Town of Carstairs

GROWTH STUDY

JUNE 2025

Carstairs
AN AUTHENTIC SMALL TOWN

PREPARED FOR:

Rick Blair, CAO
Town of Carstairs
844 Centre Street
Box 370 T0M 0N0

CONTENTS

1.0 INTRODUCTION

1.1 PURPOSE OF THE GROWTH STUDY

Growth is complex and constantly evolving, requiring thoughtful planning to ensure it continues to reflect the community's distinct identity. To evaluate growth through a sustainable and community-focused lens, which reflects the town's vision, the Town of Carstairs (the Town) has initiated the preparation of this Growth Study (the Study).

The Study provides a framework to support Administration and Council to make informed decisions to accommodate projected growth. Building on the Municipal Development Plan (MDP), the Study supports decision-making that considers economic, social, and environmental impacts, ensuring the Town grows in a way that enhances quality of life for current and future residents.

The Study is a practical tool to support informed choices in the following key areas:

1. Day-to-day decisions on development and land use
2. Long-term planning of land supply for growth
3. Extension and expansion of infrastructure
4. Expansion of services
5. Areas of investment.

As the community evolves, the Study will be updated as needed to keep growth aligned with the changing context and future aspirations. Figure 1 illustrates the geographic area of analysis used throughout the Study, which mirrors the extent of the long-term planning and policy development within the Intermunicipal Development Plan (IDP).

1.2 POLICY DIRECTION SUPPORTING GROWTH STUDY

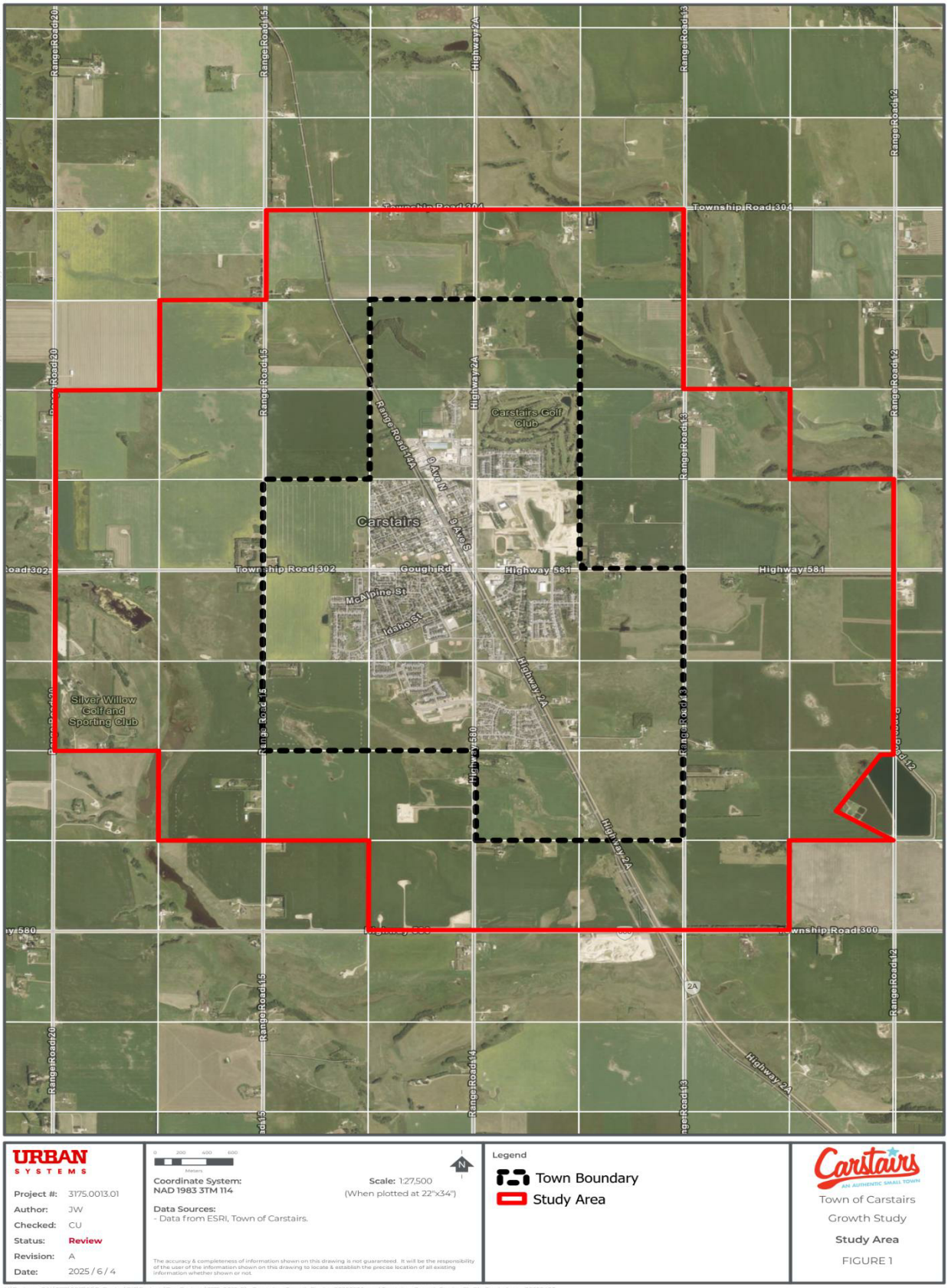
The MDP envisions growth management through the lens of sustainable service delivery and making sure that local assets are aligned with anticipated growth. The MDP supports financially sound growth that balances logical expansion of development into new areas that can be reasonably serviced with locally compatible infill.

> The Town of Carstairs Vision:
> "Building a vibrant, affordable and sustainable community, offering an unsurpassed quality of life."
> - 2020, Municipal Development Plan (MDP)

There are many variables that shape the scale and timing of growth, which requires any growth study to be an adaptable document. Given the dynamic nature of growth, these variables must be tested, refined, and updated as the community evolves to ensure decision making remains aligned with the community's vision. To remain informed on the evolution of the community, the following general growth variables helped shape this analysis and should continue to provide guidance on future reviews:

1. Land Supply Analysis – Assesses the availability of land and considers what constraints may make development challenging or impractical.
2. Land Demand Analysis - Considers how the Town has grown in population and how it may be expected to grow considering land required for residential uses and employment.
3. Land Suitability Analysis – Consider how the Town has planned and serviced the land and what opportunities and constraints may influence future community growth.
4. Pathways of Growth – Provide the Town with a tool to envision different conditions resulting from different patterns and types of growth.

Figure 1: Growth study area of analysis



2.0 CARSTAIRS CONTEXT

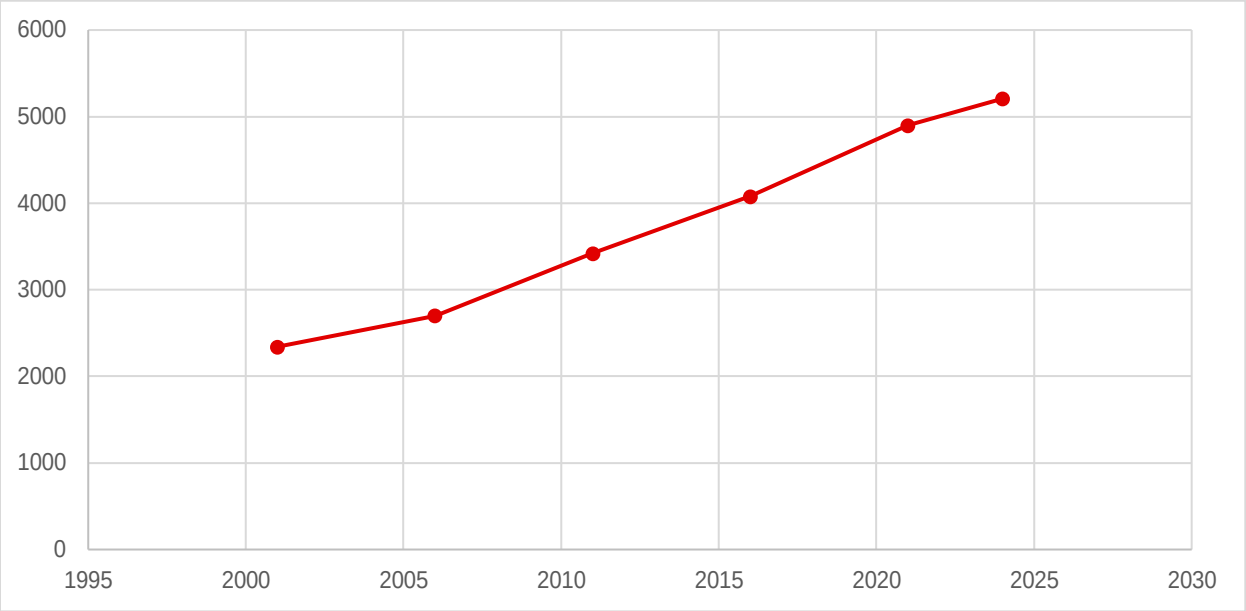
Located along the QE II corridor, approximately 30 KM north of the City of Airdrie and 50 KM north of the Calgary International Airport, the Town is not only growing but also getting younger as more families are moving into the community, which is the opposite trend of other peer communities.

Over the last decade, the Town has experienced consistent population growth and correlated urban development, mostly focused on lower-to-moderate density housing. Understanding past trends in population, employment, housing, and demographics is essential to guiding responsible growth and ensuring the community is well positioned to meet future needs.

Population

Today, the Town is home to approximately 5,313 residents (based on the 2024 municipal census), up from the 2021 Census population of approximately 4,900. The Town has consistently grown over the last 25 years, experiencing an average annual growth rate of 3.8% since the 2001 Census (peaking at 4.9% between 2006 and 2011), with the total population more than doubling during that timeframe. Figure 2 illustrates the growth since the 2001 Census.

