

# Town of Stony Plain Population and Employment Forecast

**FINAL REPORT**

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# Growth Scenarios

A population and employment forecasting model was used to project growth for each of three scenarios.

- ▶ **Low Scenario:** This scenario represents a slowdown in economic growth in the Study Area, including reduced growth in the oil industry, which does not recover to the pre-oil price decline levels of 2014.
- ▶ **Medium Scenario:** This scenario represents the 'best guess' as to the growth which can be expected for Stony Plain and assumes that energy prices recover to levels which will remain slightly below those that existed prior to the oil price declines of 2014.
- ▶ **High Scenario:** This scenario represents an 'optimistic' picture of future growth that can be expected for the region, including a return of oil prices to levels similar to those that existed prior to the oil price declines of 2014.

## Base Year Profile

### TOWN OF STONY PLAIN

Between 2011 and 2016 the Town of Stony Plain's population increased from 15,051 to 17,190 according to the Federal Census- an average annual growth rate of about 2.7%. A municipal census was performed in 2015 that placed Stony Plain's population at 15,737. Using federal and municipal census data, along with population projections completed by Alberta Treasury Board and Finance,<sup>1</sup> Stony Plain's 2017 population was estimated at 17,534.

The median age of Stony Plain's population in 2016 was 38.2 years, compared to the provincial average of 36.7 years. As well, according to the 2016 Federal Census Profiles,<sup>2</sup> more than one half of Stony Plain's labour force possessed a postsecondary certificate, diploma or degree; and the town's participation rate was 68.2% (compared to the provincial average of 71.8%).

### OTHER GEOGRAPHIES

Other geographies included in this analysis, which are assumed to possess significant economic linkages with Stony Plain, include much of the Edmonton Census Metropolitan Area (CMA). Specifically, municipalities include Parkland County, Spruce Grove, Edmonton, and the rest of the CMA.

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<sup>1</sup> Alberta Treasury Board and Finance, Alberta Population Projections 2018-2046, <https://www.alberta.ca/population-statistics.aspx>

<sup>2</sup> Statistics Canada. 2017. Stony Plain, T [Census subdivision], Alberta and Division No. 11, CDR [Census division], Alberta (table). Census Profile. 2016 Census. Statistics Canada Catalogue no. 98-316-X2016001. Ottawa. Released November 29, 2017.

Geography	2017 Population Estimate
Stony Plain	17,534
Parkland County	32,729
Spruce Grove	34,520
Edmonton	934,036
Rest of Edmonton CMA	393,132

## BASE YEAR JOBS

The number of jobs located in Stony Plain for the base year (2017) are shown in the table below, according to 2-digit NAICS categories. A total of 7,445 jobs were estimated for 2017. Note that this is an estimate of the types of jobs located in Stony Plain, rather than the standard measure of the types of jobs held by the employed residents of Stony Plain.

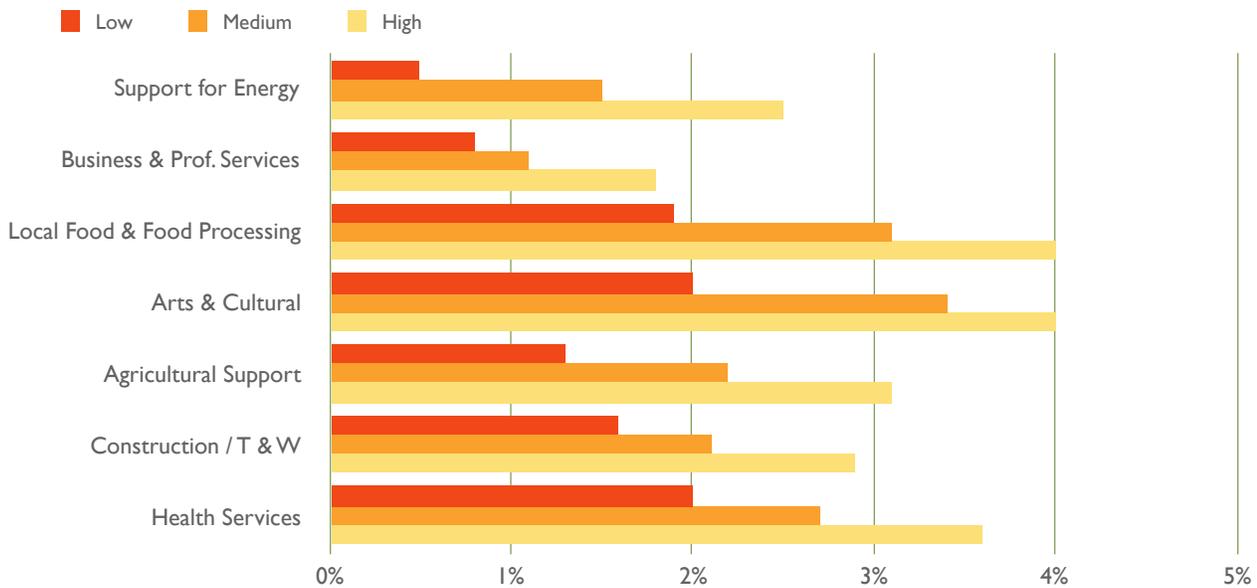
Industry	2017
11 Agriculture, forestry, fishing and hunting	24
21 Mining, quarrying, and oil and gas extraction	175
22 Utilities	232
23 Construction	905
31-33 Manufacturing	263
41 Wholesale trade	256
44-45 Retail trade	779
48-49 Transportation and warehousing	327
51 Information and cultural industries	123
52 Finance and insurance	265
53 Real estate and rental and leasing	176
54 Professional, scientific and technical services	484
55 Management of companies and enterprises	8
56 Administrative and support, waste management and remediation services	208
61 Educational services	630
62 Health care and social assistance	1,193
71 Arts, entertainment and recreation	112
72 Accommodation and food services	423
81 Other services (except public administration)	463
91 Public administration	399
<b>All industry categories</b>	<b>7,445</b>

# Driver Industries

This section of the report provides information on the Driver industries defined for Stony Plain, and rationales as to why these industries are expected to drive near-term job growth in the region.

Each of the industries included in the analysis has been determined to have a particular level of influence on employment in Stony Plain. Growth of these industries has been determined to have an affect on the net migration of workers and their families to the region. The importance of each industry for Stony Plain is summarized in the following section. The information presented for each industry category has been based on research of publicly available information and the sources are provided as they are referenced below.

