that a priority for the City is to ensure that there is a steady supply of pre-serviced land within the City in order to manage growth effectively. The Plan identifies residential, commercial and industrial lands which are considered by the City as sufficient to accommodate forecast growth for the next 25 years. These lands are identified as being needed for the short term, intermediate term and long term, and include lands both north and south of the North Saskatchewan River and south of the City limits.

Plan Prince Albert emphasizes the importance for the City to maintain a long-term supply of residential land and that development should occur in an orderly manner that discourages urban sprawl. Plan Prince Albert also identifies the need for a variety of housing types based on changing socio-economic and demographic trends.

Prince Albert District Planning Commission and Community Plan

Formed in 1956, the Prince Albert District Planning Commission is an advisory body which promotes a regional approach to commercial and residential development. Members include the City of Prince Albert, the Rural Municipality (R.M.) of Prince Albert and the Rural Municipality (R.M.) of Buckland. The Prince Albert Planning District Development Plan applies to all future development within the R.M. of Prince Albert and R.M. of Buckland.

The *Prince Albert Planning District Official Community Plan* is currently under review and a revised plan is expected to be finalized in 2009. The Plan will provide goals, objectives and policies relating to future growth for the next 20 years. Part of this initiative includes the Prince Albert Planning District Preliminary Policies document which was prepared in April, 2009 and is subject to public consultation which will be incorporated into the revised Plan. The Prince Albert Planning District Preliminary Policies document proposes policies that discourage development which negatively impacts environmentally sensitive features, and policies that discourage the conversion of agricultural lands to development.

7. POPULATION, HOUSING AND EMPLOYMENT FORECAST

7. POPULATION, HOUSING AND EMPLOYMENT FORECAST

The population and household forecast, provided herein, is based on the firm's housing market-based methodology, as described in Chapter 2. A cohort-survival population forecast was also prepared in conjunction with the market-based forecast, as described in Chapter 2.

The employment forecast provided is largely based on the activity rate method, which is defined as the number of local jobs in the City, divided by the resident population, as described in Chapter 2.

The growth analysis provided herein is based on the findings detailed in Chapters 3 to 6. As previously identified, there are several regional/local demographic and economic drivers that are anticipated to drive future growth in Prince Albert. In accordance with the long-term planning horizon outlined in Plan Prince Albert, a 25-year (2009-2034) forecast period was established.

Given the broad range of existing, anticipated and potential economic and growth drivers, it became necessary to develop two long term growth forecasts for the City of Prince Albert:

- Medium Growth Scenario (base scenario); and
- High Growth Scenario.

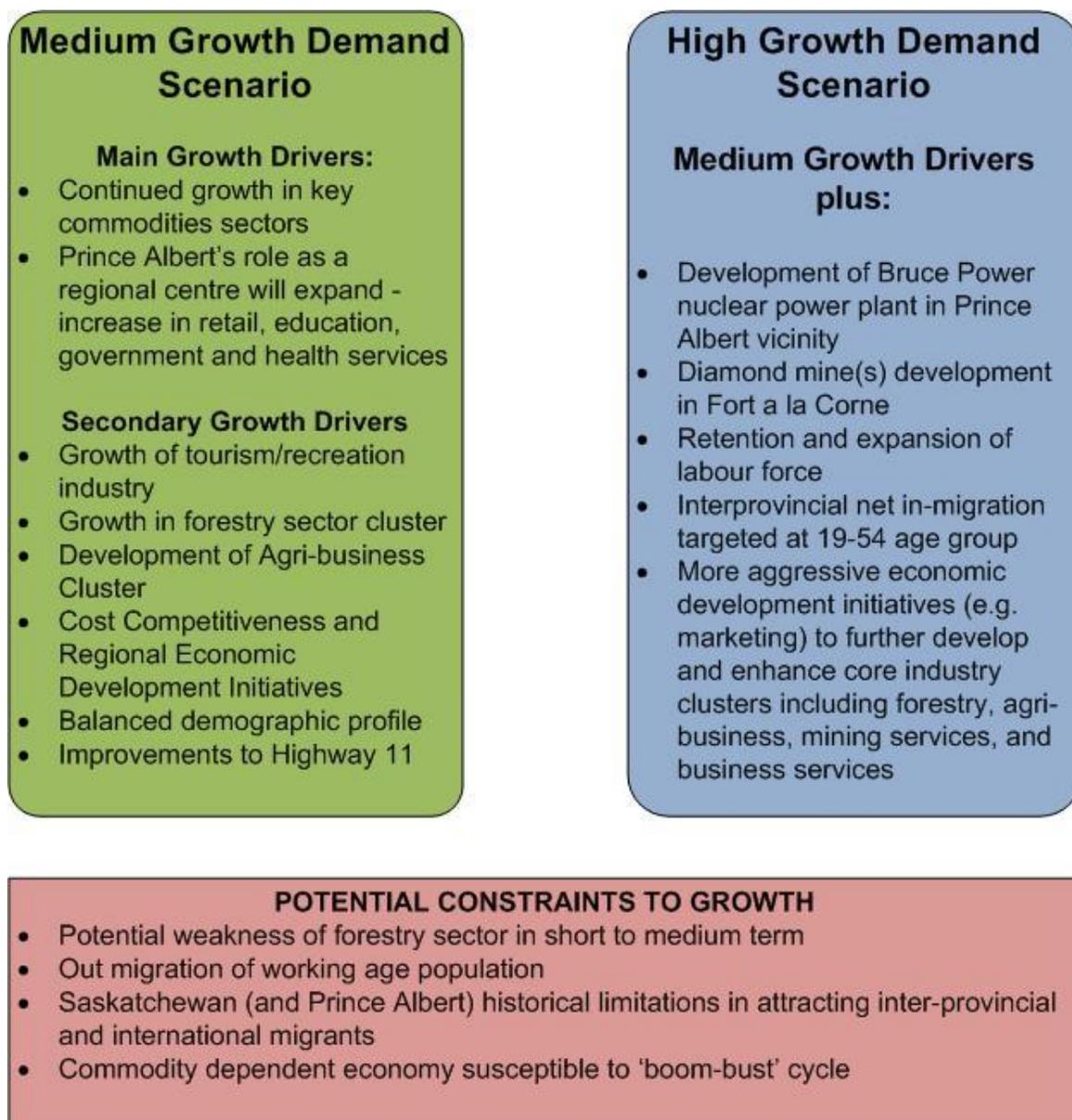
These two growth scenarios explore various levels of potential housing growth based on both historical trends and future prospects within the City of Prince Albert. A comprehensive review of current and evolving demographic and economic trends, as well as future development opportunities/constraints, was undertaken. Several factors were considered in the development of each growth forecast. These include:

- Historical housing and employment activity (i.e. residential building permits, housing completions, non-residential building permit values);
- Prospective housing growth trends by type (i.e. single/semi-detached, townhomes, apartments);
- Forecast population age structure;
- Forecast net migration, fertility rate and mortality rate trends; and
- Prospective employment growth by major sector (i.e. primary, work at home, industrial, commercial and institutional).

Each forecast scenario was generated using different assumptions regarding drivers and potential constraints of future growth as illustrated in Figure 7-1. The potential constraints

include factors that may curb growth potential under each scenario but could be mitigated through the long-term implementation of an economic development strategy.

Figure 7-1



7.1 Drivers of Future Growth and Potential Constraints

While Prince Albert's population and housing growth was relatively modest between 1986 and 2006, there are a number of factors which indicate that long-term growth will be considerably stronger, and will build on the economic growth experienced in 2007 and 2008. Expanding on

the analysis presented in Chapters 3 and 4, the following section summarizes the anticipated drivers to future population and employment growth.

7.1.1 Main Drivers of Future Growth

Main drivers of future growth reflected in both the Medium Growth and High Growth Scenarios include:

Continued Growth in Key Commodities Sectors

Saskatchewan's economy is expected to weather the recent financial crisis better than most other Canadian provinces. However, a continued economic slowdown for the remainder of 2009 and part of 2010 is forecast to yield GDP growth of 0.6% and 1.4%, respectively.¹ Saskatchewan's vast wealth in commodities, namely oil, uranium and potash will continue to drive the Province's economy in the short term and long term, and will directly and indirectly benefit Prince Albert. The financial crisis has had less of an impact on commodity-oriented regions such as Saskatchewan than more traditional manufacturing/industrial belts of Canada.

As detailed in Chapter 4, the long-term outlook for Saskatchewan's key commodities remains favourable:

- The price of crude oil has rebounded from its recent low of \$40 per barrel in February 2009. As of June 2009, the price was above \$70 per barrel and will likely continue to rise in 2010 with the economic recovery.² The long-term price outlook remains positive as global demand is expected to increase (particularly from emerging economies of China and India) as the economic recovery takes effect;
- The price of uranium (U_3O_8), though far below its peak of 2007, remains well above its historical low. Prices are anticipated to rise gradually in the short to medium term (2009 and 2017) with favourable long-term outlook given anticipated demand for nuclear energy; and
- The price of potash has remained relatively high through the recent financial crisis; however, demand has waned through the first quarter of 2009, which has resulted in reduced production.³ The medium- and long-term outlook for the sector remains favourable with resurgence in demand expected from China, India, Brazil and the U.S. when economic conditions improve.

¹ TD Economics, Special Report, Feb. 23, 2009.

² EIA, Official Energy Statistics, U.S. Government.

³ "Potash Corp. to continue output cuts until demand in China increases," National Post, May 15, 2009.

Prince Albert's Growing Importance as the Regional Centre

The importance of Prince Albert as a regional centre is anticipated to increase in the future.

- Prince Albert will continue to grow as a regional hub for retail, government, education and health services. As well, it is well positioned to attract population from rural areas as the region continues to urbanize. The urbanization will be partly driven by an aging population which will also be drawn to larger centres, such as Prince Albert, to have better access to health and other services.
- The City will continue to experience expansion in the retail sector, building on its already strong retail base. Development will be focused on large format and specialty retailers that will cater to the large market trade area.
- Prince Albert will continue to expand its post-secondary education facilities, including Saskatchewan Institute of Applied Science and Technology (SIAST) and traditional learning centres such as the Saskatchewan Indian Institute of Technologies (SIIT) and First Nations University (Northern Campus).
- The health sector will experience expansion as the aging population will place increased demands on these services.

7.1.2 Secondary Drivers of Future Growth

Tourism/Recreation Industry Growth

Prince Albert's location on the edge of the Canadian Shield and the gateway to northern Saskatchewan, with excellent natural attractions such as the Prince Albert National Park and a multitude of lakes and wilderness areas to the north, makes the City well poised to attract and develop eco-tourism and recreational opportunities. Prince Albert has just started to capitalize on the opportunities in this area and it is anticipated that this will be a growth sector in the forecast period.

Growth of Forestry Sector Cluster

As the provincial hub of the forestry sector, Prince Albert will continue to develop and diversify its forestry industry cluster, building on the success of the Saskatchewan Forestry Centre. Areas of future growth will include development of value-added secondary industries and additional research and development, and eco-friendly technologies development to serve the sector. Though the primary forestry sector is expected to remain stagnate in the short to medium term, there is optimism that the sector will recover in the long term as global demand

for lumber and pulp and paper resumes growth.¹ However, certain structural changes, such as decline in newsprint demand due to the Internet, will continue into the future.

Development of Agri-Business Industry

The Prince Albert area is well positioned to see a cellulosic ethanol industry cluster taking form. Iogen Corporation has been actively seeking to establish a \$250 million cellulosic ethanol plant in the Prince Albert area. In June 2009, the company signed a letter of intent with the Province to locate the plant at the site of the former Weyerhaeuser pulp and paper mill. Cellulosic ethanol is extracted from plant fiber such as straw or tree waste, of which Prince Albert has extensive supply from the forestry and agricultural sectors. It is anticipated that the project will likely proceed forward in the Prince Albert area in the medium term, helping revitalize the City's industrial base.

Balanced Demographic Profile

As highlighted in Chapter 3, Prince Albert's Aboriginal population represents over 36% of the City's total population and 70% of the Aboriginal population is under the age of 35. This relatively young Aboriginal population potentially offsets the trend of the aging population at large.

Cost Competitiveness and Expanding Regional Economic Development Initiatives

The City of Prince Albert has a competitive cost structure for business, affordable cost of living, and is engaged in active economic development activities which will facilitate economic development and employment growth. Key highlights include:

- Prince Albert is a very cost competitive place to conduct business. A 2004 KMPG cost competitiveness study found Prince Albert to be the most cost competitive of any mid-west Canadian or American City surveyed²;
- As illustrated in Chapter 3, the City has a relatively low cost of living in terms of housing costs; and
- In May 2009, the Province announced the creation of the North Central Enterprise Region (NCER) which replaces the REDA (Regional Economic Development Agency) program. Based in Prince Albert and serving the Region, the initiative will see expanded funding and services for regional economic development capitalizing on the vast economic potential of the Region.

¹Canada's Forest Products Industry Economic Outlook, Forest Products Association of Canada, Dec. 2008.

²"Saskatchewan Cities Competitive," news release, February 19, 2004, Government of Saskatchewan

Improvements to Highway 11

Highway 11 is the primary highway connection between Prince Albert and the southern part of the Province. The committed future twinning (four laning) of Highway 11 between Saskatoon and Prince Albert will improve Prince Albert's accessibility to the rest of Province and beyond. This will enhance the City's economic development potential and make it more competitive with urban centres in the southern part of the province. Recently announced federal and provincial funding will move up the completion of the project from 2016 to 2012.

7.1.3 Potential Drivers of Growth (High Growth Scenario)

The City of Prince Albert is currently poised to benefit from two key developments that, if developed, would significantly increase the rate of growth of the City. These are as follows:

- Development of Bruce Power nuclear power plant in the Prince Albert area; and
- Diamond mining at Fort a la Corne.

At this point, the development of these projects (and their timing) is not certain but plausible in the forecast period. For the purposes of the High Growth Scenario, the development of both these projects is assumed to occur and is reflected in the forecast.

There are also initiatives that the City can undertake, building on its strengths and opportunities that can enhance some of the key secondary growth drivers highlighted in the Medium Growth Scenario. These include:

- Retention and expansion of the local labour force pool; and
- More aggressive economic development initiatives (e.g. marketing, business retention and expansion programs) to further develop and enhance core industry clusters including forestry, agri-business, mining services and business services.

Under the High Growth Scenario, it is assumed that the City will experience a positive impact to population and employment growth as a direct response to success experienced in local marketing and economic development initiatives.

Bruce Power Nuclear Power Plant

Bruce Power is currently evaluating the development of a nuclear power plant in Saskatchewan. It is estimated that such a facility would generate 2,000 jobs during construction, and 1,000 permanent jobs (plus 900 indirect jobs) once in operation.¹ The Prince Albert economic sub-

¹Saskatchewan 2020 - Report on Bruce Power's Feasibility Study, Bruce Power, November 2008

region, which spans east-west from the Alberta border to Manitoba border and includes the communities of Lloydminster, the Battlefords and Prince Albert, is the “most viable” location to construct the facility.¹ Prince Albert was identified as one of three potential sites, the other two being North Battleford and Lloydminster. The power plant could be operational by 2020. It is anticipated that under the High Growth Scenario, the plant will be located in the vicinity of Prince Albert and will directly and indirectly benefit the City.

Fort a la Corne Diamond Mining

As highlighted in Chapter 4, the Fort a la Corne Diamond area offers significant economic potential with two large open pit mines planned for production. Despite the financial crisis which has dampened exploration and development activity in the area, there is a possibility that with an economic turnaround, characterized by a return to stronger credit and financing availability and higher demand for diamonds, the mine project(s) will be developed in the medium and long term and this is reflected in the High Growth Scenario.

