



Official Plan Review Phase 1 Background Report

City of Stratford

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List of Acronyms and Abbreviations

Acronym	Full Description of Acronym
C.D.	Census Division
CMHC	Canada Mortgage and Housing Corporation
G.I.S.	Geographic information systems
G.T.H.A.	Greater Toronto and Hamilton Area
L.Q.	Location Quotients
O.P.	Official Plan
P.P.S., 2020	Provincial Policy Statement, 2020
P.P.S., 2023	Provincial Planning Statement, 2023
P.P.U.	Persons per unit
sq.ft.	square foot/feet
sq.m	square metre/metres



Executive Summary

As part of the five-year review and update of the City of Stratford's Official Plan (O.P.), Watson & Associates Economists Ltd. (Watson) has prepared a background review report, titled "How have we grown?", as part of Phase 1 of the study. This report examines recent growth and development trends within the context of broader regional growth trends and the local level planning policy framework. The review also assesses Stratford's potential to accommodate future growth through intensification and greenfield supply opportunities.

Recent Growth Trends

The City of Stratford has experienced strong population growth and demand for housing over the past five years. Stratford's population base increased from 31,600 in 2006 to 34,200 in 2021, reflecting average annual growth rates of 0.1% over the 2006 to 2011 period, 0.4% over the 2011 to 2016 period, and 1.1% over the 2016 to 2021 period. Stratford's average annual population growth rates significantly increased over the 15-year period.

A range of demographic and economic factors is driving this shift, including growth in local employment opportunities, net migration, an aging population and affordability considerations.

Stratford's Housing Market and Development Trends

Stratford's 2021 housing base totalled approximately 14,740 occupied dwelling units largely consisting of low-density housing (single detached/semi-detached) which accounted for 64% of total units.^[1] Stratford's housing base comprised approximately 11% and 26% medium- and high-density units, respectively. Stratford had a higher share of renter households than the provincial average, with 34% of housing units renter-occupied.^[2]

Over the 2013 to 2022 period, housing growth in Stratford averaged 167 residential units constructed per year. Housing growth has accelerated in the past five years, with an average of 185 units per year over the 2018 to 2022 period. Over the past decade,

^[1] Based on Statistics Canada. 2021.

^[2] Based on 2021 Census Profile data.



low-density housing construction has declined as a share of total housing development, with an increase in the share of high-density units (i.e., apartments and other multi-unit dwellings) including purpose-built rental dwellings.

The City of Stratford has currently achieved an overall average of 37 units per net hectare in recently developed residential areas (i.e., areas developed since 2012). The average density is impacted by the size of the lots, housing mix and the development form. In the City's newly developing neighbourhoods, average densities vary, ranging from 17 units per net hectare on large, expansive, single detached house lots to over 100 units per net hectare on apartment lots.

Stratford's Non-Residential Areas

Stratford has a diverse employment base comprising a range of industrial, commercial, and institutional sectors. The City's employment base is primarily accommodated on two types of designated lands – Employment Areas and Commercial Areas (including the Downtown Core).

Employment Areas are an integral part of Stratford's economic development potential and accommodate a significant share of the City's businesses and employment. Employment Areas accommodate primarily export-based employment, including a wide range of industrial uses (e.g., manufacturing, distribution/logistics, transportation services), as well as specific commercial and institutional uses (e.g., office, service, ancillary/accessory retail) which generally support the industrial/business function of the industrial area. In contrast to other urban land uses (e.g., commercial and mixed-use areas), employment lands provide the opportunity to accommodate export-based employment sectors that cannot be easily accommodated in other areas of the municipality. Stratford has a strong and successful history of municipal employment land development. The City continues to be a key employment land developer in the municipality, assembling and servicing land. The municipality is responsible for subdivision design, infrastructure development, and land sales.

Stratford's commercial base is also an integral part of the community, supporting jobs, as well as providing residents access to goods and services which enhances the overall quality of life for residents. Stratford has approximately 187,000 sq.m (approximately 2 million sq.ft.) of purpose-built retail and accommodation space on designated commercial lands (Commercial Area and Downtown Core). On a per capita basis,



Stratford has approximately 5.3 sq.m (57 sq.ft.) of retail space per resident. Relative to the population base, the size of the retail base in Stratford is considered high. The high per capita level of retail is largely a result of supporting a vibrant tourism market, as well as supporting a trade area that extends beyond the City of Stratford.

Stratford's Non-Residential Market and Development Trends

Over the 2013 to 2022 period, Stratford averaged 15,990 sq.m (172,100 sq.ft.) of non-residential development activity annually. Over the past decade (2013 to 2022), industrial development accounted for approximately 73% of development activity compared to 22% and 4% in the commercial and institutional sectors.

The robust industrial development activity in Stratford has primarily occurred on Employment Areas lands where land absorption has averaged approximately 6 hectares (14 acres) per year. Lands absorbed on Employment Areas have largely comprised manufacturing, construction services, warehousing and utilities uses. Due to the land extensive requirements of these industries, employment densities have averaged 15 jobs per net hectare (6 jobs per net acre) over the past five years.^[1]

Over the 2018 to 2022 period, Stratford has added approximately 1,710 sq.m or 18,400 sq.ft. of commercial building floorspace annually.^[2] Based on the City's population growth over this period, Stratford's commercial floorspace is growing at a slightly lower pace (0.9% annually) than the growth rate of the City's population base (1.1% annually). This is generally consistent with trends experienced in other smaller markets in Ontario.

Opportunities to Accommodate Growth in Stratford

City staff provided the Consultant Team with an inventory of vacant residential and non-residential lands. With respect to the City's designated urban residential areas, future residential development opportunities are summarized by active development applications, vacant designated greenfield areas and intensification opportunities. Consideration has also been given to the City's ability to accommodate future non-residential growth on designated commercial and employment lands, as well as through non-residential intensification.

^[1] Watson & Associates Economists Ltd. survey data, 2023.

^[2] Based on City of Stratford Non-Residential Building Permit Activity.



Stratford has approximately 4,190 housing units in the development approvals process (registered unbuilt, draft approved and under review) across the City. This includes 2,195 units in registered plans of subdivision, 850 units in draft approved plans and 1,145 units in draft plans under review. Of the total housing units in development approvals, 665 units (16%) are low density, 945 units (23%) are medium density, and 2,580 units (62%) are high density.

As part of the residential intensification analysis, the Consultant Team has reviewed and updated the redevelopment site inventory prepared as part of the City's 2012 Residential Intensification Assessment. Infill lots were also considered and include vacant designated residential lands within the built boundary that are not in the development approvals process. Mapping data, aerial photography, and other existing information sources were used to develop this inventory. It is estimated that 183 housing units could be accommodated on infill lots, including 37 low-density, 30 medium-density and 116 high-density units. Redevelopment opportunities were assessed based on a low- and high-range scenario. Under the low-range scenario, the updated analysis identified a total supply of 805 housing units, while under the high-range scenario, the supply potential totals 1,055 housing units.

It is estimated that the City has a gross land area (less environmental take-outs) of 58 hectares (143 acres) of vacant greenfield residential lands with no applications. A net to gross ratio of 55% was applied to determine the net developable land area of 32 net hectares (79 acres). A more detailed assessment of the housing potential on vacant greenfield lands in Stratford will be prepared in Phase 2 and will include a total estimate of housing unit supply potential on vacant lands once an appropriate density assumption is established.

Based on a review of the Employment Area vacant land supply, Stratford is estimated to have a net developable land area estimated at 199 net hectares (492 net acres). It is estimated that approximately 5% of the vacant designated employment land (10 net hectares or 25 net acres) is owned by the City. The remaining 189 net hectares (467 net acres) are privately owned lands located throughout Stratford. Of Stratford's shovel-ready employment lands totalling 54 net hectares (133 net acres), 10 net hectares (25 net acres) are City owned, accounting for 19% of the total.

It is anticipated that a share of future employment growth within Stratford may be accommodated within existing developed Employment Areas. Intensification can take



several forms, including development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and redevelopment of sites. Through a high-level desktop review using the developed employment land parcel inventory, building footprints, and orthophoto overlays, 82 hectares (203 acres) of Stratford's developed employment lands were identified as underutilized. The underutilized parcels account for 19% of the total developed employment land base in Stratford.

With respect to the supply of Stratford's vacant commercial areas designated commercial/mixed-use lands (lands designated in the City of Stratford O.P. as "Commercial Area;" "Downtown Core;" and "Gateway Mixed-Use Area"), the City of Stratford has a very minimal supply, totalling only 4 hectares (10 acres). Furthermore, while the City has 20 vacant commercial/mixed-uses sites, the vast majority of the sites measure less than 1 hectare, which limits the opportunities for a range of commercial uses.



1. Introduction

1.1 Terms of Reference

As part of the five-year review and update of the City of Stratford's Official Plan (O.P.), Watson & Associates Economists Ltd. (Watson) has prepared a background review report, titled "How have we grown?", as part of Phase 1 of the study. This report examines recent growth and development trends within the context of broader regional growth trends and the local level planning policy framework. The review also assesses Stratford's potential to accommodate future growth through intensification and greenfield supply opportunities. This will then lead to a more in-depth analysis of forecast growth trends and drivers and corresponding urban land needs, which will be examined in Phase 2 of the study.

1.2 Context

The City of Stratford is located in southwestern Ontario, 40 km west of Kitchener and 50 km northeast of the City of London, and approximately 150 km southwest of the Greater Toronto and Hamilton Area (G.T.H.A.). The City is a single-tier municipality situated within the Perth County Census Division.