## Scenario-Specific Driver Industry Employment Growth Rates (Average Annual)



Growth rates for each Driver industry in each scenario have been based on a review of the historical growth patterns for these industries in the context of the expected growth for the Study Area in the future. For example, historical growth of employment in the Support Activities for Energy and Extraction sector in relation to the historic price of oil has been used to estimate the future rate of growth for this sector given expected future energy prices.

For each scenario, a series of growth rates were developed for the industries (or industry groups) that are expected to lead growth in the region – referred to as ‘Driver Industries’. For the Study Area, seven Driver industry groups have been identified as follows:

- ▶ Support Activities for Energy and Extraction
- ▶ Business and Professional Services
- ▶ Local Food and Food Processing
- ▶ Arts and Cultural Industries

- ▶ Agriculture Support
- ▶ Construction / Transportation and Warehousing
- ▶ Health Services

In general, Stony Plain's Driver industry groups listed above act to support economic growth in the entire region (which includes much of the Edmonton Census Metropolitan area), with Stony Plain assumed to act as a hub for supporting economic activity in surrounding municipalities. In this sense, the expected output and employment growth rates of Stony Plain's Driver industries are reliant to some degree on the economic performances of other industries within the region, which are generally external to Stony Plain.

### SUPPORT ACTIVITIES FOR ENERGY AND EXTRACTION

The Support Activities for Energy and Extraction sector has played a significant part in the economic growth of Stony Plain. For 2017, it has been estimated that approximately 11% of the jobs located in Stony Plain are directly involved in this group of industries (representing 825 jobs).

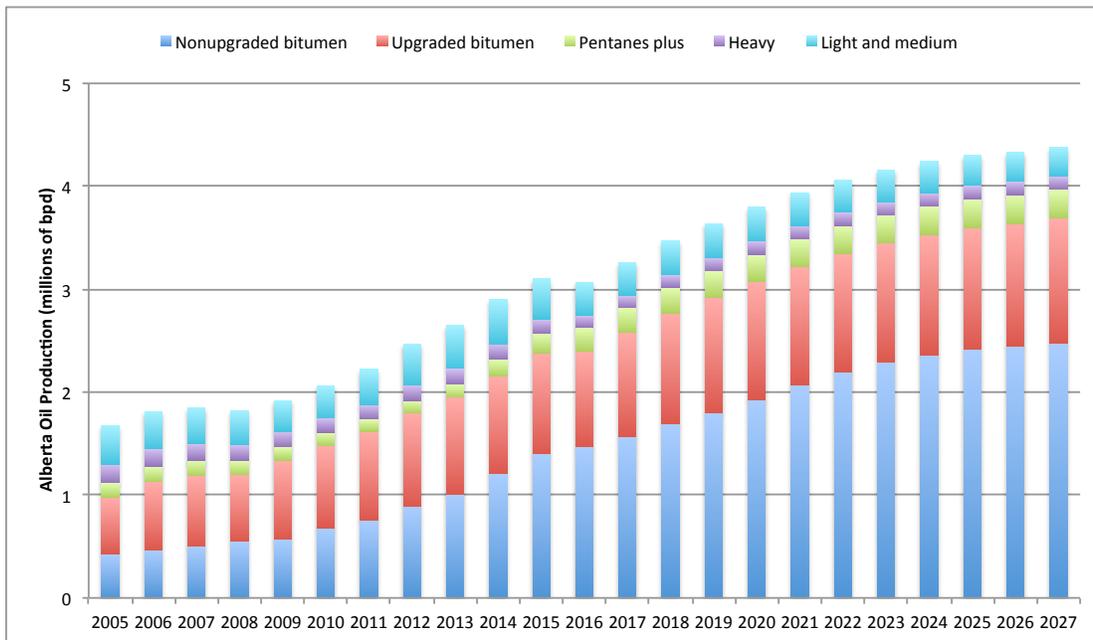
Resource extraction is the primary Driver of Alberta's economy, including oil and gas fields along the eastern slope of the Rockies, oil sands to the north of Edmonton, and extensive mining operations in Alberta and the Northwest Territories. For Stony Plain, an important producer lies a half hour to the west, where TransAlta has two coal mines and nine coal-fired power plants, representing the largest concentration of electrical power generation in Alberta. However, given the government action to phase out coal-fired emissions by 2030, it is more likely that job growth in Stony Plain will be driven by support activities for the oil and gas sector.

Based on the latest forecast from the Alberta Energy Regulator,<sup>3</sup> crude oil production in Alberta is expected to increase from an average of 3.26 million barrels per day in 2017 to 4.38 million barrels per day by 2027, an average annual increase of about 3%. While this rate of production growth is below that observed in Alberta between 2007 and 2017 when crude production increased at an average annual rate of 5.8%, the industry has yet to fully recover from the price collapse that began in 2014 and capital investment in new, large-scale extraction projects has been limited. Historical and projected levels of provincial oil production (according to the type of oil produced) are shown in the chart below:

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<sup>3</sup> Alberta Energy Regulator, Alberta supply of crude oil and equivalent, Base case forecast, March 2018, [https://www2.aer.ca/t/Production/views/Executive-SummaryFigure7Albertasupplyofcrudeoilandequivalent/Figure7Albertasupplyofcrudeoilandequivalent?:embed=y&showShareOptions=true&display\\_count=no&showVizHome=no](https://www2.aer.ca/t/Production/views/Executive-SummaryFigure7Albertasupplyofcrudeoilandequivalent/Figure7Albertasupplyofcrudeoilandequivalent?:embed=y&showShareOptions=true&display_count=no&showVizHome=no).

## Alberta Oil Production by Type, Historical and Forecast, 2005 to 2027



The gradual stabilization of crude oil prices is a critical factor in achieving the increased production growth described above. In its 'base case' forecast,<sup>4</sup> the Alberta Energy Regulator expects the benchmark price of West Texas Intermediate (WTI) to increase from the 2017 average of US\$50.95 to US\$84.47 by 2027. This price forecast supports the assumption of moderate production growth, with the 'breakeven' price for new projects estimated to be around US\$55.<sup>5</sup> Forecasters are generally not optimistic that oil prices will soon return to the highs observed in previous years, when WTI reached a peak of US\$98.05 in 2013.