It is expected that mine development would begin around 2015 with production to commence around 2019. The mine(s) is expected to have a long-term life span (25+ years) and could generate as many as 3,000 jobs (750 direct, and 2,300 indirect and induced) in the Region.²

Retention and Expansion of Labour Force

Under the High Growth Scenario, it is assumed that increased success will be experienced with respect to the retention and expansion of the local/regional labour force pool in comparison to the Medium Growth Scenario. A vibrant labour market is a valuable resource that attracts new employers to the City. Example initiatives would include, but are not limited to:

- **Youth retention programs** (e.g. apprenticeship and youth employment programs) that encourage Prince Albert youth to remain in the City to work and to attract those who have left the City to pursue post-secondary education and other opportunities to return;
- **Marketing initiatives** that encourage in-migration of working age people from other parts of Canada and beyond to locate to Prince Albert because of the quality of life, amenities and employment opportunities that the City offers.

¹Saskatchewan 2020 - Report on Bruce Power’s Feasibility Study, Bruce Power, November 2008

²The Diamond Industry - An Opportunity and Impact Assessment, PAREDA, May 2008.

Economic Development Strategy

The City will undertake and implement an economic development strategy to further develop and enhance core industry clusters including forestry, agri-business, mining services and business services. The focus will be on value-added industries which generate high-wage employment. Key areas of focus should include:

- Marketing programs that attract new businesses to the City;
- Business retention and expansion (BR+E) programs;
- Entrepreneur attraction through “Quality of Place”;
- Continued partnerships with senior levels of government;
- Increased public-private partnerships; and
- Expanded regional economic development.

7.2 Population and Housing Forecast

Table 7-1 and Figure 7-2 summarize the forecast population growth under each scenario.

- Under the Medium and High Growth Scenarios, the population of Prince Albert is forecast to reach 42,000 and 49,200 by 2034, respectively; and
- This represents an average of 0.8% to 1.5% growth annually under the Medium and High Growth Scenarios, respectively.

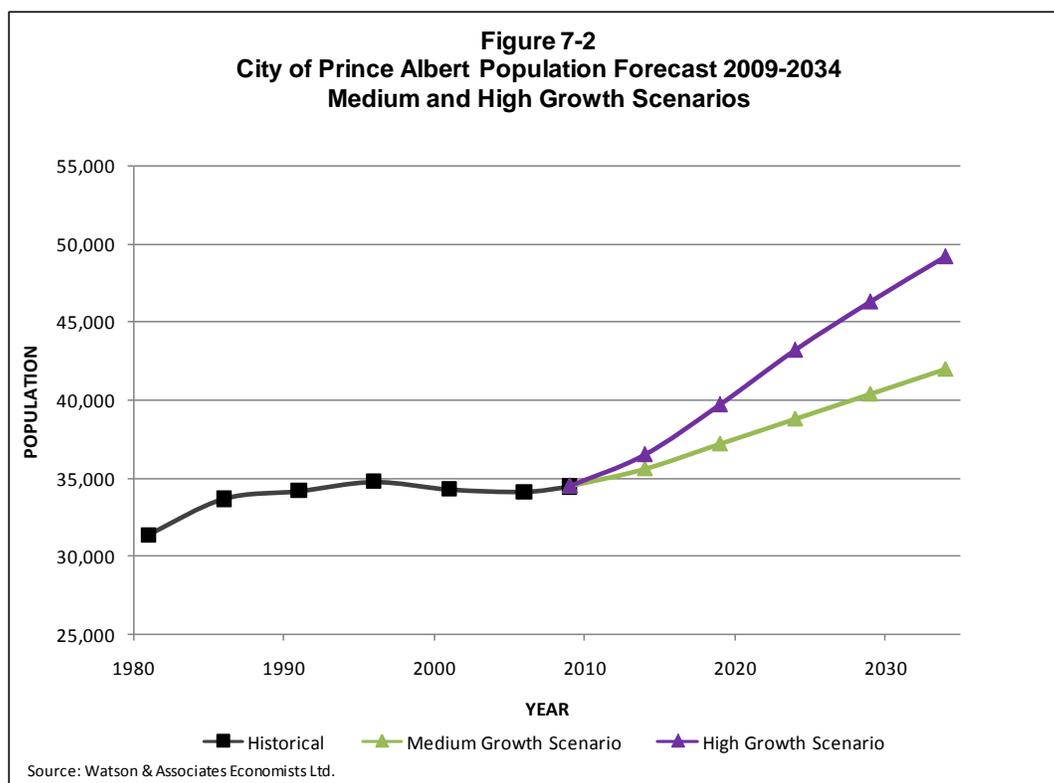
**Table 7-1
City of Prince Albert
Population Forecast - Medium and High
Growth Scenarios¹**

Year	Medium Growth Scenario	High Growth Scenario
2006	34,138	34,138
2009	34,500	34,500
2014	35,600	36,500
2019	37,200	39,700
2024	38,800	43,200
2029	40,400	46,300
2034	42,000	49,200
Average Annual Population Growth		
2006-2009	121	121
2009-2014	220	400
2014-2019	320	640
2019-2024	320	700
2024-2029	320	620
2029-2034	320	580
2009-2034	300	588
Average Annual Growth Rate		
2006-2009	0.4%	0.4%
2009-2014	0.6%	1.1%
2014-2019	0.9%	1.7%
2019-2024	0.8%	1.7%
2024-2029	0.8%	1.4%
2029-2034	0.8%	1.2%
2009-2034	0.8%	1.5%

1. Excludes Census undercount.

Note: Population figures have been rounded

Source: Watson & Associates Economists Ltd.



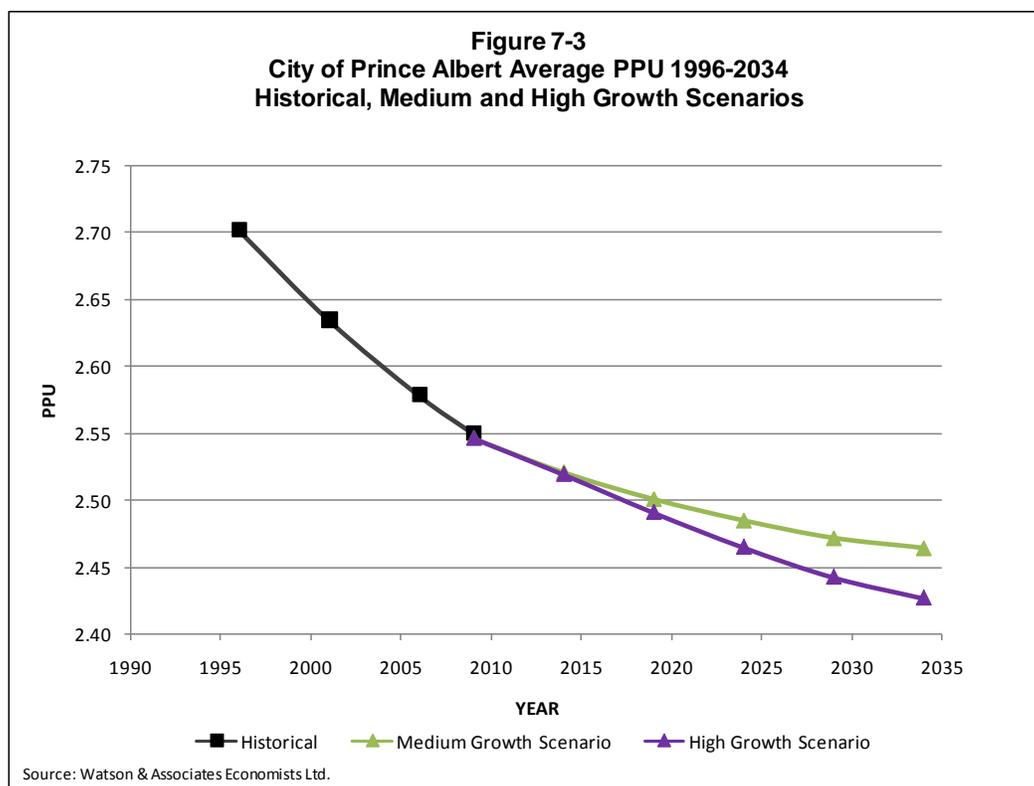
Forecast housing occupancy (i.e. persons per unit or PPU), is based on W&A's housing market forecast approach as described in Section 2. This approach to household forecasting provides a direct correlation between population and housing based on a comprehensive examination of the City's existing stock by age and dwelling type. Based on this analysis, new housing units constructed over the forecast period are forecast to have the following PPU levels:

- Low Density – 3.19
- Medium Density – 2.01
- High Density – 1.52

Over the forecast period, the average occupancy of existing households is expected to decline, largely as a result of the City's aging population and associated population decline in existing households. Household occupancy has a major impact on the correlation between future housing and associated net population growth. Figure 7-3 illustrates forecast PPU levels from 1996 to 2034 under the two growth scenarios. Key observations include:

- The City's average occupancy levels are forecast to decline from 2.55 in 2009 to 2.46 and 2.43 in 2034 under the Medium Growth and High Growth forecasts, respectively;
- As demonstrated, PPU levels are expected to decline at a slightly slower rate over the next 25 years than in the 1996-2006 period;

- It is anticipated that PPU levels will gradually stabilize during the post 2034 period; and
- Comparatively, housing occupancy levels are forecast to decline at a slightly slower rate in Prince Albert relative to other municipalities, due to a larger “under 25” population.



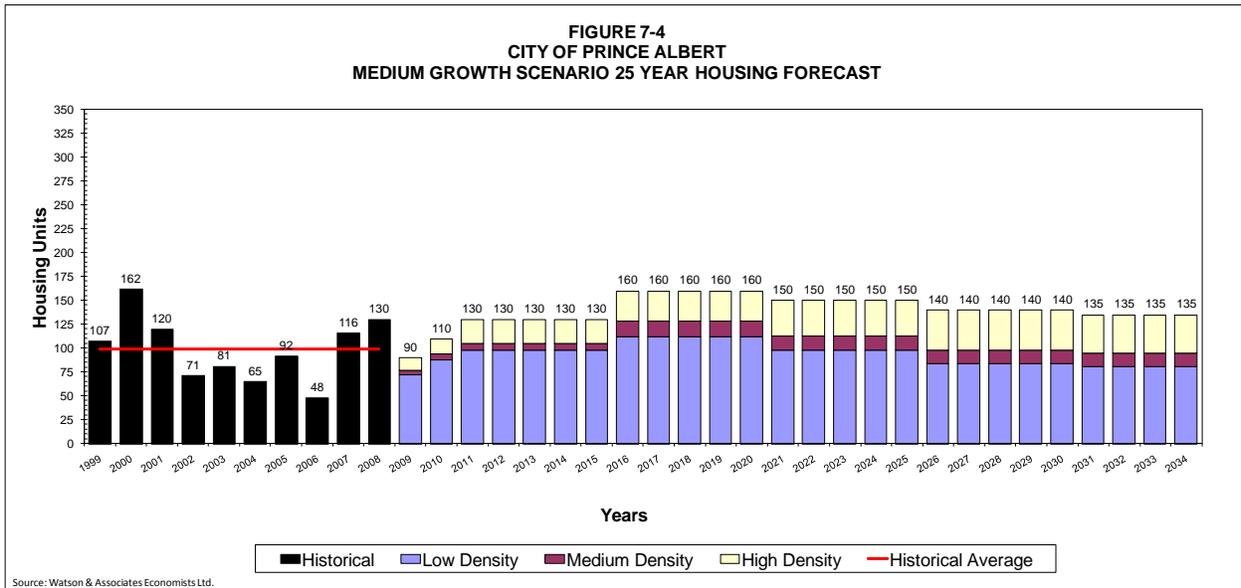
7.2.1 Medium Growth Scenario – Population and Housing Growth

The Medium Growth Scenario assumes a moderate rate of housing growth for Prince Albert, building on the housing activity experienced in 2007 and 2008.

Figure 7-4 graphically illustrates forecast annual housing growth for the City of Prince Albert over the 2009 to 2034 period against historical building permit activity over the past 10-year period (1999-2008). Table 7-2 summarizes the results of the Medium Growth Scenario. Observations include:

- Housing activity is expected to decline slightly during the 2009 to 2010 period from recent 2007-2008 levels, due to the current global economic downturn, followed by a recovery in the post 2010 period;
- Housing activity during 2011-2015 is forecast to be similar to that experienced in 2008, averaging 130 units per year. Post 2015, housing activity is expected to increase marginally to 2021 and then taper off slightly thereafter due to the gradual aging of the population and labour force;

- A total of 3,510 housing units are forecast to be built between 2009 and 2034, an average of about 140 per year, of which 67% are low density, 9% are medium density, and 24% are high density;
- Under this scenario, the City’s population is expected to increase by 7,500 from 2009 to 2034; and
- The percentage of new housing is expected to shift moderately towards medium and high-density housing during the medium and longer term to reflect an aging population and increased need for more affordable housing consisting primarily of apartments and townhouses.



**Table 7-2
City of Prince Albert
Medium Growth Scenario 2009-2034 Population and Household Forecast**

Year	Population ¹	Households				Total	Persons per Unit (PPU)
		Low Density (Single Family, Semi-Detached)	Medium Density (Townhouses, Rowhouses)	High Density (Apartments, Condominiums)	Other (Mobile Homes)		
2006	34,138	9,055	790	3,370	25	13,240	2.58
2009	34,500	9,310	810	3,390	25	13,530	2.55
2014	35,600	9,770	840	3,490	25	14,120	2.52
2019	37,200	10,300	910	3,640	25	14,860	2.50
2024	38,800	10,820	980	3,810	25	15,630	2.48
2029	40,400	11,260	1,060	4,010	25	16,350	2.47
2034	42,000	11,670	1,130	4,220	25	17,040	2.46
Incremental Change							
2009-2014	1,100	460	30	100	0	590	
2009-2019	2,700	990	100	250	0	1,330	
2009-2024	4,400	1,510	170	420	0	2,100	
2009-2029	6,000	1,950	250	620	0	2,820	
2009-2034	7,500	2,360	320	830	0	3,510	

1. Excludes Census undercount

Note: Population and household units have been rounded

Source: Watson & Associates Economists Ltd., 2009

7.2.2 Medium Growth Scenario – Population Age Structure

Table 7-3 illustrates the forecast population composition by major age group in five-year increments over the 2009-2034 period under the Medium Growth Scenario. The key findings are:

- The population share of age group 18 and under and those 55+ are anticipated to increase slightly over the forecast period; and
- The percentage share of the 19-54 age group will decrease by 2% over the forecast period.

TABLE 7-3
CITY OF PRINCE ALBERT (MEDIUM GROWTH SCENARIO)
FORECAST PERCENTAGE POPULATION BY MAJOR AGE GROUP, 2009-2034

Year	0-18	19-54	55-74	75+	Total
2009	29.0%	46.7%	17.0%	7.4%	100.0%
2014	28.8%	45.7%	18.8%	6.7%	100.0%
2019	30.1%	43.2%	20.4%	6.3%	100.0%
2024	31.2%	42.0%	20.1%	6.7%	100.0%
2029	30.7%	42.9%	19.1%	7.2%	100.0%
2034	29.8%	44.7%	17.7%	7.8%	100.0%
Change in Growth 2009-2034	0.9%	-2.0%	0.6%	0.5%	

Forecast includes net Census undercount of approximately 2.14%.
 Source: Watson & Associates Economists Ltd., June, 2009.