Figure 2: Census population growth



NOTE: The 2024 population represents an estimate generated by the Government of Alberta Regional Dashboard.

When compared with other communities along the QE II corridor, extending north from Airdrie, the Town has consistently demonstrated it is an attractive community to residents looking to relocate through its high growth rates relative to comparable communities within the region. Table 1 illustrates the total population for the census years between 2001 and 2021, as well as the 2024 estimate, and the percentage change in the population between these years.

The Town is in the process of making significant upgrades to its water infrastructure system that will allow for continued growth and development. While this project will enable the Town to accommodate growth, it does not signal unrestrained expansion. Rather, it supports a responsibly managed, identity-driven approach to planning, ensuring that new development aligns with the community's values, vision, and financial capacity.

Table 1: Census population for comparable communities

Census Year	Carstairs	% Change	Didsbury	% Change	Crossfield	% Change	Olds	% Change	Innisfail	% Change
2001	2,342	-	4,035	-	2,465	-	6,753	-	7,106	-
2006	2,699	15.2%	4,450	10.3%	2,758	11.9%	7,494	11.0%	7,561	6.4%
2011	3,422	26.8%	5,094	14.5%	2,943	6.7%	8,501	13.4%	8,084	6.9%
2016	4,077	19.1%	5,389	5.8%	3,065	4.1%	9,240	8.7%	8,014	-0.9%
2021	4,898	20.1%	5,219	-3.2%	3,727	21.6%	9,473	2.5%	8,224	2.6%
2024 (estimate)	5,207	6.3%	5,202	-0.3%	4,045	8.5%	9,998	5.5%	8,714	6.0%

Demographics

The working age population continued to grow between the 2011 and 2021 census years, as most of the growth was represented by young families with children, which contributed to the relative stability of the median age (38.5 in 2011 and 38.4 in 2021). While there has been considerable growth among the youth and working age populations, the senior-aged cohorts (i.e., population over 65) continue to expand as the longer-term residents have remained in the community. Figure 3 illustrates changes in the community population by age and gender that occurred between the 2011 and 2021 census years.

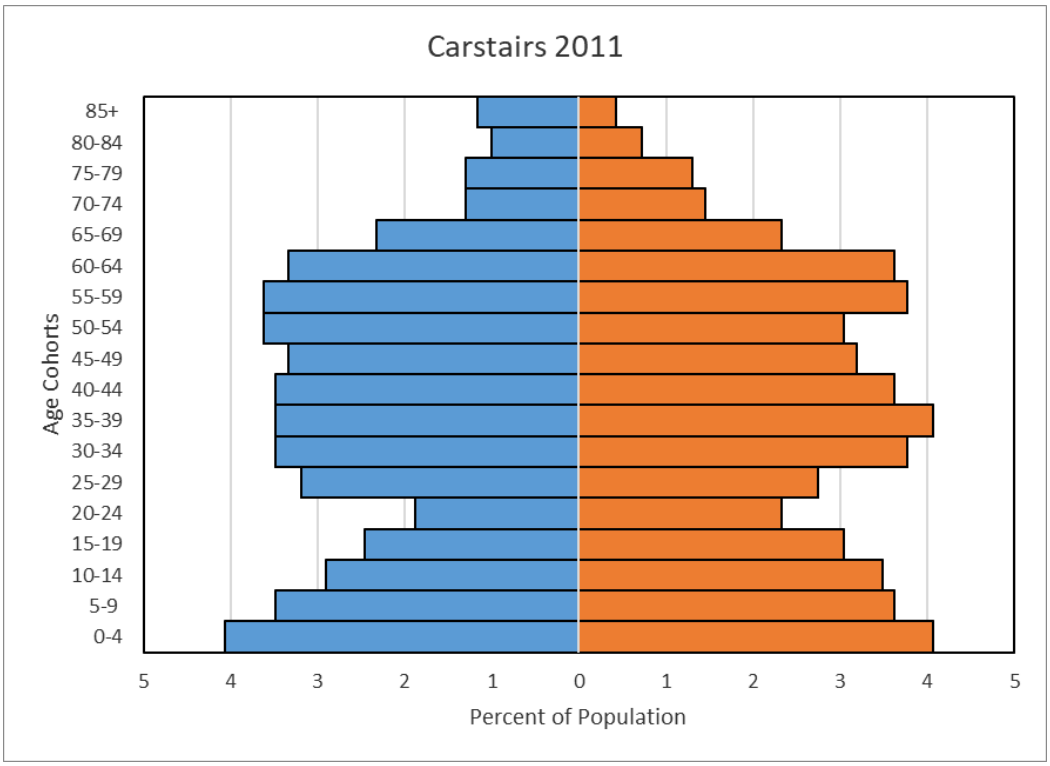
While the percentage of the population represented by visible minorities remains relatively small (3.5% in 2021), this has more than doubled the 2011 percentage of 1.3%. Migration patterns have shifted, with a rise in interprovincial movement and a decline in international migration, suggesting growth is increasingly driven by mobility within Alberta and housing affordability has driven migration from larger cities to smaller towns within the commuter-shed of major employment areas.

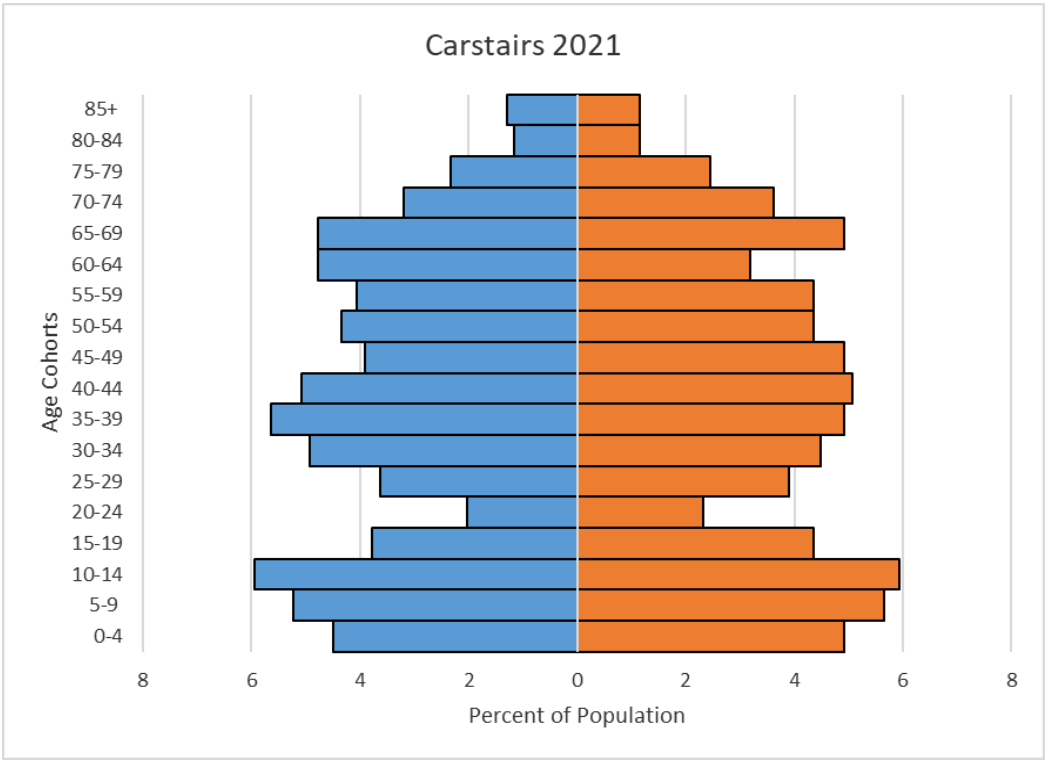
Housing

The 2021 census reported 1,840 total housing units. While lower-density, single-family housing represent the dominant form, representing approximately 80% of the total stock, this number decreased from approximately 89% reported in 2011. This has been offset by an increase in semi-detached housing which rose from approximately 4% to 8% during that same timeframe. The trend in housing supply is matched by the distribution of housing by tenure, with approximately 86% of housing owner-occupied, vs. 14% renter occupied. The Town has been more deliberate in working with developers to implement policy directives from the MDP to increase the supply in alternative forms of housing, and this trend is expected to incrementally grow as affordability concerns increase and the senior population increasingly look to housing transitions.

Over the last five (5) years, there has been an average of 41 housing starts per year, peaking with 71 in 2024. The trend toward single-family development has continued, representing 83% of all starts and 17% through all other types of multi-unit starts (i.e., semi-detached, townhomes, etc.). This trend remains influenced by market forces as migration from Calgary and Airdrie continues to drive residential expansion seeking more affordable, single-family housing.

Figure 3: Census Population Pyramids 2011-2021





Employment

While the labour force has increased consistently over the 2011 to 2021 census years (growing from 1,955 to 2,430), this has not translated to a commensurate growth in non-residential development. The migration to the Town for housing opportunities remains associated with new residents continuing to commute to their existing places of employment. This is reinforced through the examination of the net commuter flow, which measures the difference between outgoing and incoming commuters. In 2021 the net commuter flow was -560, indicating there are 560 more individuals leaving town than were entering for commuting purposes. This negative outflow has grown over the last decade when it was only -380 in 2011.

The market continues to reinforce migration, though there is a recognition that the Town will need to diversify its land use patterns to enhance the residential to non-residential assessment ratio. The current ratio is approximately 92% residential to 8% non-residential, which is a typical pattern for a bedroom community. However, as the Town evolves there will be an increasing need to expand non-residential development not only in support of financial sustainability, but also to offer the necessary commercial opportunities for a growing population and employment options to meet the evolving needs of the emerging labour force.