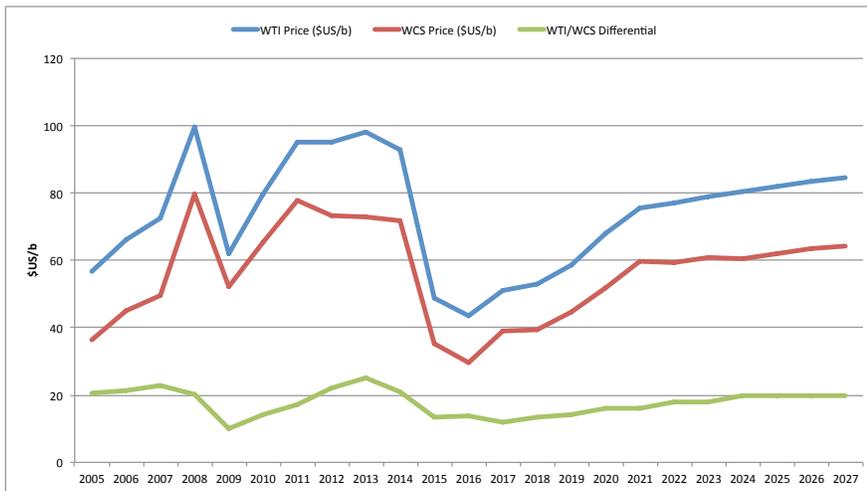
It is noted that producers of heavy oil in Alberta do not typically receive the WTI price for their product. Heavy oil prices are discounted for the extra costs required for transportation and upgrade. The benchmark price for Alberta producers is better reflected by the Western Canadian Select (WCS) benchmark, which typically trades at a US\$10-25 discount relative to WTI. While WCS traded at an average discount of about US\$12 in 2017, this differential is expected to widen to US\$20 by 2027, due primarily to pipeline capacity and upgrading constraints. While a provincial government initiative that intends to provide \$1 billion to bitumen upgrading investment between 2019 and 2027 could assist in narrowing the price gap,<sup>6</sup> forecasters anticipate a widening of the WTI/WCS price differential - another factor likely to moderate growth in Alberta's oil sector relative to recent historical averages, and correspondingly limit growth somewhat in the supporting industries located in Stony Plain.

<sup>4</sup> Alberta Energy Regulator; Price of WTI, Base case forecast, March 2018, [https://www2.aer.ca/t/Production/views/ExecutiveSummaryFigure3PriceofWTI/ExecutiveSummaryFigure3PriceofWTI?embed=y&:showShareOptions=true&:display\\_count=no&:showVizHome=no](https://www2.aer.ca/t/Production/views/ExecutiveSummaryFigure3PriceofWTI/ExecutiveSummaryFigure3PriceofWTI?embed=y&:showShareOptions=true&:display_count=no&:showVizHome=no)

<sup>5</sup> Nia Williams, Canada's oil sands survive, but can't thrive in a \$50 oil world, Reuters, October 18, 2017.

<sup>6</sup> Dean Bennett, Alberta to invest \$1B over 8 years on bitumen upgrading projects, Global News, February 26, 2018.

## WTI and WCS Price and Differential per Barrel, Historical and Base Forecast, 2005 to 2027



This Driver category includes a wide variety of sub-industries with support relationships to the energy sector, such as nonresidential maintenance and repair; services to buildings and dwellings, waste management and remediation, scenic and sightseeing transportation and support activities for transportation, commercial and industrial machinery and equipment rental and leasing. Direct support industries to the energy sector are also included in this Driver category, such as mineral exploration, geophysical services and surveying. Industries related to manufacturing and distribution can also be included in this category, such as cutting and machine tool accessory, rolling mill, and other metalworking machinery manufacturing, material handling equipment manufacturing, valve and fittings other than plumbing, wholesale trade, and warehousing and storage.

Examples of businesses currently operating in Stony Plain that fall into this Driver industry group include the Tervita field offices, which provides environmental and waste management services to the oil and gas sector; as well as Pankratz, which provides freight and transportation services to oil and gas clients.

Stony Plain's holds some potential advantages in accommodating growth in this Driver industry group- which tends to be primarily comprised of small or startup businesses. Stony Plain is able to provide space in new buildings or on development sites, at a cost that is lower than most other parts of the metropolitan area.

Employment in Stony Plain's Support for Energy and Extraction Driver industry group is expected to increase at an average annual rate of 1.5% in the base growth scenario; 2.5% in the high growth scenario; and 0.5% in the low growth scenario.

### BUSINESS AND PROFESSIONAL SERVICES

The Business and Professional Services sector is among the fastest-growing groups of industries in the Edmonton Census Metropolitan Area, with the majority of new business starts found within this sector. For 2017, it has been estimated that 2.3% of the jobs located in Stony Plain are directly involved in this group of industries (representing 175 jobs).

Industries comprising this Driver group include many sub-sectors within the broad professional, scientific and technical services category, including legal services; accounting, tax preparation, bookkeeping and payroll services; architectural, engineering and related services; specialized design services; computer systems design and related services; management, scientific and technical consulting services; scientific research and development services; advertising, public relations, and related services; other professional, scientific and technical services. Some sub-sectors within the information and cultural industries category are also included in this Driver group, such as publishing industries (except Internet); motion picture and sound recording industries; data processing, hosting, and related services; other information services.

Similar to the Support Activities for Energy and Extraction Driver group described above, the Business and Professional Services cluster is primarily composed of small businesses and microbusinesses (less than five employees). This would include a large number of startup businesses, and may include small branch establishments of larger firms.

Examples of businesses currently operating in Stony Plain that fall into this Driver industry group include Hawkings Tinney LLP, which provides accounting services to small- and medium-sized businesses; and the Dash Group, which provides accounting and business consulting services.

Employment in Stony Plain's Business and Professional Services Driver industry group is expected to increase at an average annual rate of 1.1% in the base growth scenario; 1.8% in the high growth scenario; and 0.8% in the low growth scenario.

## LOCAL FOOD AND FOOD PROCESSING

A growing segment of consumers believe that organic, locally-produced, non-GMO, gluten-free, craft or artisanal food products offer better taste, nutrition, or food safety. These market niches are the focus of many food industry startups, and are increasingly drawing the attention of large manufacturers. Small-scale production among emerging businesses is well matched to Stony Plain's location, business sites, and resources. For 2017, it has been estimated that approximately 5% of the jobs located in Stony Plain are directly involved in this group of industries (representing 385 jobs).