Stratford has experienced strong population growth and demand for housing across the housing spectrum over the 2016 to 2021 period.^[1] A range of demographic and economic factors is driving this shift, including growth in local employment opportunities, an aging population, and affordability considerations.

Over the coming decades, Stratford is anticipated to experience continued population and employment growth. There are numerous economic benefits associated with population and employment growth related to economic expansion, community vibrancy, and an increasing tax base. On the other hand, new developments can also create new challenges associated with infrastructure requirements, municipal service delivery, housing needs, and environmental protection.

^[1] Based on Statistics Canada 2016-2021 Census data, Stratford's population increased by approximately 6%.



1.3 Planning Context

This chapter summarizes the key provincial policy directions relevant to growth management in Stratford. It describes the policies of the Provincial Policy Statement, 2020 (P.P.S., 2020) and their applicability to the O.P. review. It also describes the policies of the proposed Provincial Planning Statement released in April 2023 (P.P.S., 2023) and how it may affect future planning matters.

Provincial Policy Statement, 2020

The P.P.S., 2020 came into effect on May 1, 2020.^[1] Its purpose was to update the P.P.S., 2014 so that it worked together with changes to the provincial land use planning system that occurred around the same time. This included changes to the *Planning Act* through Bill 108, the *More Homes, More Choice Act* (2019) and the on-going updates to A Place to Grow: Growth Plan for the Greater Golden Horseshoe (the Growth Plan). Additional reasons for the update largely related to the need to increase urban housing supply, support the economy and job creation, and to reduce barriers and costs to the land use planning system to provide greater predictability.

A significant change of the P.P.S., 2020 with regard to housing policy is the provision of a housing options approach to address an appropriate range and mix of housing, and to specifically meet market-based needs of current and future residents (policy 1.4.3). Providing housing options adds broader considerations like ownership structures and housing program planning to built-form considerations. Housing options are defined as:

“A range of housing types such as, but not limited to single detached, semi-detached, rowhouses, townhouses, stacked townhouses, multiplexes, additional residential units, tiny homes, multi-residential buildings and uses such as, but not limited to life lease housing, co-ownership housing, co-operative housing, community land trusts, affordable housing, housing for people with special needs, and housing related to employment, institutional or educational uses.”

Throughout the P.P.S., 2020 there is strong encouragement to consider the housing market when addressing planning matters such as managing growth overall, identifying market-ready sites to improve economic development and competitiveness, and providing for a range and mix of housing options. Although this may assist with

^[1] Provincial Policy Statement, 2020. Under the *Planning Act*. Ontario.



managing growth and development in a way that may more accurately reflect market realities, it could make it more challenging for municipalities to transition to other types of development forms with which they have not historically had considerable success in implementing. As such, while housing market demand is important when considering long-range, land use planning and housing objectives, this demand must be broadly considered within the context of broad provincial interests, namely: ensuring the efficient use of land, resources, and infrastructure; providing a clean and healthy environment for current and future generations; providing for affordable housing; diversifying the economic base; and supporting job creation.

Bill 23: *More Homes Built Faster Act, 2022*

On October 25, 2022, the Ontario government introduced the *More Homes Built Faster Act* (Bill 23). Following Bill 108 and Bill 109, Bill 23 is part of a long-term strategy to address the housing crisis by facilitating the construction of 1.5 million homes over the next 10 years. Bill 23 received Royal Assent by the provincial legislature on November 28, 2022. The Bill is intended to increase the housing supply and provide a mix of ownership and rental housing types for Ontarians. This identified need for additional housing relates to demand associated with both existing Ontario residents and newcomers to the Province through immigration.

To support the provincial commitment to getting 1.5 million homes built over the next 10 years, Bill 23 includes sweeping and substantive changes to a range of legislation, as well as through updates to regulations and consultations on various provincial plans and policies. Bill 23 exempts residential development with up to 10 residential units from site plan control approval. Furthermore, for developments that are subject to site plan control, Bill 23 limits the extent to which exterior design could be addressed through the site plan approval process. To encourage gentle intensification, Bill 23 also allows for up to three residential units to be developed on any serviced lot that is designated for residential uses.

1.3.1 *Proposed Provincial Planning Statement, 2023*

On April 6, 2023, the Province of Ontario released a new P.P.S. in concert with introducing Bill 97: *Helping Homebuyers, Protecting Tenants Act, 2023*. Bill 97 proposes amendments to seven provincial statutes, including the *Planning Act*. Bill 97 was introduced on April 6, 2023, and received Royal Assent on June 8, 2023. The



proposed P.P.S., 2023 (anticipated to receive a decision by the Province in the fall of 2023) is intended to simplify and integrate existing provincial policies (the Growth Plan and the P.P.S., 2020) while providing municipalities and the Province with greater flexibility to deliver on housing objectives. A key focus of the proposed P.P.S., 2023 is that it recognizes that the approach for achieving housing outcomes will vary by municipality and, as such, it moves away from a prescriptive guideline approach.

According to the proposed P.P.S., 2023, at the time of each O.P update, sufficient land shall be made available to accommodate an appropriate range and mix of land uses to meet projected needs for a time horizon of at least 25 years. The previous P.P.S. required that municipalities accommodate projected needs up to 25 years.

Generally unchanged from the P.P.S, 2020, the proposed P.P.S., 2023 still requires planning authorities to maintain at all times the ability to accommodate residential growth for a minimum of 15 years through lands which are designated and available for residential development. It is noted, however, that the emphasis on intensification and redevelopment in this regard has been removed. Planning authorities are also required to maintain at all times, where new development is to occur, land with servicing capacity sufficient to provide at least a three-year supply of residential units, available through lands suitably zoned, including units in draft approved or registered plans.

Another key change in the proposed P.P.S., 2023 is that planning authorities are allowed to extend their growth forecasts and land needs assessments for infrastructure, public service facilities, Employment Areas and Strategic Growth Areas beyond a 25-year time frame. The P.P.S., 2020 allows for the planning of the long-term protection of Employment Areas beyond a 25-year horizon; however, it does not allow for the designation of Employment Areas beyond a 25-year horizon.

The achievement of complete and competitive communities is an important concept to consider with respect to the balance between residential and non-residential growth across the City over the long term. In accordance with the proposed P.P.S., 2023, complete and competitive communities include an appropriate mix of jobs and a full range of housing. Accordingly, the long-term growth vision for Stratford should be considered within the context of complete and competitive communities. Attempting to accelerate population growth too aggressively within the City, without consideration of how such population growth would be balanced by an appropriate mix of jobs (including export-based/industrial jobs in addition to community-supportive employment) would



potentially undermine the proposed P.P.S., 2023 policies related to complete and competitive communities.

The proposed P.P.S., 2023, if approved, is anticipated to come into effect in the fall of 2023.^[1]

2. Stratford Population and Demographic Trends

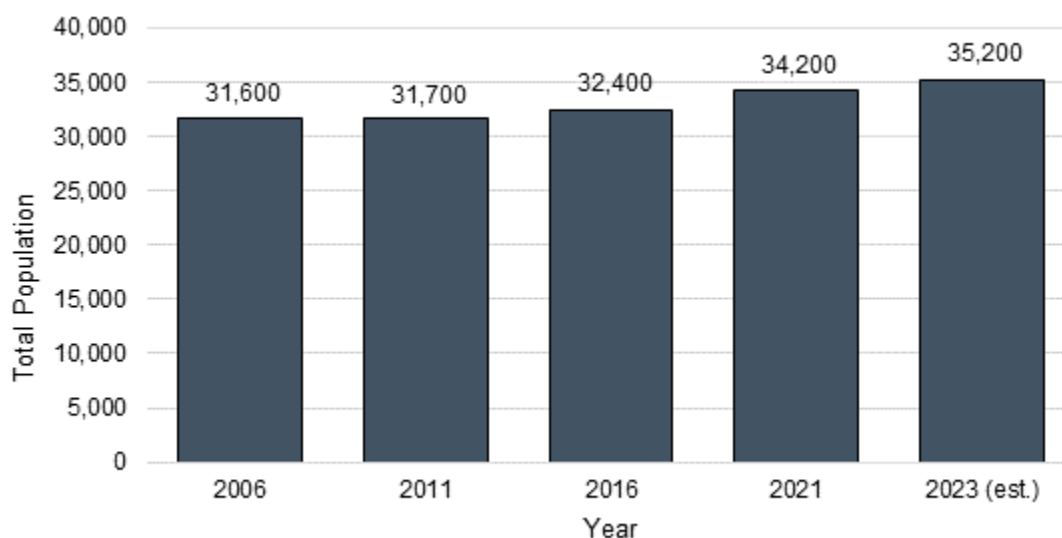
2.1 Population Trends

Figure 1 and Figure 2 summarize the historical population growth rates for the City of Stratford during the 2006 to 2021 period. For comparative purposes, historical population growth rates have also been provided for Perth County and the Province of Ontario. As illustrated, Stratford's population base increased from 31,600 in 2006 to 34,200 in 2021, reflecting average annual growth rates of 0.1% over the 2006 to 2011 period, 0.4% over the 2011 to 2016 period, and 1.1% over the 2016 to 2021 period. Stratford's average annual population growth rates significantly increased over the 15-year period. With a growth rate of 1.1% between 2016 and 2021, the City of Stratford grew slightly slower than the provincial and County averages. As of 2023, the population of Stratford is estimated to be 35,200, an increase of approximately 1,000 from 2021.