7.2.3 Medium Growth Scenario – Net Migration Trends

Tables 7-4a and 7-4b illustrate net migration by age group over the 2009-2034 forecast period under the Medium Growth Scenario. Key conclusions are:

- The City of Prince Albert is anticipated to have net out-migration during 2009-2014, consisting primarily of the working age population (19-54 years of age);
- This trend is expected to reverse after 2014 with modest net migration initially, which will increase during the course of the forecast period; and
- The forecast net migration over the latter half of the forecast period will contain a growing share of working age population.

TABLE 7-4a
CITY OF PRINCE ALBERT (MEDIUM GROWTH SCENARIO)
TOTAL NET MIGRATION BY MAJOR AGE GROUP, 2009-2034

Major Age Group	2009-2014	2014-2019	2019-2024	2024-2029	2029-2034
0-18	(92)	8	62	108	130
19-54	(185)	40	188	245	243
55-74	64	64	122	144	127
75+	65	49	120	130	114
Total	(148)	161	491	627	614

Source: Watson & Associates Economists Ltd., June, 2009.

TABLE 7-4b
CITY OF PRINCE ALBERT (MEDIUM GROWTH SCENARIO)
PERCENTAGE NET MIGRATION BY MAJOR AGE GROUP, 2009-2034

Major Age Group	2009-2014	2014-2019	2019-2024	2024-2029	2029-2034
0-18	-62.3%	4.9%	12.6%	17.2%	21.2%
19-54	-125.0%	25.0%	38.2%	39.1%	39.6%
55-74	43.2%	39.7%	24.8%	23.0%	20.6%
75+	44.1%	30.4%	24.4%	20.8%	18.6%
Total	-100.0%	100.0%	100.0%	100.0%	100.0%

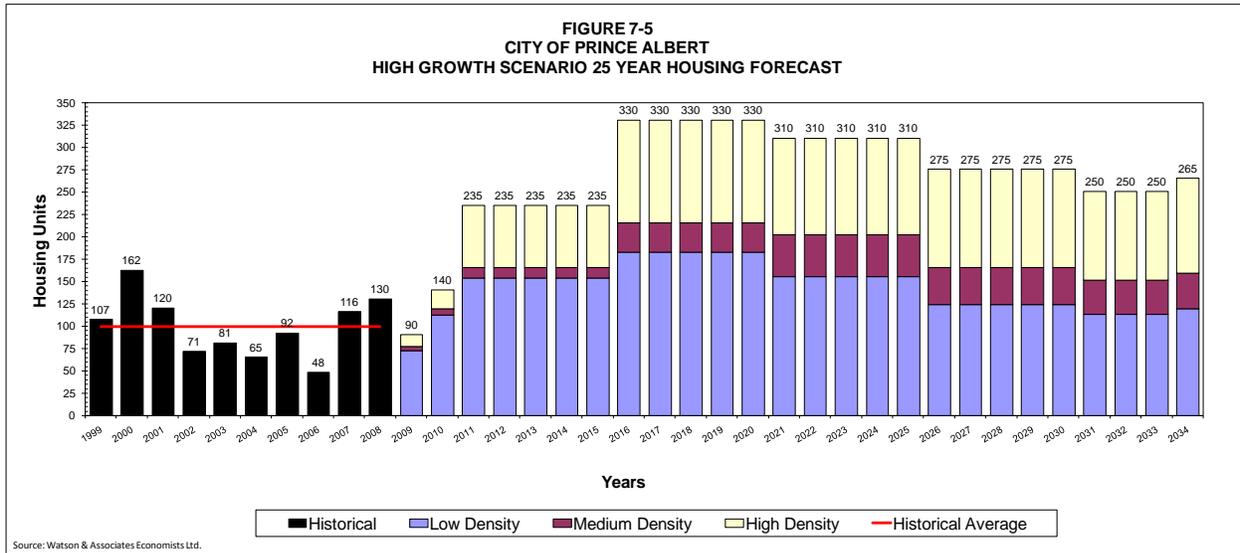
Source: Watson & Associates Economists Ltd., June, 2009.

7.2.4 High Growth Scenario – Population and Housing Growth

Figure 7-5 graphically illustrates forecast annual housing growth for the City of Prince Albert over the 2009 to 2034 period against historical building permit activity over the past 10-year period (1999-2008) under the High Growth Scenario. Table 7-5 summarizes the results of the High Growth Scenario. Observations include:

- Housing activity is expected to decline slightly in 2009 period from recent 2007-2008 levels due to the current global economic downturn, followed by a recovery in 2010;
- Housing activity during 2011-2015 is forecast to be considerably stronger than that experienced in recent decades, averaging 235 units per year. Post 2015, housing activity is expected to increase significantly, to an average of 330 units per year with the anticipated development of diamond mine(s) at Fort a la Corne and the Bruce Power nuclear power plant;
- A total of 6,730 housing units are forecast to be built between 2009 and 2034, an average of about 269 per year, of which 53% are low density, 12% are medium density, and 35% are high density;
- Under this scenario, the City's population is expected to increase by 14,700 from 2009 to 2034; and

- The percentage of new housing is expected to shift steadily towards medium and high-density housing during the medium and longer term to reflect an aging population and increased need for a broader range of housing types (including affordable housing) to accommodate a growing labour force.



**Table 7-5
City of Prince Albert
High Growth Scenario 2009-2034 Population and Household Forecast**

Year	Population ¹	Households				Total	Persons per Unit (PPU)
		Low Density (Single Family, Semi-Detached)	Medium Density (Townhouses, Rowhouses)	High Density (Apartments, Condominiums)	Other (Mobile Homes)		
2006	34,138	9,055	790	3,370	25	13,240	2.58
2009	34,500	9,310	810	3,390	30	13,530	2.55
2014	36,500	9,950	860	3,630	30	14,470	2.52
2019	39,700	10,810	980	4,120	30	15,930	2.49
2024	43,200	11,640	1,190	4,670	30	17,520	2.46
2029	46,300	12,320	1,410	5,220	30	18,960	2.44
2034	49,200	12,900	1,600	5,730	30	20,260	2.43
Incremental Change							
2009-2014	2,000	640	50	240	0	940	
2009-2019	5,200	1,500	170	730	0	2,400	
2009-2024	8,700	2,330	380	1,280	0	3,990	
2009-2029	11,900	3,010	600	1,830	0	5,430	
2009-2034	14,700	3,590	790	2,340	0	6,730	

1. Excludes Census undercount

Note: Population and household units have been rounded

Source: Watson & Associates Economists Ltd., 2009

7.2.5 High Growth Scenario – Population Age Structure

Table 7-6 summarizes the City of Prince Albert's forecast population composition by major age group in five-year increments over the 2009-2034 period under the High Growth Scenario. Key findings include:

- The 55+ age group is anticipated to experience the largest growth in percentage terms. Over the next 25 years, the percentage of persons aged 55+ and older will increase from 24% in 2009 to 32% in 2034; and
- While the share of the 19-54 age group will decline by nearly 5% over the forecast period, the age group will experience a strong population increase during the forecast period.

TABLE 7-6
CITY OF PRINCE ALBERT (HIGH GROWTH SCENARIO)
FORECAST PERCENTAGE POPULATION BY MAJOR AGE GROUP, 2009-2034

Year	0-18	19-54	55-74	75+	Total
2009	29.0%	46.7%	17.0%	7.4%	100.0%
2014	28.3%	45.4%	19.1%	7.2%	100.0%
2019	28.4%	42.1%	21.9%	7.6%	100.0%
2024	28.2%	40.5%	22.6%	8.7%	100.0%
2029	27.0%	41.0%	22.7%	9.3%	100.0%
2034	25.9%	42.1%	22.1%	10.0%	100.0%
Change in Growth 2009-2034	-3.1%	-4.6%	5.1%	2.6%	

Forecast includes net Census undercount of approximately 2.14%.

Source: Watson & Associates Economists Ltd., June, 2009.

7.2.6 High Growth Scenario – Net Migration Trends

Tables 7-7a and 7-7b illustrate the anticipated net migration by age group during the 2009-2034 period under the High Growth Scenario. Key observations include:

- Total net migration levels are forecast to be relatively high compared to recent historical levels and will peak during 2024-2029;
- Net migration is expected to be relatively well balanced over the 2009-2034 period; and
- The working age population (19-54) share of total net migration is forecast to increase over the course of the forecast period.

TABLE 7-7a
CITY OF PRINCE ALBERT (HIGH GROWTH SCENARIO)
TOTAL NET MIGRATION BY MAJOR AGE GROUP, 2009-2034

Major Age Group	2009-2014	2014-2019	2019-2024	2024-2029	2029-2034
0-18	(10)	103	350	594	675
19-54	145	524	1,116	1,286	1,254
55-74	297	912	950	804	676
75+	298	672	833	688	593
Total	730	2,211	3,249	3,372	3,198

Source: Watson & Associates Economists Ltd., June, 2009.

TABLE 7-7b
CITY OF PRINCE ALBERT (HIGH GROWTH SCENARIO)
PERCENTAGE NET MIGRATION BY MAJOR AGE GROUP, 2009-2034

Major Age Group	2009-2014	2014-2019	2019-2024	2024-2029	2029-2034
0-18	-1.4%	4.6%	10.8%	17.6%	21.1%
19-54	19.9%	23.7%	34.4%	38.1%	39.2%
55-74	40.6%	41.3%	29.2%	23.8%	21.1%
75+	40.9%	30.4%	25.6%	20.4%	18.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Watson & Associates Economists Ltd., June, 2009.

7.3 Forecast Employment Growth

As indicated in Chapter 2, the employment forecast is largely based on the activity rate method, which is defined as the number of jobs in the City divided by the number of residents. In forecasting long-term employment trends for the City, the following employment indicators were considered:

- Historical Census employment growth for the City of Prince Albert;
- Historical non-residential building permit activity by employment sector (1999-2008);
- Forecast of employment growth/decline for major industry sectors;
- Impacts of identified economic drivers on long-term employment growth rates; and
- A review of major employment prospects for the City of Prince Albert and the surrounding area.

7.3.1 Medium Growth Scenario Employment

Table 7-8 summarizes the employment forecast growth totals in accordance with the Medium Growth forecast summarized in Section 7.2.

Over the 2009-2034 forecast period, all employment sectors, except primary (e.g. forestry, agriculture), are anticipated to experience steady employment growth. The following observations have been made:

- Total employment is forecast to grow by 3,720 over the 2009 to 2034 period;
- Future industrial employment growth in Prince Albert is anticipated to be low to moderate, accounting for 18% of employment growth. Employment growth opportunities exist in sectors primarily related to construction, transportation, warehousing, distribution and agri-business;
- Population-related/commercial represents the largest employment growth sector in Prince Albert, comprising approximately 46% of total employment growth. A large portion of this employment growth is directly related to population-related employment sectors such as retail and accommodation/food services. The majority of tourism-related employment is also included in the commercial employment category;
- Prince Albert is anticipated to experience a moderate employment increase in the institutional sector, largely driven by the need for increased health, higher education and government services and other institutional facilities (i.e. cultural, religious, schools) associated with population growth. Institutional employment growth is forecast to account for 31% of total employment growth; and
- Over the next 25 years, increased opportunities will exist for work at home employment through improved telecommunication technology, increased opportunities related to telecommuting and potential work schedule flexibility, most notably in knowledge-based employment sectors. Given the significant forecast increase in the 55+ population, it is likely that an increased number of working and semi-retired residents will be seeking lifestyles which will allow them to work from home on a full-time or part-time basis.

Table 7-8
City of Prince Albert
Medium Growth Scenario Employment, 2009 to 2034

Period	Population	Activity Rate	Employment					Total
			Primary	Work at Home	Industrial	Population Related	Institutional	
2006	34,138	0.480	135	720	2,238	7,023	6,265	16,380
2009	34,500	0.477	135	725	1,740	7,435	6,410	16,445
2014	35,600	0.480	135	760	1,815	7,785	6,605	17,105
2019	37,200	0.482	140	795	1,955	8,205	6,820	17,910
2024	38,800	0.483	140	830	2,120	8,535	7,130	18,755
2029	40,400	0.483	145	865	2,280	8,840	7,375	19,505
2034	42,000	0.480	145	885	2,415	9,140	7,580	20,165
Incremental Change								
2009-2014	1,100	0.003	0	30	80	355	195	660
2009-2019	2,700	0.005	5	65	215	770	410	1,465
2009-2024	4,400	0.006	5	105	380	1,100	720	2,310
2009-2029	6,000	0.005	10	140	545	1,405	965	3,060
2009-2034	7,500	0.003	10	160	680	1,705	1,170	3,720

Note: Population and Employment numbers have been rounded

Source: Watson & Associates Economists Ltd.

7.3.2 High Growth Scenario Employment

Table 7-9 summarizes the employment under the High Growth Scenario summarized in Section 7.2.

Over the 2009-2034 forecast period, all employment sectors, except primary (e.g. forestry, agriculture), are anticipated to experience strong employment growth. The following observations have been made:

- Total employment will grow by 8,485 over the 2009 to 2034 period;
- Future industrial employment growth in Prince Albert is anticipated to be high, accounting for 32% of employment growth. Significant employment opportunities will exist in sectors related to energy, advanced manufacturing, agri-business, construction, transportation, warehousing and distribution. A large share of industrial employment growth will be indirect employment from the Fort a la Corne diamond mining and Bruce Power nuclear power plant facility (both situated outside of the City of Prince Albert);
- In the medium and long term, the potential opportunity for a mining supply and services cluster in Prince Albert to serve the diamond mining activities at Fort a la Corne is identified. This would include mining suppliers and services such as diamond cutting/polishing, drilling companies, mining construction and engineering firms, light manufacturing of mine equipment and supplies, and exploration and environmental services. Mining companies would also likely have offices located in Prince Albert.
- The Bruce Power nuclear power plant will generate indirect industrial employment in the areas of engineering services, research and development, company management and light manufacturing of plant supplies.
- Forestry-related and agri-business industrial employment growth, meanwhile, is expected to be somewhat higher than under the Medium Growth Scenario;
- Population-related/commercial represents the largest employment growth sector in Prince Albert, comprising approximately 34% of total employment growth. A large portion of this employment growth is directly related to population-related employment uses such as retail and accommodation/food services. Spin offs from the diamond mining and nuclear power plant will spur an increase in professional services including accounting, law firms, insurance and business consultants. The majority of tourism-related employment is also included in the commercial employment category;
- Prince Albert is anticipated to experience a moderate employment increase in the institutional sector in areas identified under the Medium Growth Scenario, and will be largely driven by the associated population growth. Prince Albert's role as an education hub will expand as academic research and innovation, technical training and post-secondary programs related to the diamond mining sector are anticipated to emerge.

Institutional employment growth is forecast to account for 30% of total employment growth; and

- Over the next 25 years, increased opportunities will exist for work at home employment as described under the Medium Growth Scenario.

Table 7-9
City of Prince Albert
High Growth Scenario Employment, 2009 to 2034

Period	Population	Activity Rate	Employment					
			Primary	Work at Home	Industrial	Population Related	Institutional	Total
2006	34,138	0.480	135	720	2,238	7,023	6,265	16,380
2009	34,500	0.477	135	725	1,740	7,435	6,410	16,445
2014	36,500	0.493	135	770	2,570	7,755	6,745	17,975
2019	39,700	0.507	140	845	3,395	8,440	7,300	20,115
2024	43,200	0.510	140	925	3,910	9,140	7,905	22,020
2029	46,300	0.508	145	990	4,195	9,760	8,455	23,540
2034	49,200	0.507	145	1,045	4,450	10,360	8,925	24,930
Incremental Change								
2009-2014	2,000	0.016	0	40	835	320	335	1,530
2009-2019	5,200	0.030	5	115	1,655	1,005	890	3,670
2009-2024	8,700	0.033	5	195	2,170	1,705	1,490	5,570
2009-2029	11,900	0.031	10	265	2,455	2,325	2,040	7,095
2009-2034	14,700	0.030	10	320	2,715	2,925	2,515	8,485

Note: Population and Employment numbers have been rounded

Source: Watson & Associates Economists Ltd.