In the context of the Stony Plain economy where not much new primary crop production is likely to develop, the Local Food and Food Processing sector is comprised of industries including food manufacturing; beverage product manufacturing; farm product merchant wholesalers; food merchant wholesalers; beverage merchant wholesalers; and potentially final product retailers such as grocery stores and restaurants.

The development of a business plan for a "food hub" in Stony Plain has been considered, which would attempt to recruit emerging food-related businesses to the region through educational programs, the promotion of food events, and generating economic incentives within the sector.

Examples of businesses currently operating in Stony Plain that fall into this Driver industry group include Freson Bros., a food retailer focusing on locally-oriented products; and North Central Co-op, one of the largest employers in Stony Plain (providing about 500 jobs).

Employment in Stony Plain's Local Food and Food Processing Driver industry group is expected to increase at an average annual rate of 3.1% in the base growth scenario; 4.0% in the high growth scenario; and 1.9% in the low growth scenario.

## ARTS AND CULTURAL INDUSTRIES

Growth in Stony Plain's Arts and Cultural Industries is expected to be driven by the more than 1.3 million people living in the Edmonton region, which also has the second-fastest growth rate and third-highest median income among Canada's largest CMAs. Further, Albertans spend more on the arts, per capita, than any other province. Stony Plain's Arts and Cultural Industries have access to a very large market base, and the destination activities for which people will travel outside of their normal patterns. This Driver industry group has been estimated to include about 285 jobs in Stony Plain.

"Stony Plain has the nucleus of a destination district anchored by its historic downtown, Multicultural Centre, Pioneer Museum, Heritage Park, and Rotary Park. Already, there are several existing shops and galleries in the downtown core. These are drawing customers from far beyond the Town's regular trade area."<sup>7</sup>

Examples of businesses currently operating in Stony Plain that fall into this Driver industry group include the Multicultural Heritage Centre; and the Stony Plain and Parkland Pioneer Museum Society.

Employment that is directly related to the Arts and Cultural industry such as event caterers and wedding planning, has also been included in this Driver group.

Employment in Stony Plain's Arts and Cultural Industries Driver group is expected to increase at an average annual rate of 3.4% in the base growth scenario; 4.0% in the high growth scenario; and 2.0% in the low growth scenario.

## SUPPORT FOR AGRICULTURE

While there are not a great number of direct agriculture jobs in Stony Plain, the town continues to provide support services for the region's agriculture sector, including neighbouring Parkland County. For 2017, it has been estimated that approximately 4% of the jobs located in Stony Plain are directly involved in this group of industries (representing 460 jobs).

Activity in this Driver industry group is largely dependent on the performance of the agriculture sector in the surrounding region. Parkland County's Future of Agriculture Study<sup>8</sup> proposes two possible outcomes for its agriculture sector. A 'status quo' scenario where minimal action is taken on behalf of the municipality to promote agriculture finds that many existing farming operations will relocate or consolidate; and ideal farmland will increasingly be subdivided for residential development purposes. A second 'leading' scenario where diversification within the agriculture sector is promoted in the County suggests that increased private

<sup>7</sup> Place Dynamics and the Town of Stony Plain, Target Sector Study & Marketing Plan, Town of Stony Plain, Alberta, 2015. <http://www.stonyplain.com/Assets/Draft+TSS.pdf>

<sup>8</sup> Parkland County, Future of Agriculture Study, June 30, 2016. <https://www.parklandcounty.com/en/county-office/resources/Documents/MDP/Final-Draft---Parkland-Future-of-Agriculture.pdf>

investment and business opportunities could result, create stronger growth and competitive advantage in the local agricultural base.

Support Services for Agriculture includes jobs within the manufacturing, wholesale and retail trade, transportation and warehousing, professional, scientific and technical services, and administrative and support industries.

Examples of businesses currently operating in Stony Plain that fall into this Driver industry group include Parkland Farm Equipment, which provides machinery to the agriculture sector; and Ray Agro & Petroleum Ltd. which provides a variety of products and services for the agriculture sector.

Employment in Stony Plain's Support for Agriculture Driver industry group is expected to increase at an average annual rate of 2.2% in the base growth scenario; 3.1% in the high growth scenario; and 1.3% in the low growth scenario.

## CONSTRUCTION / TRANSPORTATION & WAREHOUSING

Stony Plain's construction and transportation and warehousing industries can be thought of as Driver industries in the context of supporting growth in the region.

Given Stony Plain's relatively high proportion of construction jobs in its local base (13% of local jobs, representing 940 positions), increased economic activity and development in nearby counties has the potential to spur job growth in Stony Plain to support activity elsewhere in the region. An example of a business currently operating in Stony Plain that falls into this Driver group is Vector Construction, a speciality concrete contractor, with an office located in Stony Plain that provides service to the entire Edmonton CMA region.

Similar for the transportation and warehousing industry- while this industry is not as dominant in Stony Plain (representing less than 6% of local employment), increased economic activity within the region could induce related job growth, if Stony Plain is to act as a transportation and warehousing hub for the region. An example of a business currently operating in Stony Plain that falls into this Driver group is W5 Transport, which provides trucking and local freight services.

Employment in Stony Plain's Construction /Transportation & Warehousing combined Driver industry group is expected to increase at an average annual rate of 2.1% in the base growth scenario; 2.9% in the high growth scenario; and 1.6% in the low growth scenario.

## HEALTH SERVICES

The Health Services industry is recognized as an important sector in Stony Plain, possessing significant growth potential and already representing a substantial proportion of employment and economic activity in the municipality. Health care services is typically considered a "Support" industry rather than a Driver, due to its reliance on regional population growth and demographic changes - with relatively older segments of the population utilizing health services to a greater extent.

However, Stony Plain has been successful in attracting and accommodating a large number of seniors. According to the 2016 Federal Census, Stony Plain's seniors (65+) represented 16.4% of its total population, compared to 12.1% in Edmonton and a provincial average of 12.3%.<sup>9</sup> The Meridian Foundation has been active in providing housing for seniors in Stony Plain, with the 57-unit Whispering Waters Manor built in 1990, and the attached 42-unit Forest Ridge Place added in 2007.<sup>10</sup>

The presence of the WestView Health Centre in Stony Plain has contributed to the ability of the municipality to act as a retirement hub in the region. The WestView Health Centre also attracts those demanding health care services, young and old, from throughout the region.