^[1] Proposed Approach to Implementation of the proposed Provincial Planning Statement, April 6, 2023.



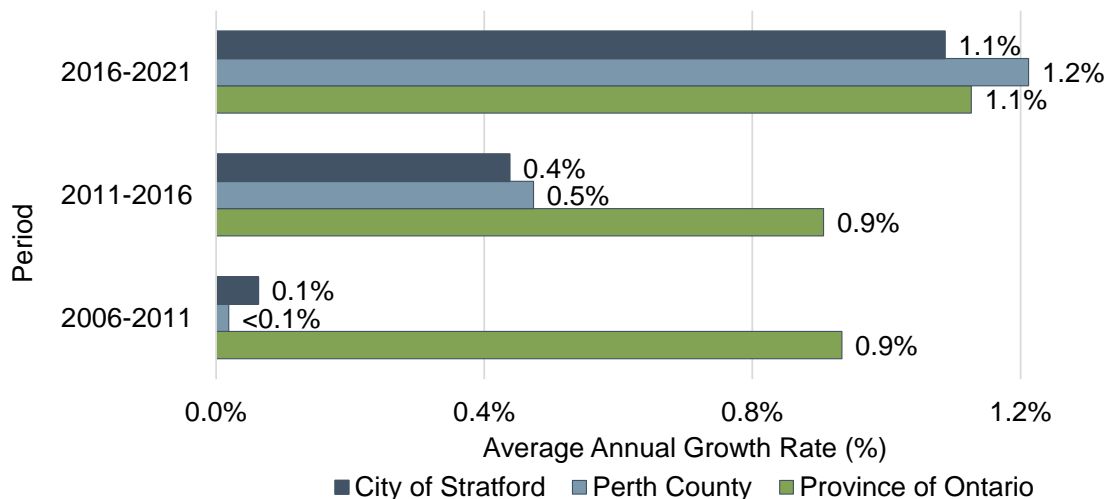
Figure 1
City of Stratford
Historical Population, 2006 to 2023



Note: Population includes a net Census undercount estimated at approximately 2.8%. Population figures have been rounded.

Source: 2006 to 2021 derived from Statistics Canada Census data, 2023 estimated by Watson & Associates Economists Ltd., 2023.

Figure 2
City of Stratford, Perth County and Province of Ontario
Average Annual Population Growth Rate, 2006 to 2021



Note: Population figures include net Census undercount.

Source: Derived from Statistics Canada Census data by Watson & Associates Economists Ltd., 2023.



2.2 Demographic Trends

Demographic trends strongly influence both housing need and form. Across Ontario, the population is getting older on average, due to the aging of the Baby Boomers.^[1] The first wave of this demographic group turned 75 years of age in 2021.

Similar to the Province, the average age of the population base in Stratford is also aging, due to the large concentration of Baby Boomers. The aging of the local population base further reinforces the need to attract younger age groups to the City, particularly those characterized as Millennials and Generation Z, as well as other future generations.^[2]

Figure 3 summarizes historical trends in population structure over the 2001 to 2021 period by major age group in Stratford. Key observations include:

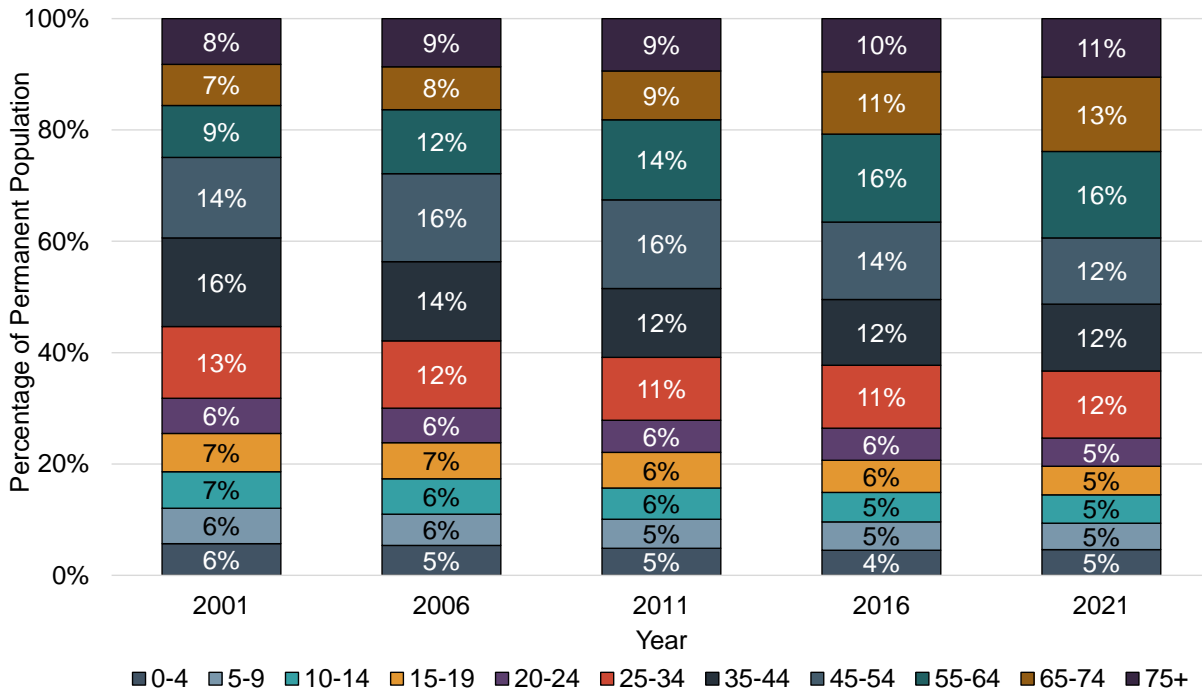
- The share of population in the 55+ age cohort steadily increased from 25% in 2001 to 39% in 2021;
- In contrast to the 55+ population age group, the population share of the 0 to 19 age group declined from 25% in 2001 to 20% in 2021;
- Similarly, the share of the 35 to 54 age group steadily declined from 30% in 2001 to 24% in 2021; and
- Lastly, the population share of the young adult age group (20 to 34) declined from 19% to 17%.

^[1] Baby Boomers are generally defined as people born between 1946 and 1964.

^[2] Millennials are generally defined as those born between 1980 and 1992. For the purposes of this study, we have assumed that those born between 1993 and 2005 comprise Generation Z.



Figure 3
City of Stratford
Historical Permanent Population by Major Age Group, 2001 to 2021



Source: Derived from Statistics Canada Custom Order data by Watson & Associates Economists Ltd., 2023.

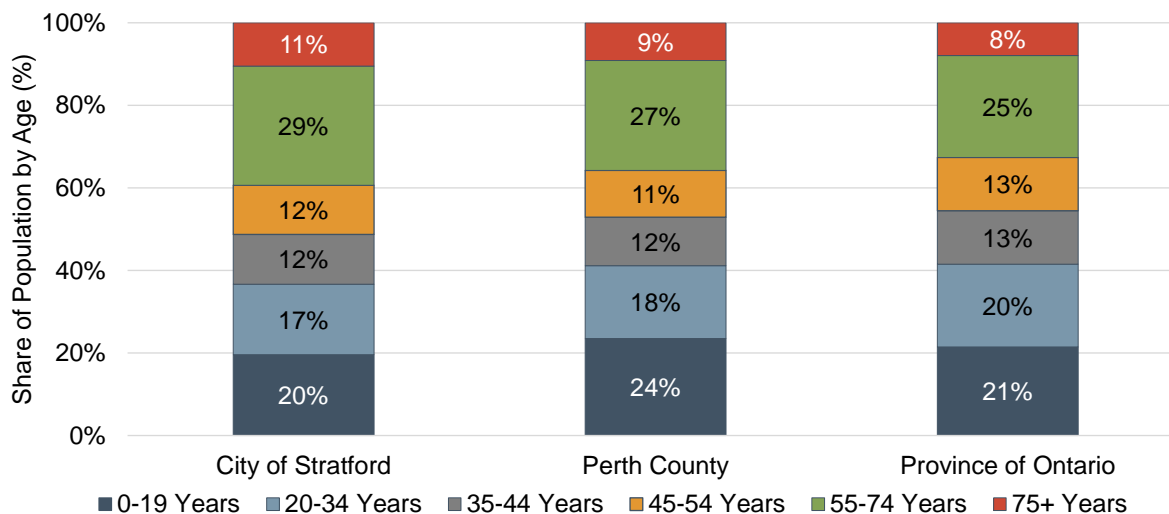
Stratford has a moderately older age profile than the provincial and County averages, with 39% of the population over the age of 55, as illustrated in Figure 4.^[1] Stratford's median age is 46, which is higher than Perth County's median age of 42 and the provincial median age of 42.^[2] Over the past decade, the age structure of Stratford has been changing with a notable increase in the population aged 55-74 years. The City experienced an overall increase in population over the 2011 to 2021 period, with a significant increase in the 55+ age group population, as shown in Figure 5. This is in contrast to all other age groups which had a decline or marginal increase in population over the period.

^[1] Based on 2021 Census single year of age data.

^[2] 2021 Statistics Canada Census.