3.0 GROWTH PROJECTIONS AND LAND NEEDS

A variety of regional, economic, and demographic factors are expected to shape population, housing, and employment growth in the Town over the next 25 years. These factors will influence decisions on the type, locations, and intensities of new development required to support the needs of a changing population and workforce. These factors include:

1. Economic cycles, and Alberta's ever-changing economy and employment landscape.
2. Rising housing costs in major urban centres, leading to increased migration to smaller, more affordable communities.
3. Immigration and interprovincial migration patterns.
4. A changing demographic profile, as longer-term residents age, offset by younger people migrating into the Town.
5. Technology and innovation influences on economic development opportunities.
6. Continued affordability relative to the Cities of Airdrie and Calgary.
7. Proximity to major areas of employment.

By projecting the future population and demographic trends and understanding the desired financial outcomes, the Town can forecast how much residential and employment land is needed to accommodate desired growth. This helps the Town strategically take steps towards a preferred growth scenario that supports residential and non-residential development within existing and new neighbourhoods.

As noted, growth is not a linear process, given all the variables involved in shaping it. Over the next 25 years, the Town will see have slower and faster rates of growth as the local, regional, provincial, and national contexts change. To better understand the impacts of different growth scenarios and support informed decision-making, three different population projection scenarios have been prepared designed to illustrate how future growth will impact the following:

1. Plan and prepare for infrastructure upgrades and investments (e.g. water and sanitary expansion and/or upgrades) and consider funding alternatives.
2. Establish appropriate timing to unlock new lands for development (e.g. approval of new Area Structure Plans).
3. Forecast community needs, such as new schools and emergency services.

3.1 POPULATION AND DEMOGRAPHIC PROJECTIONS

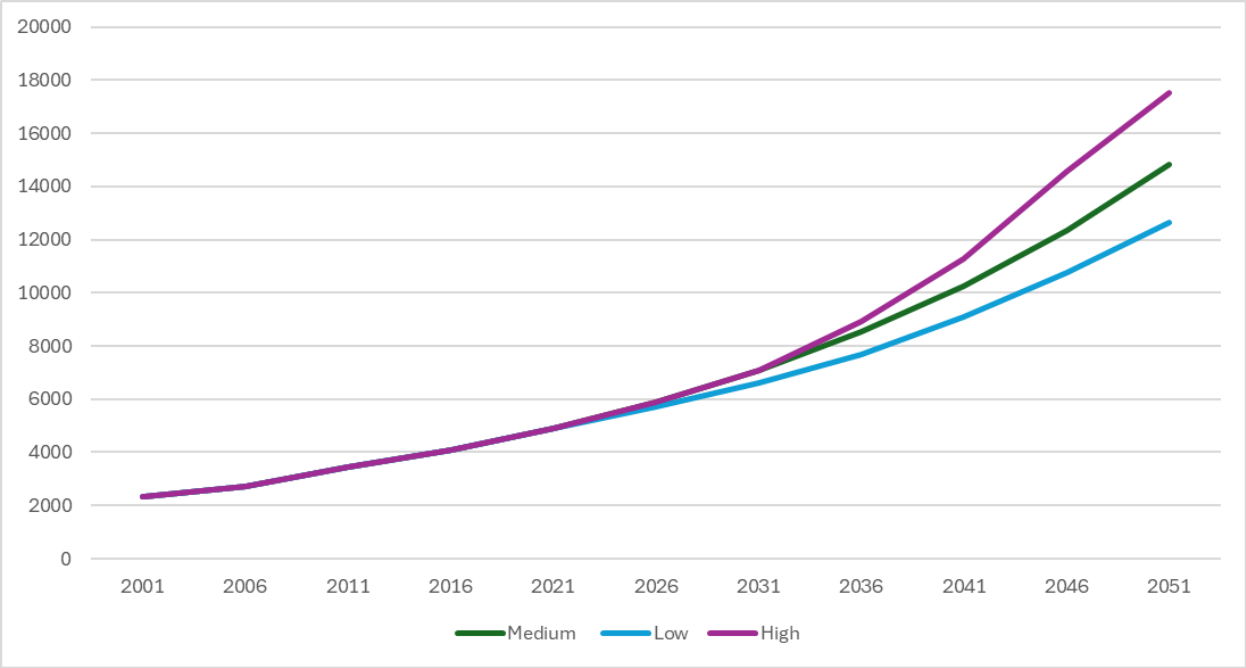
In considering the expectation around the Town's continued growth, three (3) different population projection models were used, built around the following conditions:

1. Low Growth Projection: this assumes that migration would play a minimal role, and that most of the growth would be the natural expansion of the population through a cohort-survival model. Under this scenario, the population is expected to reach approximately 12,600 by the year 2051.
2. Medium Growth Projection: this assumes a continuation of the historic growth rate that the Town has experienced between census years between 2001 and 2021, acknowledging migration will continue to play a considerable role in future growth. Under this scenario, the population is expected to reach approximately 14,800 by the year 2051.
3. High Growth Projection: this assumes that migration will accelerate as the Town continues to attract households looking for not only the housing and lifestyle Carstairs offers, but also that the development pattern will continue to diversify introducing alternative housing options that appeal to a greater diversity of households (i.e., young professionals, single individuals, downsizing seniors, etc.). Under this scenario, the population is expected to reach approximately 17,500 by the year 2051.

As migration plays a larger role in the population growth, this will continue to impact the demographic profile of the community, continuing to attract younger families and school-aged children. This has the potential to continue the decline of the median age, while increasing the potential labour force as part of broader business retention and expansion efforts that can support diversification of land use patterns and the overall tax base.

As illustrated in Figure 4, The three (3) scenarios do not diverge much over the first five (5) years between 2026 and 2031, but as the migration accelerates in the medium and high scenarios, the gap between each starts to widen.

Figure 4: Growth projection scenarios

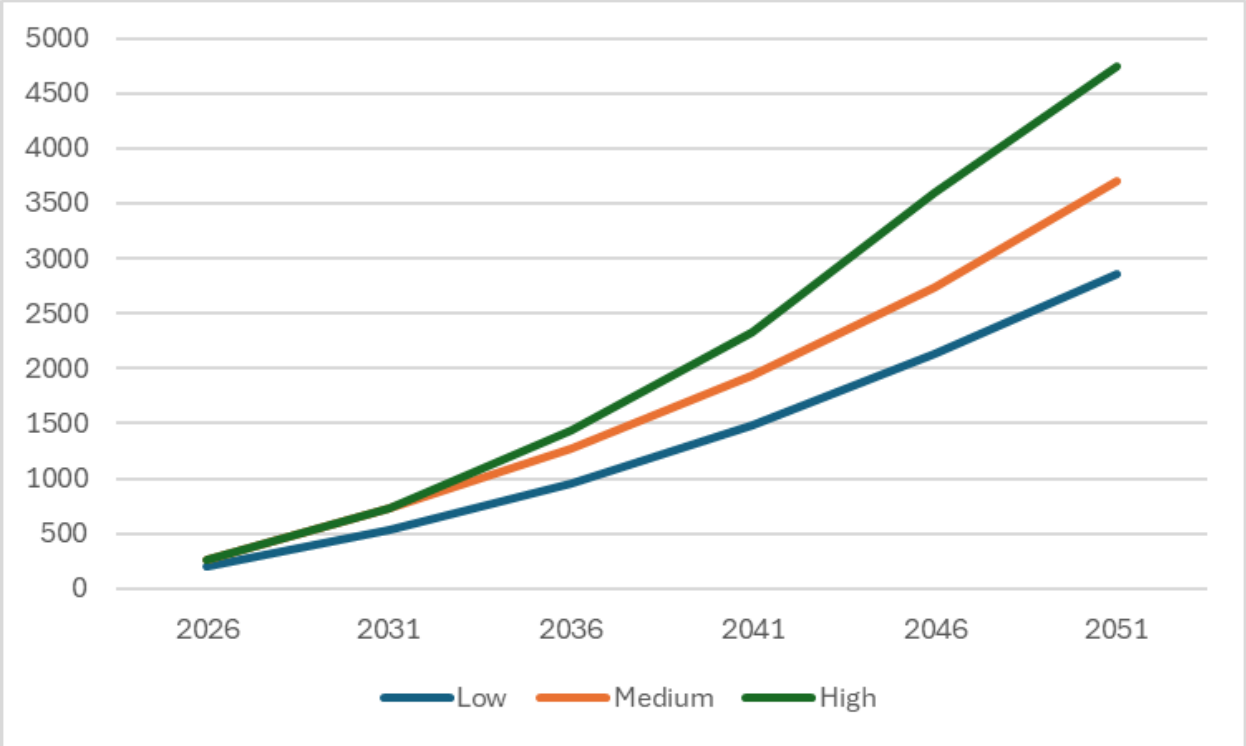


3.2 HOUSING UNIT PROJECTIONS

Housing demand is established by estimating the quantity of housing needed to support the projected future population. As the demographics of the Town change, the type of housing that people are looking for will also change. Smaller homes to support seniors aging in place and smaller households seeking affordable options outside major metropolitan areas will be in higher demand in 2051 than they are today, which will diversify the housing stock. Shifting macroeconomic trends around work, as well as choices regarding work-life balance will require a greater variety of forms of housing to accommodate these changes.

Figure 5 illustrates the projected housing demand for each of the three (3) population growth scenarios. This represents an aggregate of the total housing types and does not differentiate among single-family or multi-unit households. The MDP policy strives to achieve a 30% mix of multi-unit households, which has not been reflected in recent growth trends. As affordability evolves, it is anticipated that the mix of housing densities will incrementally transition toward the 30% and a greater diversity of housing types.

Figure 5: Projected housing demand



The three (3) population projection scenarios and maintaining an average household size of 2.6, translate to the projected housing demand shown in Figure 3, anticipating the following approximate totals for each of the scenarios:

1. Low Growth: approximately 2,900 new units
2. Medium Growth: approximately 3,700 new units
3. High Growth: approximately 4,700 new units

Housing density is determined by assigning a reasonable density (units per hectare) based on MDP policy, Area Structure Plan design, and densities observed within the mature community. It additionally considers the difference between new communities and mature/developing communities in their ability and appropriateness to accommodate density. Based on overall direction in the MDP, the Town has

established a target of 12 to 25 units per hectare for new development and have prioritized compatibility with adjacent land uses within mature neighbourhoods for any potential infill or redevelopment. Housing densities have been averaging approximately 17 units per hectare. New ASPs remain predominantly single-family, however they have been incrementally adding alternative multi-unit housing types that is nudging the density toward the higher end of the spectrum.