While the entirety of Stony Plain's health care sector cannot be categorized as a Driver industry (as some portion of health-related activity in the municipality is attributable to its own non-senior population, and the rate at which it grows), a significant portion can be described as such. Approximately 8% of the jobs in Stony Plain have been assigned to the Health Services Driver industry group, representing 560 jobs.

Stony Plain's Health Services sector is well-positioned to benefit from an increasing number of seniors in the region. Employment in Stony Plain's Health Services Driver industry group is expected to increase at an average annual rate of 2.7% in the base growth scenario; 3.6% in the high growth scenario; and 2.0% in the low growth scenario.

## Support Industries

Of those other industrial sectors investigated, none were determined to be of sufficient significance in terms of direct employment or economic influence in Stony Plain to be included as a Driver industry for this study.

Stony Plain supports a diverse range of economic activities to businesses in the broader regional services and trading area. In this analysis, some sectors that are often conceptualized as being Support Industries (Health, Agricultural Support, Transportation and Warehousing) are classified as Driver Industries, due to Stony Plain's position as a support hub for services in the broader region.

Stony Plain's Support industries include the majority of those that are not classified as being Driver industries, and represent 3,462 jobs in the municipality (or 47% of total jobs). Employment in these Support industries is assumed to change in proportion with Stony Plain's population, which is affected by migration (related to Driver industry growth) and natural increase considerations.<sup>11</sup> The following table shows the top industries comprising Stony Plain's support employment in 2017, and the estimated employment per capita in these industries.

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<sup>9</sup> Statistics Canada, Census Profiles, 2016, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/index.cfm?Lang=E>

<sup>10</sup> Meridian Foundation, Our History, <https://meridianfoundation.ca/about/>

<sup>11</sup> Growth in support industries is based on the change in population over the previous period. As a result, there is a lag in Support Industry employment growth.

## Support Employment in Stony Plain, 2017

Industry	Support Employment (2017)	Employment per Capita (2017)
62 Health care and social assistance	631	0.036
61 Educational services	630	0.036
44-45 Retail trade	527	0.030
81 Other services (except public administration)	420	0.024
91 Public administration	399	0.023
22 Utilities	232	0.013
72 Accommodation and Food Services	227	0.013
All other industries	396	0.023
<b>Total</b>	<b>3,462</b>	<b>0.197</b>

The industries representing the greatest shares of support employment in Stony Plain in 2017 were Health care and social assistance (631 jobs, or 8.5% of total jobs), Educational services (630 jobs, or 8.5% of total jobs), and Retail trade (527 jobs, or 7.1% of total jobs).

Employment that is neither classified as Driver or Support can be considered “inert” or “exogenous” to Stony Plain’s economy. These jobs do not drive economic growth in the region, nor do they increase (or decrease) in proportion with Stony Plain’s economy. These jobs were assumed to represent only a small portion of Stony Plain’s local employment in this analysis (353 jobs).

# Forecast Assumptions

A number of assumptions related to Stony Plain's population and economic conditions are necessary to perform the analysis described in this report. These assumptions are described in the section below.

## FERTILITY

Fertility rates represent the estimated likelihood of a birth per female in a particular age group. The age-specific fertility rates used in this forecast were calculated based on the five-year averages (2013 to 2017) of those reported in Alberta's Census Division 11.<sup>12</sup>

## MORTALITY

Mortality rates represent the estimated likelihood of death in a particular demographic group. The age- and gender-specific mortality rates used in this forecast were calculated based on the five-year averages (2013 to 2017) of those reported in Alberta's Census Division 11.<sup>13</sup>

## MIGRATION

In this analysis, migration is primarily assumed to occur based on projected levels of job availability and general economic conditions in Stony Plain. Job vacancies that remain unfilled by Stony Plain's local labour force attract employment-based migrants, who are also expected to bring their families with them. The average household size of incoming migrants was assumed to be equal to the Stony Plain average of 2.5 people, as reported in the 2016 Federal Census profile.<sup>14</sup>

The age- and gender-specific profile of migrating workers and their families was calculated based on the five-year average (2013 to 2017) net migration profile of the Edmonton CMA.<sup>15</sup> The net migration profile is calculated according to: International Migrants - Emigration + Net Interprovincial Migrants + Net Intraprovincial Migrants.

## LABOUR FORCE PARTICIPATION

Labour force participation are used in the analysis to estimate the proportion of each age group in Stony Plain's propensity to actively engage in employment, or employment seeking. The labour force is comprised of employed workers as well as the unemployed. According to the 2016 Federal Census, the 15+ population of Stony Plain exhibited an overall labour force participation rate of 68.2% - slightly below the provincial average of 71.7%.<sup>16</sup>

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<sup>12</sup> Alberta Government, Fertility Rates - Alberta and Census Divisions, <https://open.alberta.ca/dataset/fertility-rates-alberta-and-census-divisions>

<sup>13</sup> Alberta Government, Vital Statistics (Births and Deaths) - Alberta, Census Divisions and Economic Regions, <https://open.alberta.ca/dataset/vital-statistics-births-and-deaths-alberta-census-divisions-economic-regions>

<sup>14</sup> Statistics Canada. 2017. Stony Plain, T [Census subdivision]. Census Profile. 2016 Census. Statistics Canada Catalogue no. 98-316-X2016001. Ottawa. Released November 29, 2017.

<sup>15</sup> Statistics Canada, CANSIM Table 17-10-0079-01.

<sup>16</sup> Ibid.

Stony Plain's participation rates specific to age categories (15 to 24, 25 to 64, 65+) were calculated according to provincial averages,<sup>17</sup> and were then downwardly adjusted to reflect both the lower observed rates in Stony Plain, and the actual labour force figures in the base year of this analysis.

## REGIONAL ECONOMIC OUTLOOK

The three growth scenarios (High, Medium, and Low) considered in this forecast relate to driver industry employment growth rates in Stony Plain. It is assumed that these growth outlooks are reflective of the prevailing economic conditions throughout the Tri-Municipal Region, and the province as a whole. For example, the High growth scenario assumes that the entire region is experiencing similarly high rates of economic output, job growth, and competition for labour resources. That is, Stony Plain's economy does not exist in a vacuum, and its performance is highly correlated with, and dependent upon factors that are often external to the municipality itself (i.e. oil prices).