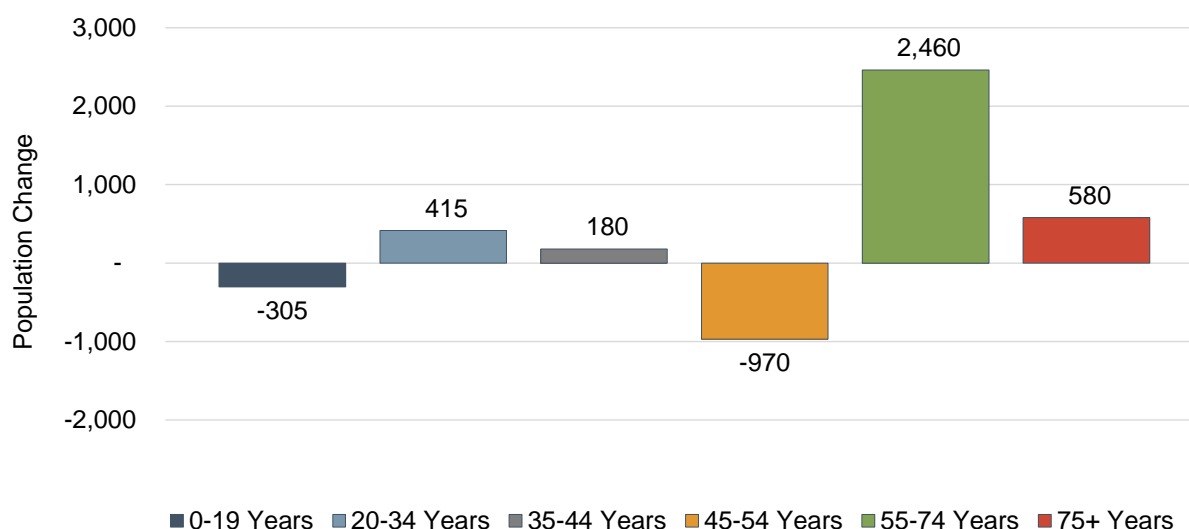


Figure 4
City of Stratford, Perth County, and Province of Ontario
Population by Age Cohort, 2021



Source: Derived from Statistics Canada Census data by Watson & Associates Economists Ltd., 2023.

Figure 5
City of Stratford
Population Growth by Age Cohort, 2011 to 2021



Source: Derived from Statistics Canada Census Data by Watson & Associates Economists Ltd., 2023.



2.3 Understanding the Key Components of Population Growth

There are two primary components of population growth: natural increase (i.e., births less deaths), and net migration. Net migration can be broken into three broad categories, including:

- **International Net Migration** – represents international immigration less emigrants, plus net non-permanent residents.
- **Inter-Provincial Net Migration** – comprises in-migration less out-migration from other Canadian provinces/territories.
- **Intra-Provincial Net Migration** – includes in-migration less out-migration from elsewhere in the Province of Ontario.

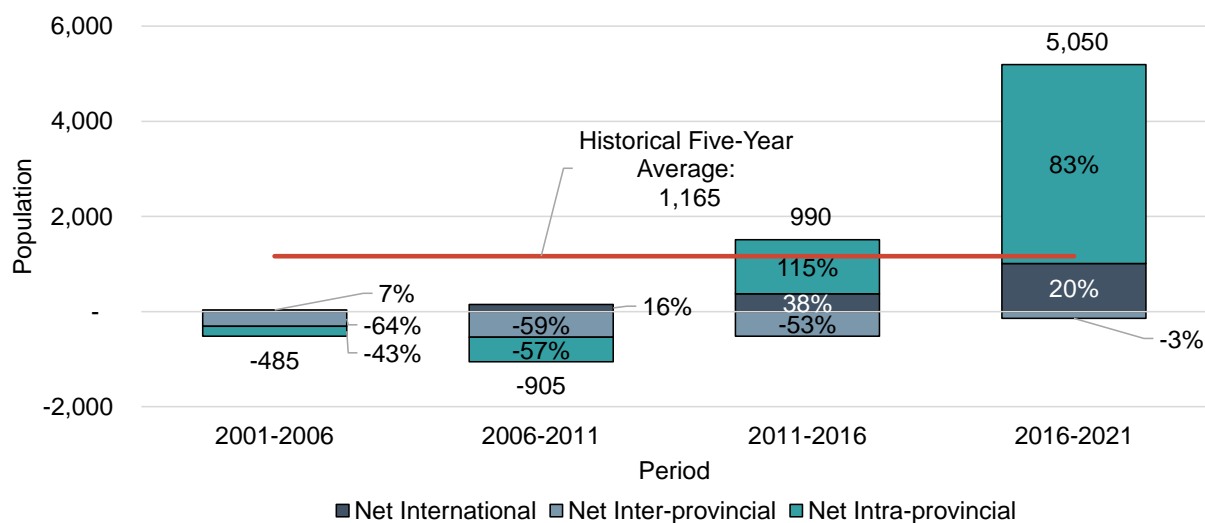
Figure 6 summarizes historical net migration trends between 2001 and 2021 within the Perth County Census Division (C.D.),^[1] by type of net migration. Key observations are as follows:

- Over the 20 years reviewed, net migration in the Perth County C.D. averaged approximately 1,165 persons per five-year Census period or 210 persons per year.
- Intra-provincial net migration represented the largest driver of net migration to the Perth County C.D. Over the 2015 to 2021 period, the Waterloo Region and the G.T.H.A. were the largest contributors of intra-provincial net migration to the Perth County C.D., with 26% and 15% of total net migration, respectively, as shown in Figure 7. Over this period, intra-provincial net migration largely comprised the 25-44 population age group (35%), followed by the 0-17 (21%) and 45-64 (20%) age groups.
- International migration also represented an increasing share of overall net migration. The amount of international migration to the Perth County C.D. increased from 35 during the 2001 to 2006 period to 1,015 during the most recent 2016 to 2021 period.

^[1] Perth County Census Division includes Perth County (i.e., Township of Perth South, Municipality of West Perth, Township of Perth East, and Municipality of North Perth), the City of Stratford, and the Town of St. Marys.



Figure 6
Perth County Census Division
Historical Net Migration Trends, 2001 to 2021

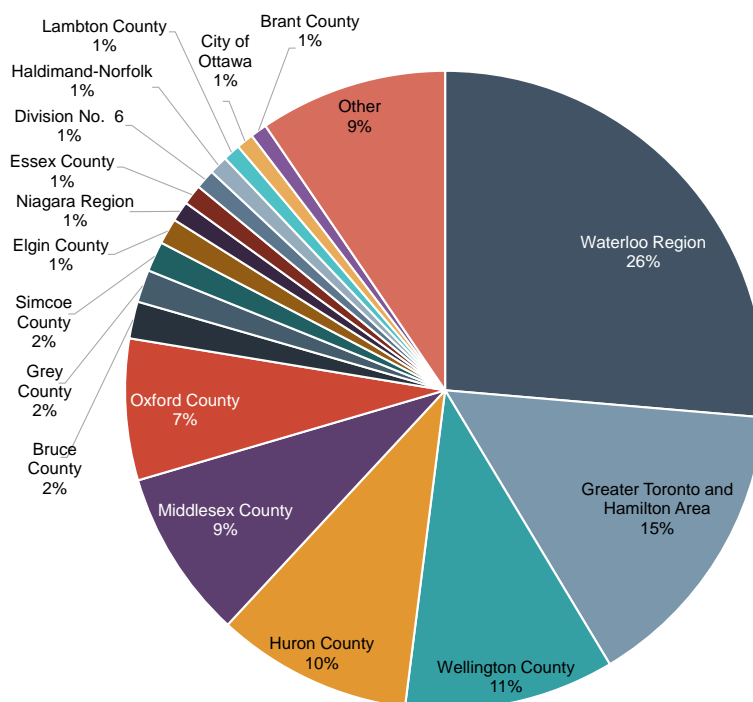


Note: Perth County Census Division includes Perth County (i.e., Township of Perth South, Municipality of West Perth, Township of Perth East, and Municipality of North Perth), the City of Stratford, and the Town of St. Marys.

Source: Data derived from Statistics Canada. Table 17-10-0136-01 by Watson & Associates Economists Ltd., 2023.



Figure 7
Perth County Census Division
Share of Intra-Provincial Migration, 2015 to 2021



Note: Perth County Census Division includes Perth County (i.e., Township of Perth South, Municipality of West Perth, Township of Perth East, and Municipality of North Perth), the City of Stratford, and the Town of St. Marys.

Source: Derived from Statistics Canada Custom Data by Watson & Associates Economists Ltd., 2023.