7.4 Conclusions

The City of Prince Albert population, housing and employment forecast is summarized as follows:

- W&A has prepared two 25-year (2009-2034) population, housing, and employment forecasts – Medium Growth Scenario and High Growth Scenario;
- The two forecasts are based on differing sets of assumptions regarding drivers of future growth;
- The Medium Growth Scenario is considered the “most likely” scenario and is recommended as the basis for the City’s 2009 Development Levies and Servicing Fees Study, as well as other long-term land use planning, infrastructure and capital budgeting requirements;
- The Medium Growth Scenario (base scenario) anticipates moderate housing growth which builds on the momentum established in 2007 and 2008. Main drivers of future growth include continued strength in the key commodities sectors of the provincial economy (crude oil, uranium, and potash), and the City’s growing importance as a regional centre in the areas of retail, government, education and health services;
- Under the Medium Growth Scenario, the City’s housing growth totals 3,510 units over the forecast period and the population is anticipated to increase to 42,000 by 2034;

- The High Growth Scenario forecasts a considerably stronger rate of housing growth than in the Medium Growth Scenario fuelled by the main drivers established in the Medium Growth Scenario, along with a significant set of additional drivers. These include the development of the Bruce Power nuclear power plant in the Region, the development of diamond mining in Fort a la Corne, and City policies and economic development programs/strategies which aggressively work to retain and expand the local/regional labour force and further develop and enhance industry clusters including agri-business, forestry, mining, energy and business services;
- Under the High Growth Scenario, the City's population is anticipated to increase to 49,200 by 2034 with total housing growth of 6,730 units;
- The overall PPU is expected to decline during the next 25 years, albeit at a slower rate than during the 1996-2006 period, and the rate of decline will slow during the course of the forecast period;
- Under the Medium Growth Scenario, the City of Prince Albert is anticipated to have net out-migration during 2009-2014 which will reverse after 2014 with increasing net-in migration for the duration of the forecast period;
- Under the High Growth Scenario, the City is forecast to have relatively high net in-migration compared to historical levels including a significant share of working age population;
- Employment growth under the Medium Growth Scenario will total 3,720 over the forecast period. The majority of growth will be in the population-related/commercial and institutional sectors. In contrast, industrial employment growth will be relatively small; and
- Under the High Growth Scenario, total employment is anticipated to increase by 8,485 over the forecast period. Industrial employment is expected to account for one-third of total employment growth, with a large share related to diamond mining and the Bruce Power nuclear power plant. The population-related/commercial and institutional employment is also anticipated to grow significantly, largely correlated to the high population growth.

8. LAND NEEDS ANALYSIS

8. LAND NEEDS ANALYSIS

The following chapter identifies the required residential and non-residential land needs associated with the Medium and High Growth Scenarios for the City of Prince Albert, as identified in Chapter 7.

8.1 Residential Land Needs

As identified in Chapter 5, the City of Prince of Albert has a supply of 11,457 residential units. Table 8-1 and Table 8-2 summarize the forecast residential land needs for 2009-2034 under the Medium Growth and High Growth Scenarios, respectively. Key findings are as follows:

- Under the Medium Growth Scenario, there is an anticipated residential surplus of 7,947 units by 2034 with sufficient supply of all residential units types; and
- Under the High Growth Scenario, there is an anticipated residential surplus of 4,727 units by 2034 with sufficient supply of all residential unit types.

Table 8-1
Residential Land Needs Summary, 2009-2034
Medium Growth Scenario

	Residential Units			
	Low Density	Medium Density	High Density	Total
Housing Supply (Units)	5,780	1,481	4,196	11,457
Demand for Housing Units	2,360	320	830	3,510
Surplus (Shortfall) in Housing Units	3,420	1,161	3,366	7,947

Source: Watson & Associates Economists Ltd.

Table 8-2
Residential Land Needs Summary, 2009-2034
High Growth Scenario

	Residential Units			
	Low Density	Medium Density	High Density	Total
Housing Supply (Units)	5,780	1,481	4,196	11,457
Demand for Housing Units	3,590	790	2,340	6,730
Surplus (Shortfall) in Housing Units	2,190	691	1,856	4,727

Source: Watson & Associates Economists Ltd.

Residential Land Capacity Analysis

As identified above, the City of Prince Albert has a more than sufficient residential land supply to accommodate anticipated growth (under either growth scenario) for the 25-year forecast period (2009-2034). A residential land capacity analysis examining the buildout horizon of the residential lands indicates the following:

- Under the Medium Growth Scenario, the City of Prince Albert has sufficient designated residential lands to accommodate residential growth for the next 79 years;
- The City of Prince Albert has sufficient designated residential lands under the High Growth Scenario to accommodate residential growth for the next 42 years. Under this scenario the City would need to plan for residential expansion to the southeast of the City within approximately 35-40 years;
- Residential lands south of the North Saskatchewan River are anticipated to approach capacity in the next 40 years under the Medium Growth Scenario; and
- Under the High Growth Scenario, the residential lands south of the North Saskatchewan River are anticipated to approach buildout in 27 years. As such, under this scenario the City would need to start planning its designated residential lands north of the North Saskatchewan River towards the latter portion of the 25-year forecast period.

8.2 Non-Residential Land Needs

Table 8-3 summarizes net developable non-residential land supply. This represents lands that are vacant, designated and available for development. The net commercial and industrial land supply, as summarized in Chapter 5, is subject to a land vacancy adjustment to determine a net vacant and developable land supply total. This consists of a 10% land vacancy adjustment for commercial lands and a 15% land vacancy adjustment for industrial lands. The net vacant and developable land supply is as follows:

- 51 net acres for industrial;
- 55 net acres for commercial; and
- 106 acres of institutional.

Table 8-3
City of Prince Albert
Net Developable Non-Residential Land Supply

	Industrial		Commercial		Institutional	
	Acres	Hectares	Acres	Hectares	Acres	Hectares
Net Land Supply	51	21	61	25	106	43
<i>Less Land Vacancy Adjustment of Net Employment Land Supply</i> ¹	8	3	6	2	0	0
Net Vacant and Developable Land Supply	44	18	55	22	106	43

Source: Watson & Associates Economists Ltd.

1. Vacancy adjustment of 10% applied to net commercial land and 15% applied to net industrial land. This adjustment accounts for sites which are unlikely to develop over the long term due to odd/small lot sizes and poor configuration, underutilized employment sites, marketability issues, and site inactivity/land banking, which may tie up potentially vacant and developable lands.

Table 8-4, summarizes the long-term surplus or shortfall (i.e. land need) of industrial, commercial and institutional lands in accordance with forecast demand under the Medium Growth Scenario and available net developable vacant land supply for the City. A more detailed analysis is provided in Appendix C. Key findings are:

- Under the Medium Growth Scenario, it is anticipated that there will be a deficit of industrial lands totaling 80 acres by 2034;
- By 2034, commercial land supply will have a deficit of 1 acre; and
- There is a forecast surplus of 46 acres of institutional land by 2034.

Table 8-4
City of Prince Albert
Medium Growth Scenario
Non-Residential Land Needs, 2009-2034

	Industrial		Commercial		Institutional	
	Acres	Hectares	Acres	Hectares	Acres	Hectares
Net Vacant and Developable Land Supply	44	18	55	22	106	43
Land Demand 2009-2034	124	50	55	22	60	24
Surplus/ (Deficit) (Land Need)	(80)	(32)	(1)	(0)	46	19

Source: Watson & Associates Economists Ltd.

Table 8-5 summarizes the long-term surplus or shortfall (i.e. land need) of industrial, commercial and institutional lands in accordance with forecast demand under the High Growth Scenario and available net developable vacant land supply for the City of Prince Albert. A more detailed analysis is provided in Appendix C. Key findings are:

- Under the High Growth scenario, there is anticipated deficit of 402 acres of industrial land by 2034;
- There is a forecast deficit of commercial lands totalling 45 acres by 2034; and

- There is an anticipated deficit of institutional lands in 2034 totalling 23 acres.

Table 8-5
City of Prince Albert
High Growth Scenario
Non-Residential Land Needs, 2009-2034

	Industrial		Commercial		Institutional	
	Acres	Hectares	Acres	Hectares	Acres	Hectares
Net Vacant and Developable Land Supply	44	18	55	22	106	43
Land Demand 2009-2034	445	180	100	40	129	52
Surplus/ (Deficit) (Land Need)	(402)	(163)	(45)	(18)	(23)	(9)

Source: Watson & Associates Economists Ltd.

Non-Residential Land Capacity Analysis

Based on forecast land demand under the Medium Growth Scenario, the non-residential land supply is anticipated to approach capacity within the following time horizon:

- Industrial land supply - 10 years
- Commercial land supply – 24 years
- Institutional land supply – 40 years

Under the High Growth Scenario, the non-residential land supply is anticipated to reach capacity within the following time horizon:

- Industrial land supply - 3 years
- Commercial land supply – 14 years
- Institutional land supply – 18 years

As illustrated, there is a clear need under both growth scenarios to designate new areas of industrial and commercial lands during the forecast period. Due to higher employment growth forecast under the High Growth Scenario, the need for additional developable industrial and commercial lands will occur considerably sooner than under the Medium Growth Scenario. In addition, under the High Growth Scenario the City will need to explore expansion areas for future institutional development.

Under both Medium and High Growth Scenarios, the designation of new industrial lands should occur in the near term to ensure sufficient market choice of non-residential lands. Designation of new commercial lands should occur in the next 10 years under the Medium Growth Scenario and in the next 5 years under the High Growth Scenario to ensure there is a range of development options well in advance of existing commercial lands reaching capacity. Under the

High Growth Scenario, new institutional lands should be designated within the next 5 to 10 years.

8.3 Location Options for Future Non-Residential Expansion Areas

As previously discussed, the City needs to address and plan for its non-residential lands well in advance of 2034. The City is currently assessing the feasibility of a proposed 28 acre “green energy” park to be located north of the Prince Albert Airport. The proposed park would address some of the short to medium term industrial land needs and would offer the first prestige-type industrial/business park development opportunity in the City.

South of the North Saskatchewan River, the City has limited opportunities to expand developable non-residential lands within the City limits. W&A recommends that:

- Lands for future industrial and commercial expansion south of the City limits should be pursued in accordance with the timing outlined in Section 8.2;
- The South Commercial Area-west side presents an optimal location for commercial land uses. The area is a gateway to the City, along the main highway connection into Prince Albert and should be a priority area for future commercial development;
- Industrial lands within the South Industrial Expansion area should be designated. The lands are considered an extension of the South Industrial Area and designated uses are anticipated to be similar to the existing area to the north, namely light industry, construction, warehousing and distribution; and
- Industrial lands in the Airport Industrial Area, as discussed in Chapter 5, should be considered a longer-term priority after airport expansion needs are addressed.

It is important to note that the identified non-residential land needs identified in Section 8.2 will need to be “grossed up” to account for local infrastructure requirements. As a general rule of thumb, 75% net to gross ratio is recommended. Additional consideration will also need to be given to additional “takeouts” associated with environmentally significant/sensitive areas. It is recommended that the City of Prince Albert should conduct a study to identify the location of significant environmental areas which will be removed from the developable land area of identified future non-residential expansion areas.

8.4 Conclusions

- Under both the Medium Growth and High Growth Scenarios, there is sufficient residential land supply on the south side of the North Saskatchewan River within the City limits to accommodate growth to 2034;

- Crescent Acres (Stage 4), Adanac Pointe-Riverview, and Southwood have sufficient supply to meet anticipated demand in the near term;
- Subsequent stage(s) of Crescent Acres will need to be available for development in the short term in order for the City to accommodate anticipated growth;
- West Hill Phase 1 will need to be available for development within the next five years to accommodate anticipated low-density residential demand;
- Under both growth scenarios, the development of West Hill in the medium term is necessary to accommodate residential demand, particularly for low density residential;
- Under the Medium Growth Scenario, West Hill will be partially built out by 2034 while under the High Growth Scenario, the community will be largely built by 2034;
- Designated long term residential lands north of the North Saskatchewan River and future expansion areas southeast of the City will need to be explored in the longer term for residential development under the High Growth Scenario;
- The non-residential land needs analysis indicates that there is insufficient industrial and commercial land supply to accommodate forecast growth to 2034 under both growth scenarios;
- There is sufficient institutional lands to meet anticipated demand over the forecast period under the Medium Growth Scenario but a deficit in supply exists under the High Growth Scenario; and
- W&A recommends that the City designate the South Commercial Area-West Side for commercial development and the South Industrial Expansion Area for industrial development in the near term.

9. COMPARATIVE ANALYSIS OF PRINCE ALBERT GROWTH FORECASTS

9. COMPARATIVE ANALYSIS OF PRINCE ALBERT GROWTH FORECASTS

The following Chapter provides a comparative analysis of the Medium and High Growth Scenarios developed by W&A against recent long-term growth forecasts which have been prepared for the City of Prince Albert over the past decade. This includes analysis of base population, population growth rates, housing growth rates and assumptions regarding housing occupancy trends (i.e. persons per unit or ppu).

9.1 Statistics Canada Census vs. SaskHealth Population Data

In undertaking this comparative review, there is a need to address the ongoing “discrepancy” in the base year population of Prince Albert as reported by Statistics Canada (Census) and Saskatchewan Ministry of Health (SaskHealth). Statistics Canada 2006 Census reports a population of 34,138 for City of Prince Albert. In contrast, SaskHealth reports a 2006 population of 40,140 for the City of Prince Albert.

The SaskHealth population figure for Prince Albert is based on a database of all persons who are covered under the provincial health plan and have a Prince Albert mailing address (as filed with the Ministry). Presumably, this “covered” population reflects the entire population since all persons residing in the Province are eligible for (and presumably have) health coverage. One known issue with the database is the accumulation of duplicate records which are flagged and removed every three years. Annual data that has been adjusted includes year 2000, 2003, and 2006. Since this is not completed annually, caution must be used in comparing year-to-year changes in the database.

The Statistics Canada population data, in contrast, is collected via a household survey every five years (i.e. Census) and excludes an undercount which, for City of Prince Albert, is estimated to be 2.1%, as per the 2006 Census. It has been suggested by some that size of Census undercount for the City is significantly higher than the 2.1% reported and refer to the comparable SaskHealth population data, which is considerably higher than the Census population, as evidence of this.

In an effort to address this concern, W&A reviewed and analyzed the 2006 population discrepancy between the two datasets. Given the differing methods in compiling population totals by municipality, including place of residency vs. mailing address, it was determined that a population comparison consisting of all municipalities that comprise the Prince Albert area was necessary to establish if the discrepancy could be validated over a larger area. In doing so, W&A observed the following:

- As illustrated in Table 9-1, the Prince Albert Census Agglomeration (CA) area which includes the City of Prince Albert, Rural Municipality of Prince Albert, Rural Municipality of Buckland and Wahepton Dakota 94A IR, had a 2006 Census population of 40,766¹;
- The population total for the Prince Albert CA based on 2006 SaskHealth data is 43,471;
- While the City of Prince Albert Census population is lower than the SaskHealth figure, the Census population data for the neighbouring municipalities is higher than that reported by SaskHealth;
- Adjusting for the Census undercount, the 2006 Census population for Prince Albert CA is 41,638, slightly lower than the 43,471 reported by SaskHealth.