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<sup>17</sup> Statistics Canada, CANSIM Table 14-10-0018-01.

# Forecast Results

This section describes the results of the population and employment forecasts, which cover the 2018 to 2037 period.

## Population Forecast

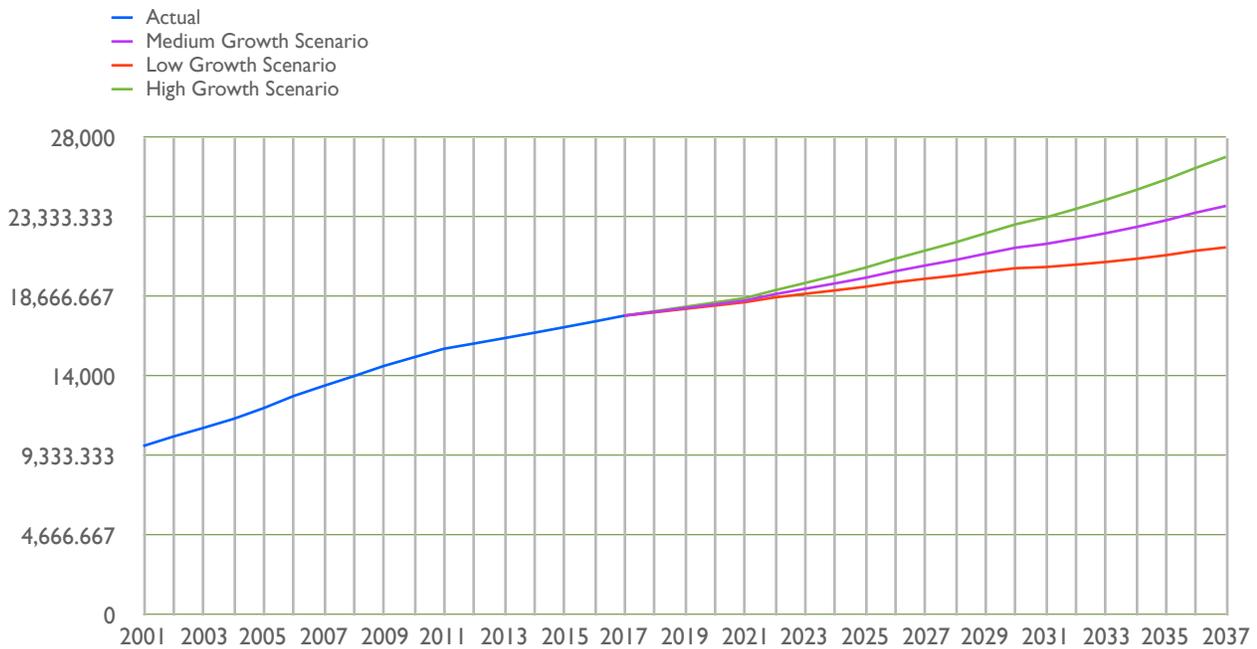
The table below shows base year (2017) population in Stony Plain, as well as the projected populations in 2027 and 2037, for each of the three growth scenarios. The average annual rate of population growth through the forecast period is also presented.

**Stony Plain Total Population Forecast, 2017 to 2037**

Scenario	2017	2027	2037	Avg Annual Change (2017-37)
Medium-Growth	17,534	20,476	23,971	1.6%
Low-Growth	17,534	19,699	21,541	1.0%
High-Growth	17,534	21,353	26,845	2.2%

From a 2017 base of 17,534, Stony Plain's total population is projected to increase to 20,476 by 2027 in the Medium growth scenario. Total population reaches 23,971 by 2037, representing an average annual growth rate of 1.4% over the forecast period. In the Low growth scenario, Stony Plain's population is expected to reach 21,541 by 2037 (an average annual growth rate of 1.0%). Stony Plain's population increases to 26,845 by 2037 in the High growth scenario (an average annual growth rate of 2.2%).

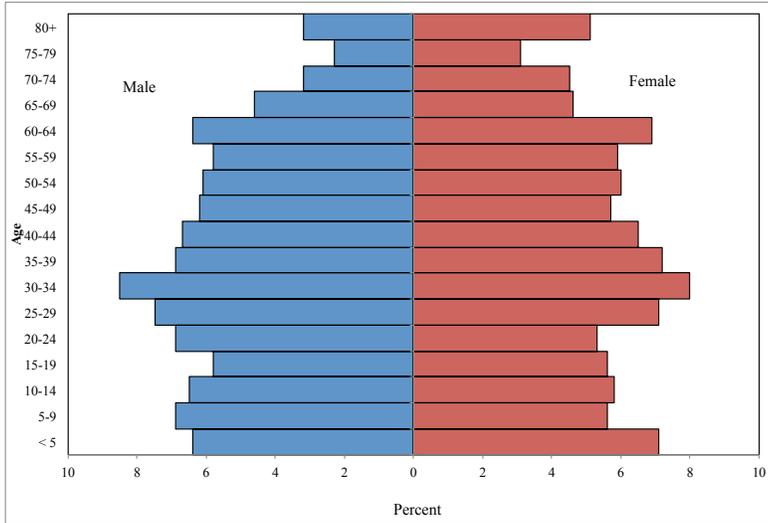
**Stony Plain Population - Actual and Forecast (2001 to 2037)**



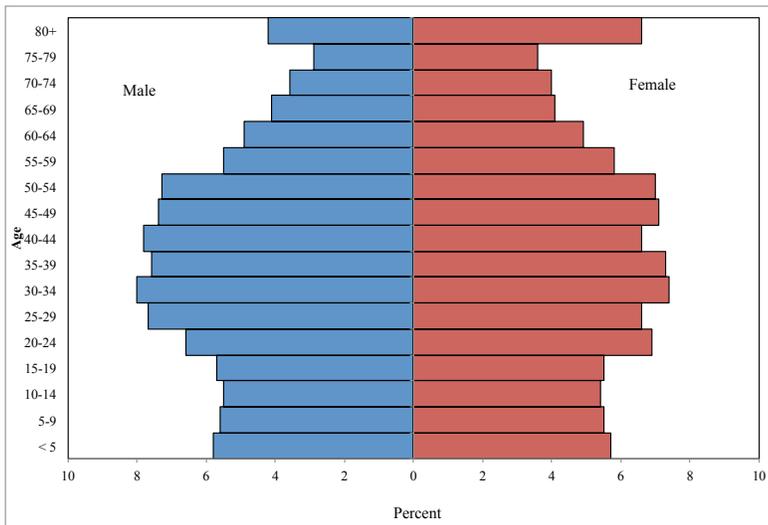
## POPULATION BY AGE AND GENDER

The population pyramid diagrams below depict the projected evolution of Stony Plain's population from 2017 to 2037 according to the growth scenario used in the forecast.