3. Stratford's Housing Market

3.1 Household Growth Trends

As shown in Figure 8, Stratford's 2021 housing base comprised approximately 14,740 occupied dwelling units, largely consisting of low-density housing (single detached/semi-detached) which accounts for 64% of units.^[1] Stratford's housing base comprised

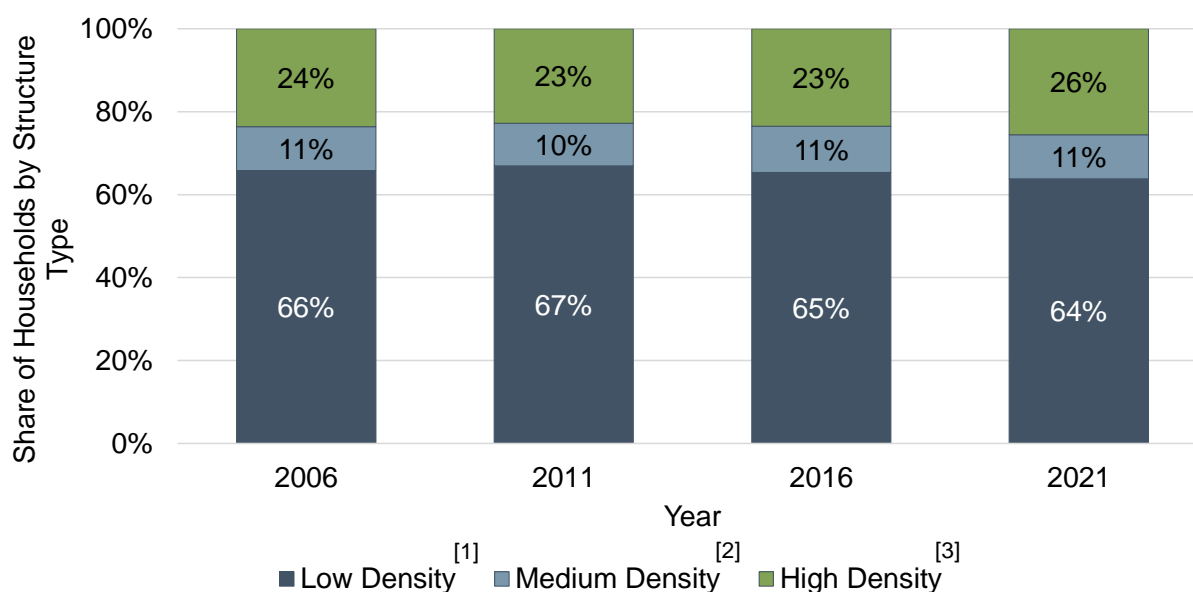
^[1] Derived from the 2021 Statistics Canada Census.



approximately 11% and 26% medium- and high-density units, respectively. Key observations include:

- Stratford's housing base has historically been predominantly owner-occupied low-density units (single and semi-detached); and
- The local housing market is gradually becoming more diverse with a greater share of higher-density units.

Figure 8
City of Stratford
Housing by Structure Type, 2006 to 2021



[1] Includes single and semi-detached units.

[2] Includes townhouses and apartments in duplexes.

[3] Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

Notes: Numbers may not add precisely due to rounding.

Source: Derived from Statistics Canada Census data by Watson & Associates Economists Ltd., 2023.

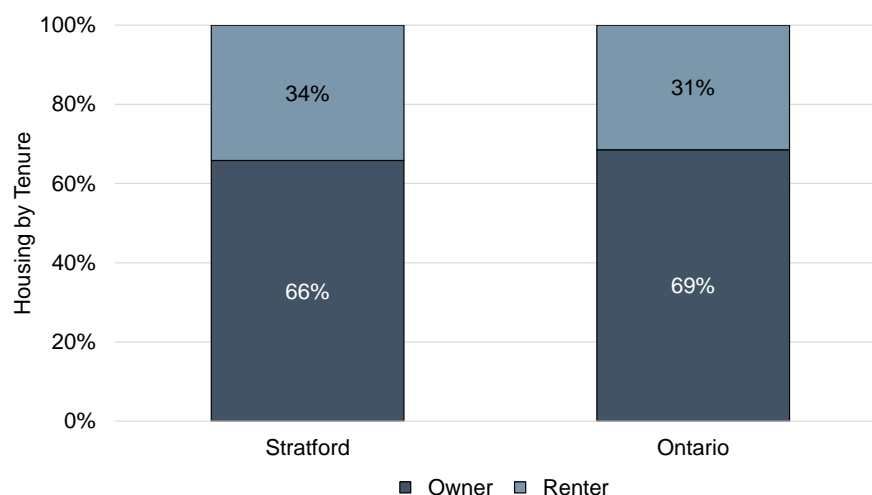
3.1.1 Housing Tenure

Housing tenure falls under two categories: owner occupied, and renter occupied. As shown in Figure 9, within the City of Stratford in 2021, 66% of housing units are owner



occupied and 34% are renter occupied.^[1] The City of Stratford has a higher share of renter households than the provincial average of 31%.

Figure 9
City of Stratford
Housing by Tenure, 2021



Source: Derived from Statistics Canada. Table 98-10-0232-01 by Watson & Associates Economists Ltd., 2023.

3.1.2 Rental Housing Market

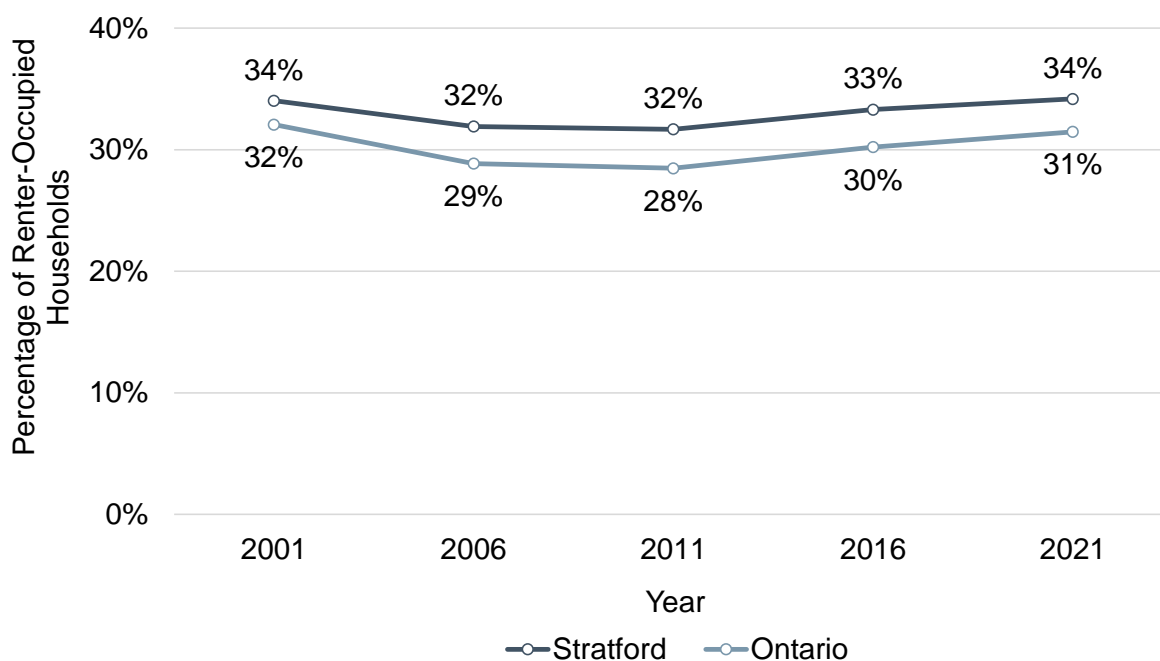
Figure 10 summarizes the historical share of renter-occupied units within Stratford and the Province over the 2001 to 2021 period. Key findings include:

- The share of renter-occupied households in Stratford decreased from 34% in 2001 to 32% in 2011, and increased from 32% in 2011 to 34% in 2021;
- Renter-occupied households as a proportion of total dwellings in Stratford remained higher than the Province of Ontario throughout the 2001 to 2021 period; and
- Over the 2001 to 2021 period, the number of renter-occupied housing units in Stratford increased from 4,165 to 5,040.

^[1] Based on 2021 Statistics Canada Census Profile data. Excludes non-Census post-secondary student households.



Figure 10
City of Stratford
Renter-Occupied Dwellings, 2001 to 2021



Note: The renter-occupied household metrics do not include non-Census dwelling units.
Source: Derived from Statistics Canada Census data, 2001-2021, by Watson & Associates Economists Ltd., 2023.

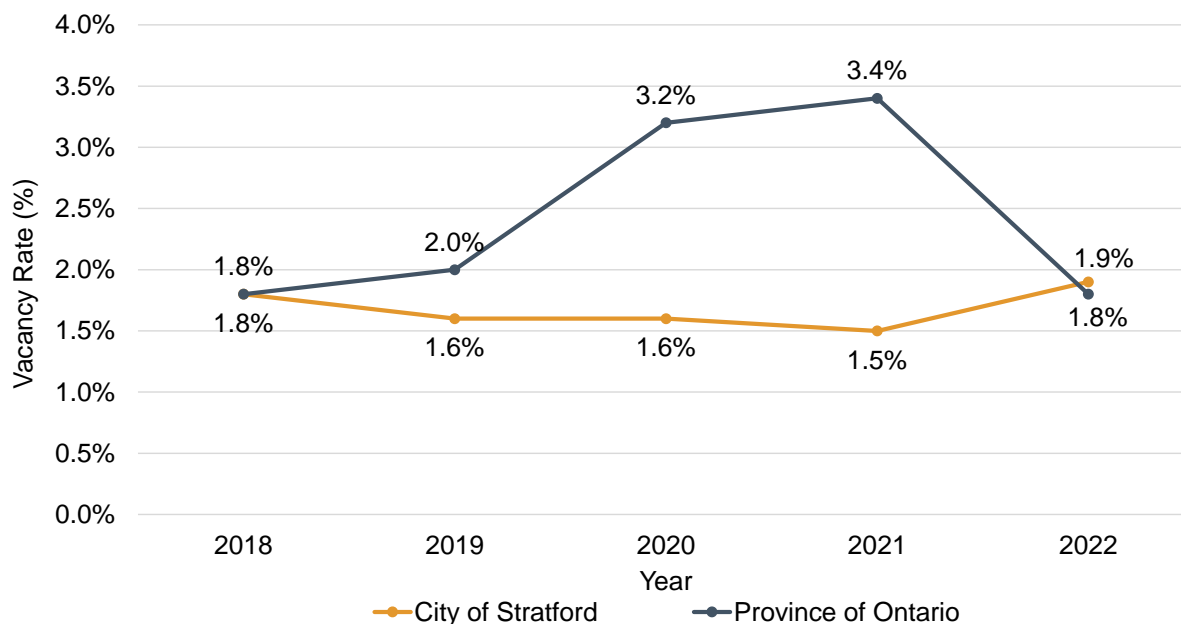
Figure 11 provides a summary of average rental vacancy rates for 1-, 2- and 3-bedroom apartments in the primary rental market over the past five years in Stratford compared to the provincial average.^[1] Key observations include:

- As of October 2022, the overall vacancy rate is 1.9% in Stratford, similar to the provincial average of 1.8%; and
- Over the past five years, Stratford's vacancy rate has been below the provincial five-year average (2.4%), ranging between 1.5% and 1.9%.