Table 9-1
Prince Albert CA
2006 Population - Census vs. SaskHealth

Municipality	Census¹	SaskHealth²
City of Prince Albert	34,138	40,140
Rural Municipality of Prince Albert	2,918	1,292
Rural Municipality of Buckland	3,429	1,935
Wahpeton Dakota 94A IR	281	104
TOTAL	40,766	43,471
TOTAL w/ Undercount³	41,638	

1. Statistics Canada 2006 Census.

2. Saskatchewan Ministry of Health 2006 'Covered' Population.

3. Statistics Canada Census undercount of 2.1%.

Based on this analysis, W&A concludes the following:

- On a CA level, the population of Prince Albert, as reported by Census and SaskHealth, is similar;
- There is a significant discrepancy in the populations reported on a municipal level (including City of Prince Albert) which is likely due to the differing methods and assumptions in determining municipality of residency;
- The SaskHealth approach to determining municipal population is considered less reliable than that of the Census because the former is based on mailing addresses, not on place of residency. It is likely that many individuals have mailing addresses on file which are place of work and not home; and
- It does not appear that the Census undercount for the City of Prince Albert is significantly greater than the 2.1% reported by Statistics Canada; and

¹Excludes Census undercount.

- W&A believes that the Census approach and methodology to municipal population compilation is a reliable one and recommends that the Census data should be used to report the City of Prince Albert base and historical population.

9.2 Comparative Review of City of Prince Albert Growth Forecasts

Over the past decade, long term population and housing growth for the City of Prince Albert has been forecast in the following reports:

- West Hill Master Plan, UMA Engineering, May 1999;
- City of Prince Albert – Residential, Industrial and Commercial Land Development Update (PowerPoint presentation), April 22, 2008, The City of Prince Albert Economic Development and Planning Department;
- Prince Albert Economic and Demographic Profile, Oct. 2006, Sask Trends Monitor; and
- Prince Albert and Area Regional Development Strategic Plan, Oct. 2005, Derek Murray Consulting Associates.

Each of the above mentioned forecasts are reviewed in detail below in respect to base population, population growth rate, housing growth rate and assumptions regarding long-term occupancy trends, where applicable.

9.2.1 West Hill Master Plan, 1999

As part of the 1999 West Hill Master Plan UMA Engineering (UMA) prepared a City-wide population forecast for the 1996-2021 period. The study also examined future housing growth in the context of the West Hill community over the same forecast period.

For the City-wide population forecast, UMA used a base year of 1996 and Census data for the historical analysis. UMA assumed a constant population growth rate of 0.5% per annum for the forecast period, resulting in a 2021 population of 39,346, as illustrated Table 9-2. City-wide housing growth is forecast to increase by 2,500 units during the 1996-2021 period (average of 100 per year) of which 1,250 to 1,750 dwelling units (average of 50 to 70 units per year) is to be constructed in the West Hill development. The Master Plan identified that West Hill would have sufficient residential supply for 100 years.

Table 9-2
Prince Albert Population 1996-2021
West Hill Master Plan - UMA Engineering

Year	Population
1996	34,777
2001	35,646
2006	36,537
2011	37,450
2016	38,386
2021	39,346
Incremental Growth	
1996-2021	4,569
Average Annual Growth	
1996-2021	183
Average Annual Growth Rate (%)	
1996-2021	0.5%

Source: West Hill Master Plan, UMA Engineering, 1999

Key conclusions of the forecast are:

- The UMA forecast is 10 years old and the time horizon is limited to 2021;
- The forecast population growth, based on historical trends, is unrealistically low given the growth drivers identified in Chapter 7;
- The low forecast population growth relative to the number of housing units forecast is due to an average PPU that is comparatively low to that utilized by W&A; and
- The buildout time horizon for West Hill of 100 years is unrealistically long given the rate of growth anticipated by W&A and the average residential density which is anticipated for the development.

9.2.2 City of Prince Albert Economic and Development Department, 2008

Two population and household forecasts for 2006-2046 were presented in the City of Prince Albert – Residential, Industrial and Commercial Land Development Update (PowerPoint presentation), April 22, 2008. Prepared by the City of Prince Albert Economic Development and Planning Department, the forecasts are based on separate sets of historical population data – Statistics Canada Census data (Scenario 1) and SaskHealth covered population data (Scenario 2). Both scenarios use 2006 Census total dwellings (occupied and unoccupied) data.

Scenario 1 forecasts population growth based on the historical annual growth observed between 1986 and 1996 of 0.3% as shown in Table 9-3. This scenario forecasts a 2031 population of 36,793 and a 2046 population of 38,484. Housing growth averages 116 units per

year over the 2006-2046 period. The PPU was based on the linear trend observed in the 2001 and 2006 data, and shows a high constant decline throughout the forecast period.

Key findings are:

- The base year PPU is slightly lower than that reported by W&A and is attributed to the use of total dwellings (occupied and unoccupied); vs. occupied housing units as used by W&A;
- This forecast exhibits a steep PPU decline over the forecast period which is considerably higher than that presented by W&A;
- The population growth rate is low, based on historical trends; and
- Forecast housing growth is moderate and consistent with W&A's Medium Growth scenario.

Table 9-3
City of Prince Albert 2006-2046 Forecast
Scenario 1 - Statistics Canada Data

Year	Population	Total Dwellings	PPU
2001	34,291		
2006	34,138	14,029	2.43
2011	34,653	14,282	2.43
2016	35,176	14,536	2.42
2021	35,707	15,130	2.36
2026	36,246	15,759	2.30
2031	36,793	16,425	2.24
2036	37,348	17,132	2.18
2041	37,911	17,883	2.12
2046	38,484	18,681	2.06
Incremental Growth			
2006-2046	4,346	4,652	
Average Annual Growth			
2006-2046	109	116	
Average Annual Growth Rate (%)			
2006-2046	0.3%	0.7%	

Source: City of Prince Albert

The Scenario 2 population forecast was determined using a linear growth projection method. As illustrated in Table 9-4, the population is forecast to grow from 41,316 in 2006 to 51,881 in 2031 and 58,220 in 2046. The average annual rate of growth over the 2006-2046 period is 0.9%. Average housing growth over the period averages 356 units per year.

Key observations are:

- Scenario 2, utilizes the 2001 and 2006 SaskHealth population data, which overstates the base year population of the City of Prince Albert (as previously discussed in Section 9.1);
- The growth between 2001 and 2006 was used as the basis for forecasting future growth. However, the 2006 population figure includes duplicate records reflecting a somewhat higher rate of growth than if the actual 2006 data was used;
- The forecast attempts to combine SaskHealth population and Census dwelling data for the base year. This generates a PPU of 2.94 for 2006. In order to utilize a PPU which is more representative, this scenario upwardly adjusts the 2011 dwelling unit total to 17,512, which generates an artificial increase in dwelling units between 2006 to 2011;
- This scenario forecasts moderate population growth, similar to that anticipated in W&A Medium Growth Scenario with respect to rate of population growth; and
- Due to the steep PPU decline projected under Scenario 2, the housing growth forecast is very high. Comparatively, the housing growth forecast under Scenario 2 is higher than that forecast by W&A in the High Growth Scenario.

Table 9-4
City of Prince Albert 2006-2046 Forecast
Scenario 2 - SaskHealth Data

Year	Population	Total Dwellings	PPU
2001	39,737		
2006	41,316	14,029	2.94
2011	43,429	17,512	2.48
2016	45,542	18,819	2.42
2021	47,655	20,193	2.36
2026	49,768	21,638	2.3
2031	51,881	23,161	2.24
2036	53,995	24,768	2.18
2041	56,107	26,466	2.12
2046	58,220	28,262	2.06
Incremental Growth			
2006-2046	16,904	14,233	
Average Annual Growth			
2006-2046	423	356	
Average Annual Growth Rate (%)			
2006-2046	0.9%	1.8%	

Source: City of Prince Albert

9.2.3 Prince Albert Economic and Demographic Profile, 2006

The Prince Albert Economic and Demographic Profile dated October 2006 presented three forecast scenarios prepared by SaskTrends Monitor - "Growth," "Constant" and "Decline". These scenarios forecast population and housing growth for 2001-2021 period based on historical Census data from 1986-2001, and are summarized in Table 9-5.

The Growth scenario assumes an annual population growth of 0.3%, consistent with the growth the City of Prince Albert experienced during 1986-1996. In contrast, the Constant scenario assumes zero population growth while the Decline scenario is based on the average growth rate of -0.3%, consistent with 1996-2001 period. The PPU forecast is based on a linear trend using the historical data, which generates a significant decline over the forecast period.

The Growth scenario forecasts the City population to increase to 36,548 by 2021. In contrast, the Constant scenario forecasts the population to remain at 34,291 (same as 2001 Census) and the Decline scenario shows the population to decrease to 32,414 by 2021. During the same period, housing growth for the Growth scenario is expected to total 2,986 units. In contrast, housing growth for the Constant and Decline scenarios is forecast to be 1,951 units and 1,090 units, respectively.

Key conclusions are as follows:

- Each of the scenarios, which are based on historical trends, all forecast relatively low population growth. Even the Growth scenario projects only 0.3% growth per year, which is considerably lower than that forecast by W&A in the Medium Growth Scenario; and
- Due to the significant PPU decline forecast, the housing growth is considerably stronger than what the population growth forecast suggests. Under the Growth scenario forecast average housing growth per year is similar to that of the W&A Medium Growth Scenario.

Table 9-5
City of Prince Albert Population and Household Forecast 2001-2021
SaskTrends Monitor 'Growth', 'Constant', and 'Decline' Scenarios

YEAR	Population			Dwellings			PPU
	Growth	Constant	Decline	Growth	Constant	Decline	
1986	33,686	33,686	33,686	12,394	12,394	12,394	2.72
1991	34,181	34,181	34,181	12,890	12,890	12,890	2.65
1996	34,777	34,777	34,777	13,567	13,567	13,567	2.56
2001	34,291	34,291	34,291	13,772	13,772	13,772	2.49
2006	34,842	34,291	33,812	14,441	14,213	14,014	2.41
2011	35,402	34,291	33,339	15,159	14,683	14,275	2.34
2016	35,970	34,291	32,873	15,929	15,185	14,557	2.26
2021	36,548	34,291	32,414	16,758	15,723	14,862	2.18
Incremental Growth							
2001-2021	2,257	0	-1,877	2,986	1,951	1,090	
Average Annual Growth							
2001-2021	113	0	-94	149	98	55	
Average Annual Growth Rate (%)							
2001-2021	0.3%	0.0%	-0.3%	1.0%	0.7%	0.4%	

Source: Prince Albert Economic and Demographic Profile, October 2006

9.2.4 Prince Albert and Area Regional Development Strategic Plan, 2005

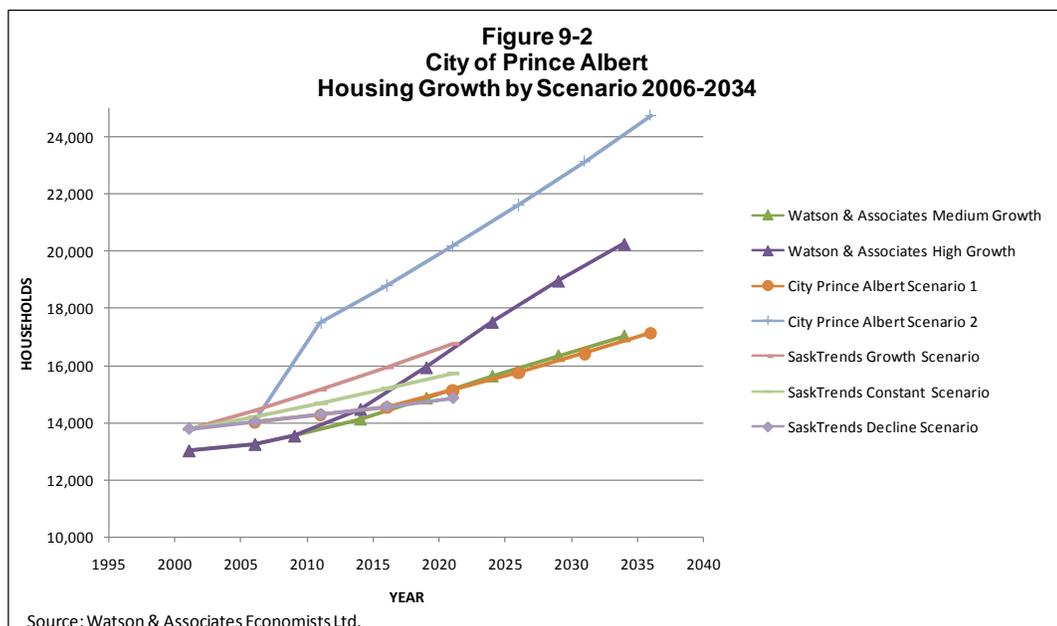
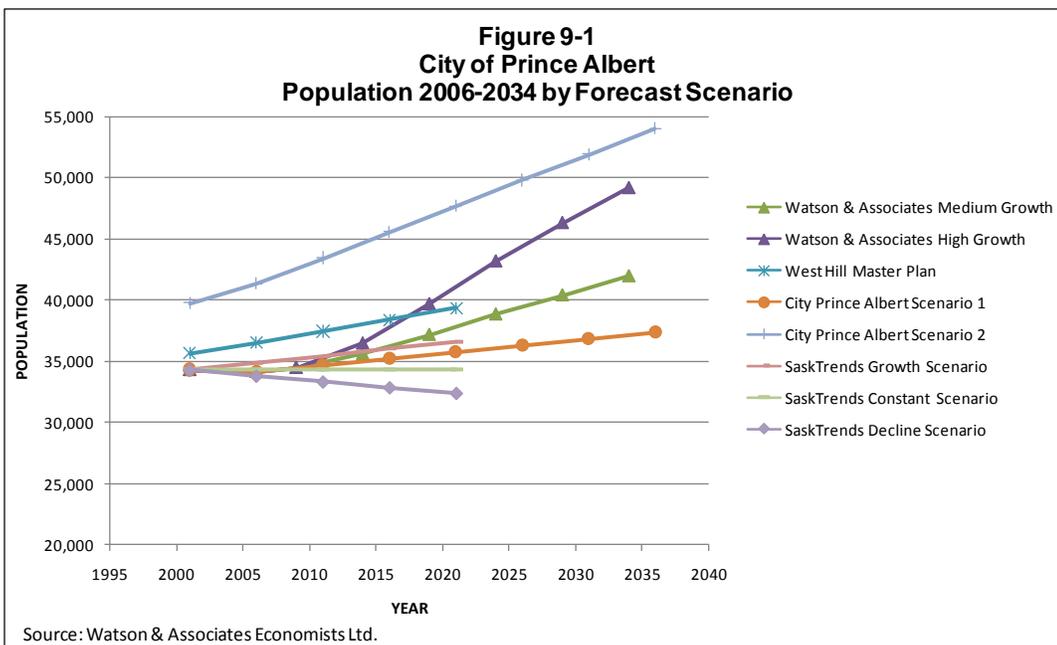
The Prince Albert and Area Regional Development Strategic Plan prepared by Derek Murray Consulting Associates in 2005, references a 2001-2011 population forecast prepared by Jack Stabler and Rose Olfert of the University of Saskatchewan. The scenario, which is based on a 1978-1998 growth trend, forecasts the population to increase from 34,300 in 2001 to 38,100 in 2011 (an average annual growth rate of 1.1%). No further information on methodology or housing data is available.