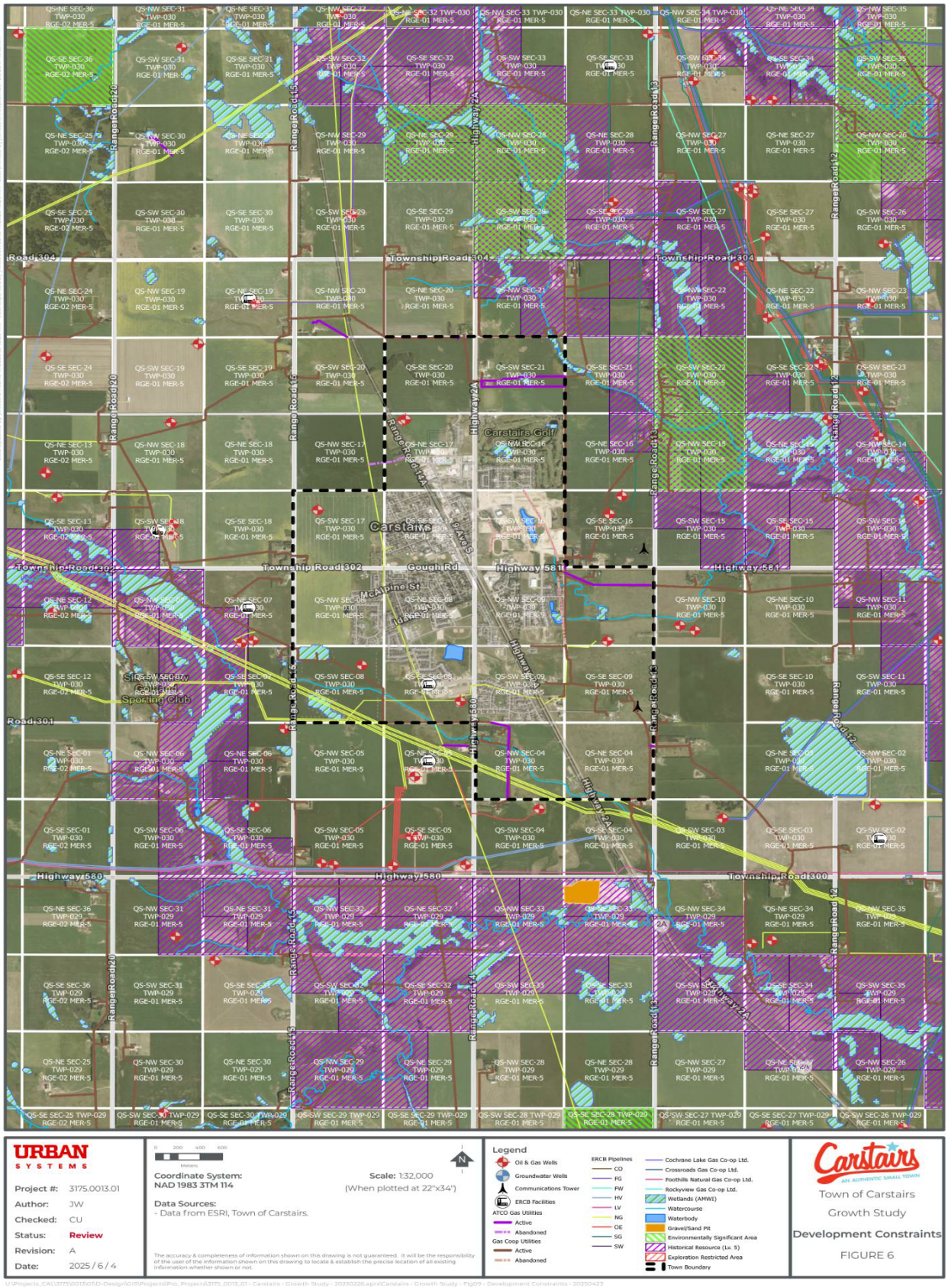
3.3 DEVELOPMENT CONSTRAINTS

To establish the existing land supply, all development constraints were considered to identify the available amount of developable land. Lands are considered developable if they are suitable for future development (i.e., free from major environmental, natural, and/or physical constraints). Lands that are unplanned (do not have ASPs in place), were assessed at a desktop level and natural constraints, such as flood hazards, wetlands, and steep slopes (15%+), and physical constraints, including major pipelines, transmission corridors, and oil and gas installations, were considered to establish the potential developable area.

Figure 6 illustrates the location and distribution of natural and physical constraints throughout the existing town boundary and the IDP area of analysis. These constraints are generally considered within the following categories:

1. Fixed locations: these are typically constructed features (i.e., pipelines and major transmission lines) that are fixed elements of the plan area.
2. Mapped locations: these apply to some of the natural features (i.e., waterways and wetlands) that may change and evolve over time but are generally considered present in the areas they have been mapped.
3. General areas: these represent a high-level, geographic analysis that generally acknowledge the potential presence of constraints (i.e., historic resources and environmentally significant areas, mapped at a quarter-section level).
4. Additional areas: these are not specifically mapped but are represented by additional buffers of development that are incorporated around different constraints (i.e., oil and gas wells and wastewater lagoons).

Figure 6: Development constraints



4.0 TOTAL LAND NEED

4.1 RESIDENTIAL LAND NEEDS

Total residential land need is determined by combining the land area necessary for housing (housing density) with the land area needed for non-housing components of a neighbourhood, such as roads, parks, and schools. Before finalizing the total residential land needs, the current planned (i.e., those areas under an existing ASP) and unplanned (i.e., vacant lands that do not have an ASP) lands need to be considered to determine what percentage of the projected housing demand can be accommodated within the current boundary.

Planned growth areas

Understanding the Town's supply of planned and unplanned land is essential for assessing readiness to meet growth demands in the short, medium, and long-term. Planned lands are more development ready, as they include guidance on land use, density, infrastructure needs, and direction and policy on environmentally sensitive lands. In contrast, unplanned lands require substantial planning work before development can occur, making them a longer-term option for accommodating growth.

There are six (6) adopted ASPs within the Town that have identified the expected residential capacity of each of the proposed neighbourhoods. Each of these neighbourhoods are at various stages of development, ranging from dormant (i.e., there has been no development activity for over five (5) years), to ongoing (i.e., development has been initiated and consistently growing over the last five (5) years), and to initiated (i.e., preliminary development has begun within the last year).

Figure 6 illustrates the geographic distribution of the planned growth areas and Table 2 illustrates each of the adopted ASPs, estimating the total number of housing units remaining, which represents a proportion of the total projected housing demand that can be accommodated within the existing boundary, impacting the total amount of residential land needed.

Table 2: Anticipated dwelling units within existing planed areas of growth

Area Structure Plan	Planned Units	Built Units	Remaining Units	Likely Units
Mandalay	595	372	223	223
Eastgate	1,056	-	1,056	1,056
South	999	644	355	355
Homestead	193	-	193	-
Carstairs Links	120	30	90	40
Marigold	190	-	190	-
Total	3,153	1,046	2,107	1,674

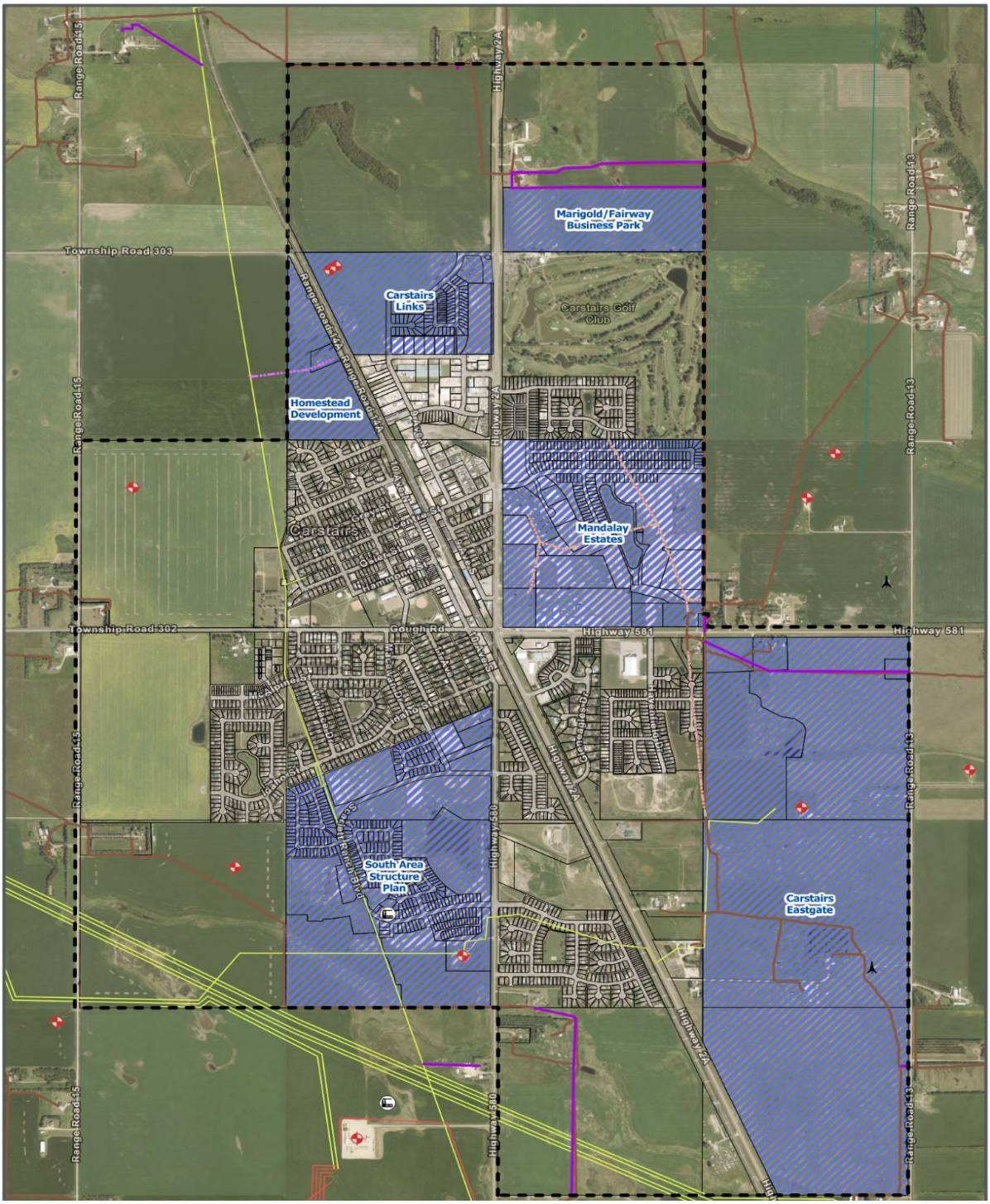
Table 2 considers each of the ASPs through the following categories to create a realistic estimate of how many housing units can be reasonably accommodated within these lands:

1. Planed Units: these are the total number of housing units that were initially anticipated within the adopted ASP.
2. Built Units: this represents the total number of housing units that have been built at the time of this report.
3. Remaining Units: this is simply the difference between the total number of planned units and total units that have been built.
4. Likely Units: this category introduces nuance around the likelihood of the remaining units getting built. This is based on constraints related to ownership (i.e., no willingness to proceed and/or sell),

finances (i.e., the proposed development is cost prohibitive), and servicing (i.e., there are servicing challenges that limit the developability of the site).

In review of the existing ASPs and considering the nuance associated with the remaining units, it is anticipated that the existing planned areas of growth can accommodate approximately 1,674 housing units. This total will be considered with the projected housing demand illustrated in Figure 5 to estimate the total amount of residential land needed.

Figure 7: Geographic distribution of planned growth areas



Unplanned growth areas

Not all lands within the current boundary are regulated by an existing ASP. There are other vacant parcels of land that have the theoretical capacity to accommodate a proportion of the projected housing demand. However, vacancy alone is not an indicator of the land's suitability to accommodate housing. Each of these vacant parcels of land have their own characteristics, opportunities, and constraints that establish a reasonable expectation of how these lands can accommodate a proportion of the projected housing demand.

Prior to advancing area structure planning, it is important for The Town to explore how to leverage unplanned lands to accommodate future community growth and needs. By assessing the unplanned lands, the Town can identify where future land uses could be accommodated, and the location and extent of environmentally sensitive lands that should be protected through policy.

Table 3 categorizes the unplanned growth areas and establishes an estimate of the total number of housing units each parcel could reasonably accommodate. Further, Figure 8 illustrates the geographic distribution of the unplanned growth areas.

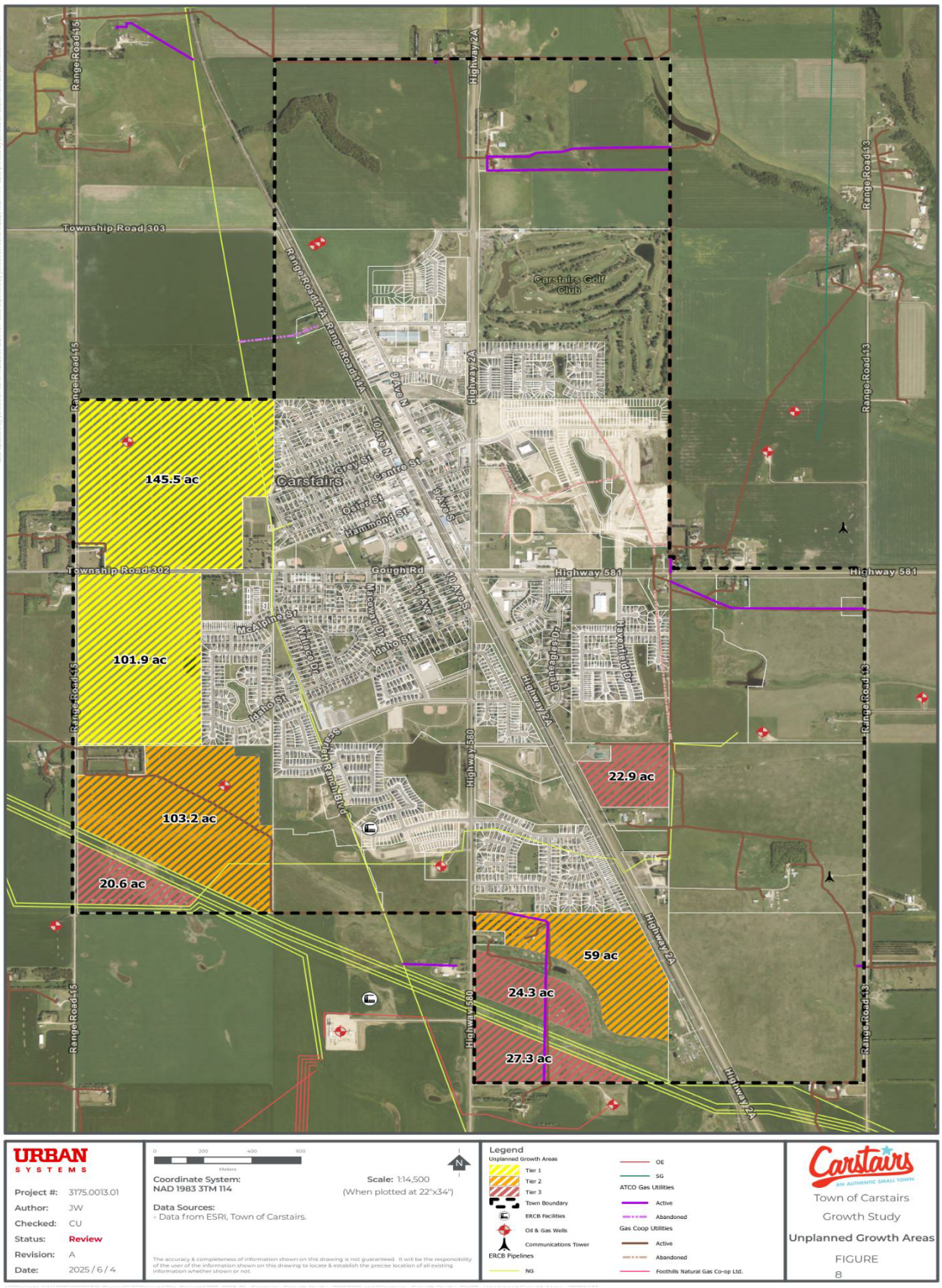
Table 3: Anticipated dwelling units within the unplanned growth areas

Unplanned Potential Areas of Growth	Developable Hectares	Total Units		
		Low Density	Medium Density	High Density
Tier 1	82.2	986	1,397	2,055
Tier 2	47.8	574	813	1,195
Tier 3	87.0	1,044	1,479	2,175
Total	217.0	2,604	3,689	5,425

The unplanned growth areas are considered based on their potential to accommodate additional housing units. The vacant lands are considered based on the following:

1. Tier of development: each of the vacant lands are considered based on the constraints that would contribute to or limit the developability of the land (i.e., fragmentation, access, serviceability, environmental or constructed constraints, etc.), with Tier 1 being the least constrained and Tier 3 the most constrained.
2. Developable Hectares: each parcel is considered based on the anticipated developable hectares (this is focused on the vacant lands that are unencumbered by environmental or constructed constraints and does not fully evaluate developability based on the other potential constraints).
3. Estimated units: based on the potential developable acres, the total number of units are estimated based on the three (3) different densities (i.e., Low at 12 units per hectare, Medium at 17 units per hectare, and High at 25 units per hectare).

Figure 8: Geographic distribution of unplanned growth areas



For the purposes of this study and establishing a reasonable estimate of the Town's capacity to accommodate the projected housing demand within the existing boundary, only the Tier 1 lands have been included. The Tier 2 lands may become developable over time as the physical constraints are mitigated and municipal servicing is less cost prohibitive for development. The Tier 3 lands have significant constraints either through fragmentation from semi-permanent physical constraints or servicing limitations that minimize development options.

4.2 NON-RESIDENTIAL LAND NEEDS

Land Considerations

Understanding non-residential land needs is typically tied to projecting employment growth across the various industries in town, which can be translated into space needs based on the site characteristics associated with each industry. This also considers the relationship to population growth and the amount of non-residential land needed to establish a growing local economy. However, in a bedroom community within an expanding metropolitan area, the typical relationship among jobs, population, and housing are more complicated and there is less of a correlation between residential and non-residential land needs. Within bedroom communities, employment is often driven through commuting patterns to economic anchors within the larger cities, which also typically drives spending patterns in larger retail establishments closer to the place of employment.

This does not imply that the Town should not consider non-residential land needs as part of anticipating future growth. As communities grow and change, the context shifts and the population reaches a point where the demand for commercial and retail opportunities, as well as the evolution of the labour force, changes the market dynamics that drive non-residential development. Within the current planned growth areas, there are lands that have been identified for non-residential uses, including the Marigold/Fairway Business Park ASP and the southern portions of the Eastgate ASP that have been planned for employment uses. Given the development constraints on some of the unplanned growth areas that make residential uses cost-prohibitive, these areas also represent a supply of potential employment lands.