^[1] CMHC identifies the primary rental market as structures that have at least three rental units. These properties are typically operated by an owner, manager, or building superintendent.



Figure 11
City of Stratford
Historical Vacancy Rates, 2018 to 2022



Source: Derived from CMHC Housing Market by Watson & Associates Economists Ltd., 2023.

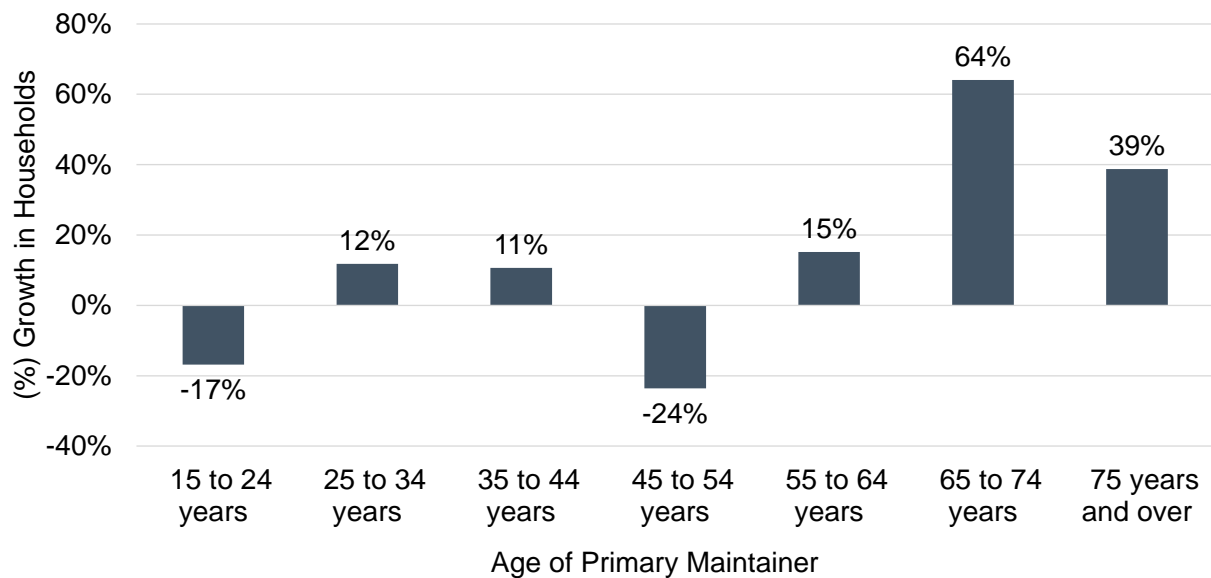
Typically, a rental vacancy rate of approximately 3% is considered healthy. It is noted that low average rental vacancy rates currently experienced in Stratford and across the Province continue to place an upward price pressure on rents.

3.1.3 Household Growth by Age and Size

Figure 12 summarizes 2016 to 2021 household growth by age of primary household maintainer in Stratford. The City has experienced strong household growth in the 55+ age cohort, including empty nesters/young seniors (55-64) and seniors (65+). Household growth in units maintained by those 55+ accounted for approximately 118% of the total unit increase over the 2016 to 2021 period. During the same time period, moderately strong growth was experienced in households maintained by younger age groups (25-34 and 35-44 age groups), while a decline occurred in the number of households maintained by those aged 15-24 and 45-54.



Figure 12
City of Stratford
Growth in the Number of Households by Age of Primary Maintainer, 2016 to 2021



Source: Derived from Statistics Canada Census data, 2016-2021, by Watson & Associates Economists Ltd., 2023.

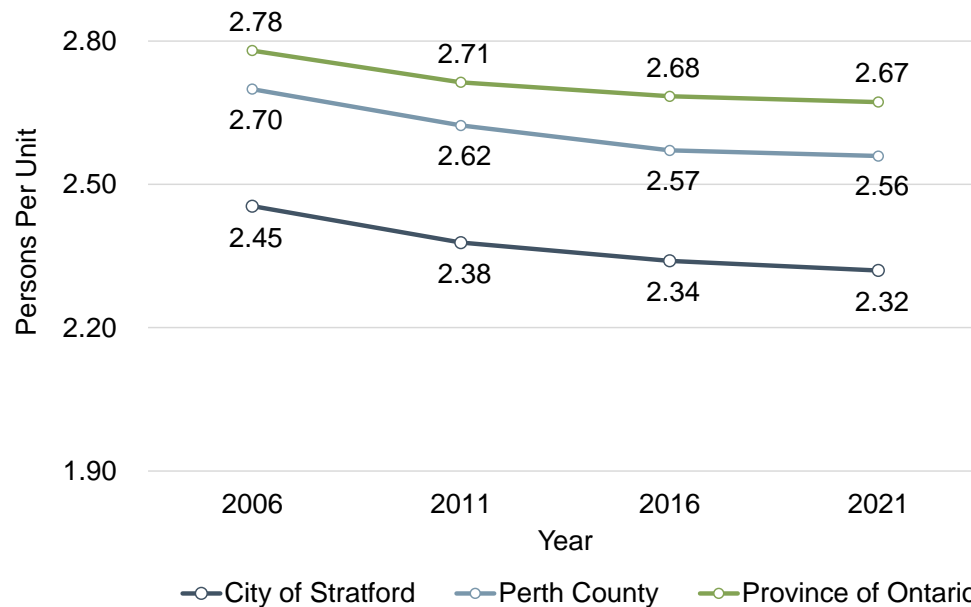
Figure 13 summarizes average housing occupancy in the City of Stratford in comparison to Perth County and the Province of Ontario. This is expressed as the average number of persons per dwelling unit (P.P.U.).^[1] The general downward trend in housing occupancy has been driven by the aging of the population which increases the proportionate share of empty nester and single-occupancy households. As shown, the P.P.U. decline in Stratford has been slightly less pronounced than in Perth County. The City's P.P.U. declined over the 2006 to 2021 period, with a P.P.U. of 2.32 in 2021, which is lower than Perth County's P.P.U. of 2.56 in 2021. The City and the County may notice a change in P.P.U. trends due to the increase in multigenerational homes. Some of the factors affecting the increase in multigenerational homes include the aging

^[1] Average number of persons per unit (P.P.U.) defined as the total population divided by the number of occupied dwelling units.



of the population, an increase in share of indigenous and newcomer families, housing cost hikes and the need for family caregiving.^[1]

Figure 13
City of Stratford, Perth County and Ontario
Average Household Occupancy, 2006 to 2021



Note: Population includes a net Census undercount estimated at approximately 3.1%.
Source: Derived from Statistics Canada Census data by Watson & Associates Economists Ltd., 2023.

3.2 Housing Development Activity

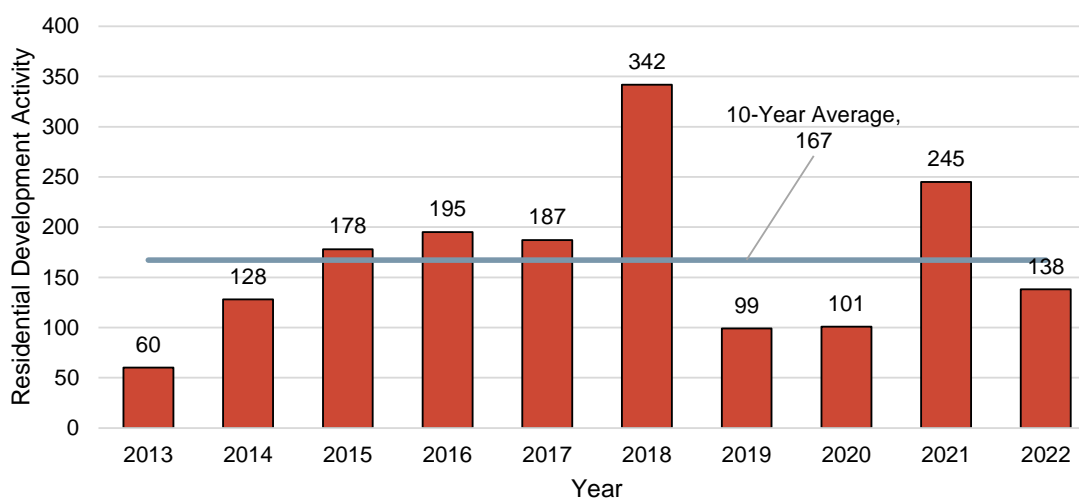
Over the 2013 to 2022 period, Stratford averaged 167 residential units constructed per year, as illustrated in Figure 14. In the past five years, housing growth has accelerated, with an average of 185 units per year over the 2018 to 2022 period. As illustrated in Figure 15, over the past decade, low-density housing construction has declined as a share of total housing development, with a significant increase in the share of high-

^[1] <https://vanierinstitute.ca/sharing-a-roof-multigenerational-homes-in-canada-2021-census-update/>



density units (i.e., apartments and condominiums) and medium-density units (i.e., townhouses).