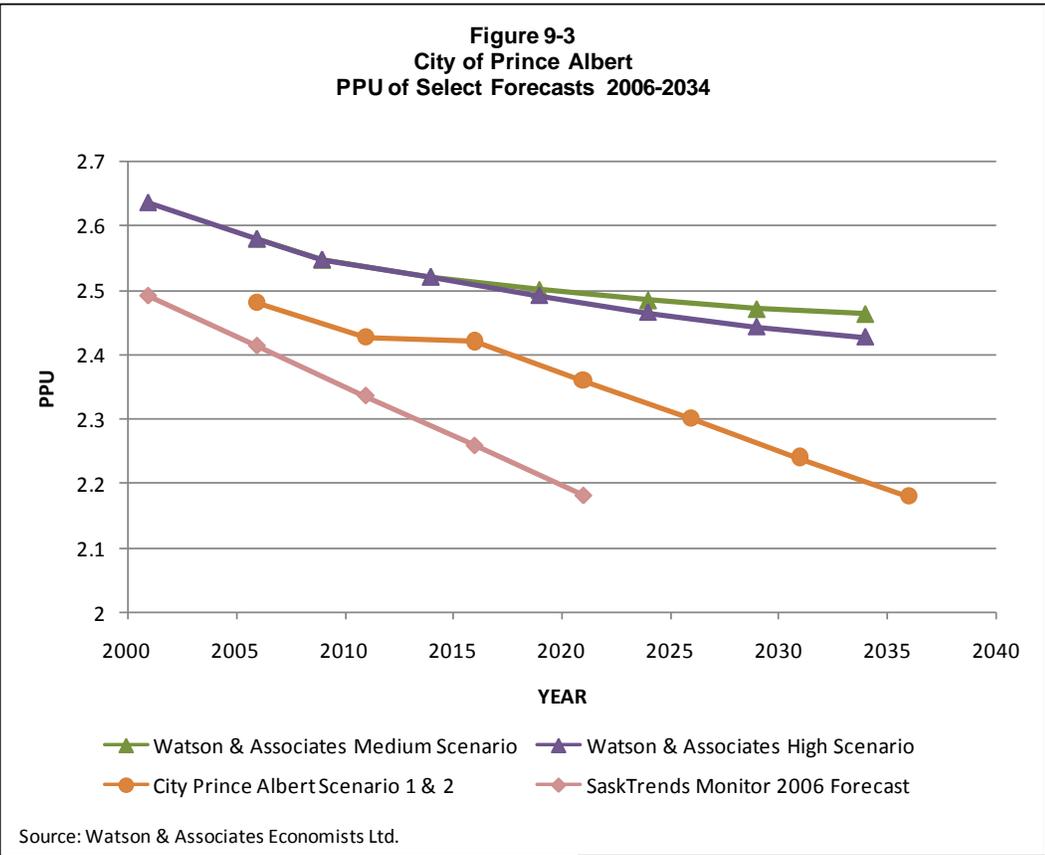
9.2.5 Conclusions

Figures 9-1, 9-2 and 9-3 summarize the population and housing forecasts reviewed in Section 9-2. Key observations include:

- With the exception of the City of Prince Albert Scenario 2, all of the forecasts reviewed have relatively modest forecast population growth. City of Prince Albert Scenario 2 forecasts a relatively strong growth rate but its base population for the City, based on SaskHealth data, makes a direct comparison difficult;
- The W&A Medium and High Growth Scenarios present a considerably higher long-term population and housing growth forecast in comparison to the other forecasts, with the exception of City of Prince Albert Scenario 2;
- Each of the existing growth forecasts reviewed for the City of Prince Albert anticipate an aggressive decline in the average PPU levels over the medium and long term. Based on long term forecast demographic trends for the City of Prince Albert, W&A forecasts a more gradual PPU decline over the forecast period;

- The reviewed forecasts exhibit steep PPU declines which are simply a projection of historic trends; and
- W&A’s PPU forecast is based on custom Census tabulation which summarizes PPU by housing unit age and type of dwelling and reflects recently observed trends in both new and older units. This is discussed in detail in Chapter 3.





10. CONCLUSIONS

10. CONCLUSIONS

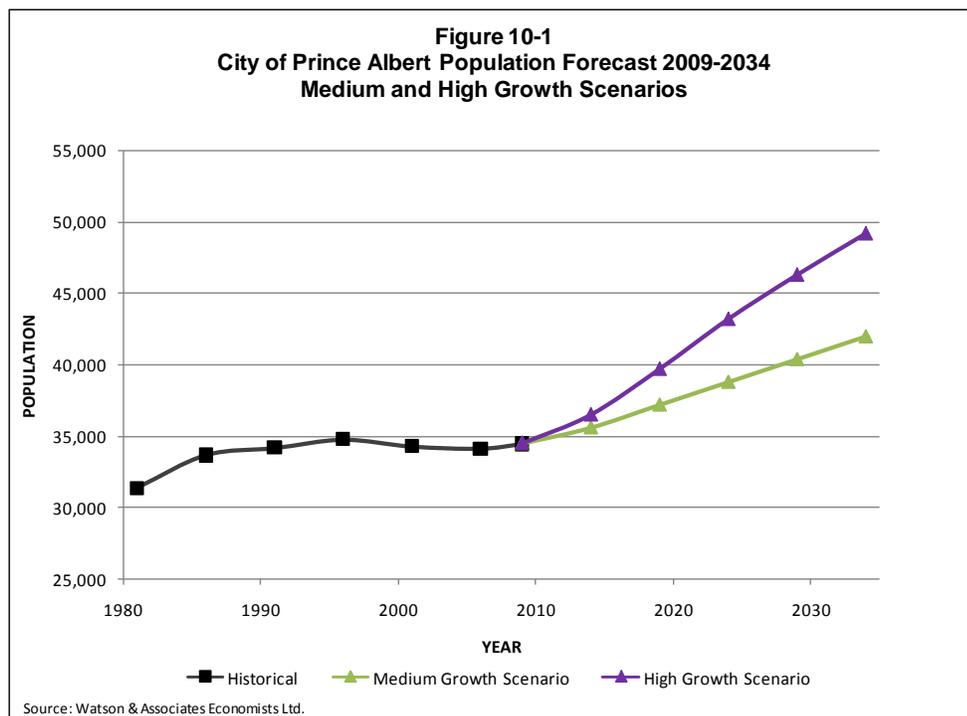
This population, household and employment forecast study for the City of Prince Albert consists of three components – an economic and demographic profile, a long-term population and employment forecast, and a review of other forecasts previously prepared for the City.

The following provides a conclusion of our key findings:

Population and Housing Growth Trends

- **Historical population growth for the City of Prince Albert has been modest.** Over the 1981 to 2006 Census period, the City's population has increased marginally at an average annual rate of 0.3% per year. The City's long-term annual average population growth rate was pulled down during a period of population decline experienced between the 1996 to 2006 Census periods. Comparatively, the City's historical 25-year population growth rate (i.e. 1981 to 2006) has been slightly above the Provincial average, which was essentially flat during this time period.
- **The City's declining population trend has been reversed in recent years.** Between 2006 and 2008, Prince Albert's population grew slightly at an average annual rate of 0.4%, reversing a decade-long trend of population decline.
- **The future population growth rate for the City of Prince Albert is forecast to exceed historical trends based on a number of identified economic growth drivers. These include:**
 - Continued growth in key commodities sectors namely in oil, uranium, potash and agri-business;
 - Prince Albert's growing importance as a regional centre for retail, government education and health services;
 - Located at the gateway to northern Saskatchewan, Prince Albert is well poised to attract employment opportunities related to eco-tourism and recreation;
 - As the provincial hub of the forestry sector, Prince Albert will continue to develop and diversify its forestry cluster, building on the success of the Saskatchewan Forestry Centre.
- **As previously identified, two long-term growth forecasts have been prepared by W&A for the City of Prince Albert including a Medium and High Growth Scenario.**

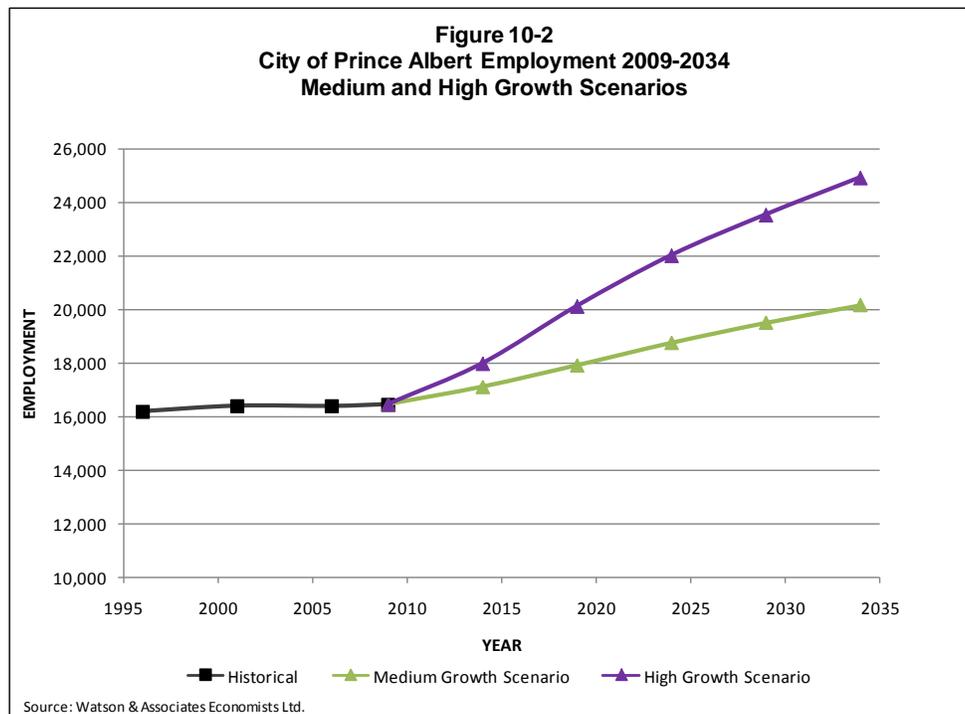
- Under the Medium Growth Scenario, Prince Albert's population is forecast to reach 42,000 by 2034. This represents an average population growth rate of 0.8% per year. In terms of housing activity, an average of 140 housing units would be constructed annually under the Medium Growth Scenario.
- Under the High Growth Scenario, Prince Albert's population is forecast to reach 49,200 by 2034. This represents an average population growth rate of 1.5% per year. In terms of housing activity, an average of 269 housing units would be constructed annually under the High Growth Scenario.
- **Figure 10-1 summarizes both the Medium and High Population Growth Scenarios from 2009 to 2034 in comparison to historical trends experienced by the City from 1981 to 2006.**



Employment Growth Trends

- **Historical employment growth for the City of Prince Albert has been modest.** Between the 1996 and 2006 Census period, the City added approximately 195 employees to its base. This represents an average annual growth rate of 0.1%. Comparatively, the City's historical employment growth rate (i.e. 1996 to 2006) has been below the Provincial average of 0.6%.

- **While the City of Prince Albert will continue to benefit from economic growth in the resource sector throughout the region, local employment growth opportunities will be felt largely through “spin-off” employment in the service sector economy.** Prince Albert’s local economic base is gradually shifting, and will continue to shift, from the resource sector (particularly forestry) towards retail, business services, education, health, social services and tourism.
- **Over the 2009 to 2034 forecast period, all employment sectors, except primary (i.e. forestry, agriculture), are anticipated to experience steady employment growth.** Under the Medium Growth Scenario, total employment is forecast to reach 20,165, by 2034, which represents a growth increment of 3,720 employment over the 2009 to 2034 period. Under the High Growth Scenario, total employment is forecast to reach 24,930, by 2034, which represents a growth increment of 8,485 employment over the 2009 to 2034 period. In terms of average annual employment growth rates, the Medium and High Growth employment forecast, represent a range of 0.8% to 1.7% over the 2009 to 2034 forecast period.
- **Figure 10-2 summarizes both the Medium and High Employment Growth Scenarios for the City of Prince Albert.**



Recommended Long-term Growth Scenario

- Based on historical population and housing growth trends, recent development trends and the long-term growth outlook for the City of Prince Albert and the Province of Saskatchewan, the Medium Population and Employment Growth Scenario represents the “most likely” long-term growth forecast for the City.
- As such, the Medium Growth Scenario is recommended as the basis for the City’s 2009 Development Levies and Servicing Fees Study, as well as other long-term land use planning, infrastructure and capital budgeting requirements.
- In an effort to illustrate the impact of higher population and employment growth on the City’s long-term residential and non-residential land needs, both the Medium and High Growth Scenarios have been considered.
- It is recommended that the City review its long-term population, housing and employment forecasts on a five-year basis.

City of Prince Albert Residential Land Needs

- **The City of Prince Albert has a potential housing supply of 11,457 units on vacant designated residential lands north and south of the North Saskatchewan River.** The City has identified a land area totaling 1,657 gross acres immediately outside the City’s current municipal boundary located in the southeast quadrant of the municipality.
- **The City of Prince Albert has a more than sufficient supply of designated residential lands south of the North Saskatchewan River to accommodate forecast population and housing growth to 2034 under both the Medium and High Growth Scenarios.**
- **The City of Prince Albert can accommodate approximately 79 years of future housing growth on designated residential lands under the Medium Growth Scenario and 42 years of future housing growth under the High Growth Scenario.**

Forecast Non-Residential Land Needs

- The following range in non-residential land needs (i.e. future expansion areas) has been identified for the City of Prince Albert to 2034:

- Industrial Lands – A deficit ranging from 80 to 402 net acres;
 - Commercial Lands – A deficit ranging from 1 to 45 net acres; and
 - Institutional Lands – A surplus of 46 net acres to a deficit of 23 net acres.
- As identified above, under both growth scenarios, the City is faced with a deficit of industrial and commercial lands by 2034. The City needs to address and plan for this in the near term. The City has a limited supply of designated non-residential land available for development (i.e. within the City limits) south of the North Saskatchewan River. W&A recommends that:
 - Expansion areas for future industrial and commercial development south of the City limits should be pursued;
 - The South Commercial Area-west side presents an optimal location for commercial land uses. As a gateway to the City, along the main highway connection into Prince Albert, this area should be a priority area for future commercial development; and
 - Industrial lands within the South Industrial Expansion area should also be developed. These lands represent a logical extension of the South Industrial Area. The future expansion area should be focused around similar uses to the designated and built area to the north, namely light industry, office, construction, warehousing and distribution.

Comparative Review of Recent Forecasts

- A review of past forecasts for the City of Prince Albert determined that for the most part, the Medium and High Growth Scenarios prepared by W&A forecast higher population and housing growth for the City of Prince Albert over the 25-year period (2009-2034) than presented in previous forecasts.