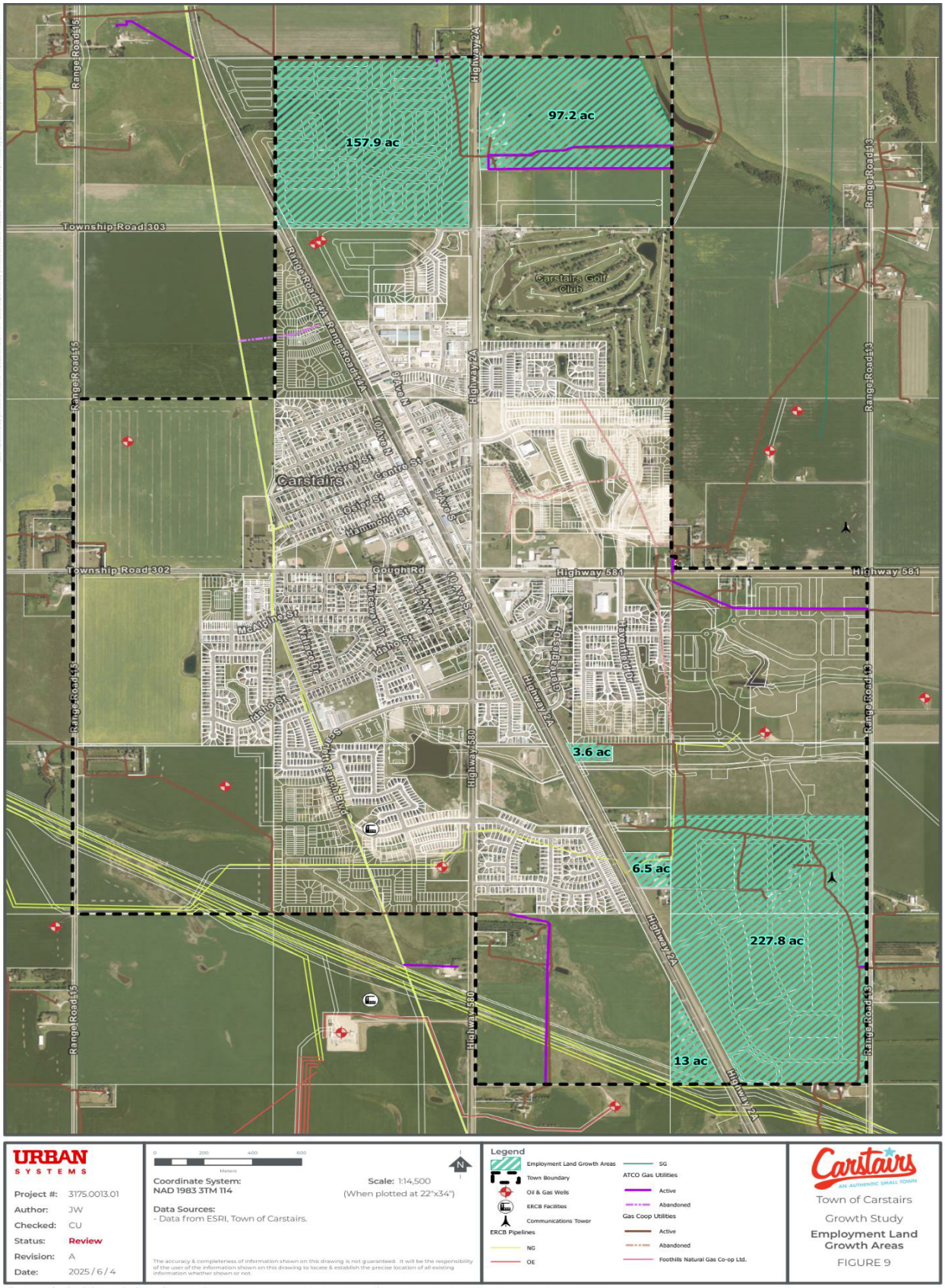
Financial Considerations

Like many bedroom communities that serve a largely residential function within a broader metropolitan market, municipal finances are largely driven by residential tax assessments, with much smaller proportions derived from non-residential uses (i.e., commercial, office, retail, industrial, etc.). Carstairs is no different. The current ratio between residential to non-residential assessment is approximately 91.6% to 8.4%.

While there is no singular target that all municipalities strive toward. Like everything, local context drives strategic priorities for growth and development. However, when ratios reach this level of differentiation, additional revenue necessary to fund sustainable service delivery is increasingly borne by homeowners, who are already feeling stretched thin on taxes, fees, and utility rates.

Recognizing that non-residential growth is challenging to predict relative to the anticipated expansion of the population (and housing), there is an acknowledgement that sufficient land needs to be identified for future employment uses as the local market evolves. Planning for future non-residential lands also serves as some assurance that future opportunities are available to contribute toward an incremental shift from the current assessment ratio toward a healthier split, that for the sake of this analysis has been defined as an aspiration to move toward a 25% proportional share for non-residential. Figure 9 illustrates a geographic distribution of the lands within the existing boundary that have been identified for long-term employment uses.

Figure 9: Geographic distribution of employment lands



As Figure 9 illustrates, there are multiple, relatively large, tracts of land (either planned or unplanned) that can reasonably accommodate non-residential uses that could both contribute to the growth of the local economy, as well as support a healthier residential to non-residential assessment split. These represent a mix of lands that have been identified within an ASP, are located adjacent the Highway 2A corridor and other non-residential uses and are limited to other types of development because of municipal servicing constraints.

This mix of location and scale of lands available for non-residential uses provide a variety of opportunities to expand employment in the Town as well as contribute to the commercial retail and service businesses that are necessary correlations to an expanding population.

5.0 GROWTH AREA CONSIDERATIONS

Growth is dynamic and requires careful and consideration of multiple factors, including:

1. The anticipated rate of growth, which considers how fast or slow the population is changing and the various implications that come with the pace of change.
2. The availability and suitability of land to accommodate future growth, which needs to be monitored over time as the rate of growth impacts the overall supply.

5.1 RATE OF GROWTH

The rate of growth refers to the speed at which a population changes year over year. While growth presents opportunities for a community, its pace can have significant effects on a Town's social, organizational, and financial health. Managing growth at a steady, balanced pace helps ensure the Town can maintain high-quality services, manage financial risks, and plan effectively for the future.

Implications of rapid growth

Rapid growth can challenge a community's organizational resources and shift focus from long-term strategic planning to short-term decision-making. While it can increase municipal revenues and benefit property tax rates, it may also present financial challenges. Rapid growth can surpass the Town's ability to fund and deliver infrastructure and services, strain budgets, and potentially lead to increased borrowing, tax adjustments, or deferred priorities. Additionally, rapid growth can affect social connections and contribute to isolation and anonymity.

Implications of slow growth

Slow growth can limit a Town's capacity to provide high-quality services, thereby affecting the quality of life for residents and local businesses and making it challenging for the Town to meet evolving community needs. To encourage and support growth, Towns typically invest in infrastructure, such as roads, water and sewer systems, or community facilities, with the expectation that revenue from future development will cover these costs, and that new residents will contribute to the operational expenses of this infrastructure. However, if development is delayed or does not occur as anticipated, the expected revenue does not materialize, leaving the Town responsible for managing and maintaining underutilized infrastructure without the projected income. Over time, these assets continue to deteriorate and may require expensive repairs or replacement before they have been fully utilized, placing the Town at financial risk and restricting its ability to fund other community priorities.

A balanced approach to growth

While many of the factors driving growth are outside the Town's sphere of control, taking a proactive approach to managing the rate of growth allows for thoughtful consideration of lands needs, levels of service, and strategic investment in community infrastructure. A balanced approach to growth enables a community to grow with purpose, ensuring development is not just about adding people and houses, but about building a strong and healthy community for all its citizens.

The Town has consistently grown between 3.5% and 4.5% annually over the last 25 years, which has contributed to its ability to plan proactively and coordinate infrastructure investment that aligns with the timing of new development and supports the levels of service and quality of life that has attracted the growth.

Over time, the Town can use 3-4% as target growth rate to monitor how growth may need to be adjusted (using other tools) to ensure growth occurs sustainably, based on the following key goals from the MDP:

1. Fiscal sustainability: focusing on long-term asset management that minimizes operational, maintenance, and replacement costs of municipal infrastructure.
2. Growth management: ensure the availability of serviceable land that can accommodate growth through a diversity of land uses.
3. Economically competitive: continue to plan for the expansion of the local economy through the growth of employment opportunities that contribute to a balancing of the municipal tax base.
4. Community inclusion: work towards diversifying the housing stock to meet a range of household needs and invest in the social infrastructure necessary to support the Town's quality of life.

5.2 DEVELOPABLE LAND SUPPLY

Residential needs

While the Town can anticipate and plan for the rate of growth to approximate 3-4% annually, this will vary over time. Regardless of the variances to the rate, the Town has identified the desire to establish a 25-year land supply to accommodate future growth.

As identified throughout the Study, undeveloped land is not the only indicator of the developable land supply. Given the variety of constraints throughout the Town, vacant lands need to be evaluated for their potential to accommodate the projected housing demand. Beyond the developable land supply, growth requires a strategic approach to guide the orderly development of planned growth areas based on the following factors:

1. Contiguous Growth: Develop land adjacent to existing areas to prevent scattered development, ensuring efficient infrastructure use.
2. Infrastructure Optimization: Utilize existing infrastructure capacity (i.e., roads, pipes, treatment facilities, etc.) to accommodate growth, and prioritize areas where infrastructure can be shared across multiple parcels or development phases to reduce costs.
3. Policy Alignment: Ensure growth reflects long-term municipal plans and policies (i.e., MDP and adopted ASPs).
4. Strategic Priorities Alignment: Development sequencing encourages orderly, contiguous development, non-contiguous growth may be appropriate when it supports key strategic priorities (i.e., creating employment lands or addressing urgent housing needs). Flexibility in these cases allows the Town to respond to evolving opportunities, provided potential impacts like higher infrastructure costs or service inefficiencies are carefully considered.