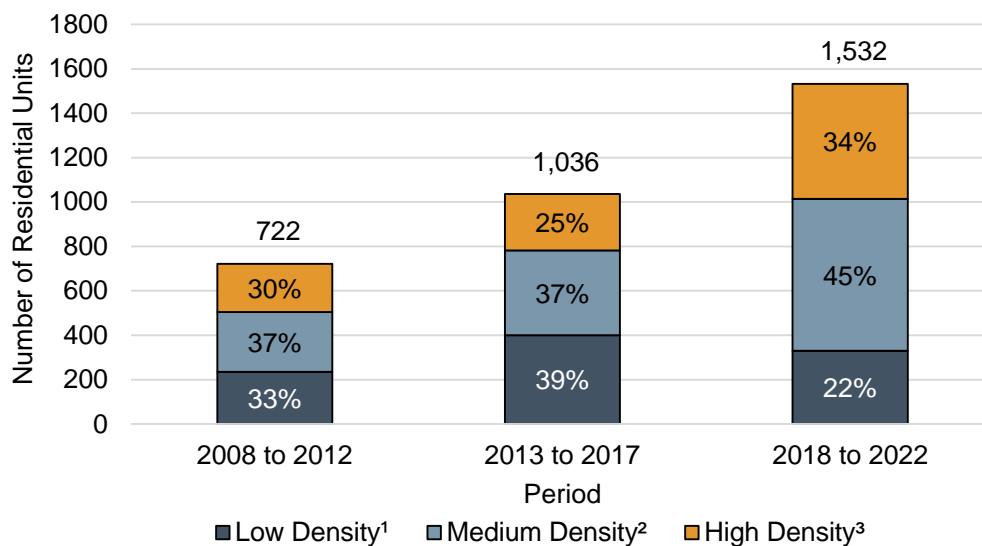
Figure 14
City of Stratford
New Housing Development, 2013 to 2022



Source: Derived from City of Stratford Building Permits Data by Watson & Associates Economists Ltd., 2023.



Figure 15
City of Stratford
New Housing Construction by Structure Type, 2008 to 2022



¹ Includes single and semi-detached units.

² Includes townhouses and apartments in duplexes.

³ Includes bachelor, 1-bedroom, and 2-bedroom+ apartment units.

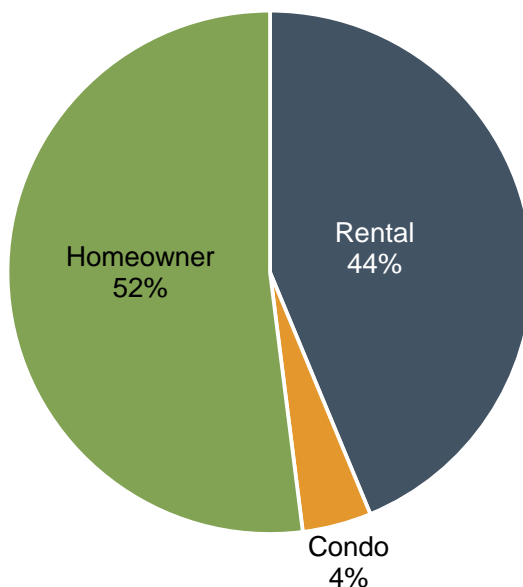
Notes: Numbers may not add precisely due to rounding.

Source: Historical 2008 to 2022 data derived from City of Stratford building permits by Watson & Associates Economists Ltd., 2023.

Over the past five years (2018 to 2022), 52% of new housing completions have been in the home-ownership market, as presented in Figure 16. This is compared to 44% for purpose-built rentals and 4% for condominiums.



Figure 16
Stratford Census Agglomeration
Housing Completions by Intended Market, 2018 to 2022



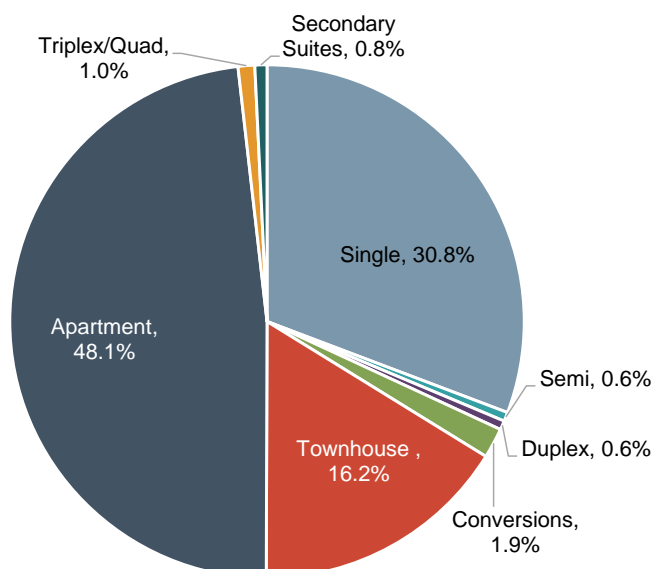
Source: Derived from CMHC's Absorbed Housing Units by Intended Market data by Watson & Associates Economists Ltd., 2023.

Building permit activity by housing type in Stratford over the past five years (2018 to 2022) is presented in Figure 17. As illustrated:

- There has been a shift to higher-density development, with about 50% of units being high density and 17% being medium density, compared to 31% of total units being low density.
- Stratford experienced relatively strong apartment growth, accounting for 48% of the housing unit development over the period.



Figure 17
City of Stratford
Residential Development Activity by Type (Units), 2018 to 2022



Source: Adapted from the City of Stratford's building permit data by Watson & Associates Economists Ltd., 2023.

Stratford has demonstrated a growing demand to accommodate housing through intensification. In accordance with the City's current O.P., Stratford has an intensification housing target of 25%. The City achieved an average intensification rate of 44% from 2013 to 2022, significantly higher than the target. Recent intensification activity has also been significantly higher than the rate of residential intensification activity over the previous 10-year period, where intensification accounted for 20% of the City's total residential development.^[1] Of the residential intensification achieved over the past decade, 81% of the units have been apartments, 10% singles/semis and 9% townhouses/duplexes.^[2]

^[1] City of Stratford Residential Intensification Assessment, prepared by Watson & Associates Economists Ltd., 2012.

^[2] Derived from City of Stratford 2013 to 2022 residential building permit data by Watson & Associates Economists Ltd., 2023.



3.2.1 Historical Housing Propensity Trends by Structure Type, 2021

Figure 18 summarizes historical housing propensity (i.e., demand) trends by structure type for permanent households in the City of Stratford based on 2021 Statistics Canada Census data. Age-specific propensities measure housing demand by dwelling structure type, by age of household maintainer.

As previously mentioned, population age structure influences the socio-economic characteristics of the population related to income/affordability, lifestyle, family size, lifestyle decisions, health and mobility. Propensities for high-density housing (apartments and condominium units) are highest among younger age groups, while propensities for low-density housing (single and semi-detached housing) tend to be highest among population age groups between 35 and 64 years of age.

As previously discussed, Stratford's population is aging. As will be discussed further, the 55+ age group has grown considerably over the past 20 years and is expected to increase in both percentage and absolute terms over the next several decades. As the average age of the City of Stratford population continues to increase, it is anticipated that the demand for higher-density housing forms will also continue to gradually increase.

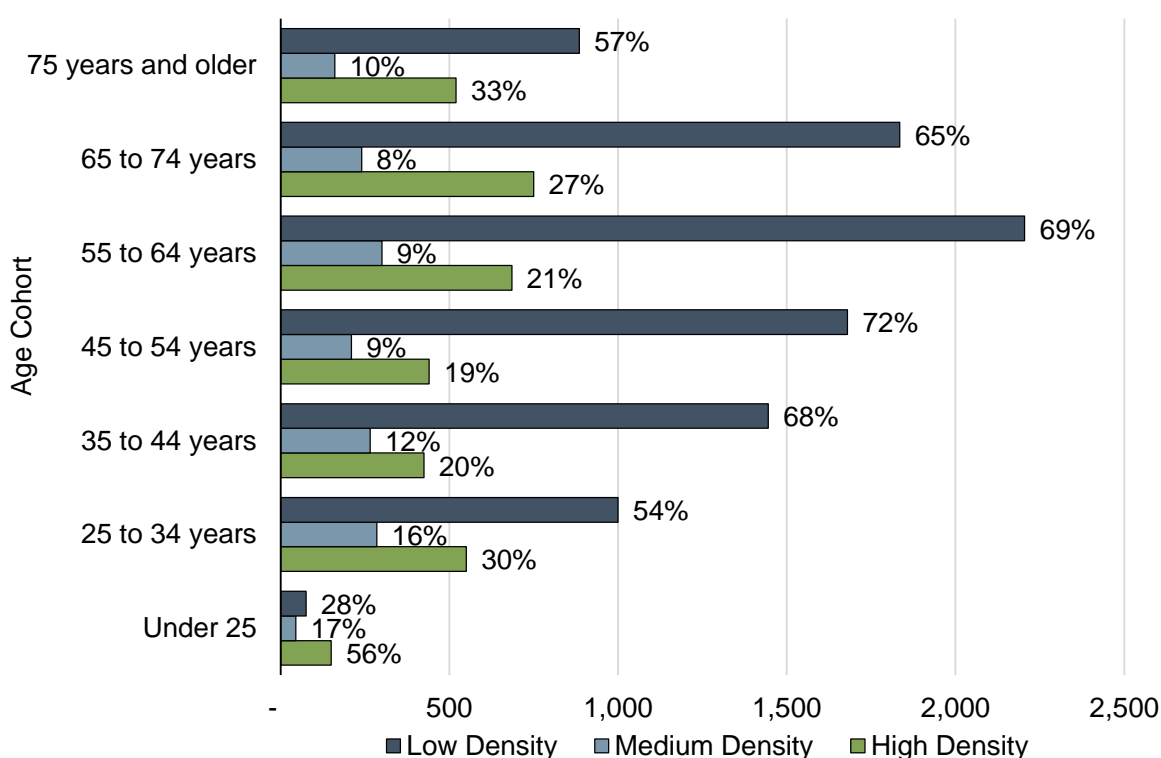
The aging of the City's population is also anticipated to drive the need for seniors' housing and other housing forms geared to older adults (e.g., assisted living, affordable housing, adult lifestyle housing). Given the diversity of the 55 to 74 and 75+ population age groups, forecast housing demand across the City of Stratford within this broad 55+ demographic group is anticipated to vary considerably.