APPENDIX A

PRINCE ALBERT HISTORICAL NET MIGRATION ANALYSIS

APPENDIX A
CITY OF PRINCE ALBERT
NET MIGRATION BY MAJOR AGE COHORT 1996-2006
ADJUSTED FOR MIGRANT BIRTHS AND DEATHS

1996-2001

2001-2006

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	As %
Under 1	(47)	(62)	(109)	4.7%
1-3 Years	(166)	(187)	(352)	15.1%
4-8 Years	(219)	(248)	(467)	20.0%
9-13 Years	(58)	(136)	(194)	8.3%
14-18 Years	28	(3)	25	-1.1%
19-24 Years	(185)	(89)	(274)	11.8%
25-29 Years	(99)	(138)	(238)	10.2%
30-34 Years	(50)	(160)	(210)	9.0%
35-39 Years	(61)	(71)	(131)	5.6%
40-44 Years	(24)	(132)	(156)	6.7%
45-49 Years	(78)	(73)	(151)	6.5%
50-54 Years	(28)	(60)	(88)	3.8%
55-59 Years	(22)	(15)	(37)	1.6%
60-64 Years	(47)	(41)	(88)	3.8%
65-69 Years	7	26	33	-1.4%
70-74 Years	30	49	79	-3.4%
75-79 Years	56	15	71	-3.1%
80-84 Years	21	26	47	-2.0%
85-89 Years	21	33	55	-2.3%
90+	(39)	(109)	(148)	6.3%
Total	(958)	(1,375)	(2,333)	100.0%

Net Migration Estimates by Age Cohort

Cohort	Males	Females	Total	
			Actual	As %
Under 1	(16)	(47)	(63)	4.5%
1-3 Years	(79)	(125)	(205)	14.5%
4-8 Years	(61)	(88)	(149)	10.6%
9-13 Years	(3)	(3)	(5)	0.4%
14-18 Years	(63)	131	68	-4.8%
19-24 Years	(308)	(27)	(335)	23.8%
25-29 Years	(328)	(207)	(536)	38.0%
30-34 Years	(201)	(172)	(373)	26.5%
35-39 Years	(111)	(59)	(171)	12.1%
40-44 Years	(123)	(20)	(143)	10.1%
45-49 Years	(49)	41	(8)	0.6%
50-54 Years	11	(3)	8	-0.6%
55-59 Years	6	6	12	-0.8%
60-64 Years	(1)	14	13	-0.9%
65-69 Years	40	67	107	-7.6%
70-74 Years	54	68	122	-8.7%
75-79 Years	54	52	106	-7.5%
80-84 Years	71	100	171	-12.1%
85-89 Years	34	63	97	-6.9%
90+	(44)	(82)	(126)	9.0%
Total	(1,119)	(290)	(1,409)	100.0%

Source: Registrar of Vital Statistics, Information Services Corporation of Saskatchewan, February 2009.

CITY OF PRINCE ALBERT
1996-2001
Net Migration Estimates by Age Cohort

2001 Calculated Population by Cohort

Cohort	Males	Females	Total
Under 1	305	305	610
1-3 Years	959	959	1,917
4-8 Years	1,562	1,565	3,127
9-13 Years	1,689	1,485	3,174
14-18 Years	1,366	1,308	2,674
19-24 Years	1,761	1,750	3,511
25-29 Years	1,193	1,423	2,617
30-34 Years	1,185	1,391	2,576
35-39 Years	1,323	1,449	2,771
40-44 Years	1,291	1,452	2,743
45-49 Years	1,202	1,233	2,435
50-54 Years	981	1,113	2,094
55-59 Years	746	731	1,477
60-64 Years	614	672	1,286
65-69 Years	488	582	1,070
70-74 Years	419	577	996
75-79 Years	326	522	848
80-84 Years	217	425	642
85-89 Years	122	287	408
90+	103	278	381
Total	17,850	19,507	37,357

2001 Census Population by Cohort

Cohort	Males	Females	Total	%
Under 1	258	243	501	1.4%
1-3 Years	793	772	1,565	4.5%
4-8 Years	1,343	1,317	2,660	7.6%
9-13 Years	1,631	1,349	2,980	8.5%
14-18 Years	1,394	1,305	2,699	7.7%
19-24 Years	1,576	1,661	3,237	9.2%
25-29 Years	1,094	1,285	2,379	6.8%
30-34 Years	1,135	1,231	2,366	6.8%
35-39 Years	1,262	1,378	2,640	7.5%
40-44 Years	1,267	1,320	2,587	7.4%
45-49 Years	1,124	1,160	2,284	6.5%
50-54 Years	953	1,053	2,006	5.7%
55-59 Years	724	716	1,440	4.1%
60-64 Years	567	631	1,198	3.4%
65-69 Years	495	608	1,103	3.1%
70-74 Years	449	626	1,075	3.1%
75-79 Years	382	537	919	2.6%
80-84 Years	238	451	689	2.0%
85-89 Years	143	320	463	1.3%
90+	64	169	233	0.7%
Total	16,892	18,132	35,024	100.0%

Net Migration Estimates by Age Cohort (+ IN, - OUT)

Cohort	Males	Females	Total
Under 1	(47)	(62)	(109)
1-3 Years	(166)	(187)	(352)
4-8 Years	(219)	(248)	(467)
9-13 Years	(58)	(136)	(194)
14-18 Years	28	(3)	25
19-24 Years	(185)	(89)	(274)
25-29 Years	(99)	(138)	(238)
30-34 Years	(50)	(160)	(210)
35-39 Years	(61)	(71)	(131)
40-44 Years	(24)	(132)	(156)
45-49 Years	(78)	(73)	(151)
50-54 Years	(28)	(60)	(88)
55-59 Years	(22)	(15)	(37)
60-64 Years	(47)	(41)	(88)
65-69 Years	7	26	33
70-74 Years	30	49	79
75-79 Years	56	15	71
80-84 Years	21	26	47
85-89 Years	21	33	55
90+	(39)	(109)	(148)
Total	(958)	(1,375)	(2,333)

Source: Watson & Associates Economists Ltd., 2009

CITY OF PRINCE ALBERT
2001-2006
Net Migration Estimates by Age Cohort

2006 Calculated Population by Cohort

Cohort	Males	Females	Total
Under 1	297	297	594
1-3 Years	871	871	1,742
4-8 Years	1,338	1,303	2,641
9-13 Years	1,341	1,315	2,656
14-18 Years	1,626	1,345	2,971
19-24 Years	1,667	1,584	3,251
25-29 Years	1,278	1,372	2,650
30-34 Years	1,084	1,281	2,365
35-39 Years	1,123	1,224	2,346
40-44 Years	1,247	1,368	2,615
45-49 Years	1,245	1,307	2,551
50-54 Years	1,097	1,142	2,239
55-59 Years	914	1,025	1,939
60-64 Years	675	686	1,361
65-69 Years	501	592	1,093
70-74 Years	406	545	950
75-79 Years	329	525	854
80-84 Years	225	411	636
85-89 Years	104	284	388
90+	110	322	433
Total	17,478	18,799	36,277

2006 Census Population by Cohort

Cohort	Males	Females	Total	%
Under 1	281	250	531	1.5%
1-3 Years	792	746	1,537	4.4%
4-8 Years	1,277	1,216	2,492	7.1%
9-13 Years	1,338	1,313	2,651	7.6%
14-18 Years	1,563	1,476	3,039	8.7%
19-24 Years	1,359	1,558	2,916	8.4%
25-29 Years	950	1,164	2,114	6.1%
30-34 Years	884	1,108	1,992	5.7%
35-39 Years	1,011	1,164	2,176	6.2%
40-44 Years	1,124	1,348	2,472	7.1%
45-49 Years	1,195	1,348	2,543	7.3%
50-54 Years	1,108	1,139	2,247	6.4%
55-59 Years	919	1,032	1,951	5.6%
60-64 Years	674	700	1,374	3.9%
65-69 Years	541	659	1,200	3.4%
70-74 Years	460	613	1,073	3.1%
75-79 Years	383	577	960	2.8%
80-84 Years	296	511	807	2.3%
85-89 Years	138	347	485	1.4%
90+	66	240	306	0.9%
Total	16,359	18,509	34,868	100.0%

Net Migration Estimates by Age Cohort (+ IN, - OUT)

Cohort	Males	Females	Total
Under 1	(16)	(47)	(63)
1-3 Years	(79)	(125)	(205)
4-8 Years	(61)	(88)	(149)
9-13 Years	(3)	(3)	(5)
14-18 Years	(63)	131	68
19-24 Years	(308)	(27)	(335)
25-29 Years	(328)	(207)	(536)
30-34 Years	(201)	(172)	(373)
35-39 Years	(111)	(59)	(171)
40-44 Years	(123)	(20)	(143)
45-49 Years	(49)	41	(8)
50-54 Years	11	(3)	8
55-59 Years	6	6	12
60-64 Years	(1)	14	13
65-69 Years	40	67	107
70-74 Years	54	68	122
75-79 Years	54	52	106
80-84 Years	71	100	171
85-89 Years	34	63	97
90+	(44)	(82)	(126)
Total	(1,119)	(290)	(1,409)

Source: Watson & Associates Economists Ltd., 2009

CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
1996/1997

Cohort	1996 Census			Net Migration Total	1996/1997 Deaths		1996/1997 Births		1997 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	280	285	565		1	1	315	315	315	315	629
1-3 Years	972	968	1,940		0	0			924	910	1,834
4-8 Years	1,693	1,487	3,180		1	1			1,707	1,550	3,257
9-13 Years	1,370	1,311	2,681		0	0			1,425	1,315	2,739
14-18 Years	1,498	1,448	2,946		2	1			1,443	1,412	2,855
19-24 Years	1,483	1,738	3,221		3	2			1,566	1,760	3,326
25-29 Years	1,196	1,396	2,592		2	1			1,187	1,391	2,577
30-34 Years	1,336	1,455	2,791		3	1			1,321	1,411	2,732
35-39 Years	1,308	1,463	2,771		3	2			1,290	1,516	2,806
40-44 Years	1,226	1,247	2,473		4	2			1,239	1,305	2,544
45-49 Years	1,014	1,134	2,148		5	4			1,047	1,123	2,169
50-54 Years	784	751	1,535		8	4			862	824	1,685
55-59 Years	663	697	1,360		8	5			650	712	1,363
60-64 Years	557	619	1,176		12	6			560	628	1,188
65-69 Years	514	640	1,154		18	12			515	593	1,108
70-74 Years	449	614	1,063		24	18			436	639	1,075
75-79 Years	355	556	911		30	26			328	541	869
80-84 Years	256	451	707		32	35			259	432	691
85-89 Years	135	283	418		25	36			129	304	433
90+	51	134	185		3	7			66	149	214
Total	17,140	18,677	35,817	-	187	164	315	315	17,268	18,828	36,096

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
1997/1998

Cohort	1997 Population			Net Migration Total	1997/1998 Deaths		1997/1998 Births		1998 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	315	315	629		-	-	308	308	308	308	615
1-3 Years	924	910	1,834		0	0			898	918	1,817
4-8 Years	1,707	1,550	3,257		1	1			1,716	1,564	3,280
9-13 Years	1,425	1,315	2,739		0	0			1,482	1,335	2,817
14-18 Years	1,443	1,412	2,855		2	1			1,407	1,421	2,828
19-24 Years	1,566	1,760	3,326		3	1			1,655	1,734	3,389
25-29 Years	1,187	1,391	2,577		2	1			1,155	1,401	2,555
30-34 Years	1,321	1,411	2,732		2	1			1,267	1,376	2,644
35-39 Years	1,290	1,516	2,806		3	2			1,333	1,550	2,883
40-44 Years	1,239	1,305	2,544		4	2			1,243	1,349	2,592
45-49 Years	1,047	1,123	2,169		5	3			1,097	1,129	2,226
50-54 Years	862	824	1,685		7	4			898	895	1,793
55-59 Years	650	712	1,363		7	4			647	709	1,356
60-64 Years	560	628	1,188		11	6			574	629	1,203
65-69 Years	515	593	1,108		16	10			512	599	1,111
70-74 Years	436	639	1,075		20	16			431	615	1,046
75-79 Years	328	541	869		24	22			341	552	893
80-84 Years	259	432	691		27	30			243	429	672
85-89 Years	129	304	433		20	34			133	289	422
90+	66	149	214		4	7			79	186	265
Total	17,268	18,828	36,096		156	147	308	308	17,419	18,988	36,407

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
1998/1999

Cohort	1998 Population			Net Migration Total	1998/1999 Deaths		1998/1999 Births		1999 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	308	308	615		-	-	323	323	323	323	646
1-3 Years	898	918	1,817		0	0			901	906	1,807
4-8 Years	1,716	1,564	3,280		1	1			1,669	1,585	3,254
9-13 Years	1,482	1,335	2,817		0	0			1,555	1,349	2,904
14-18 Years	1,407	1,421	2,828		2	1			1,367	1,400	2,767
19-24 Years	1,655	1,734	3,389		3	1			1,719	1,778	3,497
25-29 Years	1,155	1,401	2,555		2	1			1,149	1,389	2,538
30-34 Years	1,267	1,376	2,644		2	1			1,253	1,351	2,604
35-39 Years	1,333	1,550	2,883		3	2			1,333	1,551	2,884
40-44 Years	1,243	1,349	2,592		4	2			1,256	1,370	2,626
45-49 Years	1,097	1,129	2,226		5	3			1,119	1,169	2,288
50-54 Years	898	895	1,793		8	4			940	972	1,913
55-59 Years	647	709	1,356		7	4			684	724	1,408
60-64 Years	574	629	1,203		12	5			571	624	1,195
65-69 Years	512	599	1,111		17	9			519	605	1,124
70-74 Years	431	615	1,046		22	14			416	598	1,014
75-79 Years	341	552	893		27	20			344	543	887
80-84 Years	243	429	672		28	26			234	423	658
85-89 Years	133	289	422		23	29			130	300	430
90+	79	186	265		5	8			85	220	305
Total	17,419	18,988	36,407	-	172	130	323	323	17,570	19,181	36,751

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
1999/2000

Cohort	1999 Population			Net Migration Total	1999/2000 Deaths		1999/2000 Births		2000 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	323	323	646		-	-	328	328	328	328	656
1-3 Years	901	906	1,807		0	0			945	945	1,890
4-8 Years	1,669	1,585	3,254		1	1			1,603	1,535	3,138
9-13 Years	1,555	1,349	2,904		0	0			1,636	1,445	3,081
14-18 Years	1,367	1,400	2,767		2	1			1,349	1,346	2,695
19-24 Years	1,719	1,778	3,497		4	2			1,755	1,770	3,525
25-29 Years	1,149	1,389	2,538		2	1			1,139	1,386	2,525
30-34 Years	1,253	1,351	2,604		2	1			1,227	1,387	2,614
35-39 Years	1,333	1,551	2,884		3	2			1,333	1,516	2,849
40-44 Years	1,256	1,370	2,626		4	3			1,269	1,390	2,659
45-49 Years	1,119	1,169	2,288		6	4			1,173	1,218	2,392
50-54 Years	940	972	1,913		9	5			969	1,031	2,000
55-59 Years	684	724	1,408		8	5			701	739	1,439
60-64 Years	571	624	1,195		12	6			584	631	1,215
65-69 Years	519	605	1,124		18	11			502	605	1,107
70-74 Years	416	598	1,014		22	16			428	572	1,000
75-79 Years	344	543	887		28	24			339	537	876
80-84 Years	234	423	658		28	31			211	421	632
85-89 Years	130	300	430		23	36			131	297	428
90+	85	220	305		6	11			96	249	345
Total	17,570	19,181	36,751	-	180	160	328	328	17,717	19,350	37,067

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
2000/2001

Cohort	2000 Population			Net Migration Total	2000/2001 Deaths		2000/2001 Births		2001 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	328	328	656		-	-	305	305	305	305	610
1-3 Years	945	945	1,890		-	-			959	959	1,917
4-8 Years	1,603	1,535	3,138		1	1			1,562	1,565	3,127
9-13 Years	1,636	1,445	3,081		0	0			1,689	1,485	3,174
14-18 Years	1,349	1,346	2,695		2	1			1,366	1,308	2,674
19-24 Years	1,755	1,770	3,525		4	1			1,761	1,750	3,511
25-29 Years	1,139	1,386	2,525		2	1			1,193	1,423	2,617
30-34 Years	1,227	1,387	2,614		2	1			1,185	1,391	2,576
35-39 Years	1,333	1,516	2,849		3	2			1,323	1,449	2,771
40-44 Years	1,269	1,390	2,659		4	2			1,291	1,452	2,743
45-49 Years	1,173	1,218	2,392		6	4			1,202	1,233	2,435
50-54 Years	969	1,031	2,000		9	5			981	1,113	2,094
55-59 Years	701	739	1,439		8	4			746	731	1,477
60-64 Years	584	631	1,215		12	6			614	672	1,286
65-69 Years	502	605	1,107		17	10			488	582	1,070
70-74 Years	428	572	1,000		22	14			419	577	996
75-79 Years	339	537	876		27	22			326	522	848
80-84 Years	211	421	632		25	29			217	425	642
85-89 Years	131	297	428		23	33			122	287	408
90+	96	249	345		6	12			103	278	381
Total	17,717	19,350	37,067	-	173	147	305	305	17,850	19,507	37,357