Table 4 summarizes the projected population and housing demand relative to the planned housing supply (considered likely to develop) identified within adopted ASPs to establish the difference between the housing demand and the planned supply. Table 5 evaluates the land within the current boundary and its ability to accommodate the projected housing deficit based on low, medium, and high-density calculations (12, 17, and 25 dwelling units per hectare respectively).

Based on the projected population and housing demand over the next 25 years, there is expected to be a housing deficit ranging from 1,179 for the low growth scenario, 2,025 for the medium growth scenario, and 3,066 for the high growth scenario. When translating the housing deficit to land needs, the only scenario that does not require additional lands outside of the current boundary is the high-density category within the low growth scenario. In all other projections, the Town will require a boundary adjustment to accommodate the projected population and housing growth.

Table 4: Housing needs based on projected growth scenarios

Growth Scenario	Projected Population	New Population	New Housing Required	Planned Housing	Housing Deficit
Low	12,625	7,418	2,853	1,674	1,179
Medium	14,824	9,617	3,699		2,025
High	17,531	12,324	4,740		3,066

NOTE: This does not differentiate the housing deficit by type. Each of the Table 4 categories are defined as follows:

1. Growth Scenario: these represent each of the three (3) scenarios defined in Section 3.1.
2. Projected Population: these are the 2051 projected populations for each of the scenarios.
3. New Population: based on the 2024 population estimate of 5,207 this represents the additional population that the Town will need to accommodate.
4. New Housing Required: based on an average household size of 2.6, this represents the total number of new housing units needed to accommodate the new population.
5. Planned Housing: this represents the total number of housing units that have been identified within existing ASPs and considered likely to be developed.
6. Housing Deficit: this is the difference between the new housing required and the projected supply that is already planned.

Table 5: Land supply needed to accommodate housing deficit

Low Growth Scenario					
Density Category	Housing Deficit	Gross Land Required	Net Developable Area	Internal Land Supply	Land Deficit
Low (12 units/HA)	1,179	98.3	117.9	82.2	35.7
Medium (17 units/HA)		69.4	83.2		1.0
High (25 units/HA)		47.2	56.6		-25.6
Medium Growth Scenario					
Density Category	Housing Deficit	Gross Land Required	Net Developable Area	Internal Land Supply	Land Deficit
Low (12 units/HA)	2,025	168.7	202.5	82.2	120.3
Medium (17 units/HA)		119.1	142.9		60.7
High (25 units/HA)		81.0	97.2		15.0
High Growth Scenario					
Density Category	Housing Deficit	Gross Land Required	Net Developable Area	Internal Land Supply	Land Deficit
Low (12 units/HA)	3,066	255.5	306.6	82.2	224.4
Medium (17 units/HA)		180.4	216.4		134.2
High (25 units/HA)		122.6	147.2		65.0

NOTE: All land area is in hectares. Each of the Table 5 categories are defined as follows:

1. Density Category: differentiates among the three (3) target densities.
2. Housing Deficit: this is the total housing needed within the three (3) different growth scenarios.
3. Gross Land Required: this represents the gross amount of land necessary to accommodate the projected housing demand.
4. Net Developable Area: this is the total amount of developable area necessary to accommodate projected housing as well as reserves and rights of way required as part of the development (estimated as 20%).
5. Internal Land Supply: this is the amount of developable, unplanned land within the current boundary that can absorb a proportion of the housing deficit (identified as Tier 1 lands in Section 4.1.
6. Land Deficit: this represents the additional lands that would be required outside the current boundary to accommodate the projected housing deficit.

Table 5 illustrates a wide range of land needs, from the ability to accommodate all future growth within the current boundary under the low-growth scenario at medium to high density, to requiring over 224 hectares of additional land under the high-growth scenario at low densities. Given the growth trends, the Town anticipates that the medium to high growth scenarios are more likely, and that the density is likely to achieve closer to the medium rates at 17 units per hectare, incrementally increasing over time as expansion is more in line with the high growth scenario.

Under these conditions, the Town anticipates moving toward the medium to high densities within the high growth scenario and considering expanding the boundary to include an additional 65.0 to 134.2 hectares to accommodate a 25-year supply of residential land. Based on the population projections through to 2051, it is anticipated that the land supply within the current boundary will accommodate 16-18 years of growth, dependent on the rate of growth.

Non-residential needs

As noted in Section 4.2, projecting non-residential needs based on the typical ratios of jobs to population or jobs to housing and establishing land requirements by industry, are made more difficult in bedroom communities that do not have a predictable relationship between residential and non-residential land uses. However, the Town has established a direction to ensure that it maintain a land supply available for non-residential uses that will allow for the community to evolve as the population grows and the demand for retail, services, and employment changes.

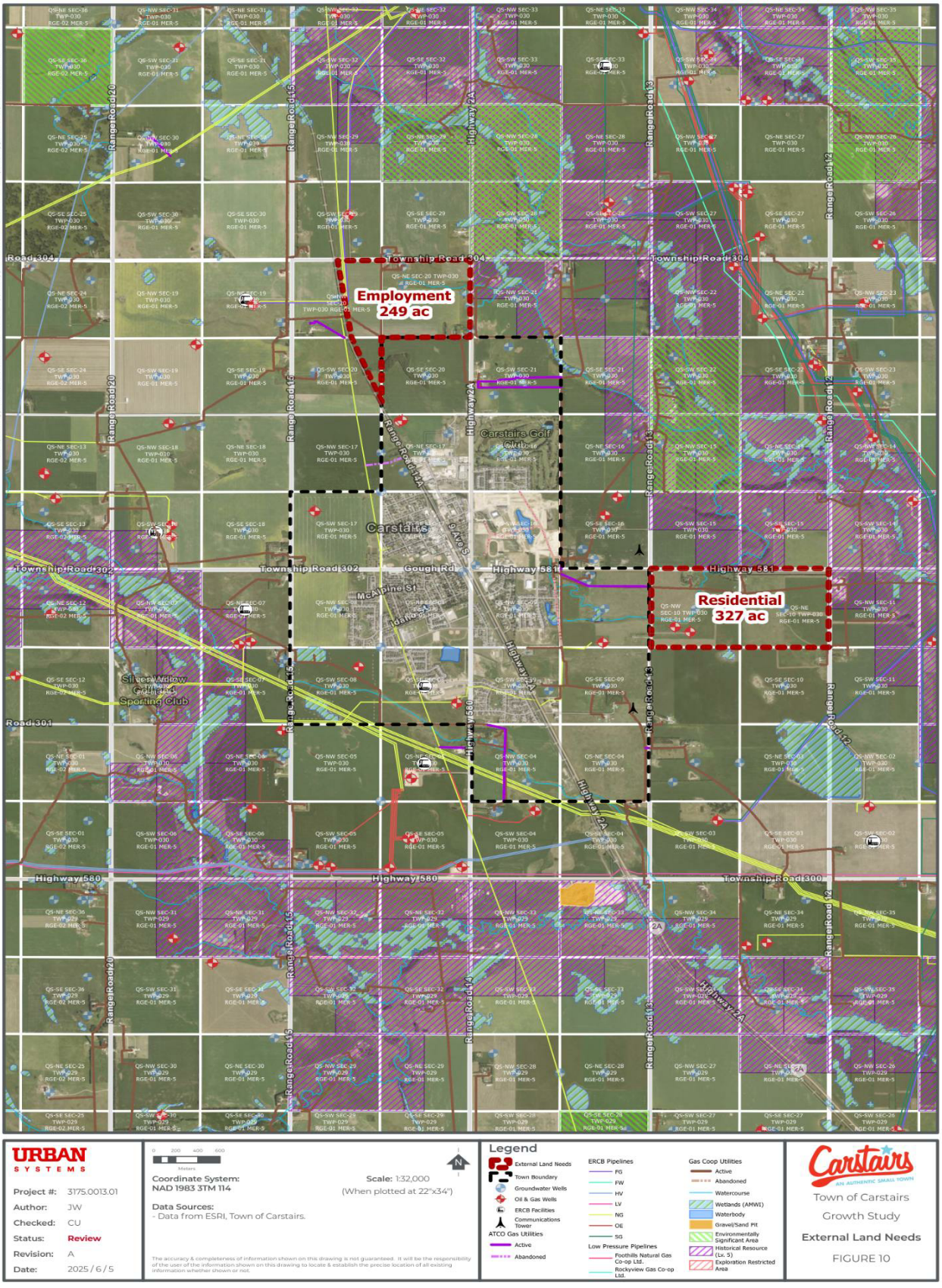
Planning for a long-term supply of non-residential lands also contributes to the financial sustainability of the Town. As noted, the status of the Town as a bedroom community leads to a tax assessment base that is over 91% attributed to residential uses. While aspirational, establishing a target of 75% residential to 25% non-residential will ensure the Town continues to reinforce land use policy that focuses on the need to diversity land uses, and therefore the tax base, and resist any temptation to convert lands targeted for non-residential use to accommodate residential growth.

Using the Town's assessment data for all internal parcels, a more detailed analysis of the residential to non-residential split can be achieved that considers the assessment value by hectare. As noted, the current split is 91.6% residential to 8.4% non-residential. When the lands identified for non-residential use in Section 4.2 are factored into the assessment ratio, the Town has the potential to achieve a 25.2% proportional share of non-residential assessment upon the build-out of these areas.

However, as Table 5 indicates, there will be additional need for land outside the current boundary to accommodate the projected population and housing growth. Assuming that the Town seeks to maximize its potential capacity and expand the boundary to include the 134.2 hectares (which roughly translates to two (2) additional quarter-sections), this would push the assessment ratio closer to 79.7% residential to 20.3% non-residential. To continue striving towards achieving a 25% proportional share for non-residential uses, the Town has identified an additional 67.2 hectares that could accommodate non-residential uses that would, at build-out, push the non-residential proportional share to 24.1%.