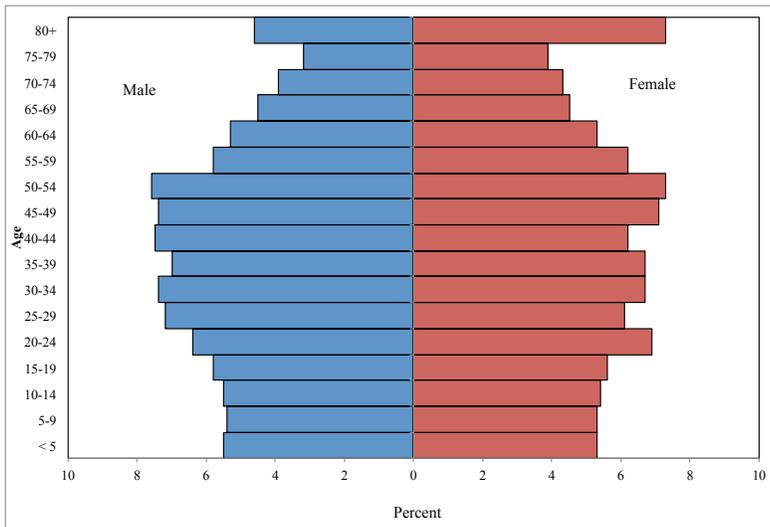
### Stony Plain, 2017 Population Pyramid



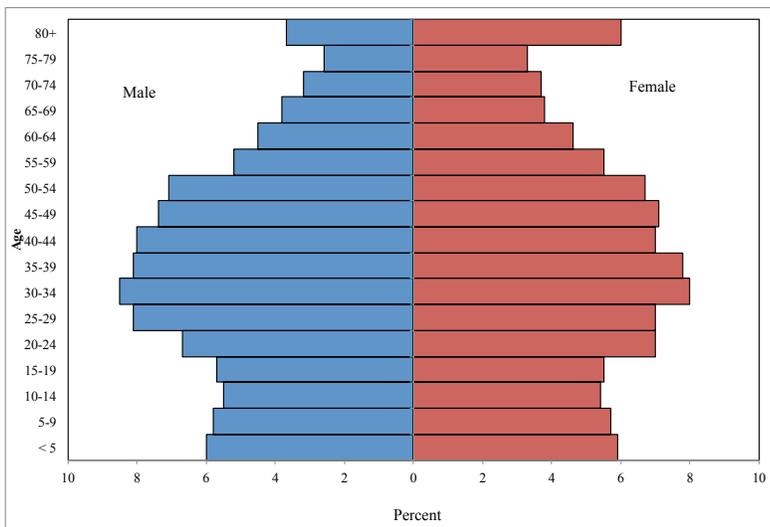
### Stony Plain, 2037 Population Pyramid (Medium Growth Scenario)



### Stony Plain, 2037 Population Pyramid (Low Growth Scenario)



### Stony Plain, 2037 Population Pyramid (High Growth Scenario)



Both the base of Stony Plain’s 2037 population pyramid (representing youth) and the mid-section of the pyramid (representing the prime 25 to 55 working ages) are noticeably wider in the high growth scenario relative to the medium and low growth scenarios. This is due to employment-induced migration being greater in the high growth scenario, where relatively more prime age workers migrate to Stony Plain (along with their families). This results in a greater number of younger workers moving to Stony Plain through the forecast period, who also contribute to a greater number of births.

## Employment Forecast

This section describes the forecasts of employment in Stony Plain from 2017 to 2037.

The table below presents Stony Plain's total employment by industry, in the base year (2017) as well as forecasts in 2027 and 2037. Also presented are the net number of additional positions added through the forecast period in each industry, and average annual employment growth rates in each industry.

### Stony Plain Total Employment by Industry Forecast, 2017 to 2037 (Medium Growth Scenario)

Industry	2017	2027	2037	New Jobs (2018-37)	Avg Annual Change (2017-37)
11 Agriculture, forestry, fishing and hunting	24	41	63	39	4.9%
21 Mining, quarrying, and oil and gas extraction	175	228	290	115	2.6%
22 Utilities	232	284	346	114	2.0%
23 Construction	905	1,177	1,504	599	2.6%
31-33 Manufacturing	263	336	430	167	2.5%
41 Wholesale trade	256	354	474	218	3.1%
44-45 Retail trade	779	985	1,237	458	2.3%
48-49 Transportation and warehousing	327	431	557	230	2.7%
51 Information and cultural industries	123	136	152	29	1.1%
52 Finance and insurance	265	301	342	77	1.3%
53 Real estate and rental and leasing	176	201	230	54	1.3%
54 Professional, scientific and technical services	484	543	612	128	1.2%
55 Management of companies and enterprises	8	10	11	3	1.6%
56 Administrative and support, waste management and remediation services	208	248	294	86	1.7%
61 Educational services	630	698	776	146	1.0%
62 Health care and social assistance	1,193	1,405	1,675	482	1.7%
71 Arts, entertainment and recreation	112	169	247	135	4.0%
72 Accommodation and food services	423	560	735	312	2.8%
81 Other services (except public administration)	463	533	616	153	1.4%
91 Public administration	399	471	556	157	1.7%
<b>All industry categories</b>	<b>7,445</b>	<b>9,111</b>	<b>11,147</b>	<b>3,702</b>	<b>2.0%</b>