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
2001/2002

Cohort	2001 Census			Net Migration Total	2001/2002 Deaths		2001/2002 Births		2002 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	258	243	501		1	0	290	290	290	290	579
1-3 Years	793	772	1,565		0	0			774	774	1,548
4-8 Years	1,343	1,317	2,660		0	0			1,341	1,257	2,597
9-13 Years	1,631	1,349	2,980		0	1			1,592	1,405	2,997
14-18 Years	1,394	1,305	2,699		1	1			1,454	1,292	2,746
19-24 Years	1,576	1,661	3,237		3	1			1,583	1,642	3,225
25-29 Years	1,094	1,285	2,379		1	1			1,115	1,319	2,435
30-34 Years	1,135	1,231	2,366		2	1			1,152	1,224	2,376
35-39 Years	1,262	1,378	2,640		2	2			1,219	1,325	2,544
40-44 Years	1,267	1,320	2,587		4	2			1,253	1,375	2,628
45-49 Years	1,124	1,160	2,284		4	3			1,154	1,189	2,343
50-54 Years	953	1,053	2,006		5	4			976	1,052	2,028
55-59 Years	724	716	1,440		8	5			805	779	1,585
60-64 Years	567	631	1,198		9	6			561	644	1,205
65-69 Years	495	608	1,103		16	9			494	602	1,097
70-74 Years	449	626	1,075		19	16			439	587	1,026
75-79 Years	382	537	919		30	21			371	562	932
80-84 Years	238	451	689		28	26			225	449	674
85-89 Years	143	320	463		26	36			145	309	454
90+	64	169	233		4	7			76	204	280
Total	16,892	18,132	35,024	-	164	141	290	290	17,017	18,280	35,298

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
2002/2003

Cohort	2002 Population			Net Migration Total	2002/2003 Deaths		2002/2003 Births		2003 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	290	290	579		-	-	283	283	283	283	565
1-3 Years	774	774	1,548		0	0			799	826	1,625
4-8 Years	1,341	1,257	2,597		1	0			1,306	1,223	2,529
9-13 Years	1,592	1,405	2,997		0	1			1,571	1,409	2,980
14-18 Years	1,454	1,292	2,746		2	1			1,480	1,286	2,766
19-24 Years	1,583	1,642	3,225		3	1			1,614	1,626	3,240
25-29 Years	1,115	1,319	2,435		2	1			1,161	1,323	2,484
30-34 Years	1,152	1,224	2,376		3	1			1,135	1,272	2,407
35-39 Years	1,219	1,325	2,544		2	2			1,176	1,253	2,429
40-44 Years	1,253	1,375	2,628		4	2			1,281	1,422	2,703
45-49 Years	1,154	1,189	2,343		5	3			1,161	1,232	2,393
50-54 Years	976	1,052	2,028		6	4			993	1,069	2,062
55-59 Years	805	779	1,585		10	5			860	829	1,690
60-64 Years	561	644	1,205		10	6			570	641	1,211
65-69 Years	494	602	1,097		17	10			479	590	1,068
70-74 Years	439	587	1,026		20	15			444	587	1,031
75-79 Years	371	562	932		31	23			356	548	904
80-84 Years	225	449	674		29	27			235	459	694
85-89 Years	145	309	454		29	37			131	296	427
90+	76	204	280		5	10			86	242	328
Total	17,017	18,280	35,298		178	148	283	283	17,122	18,415	35,536

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
2003/2004

Cohort	2003 Population			Net Migration Total	2003/2004 Deaths		2003/2004 Births		2004 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	283	283	565		-	-	287	287	287	287	574
1-3 Years	799	826	1,625		0	0			829	815	1,644
4-8 Years	1,306	1,223	2,529		1	0			1,272	1,259	2,532
9-13 Years	1,571	1,409	2,980		0	1			1,511	1,413	2,923
14-18 Years	1,480	1,286	2,766		2	1			1,522	1,250	2,771
19-24 Years	1,614	1,626	3,240		4	1			1,657	1,662	3,319
25-29 Years	1,161	1,323	2,484		2	1			1,199	1,343	2,542
30-34 Years	1,135	1,272	2,407		3	1			1,099	1,244	2,343
35-39 Years	1,176	1,253	2,429		2	2			1,162	1,228	2,390
40-44 Years	1,281	1,422	2,703		4	2			1,289	1,426	2,714
45-49 Years	1,161	1,232	2,393		5	4			1,175	1,255	2,429
50-54 Years	993	1,069	2,062		6	5			1,023	1,091	2,114
55-59 Years	860	829	1,690		11	7			888	906	1,794
60-64 Years	570	641	1,211		10	7			618	666	1,284
65-69 Years	479	590	1,068		17	11			469	571	1,040
70-74 Years	444	587	1,031		21	18			435	566	1,001
75-79 Years	356	548	904		31	27			337	540	877
80-84 Years	235	459	694		31	34			241	443	684
85-89 Years	131	296	427		27	43			121	288	408
90+	86	242	328		6	14			94	271	365
Total	17,122	18,415	35,536	-	181	179	287	287	17,227	18,523	35,750

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
2004/2005

Cohort	2004 Population			Net Migration Total	2004/2005 Deaths		2004/2005 Births		2005 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	287	287	574		-	-	302	302	302	302	603
1-3 Years	829	815	1,644		0	0			859	859	1,718
4-8 Years	1,272	1,259	2,532		0	0			1,282	1,250	2,531
9-13 Years	1,511	1,413	2,923		0	1			1,430	1,354	2,785
14-18 Years	1,522	1,250	2,771		2	1			1,590	1,307	2,897
19-24 Years	1,657	1,662	3,319		3	1			1,649	1,614	3,264
25-29 Years	1,199	1,343	2,542		2	1			1,255	1,363	2,618
30-34 Years	1,099	1,244	2,343		2	1			1,070	1,255	2,325
35-39 Years	1,162	1,228	2,390		2	2			1,137	1,243	2,380
40-44 Years	1,289	1,426	2,714		4	2			1,285	1,418	2,703
45-49 Years	1,175	1,255	2,429		5	3			1,205	1,255	2,460
50-54 Years	1,023	1,091	2,114		6	4			1,073	1,137	2,210
55-59 Years	888	906	1,794		10	7			906	943	1,849
60-64 Years	618	666	1,284		10	6			624	697	1,321
65-69 Years	469	571	1,040		16	10			497	562	1,059
70-74 Years	435	566	1,001		19	16			414	562	976
75-79 Years	337	540	877		27	23			331	529	860
80-84 Years	241	443	684		29	28			239	435	674
85-89 Years	121	288	408		22	36			109	283	392
90+	94	271	365		6	13			107	303	410
Total	17,227	18,523	35,750	-	164	154	302	302	17,365	18,670	36,035

Natural Increase

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CITY OF PRINCE ALBERT
Summary of Population Data Per Annum
2005/2006

Cohort	2005 Population			Net Migration Total	2005/2006 Deaths		2005/2006 Births		2006 Population		
	Males	Females	Total		Males	Females	Males	Females	Males	Females	Total
Under 1	302	302	603		-	-	297	297	297	297	594
1-3 Years	859	859	1,718		-	-			871	871	1,742
4-8 Years	1,282	1,250	2,531		1	0			1,338	1,303	2,641
9-13 Years	1,430	1,354	2,785		0	1			1,341	1,315	2,656
14-18 Years	1,590	1,307	2,897		2	1			1,626	1,345	2,971
19-24 Years	1,649	1,614	3,264		4	1			1,667	1,584	3,251
25-29 Years	1,255	1,363	2,618		2	1			1,278	1,372	2,650
30-34 Years	1,070	1,255	2,325		3	1			1,084	1,281	2,365
35-39 Years	1,137	1,243	2,380		2	2			1,123	1,224	2,346
40-44 Years	1,285	1,418	2,703		4	2			1,247	1,368	2,615
45-49 Years	1,205	1,255	2,460		5	4			1,245	1,307	2,551
50-54 Years	1,073	1,137	2,210		7	5			1,097	1,142	2,239
55-59 Years	906	943	1,849		12	8			914	1,025	1,939
60-64 Years	624	697	1,321		12	7			675	686	1,361
65-69 Years	497	562	1,059		19	10			501	592	1,093
70-74 Years	414	562	976		20	17			406	545	950
75-79 Years	331	529	860		30	24			329	525	854
80-84 Years	239	435	674		32	30			225	411	636
85-89 Years	109	283	392		23	38			104	284	388
90+	107	303	410		7	16			110	322	433
Total	17,365	18,670	36,035	-	184	168	297	297	17,478	18,799	36,277

Natural Increase

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APPENDIX B

RESIDENTIAL SUPPLY

APPENDIX B
City of Prince Albert Residential Supply Inventory
Number of Units by Status and Type

Location	Status	Residential Units											
		Registered not Built			Applications Under Review			Designated Residential Lands			Total Units		
		Low	Medium	High	Low	Medium	High	Low	Medium	High	Low	Medium	High
Crescent Acres (Stage 4)	Under Development	75	0	0	84	122	377	135	0	0	294	122	377
Crescent Acres (Stage 5)	Planned							221	122	377	221	122	377
Crescent Acres (Stage 6)	Planned							130	73	224	130	73	224
Crescent Acres (Stage 7)	Planned							102	0	0	102	0	0
Southwood (East Hill Area)	Under Development	51	34	0	0	0	0	14 *	62 *	0	65	96	0
Adanac Pointe-Riverview	Under Development	30	21	0	11	0	0	26	0	96 *	67	21	96
Riverview East	Designated							0	0	187 *	0	0	187
Golf Course Residential Area	Designated							34 *	0 *	124 *	34	0	124
SIAS East Residential	Designated							0	271 *	836 *	0	271	836
West Flat (19th Street West 700 block)	Under Development							10	0	0	10	0	0
West Flat (19th Street West subdivision)	Designated							72			72	0	0
West Hill	Planned							2952 *	396 *	408 *	2952	396	408
North of North Saskatchewan River Designated Lands ¹	Designated							1833 *	380 *	1567 *	1833	380	1567
Total		156	55	0	95	122	377	5529	1304	3819	5780	1481	4196

Source: Watson & Associates Economists Ltd.; compiled from data provided by City of Prince Albert Planning Dept.

1. Assumed residential land use allocation by density type: 89% for low density, 4% for medium density, 6% for high density. Assumes greater allocation to medium and high density than in current Prince Albert developments reflecting anticipated more compact development in the long-term. W&A recognizes that actual density and housing mix will vary by area with some higher and some lower than the average applied here.

* Number of units derived from gross area assuming the following densities:

Residential Densities	units/	
	units/ha	acre
Low Density (single detached, semi detached)	8	3.2
Medium Density (Townhouses, Rowhouses)	33	13.4
High Density (Apartments, Condominiums)	102	41.3

APPENDIX C

NON-RESIDENTIAL LAND NEEDS

APPENDIX C-1
City of Prince Albert
Medium Growth Scenario
Non-Residential Land Needs, 2009-2034

Industrial Lands

	Employment Forecast			Employment Density		Industrial Land Needs					
	Emp. Growth 2009-2034	% on Industrial Lands	Emp. Growth on Industrial Lands	Employees per net Acres	Employees per net Ha	Net Land Demand (acres)	Net Land Demand (ha)	Land Supply (acres)	Land Supply (ha)	Surplus/ (Deficit) of Land (acres)	Surplus/ (Deficit) of Land (ha)
Industrial	678	100%	678								
Commercial	1706	30%	512								
Institutional	1168	5%	58								
Total	3,552	35%	1,248	10.1	24.9	124	50	44	18	(80)	(32)

Commercial Lands

	Employment Forecast			Employment Density		Commercial Land Needs					
	Total Emp. Growth 2009-2034	% on Commercial Lands	Emp. Growth on Commercial Lands	Employees per net Acres	Employees per net Ha	Net Land Demand (acres)	Net Land Demand (ha)	Land Supply (acres)	Land Supply (ha)	Surplus/ (Deficit) of Land (acres)	Surplus/ (Deficit) of Land (ha)
Industrial	678	0%	-								
Commercial	1706	70%	1,194								
Institutional	1168	15%	175								
Total	3,552	39%	1,369	24.8	61.4	55	22	55	22	(1)	(0)

Institutional Lands

	Employment Forecast			Employment Density		Institutional Land Needs					
	Total Emp. Growth 2009-2034	% on Institutional Lands	Emp. Growth on Institutional Lands	Employees per net Acres	Employees per net Ha	Net Land Demand (acres)	Net Land Demand (ha)	Land Supply (acres)	Land Supply (ha)	Surplus/ (Deficit) of Land (acres)	Surplus/ (Deficit) of Land (ha)
Industrial	678	0%	-								
Commercial	1706	0%	-								
Institutional	1168	80%	934								
Total	3,552	26%	934	15.6	38.4	60	24	106	43	46	19

Appendix C-2
City of Prince Albert
High Growth Scenario
Non-Residential Land Needs, 2009-2034

Industrial Lands

	Employment Forecast			Employment Density		Industrial Land Needs					
	Total Emp. Growth 2009-2034	% on Industrial Lands	Emp. Growth on Industrial Lands	Employees per net Acres	Employees per net Ha	Net Land Demand (acres)	Net Land Demand (ha)	Land Supply (acres)	Land Supply (ha)	Surplus/ (Deficit) of Land (acres)	Surplus/ (Deficit) of Land (ha)
Industrial	2714	100%	2,714								
Commercial	2927	30%	878								
Institutional	2515	5%	126								
Total	8,156	46%	3,718	8.3	20.6	445	180	44	18	(402)	(163)

Commercial Lands

	Employment Forecast			Employment Density		Commercial Land Needs					
	Total Emp. Growth 2009-2034	% on Commercial Lands	Emp. Growth on Commercial Lands	Employees per net Acres	Employees per net Ha	Net Land Demand (acres)	Net Land Demand (ha)	Land Supply (acres)	Land Supply (ha)	Surplus/ (Deficit) of Land (acres)	Surplus/ (Deficit) of Land (ha)
Industrial	2714	0%	-								
Commercial	2927	70%	2,049								
Institutional	2515	15%	377								
Total	8,156	30%	2,426	24.4	60.2	100	40	55	22	(45)	(18)

Institutional Lands

	Employment Forecast			Employment Density		Institutional Land Needs					
	Total Emp. Growth 2009-2034	% on Institutional Lands	Emp. Growth on Institutional Lands	Employees per net Acres	Employees per net Ha	Net Land Demand (acres)	Net Land Demand (ha)	Land Supply (acres)	Land Supply (ha)	Surplus/ (Deficit) of Land (acres)	Surplus/ (Deficit) of Land (ha)
Industrial	2714	0%	-								
Commercial	2927	0%	-								
Institutional	2515	80%	2,012								
Total	8,156	25%	2,012	15.6	38.4	129	52	106	43	(23)	(9)