Figure 10 provides an illustration of the geographic distribution of the necessary land base need to accommodate a 25-year land supply for housing and to approximate a 25% proportional distribution of non-residential assessment. These lands have few constraints, maximizing the net developable area and are under ownership that has already expressed interest in future development, limiting the amount of land that will be removed from long-term agricultural use. While the non-residential lands to the north have municipal servicing limitations, the proposed realignment of the adjacent lands toward non-residential uses that require less infrastructure capacity, creates an opportunity to establish a contiguous non-residential corridor.

Figure 10: Proposed boundary expansion areas



6.0 GROWTH MANAGEMENT

Continued growth management provides considerations that can help guide the Town towards the projected growth scenario, while managing growth in a way that supports its long-term vision and community priorities. It includes a range of tools the Town can use to guide how and how quickly growth occurs. By offering a balanced and flexible approach, the framework ensures that growth is intentional, aligned with community values, and reinforces the Town's fiscal health.

6.1 WHAT CAN WE CONTROL?

Growth is dynamic and complex, shaped by factors such as market demand, immigration, and broader economic trends. many of which are beyond the Town's direct control. Similarly, the rate of growth, while important to monitor, and manage from a long-term perspective, at a nuanced level it is not something the Town can fully control. What is most within the Town's control is how growth occurs.

At the Town's disposal is a variety of fiscal, planning, and regulatory tools that can guide and direct growth in a way that is reflective of its long-term goals and community values. By strategically applying these tools, whether through planning policy, infrastructure investment, or land use regulations, the Town can ensure that future development contributes towards its goals and reinforces what residents value most.

6.2 GROWTH MANAGEMENT TOOLS

At a high-level, there are a range of tools that the Town can utilize to influence growth, such as strategic and policy planning, investments, partnerships, regulatory mechanisms and/or incentives. Each of these tools varies in their effectiveness, complexity, and risk, which must be carefully considered and applied to ensure alignment with the Town's long-term objectives.

Additionally, managing growth in an intentional way requires significant resources and ongoing monitoring, reflection, and refinement. As conditions that influence growth shift it is essential that the Town remain adaptable in its approach but focused on its desired outcomes. This can be challenging as external factors may change quickly and often, which means outcomes may be more incrementally observed.

Strategic Planning

Strategic planning is a foundational growth management tool that enables the Town to make informed, values-driven decisions that reflect its identity and long-term intentions. It is a process which clarifies priorities, trade-offs, and implications of day-to-day decisions ensuring that actions taken today are aligned to the Town's objectives for the future. By identifying what matters most (i.e., protecting natural assets, diversifying future land uses, etc.) strategic planning takes the necessary steps to analyze future opportunities and potential impacts. The Study is a strategic planning exercise. Thoughtful and continual strategic planning also provides certainty to development partners, as it signals what the Town is trying to achieve.

Comprehensive Planning

Comprehensive planning is an influential tool the Town has for managing growth, shaping both how the community grows and influencing how quickly growth can occur. At the highest level, the MDP and ASPs offer a great degree of control over how and how quickly the Town grows, setting the long-term vision for development and determining where and when growth can take place. Comprehensive planning brings together the goals (and concerns) of the community and the expertise of planners, engineers, biologists, and others to shape how an area will develop over time.

Approving a new ASP is a critical decision point for the Town. Approving new planned lands represents a formal commitment to supporting future development in a specific area and plays a key role in shaping the community's long-term growth pattern. However, opening new areas also increases the amount of land available for development, which can lead to higher-than-anticipated growth in certain periods, create new infrastructure needs to support growth in these new areas and potentially lead to excess capacity within the infrastructure system. While approvals of new planned lands can attract private investment, accelerate planning and servicing, and provide clarity to developers, they must be carefully timed and aligned with the Town's infrastructure, servicing, and market readiness to avoid overextending resources. Maintaining a balanced supply of planned land is essential to avoid the risks associated with having too little or too much development-ready land.

Strategic Investments

The Town has several regulatory tools at hand to guide growth (i.e., parking standards, land use regulations, design guidelines, etc.) which can be used to incentivize desired forms of development or redevelopment. These tools offer flexibility in how development standards are applied, allowing the Town to support specific initiatives such as affordable housing, or more broad initiatives such as infill. While not always used extensively, these tools provide an important layer of discretion to align private development with broader public objectives.

Strategic Investments

Strategic investments, particularly in infrastructure, are a way for the Town to guide where and how growth occurs. By communicating how infrastructure is expected to be financed and funded, and where the Town is willing to share financial risk, the Town can clearly demonstrate how these investments align with its long-term objectives. Prioritizing and sequencing infrastructure investments can directly influence the pace and location of growth, including the activation of employment lands and incentivization for infill and redevelopment.

Partnerships

Partnerships present unique opportunities to support and advance the Town's growth objectives. By collaborating with the development industry, the Town can proactively address challenges, close gaps in the market, and explore new opportunities that align with community needs. Strategic partnerships with the province, Mountain View County, and other regional municipalities are also essential for coordinating efforts in areas such as economic development, housing, infrastructure, and environmental protection. At the local level, working closely with community organizations and service providers can enhance program delivery and ensure that growth benefits all residents. Partnerships are a way the Town can marry its understanding of Carstairs, connection to its residents, and stewardship of the Town, with the expertise, access, and skillsets of partners to help achieve its long-term goals.

7.0 SUMMARY OF KEY FINDINGS

As a summary of the key findings of the Study, the following represent driving factors that contribute to the projected external land needs. The intent of the Study is to support informed decision making by the Town as it contemplates necessary steps now to proactively plan for its future growth.

Contextual factors

- 2024 municipal census estimate of 5,313 with an average annual growth rate of 3.8% over 20 years.
- Younger demographic as growth fueled by young families.
- Housing dominated by single-family, owner-occupied units.
- Growing labour force, though largely commute for employment outside of the Town.
- 91.6% of the current tax assessment base is residential with only 8.4% non-residential.
- There are considerable constraints in certain areas of the Town, fragmenting lands and limiting their ability to accommodate future growth.
- The MDP provides general residential policy seeking to achieve residential densities ranging between 12 and 25 units per hectare and a 70%-30% mix of single-family and multi-unit housing.

Projected growth

- The study projects land needs through the needs associated with the high growth scenario, which anticipates a total population of 17,531 in 25 years, resulting in 12,324 new residents.
- Assuming the trend in average household size remains the same, this will require an additional 4,740 new housing units to accommodate the projected growth.

Internal supply

- Planned growth areas are anticipated to accommodate 1,674 housing units based on direction within the current ASPs.
- This number is lower than the total number of housing units identified within the collective ASPs, however there are existing planned growth areas that have not had any activity in over ten (10) years based on municipal servicing constraints that make development cost prohibitive.
- The Town has 82.2 HA of developable land available to accommodate residential development.
- Most of the remaining vacant, unplanned lands have varying degrees of constraints that limit their developability, reducing their effectiveness to accommodate growth.
- Based on the projected housing growth relative to the planned growth areas, there is a housing deficit of 3,066.
- The Town has 124.2 HA of planned and 204.8 HA of unplanned non-residential areas within its current boundary.

Land needs

- For greater certainty, the Study recommends planning for a 25-year supply of land for future growth, focused on accommodating the high growth scenario and ensuring the medium density target is achieved as a minimum, to maximize the capacity of the internal land supply.
- The current internal land supply is projected to meet the growth needs for the next 16-18 years, acknowledging the variable rate of growth, requiring external lands to meet the 25-year land supply.
- To achieve the 25-year land supply, the Town requires 134.2 HA to accommodate the projected high growth scenario, which roughly translates to two (2) quarter-sections of land.
- The Study suggests an aspirational goal of achieving a 25% non-residential proportional split of the tax assessment base.
- With the lands identified for non-residential use within the internal boundary, there is the potential to achieve a 25.2 proportional split. However, when the external residential lands are incorporated, the split drops to 20.3%, based on current assessment data.
- The study identifies a non-residential northern expansion, which could achieve a 24.1% proportional split, based on current assessment data.

8.0 CLOSING

Throughout the Study, a variety of assumptions were made that the Town ultimately has no control over, suggesting this is a version of many potential futures for the Town. The projected growth has many external variables that could either accelerate or decelerate the rate of growth. The Study is based on today's best available information and is intended as an enhanced support for decision-making and not as a prescriptive call to action.

The importance of the study is in how it catalyzes conversations within the Town and its regional partners on proactively planning for future growth, recognizing the likelihood that the province, the Calgary metropolitan area, and the Town will remain attractive destinations for the foreseeable future. While reasonable to predict similar growth patterns and trends in the short-to-medium term, things can change quickly. For this reason, the Study suggests consideration of a 25-year land supply rather than a 50-year land supply, given the higher variability of projections the further out the timeline. Similarly, the Study suggests planning to accommodate the high growth scenario to increase the likelihood the increased land supply can support the projected growth, while acknowledging the external expansion remains a modest boundary adjustment that does not commit the Town to an excessive increase in size.

While the Study provides a reasonable expectation of what the future growth of the Town looks like, it does not evaluate the following broader implications of growth on the town:

1. Revenue generation of the projected growth, beyond the potential shifts to the residential to non-residential assessment splits.
2. Increased costs of service delivery that are inevitably associated with an increase in population.
3. While additional area was factored into the land need assessment (i.e., municipal reserves, road right-of-way, community facilities, etc.) there was no specific assessment of schools, parks, or community facilities as part of the growth projections.
4. Infrastructure expansion and their associated costs (i.e., capital, operational, maintenance, and replacement) were not evaluated as part of any growth scenario and would require more detailed consideration as part of future decisions.
5. The Study is not a suggestion of a notice of intent to annex lands. This is a recognition of a plausible future for the Town that should be used to inform decisions on next steps.
6. The intent of the Study was not to suggest there is right or wrong decision on how to proceed, rather provide a greater depth of information in which to make a defensible decision on next steps.