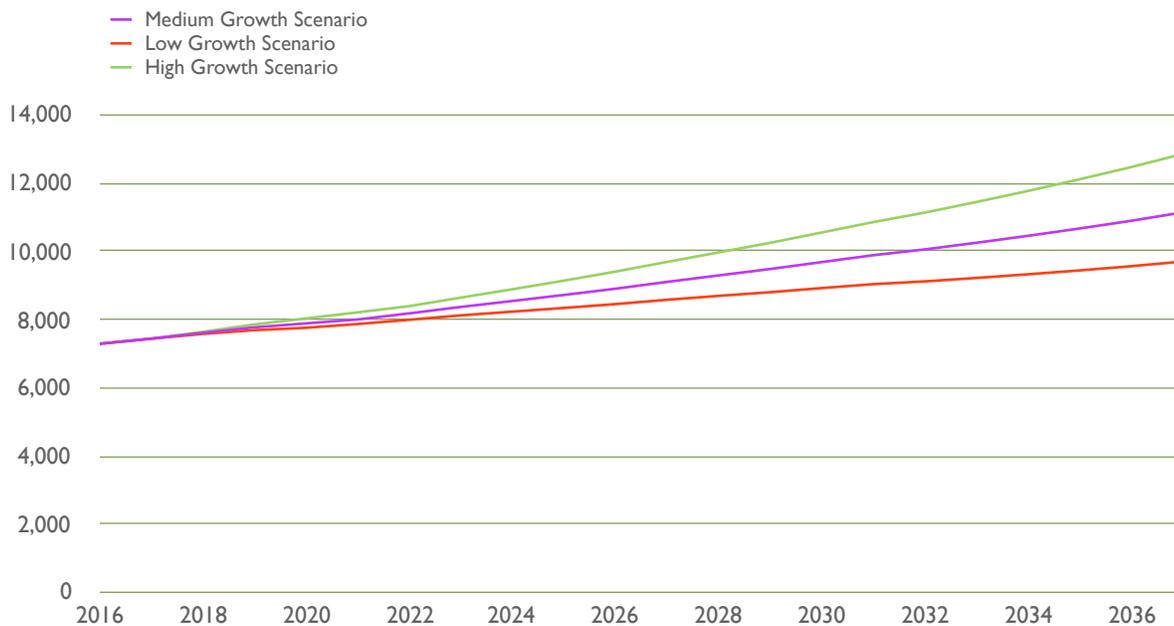
From a base of 7,445 in 2017, total employment in Stony Plain is projected to reach 9,111 by 2027 in the Medium growth scenario. Total employment increases to 11,147 by 2037 representing an average annual growth rate of 2.0% over the forecast period. Industries expected to post the greatest number of additional jobs through the forecast include Construction (599 jobs), Health care and social assistance (482 jobs), and Retail trade (458 jobs). Industries recording the highest rates of growth in this scenario include Agriculture, forestry, fishing and hunting (4.9%), Arts, entertainment and recreation (4.0%), and Wholesale trade (3.1%).

In the Low growth scenario, total employment increases to 8,585 by 2027, and to 9,707 by 2037, representing an average annual growth rate of 1.3%. Industries expected to post the greatest number of additional jobs through the forecast include Construction (399 jobs), Health care and social assistance (330 jobs), and Retail trade (278 jobs). Industries recording the highest rates of growth in this scenario include

Agriculture, forestry, fishing and hunting (3.3%), Arts, entertainment and recreation (2.4%), and Wholesale trade (2.0%).

In the High growth scenario, total employment increases to 9,695 by 2027, and to 12,860 by 2037, representing an average annual growth rate of 2.8%. Industries expected to post the greatest number of additional jobs through the forecast include Construction (896 jobs), Health care and social assistance (701 jobs), and Retail trade (654 jobs). Industries recording the highest rates of growth in this scenario include Agriculture, forestry, fishing and hunting (6.4%), Arts, entertainment and recreation (4.7%), and Wholesale trade (4.1%).

### Stony Plain Total Employment by Growth Scenario, 2016 to 2037



### DRIVER EMPLOYMENT

This section describes the forecast of Driver industry employment in Stony Plain from 2017 to 2037. The assumptions and compositions of these Driver industry groups are described earlier in this report.

### Stony Plain Driver Industry Employment Forecast, 2017 to 2037 (Medium Growth Scenario)

Driver Industry	2017	2027	2037	Avg Annual Change (2017-37)
Support Activities for Energy and Extraction	826	959	1,113	1.5%
Business and Professional Services	173	193	215	1.1%
Local Food and Food Processing	386	524	711	3.1%
Arts and Cultural Industries	284	397	555	3.4%
Agriculture Support	462	574	714	2.2%
Construction / Transportation and Warehousing	937	1,154	1,420	2.1%

Driver Industry	2017	2027	2037	Avg Annual Change (2017-37)
Health Services	561	733	957	2.7%
<b>All Driver Industries</b>	<b>3,629</b>	<b>4,533</b>	<b>5,684</b>	<b>2.3%</b>

Total Driver industry employment in Stony Plain was estimated at 3,629 jobs in 2017. Each Driver industry group was assumed to grow at a scenario-specific average annual rate (outlined earlier in this report). Total Driver industry employment reaches 4,533 in 2027, and 5,684 in 2037. While the Arts and Cultural Industries group grows at the fastest average annual rate through the forecast (3.4%), Construction / Transportation and Warehousing remains the largest Driver industry in Stony Plain by 2037 with 1,420 jobs.

### SUPPORT EMPLOYMENT

This section describes the forecast of Support industry employment in Stony Plain from 2017 to 2037. The assumptions regarding these Support industries are described earlier in this report.

The table below shows total support employment in the base year (2017), and forecasts for 2027 and 2037. The number of additional jobs added in each support industry through the forecast period is also presented.

### Stony Plain Support Industry Employment Forecast, 2017 to 2037 (Medium Growth Scenario)

Industry	Support Employment (2017)	2027	2037	Net Job Growth (2018-37)
62 Health care and social assistance	631	672	719	88
61 Educational services	630	698	776	146
44-45 Retail trade	527	654	802	275
81 Other services (except public administration)	420	484	559	139
91 Public administration	399	471	556	157
22 Utilities	232	284	346	114
72 Accommodation and Food Services	227	289	360	133
All other industries	396	671	993	597
<b>Total</b>	<b>3,462</b>	<b>4,223</b>	<b>5,111</b>	<b>1,649</b>

Total support employment in Stony Plain is projected to increase from 3,462 in 2017 to 4,223 in 2027, reaching 5,111 by 2037. The support sectors exhibiting the greatest number of additional jobs through the forecast period include Retail trade (+275 jobs), Public administration (+157 jobs), and Educational services (+146 jobs).