Within the 55+ age group, housing demand within the 55-74 age group is anticipated to be relatively stronger for ground-oriented housing forms (i.e., single detached, semi-detached and townhouses) that provide proximity to urban amenities, municipal services and community infrastructure. With respect to the 75+ age group, the physical and socio-economic characteristics of this age group (on average) are considerably different than those of younger seniors, empty nesters and working adults with respect to income, mobility and health. Typically, these characteristics represent a key driver behind their propensity for medium- and high-density housing forms (including seniors' housing) that are in proximity to urban amenities, health care services and other community facilities geared toward this age group.



In addition, the City of Stratford is also anticipated to accommodate a growing share of young adults and new families seeking competitively priced home ownership and rental opportunities. Accordingly, opportunities should be explored to provide a mix of future housing across a range of density types, to accommodate those with varying levels of income (including affordable housing options) within new greenfield areas, as well as in priority intensification areas across the City's built-up area.

Figure 18
City of Stratford
Housing Propensity by Structure Type, 2021



Notes: Low Density captures single and semi-detached units. Medium Density captures townhouses and apartments in duplexes. High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.

Source: Data from Statistics Canada Census 2021, derived by Watson & Associates Economists Ltd., 2023.



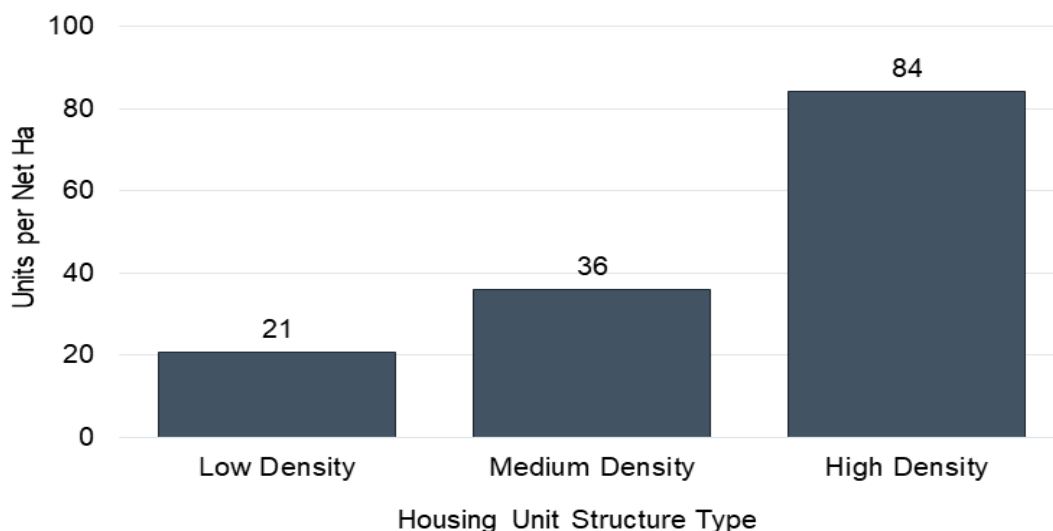
3.3 Density Assessment in Recently Developed Areas

3.3.1 Existing Units Per Net Hectare

The City of Stratford has currently achieved an overall average of 37 units per net hectare in recently developed areas (i.e., areas developed since 2012). Units per net hectare is based on the number of units in the area net of any land that is not for private use. Figure 19 provides a breakdown of the units per hectare by housing unit type. Key findings include:

- Low-density units, comprising single detached and semi-detached, have an average of 21 units per net hectare;
- Medium-density units, comprising townhouse units, have an average of 36 units per net hectare; and
- High-density units, comprising apartments, have an average of 84 units per net hectare.

Figure 19
City of Stratford
Average Units Per Net Hectare by Housing Type in Newly Developing Areas,
2012 to 2023



Notes: Low Density captures single and semi-detached units. Medium Density captures townhouses and apartments in duplexes. High Density includes bachelor, 1-bedroom, and 2-bedroom+ apartments.

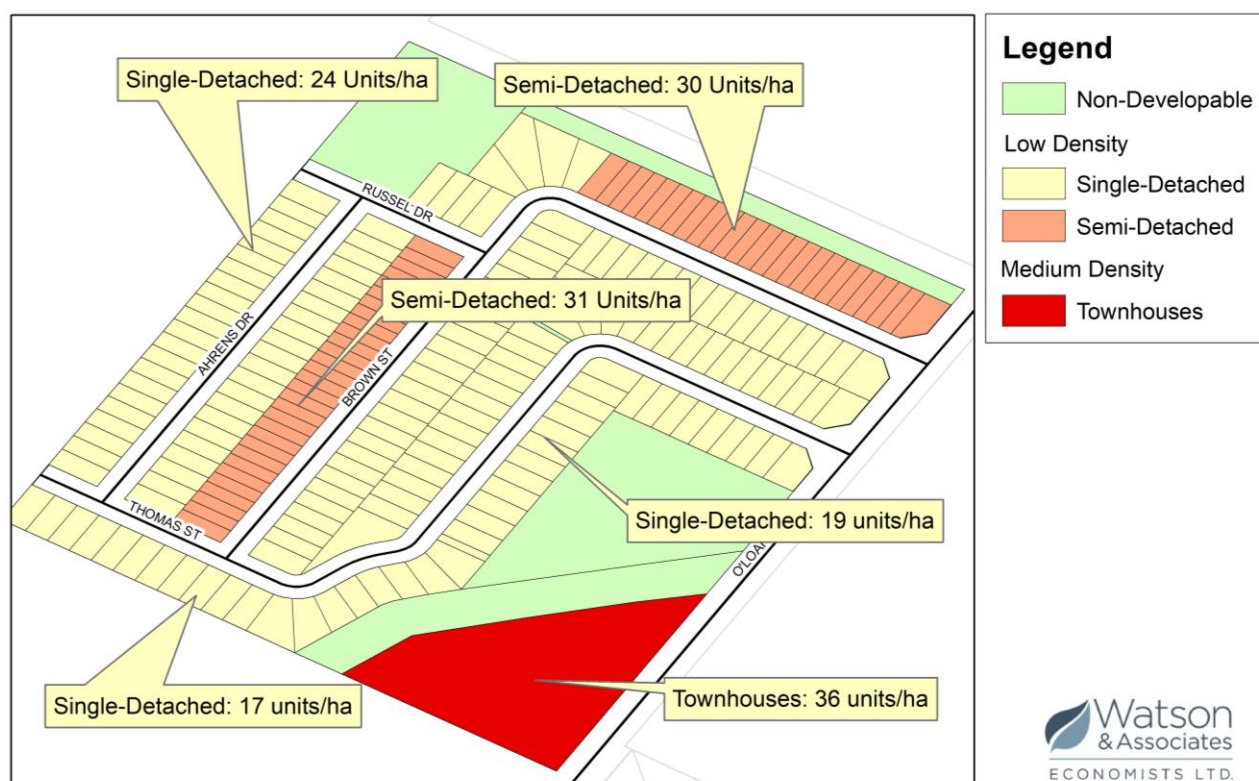
Source: Watson & Associates Economists Ltd., based on a spatial review of the City of Stratford's building permit activity, 2012 to 2023.



3.3.2 Factors Impacting Density

The density of a development is impacted by the size of the lots, housing mix and the development form. Figure 20 and Figure 21 provides an example of a newly developed area in the City with a mix of low- and medium-density housing types. In the example, the average density of single detached lots ranges from 17 to 24 units/hectare; the variation is due to slight differences to both the depth and width of the lot. Furthermore, as identified in the example, average semi-detached lots have a higher density of approximately 30 to 31 units per net hectare, as a result of having a lot size that is 27% smaller than the average single detached lot. Finally, the townhouse development in the example has an average density of 36 units per net hectare and can accommodate up to 16 additional units per net hectare than the average single detached lot in this example.

Figure 20
City of Stratford
Examples of Average Units Per Net Hectare



Note: Common elements and internal roadways of the townhouse development have been netted out of the density calculation.



Figure 21
City of Stratford
Examples of Average Units Per Net Hectare



Notes: Locations above include developments in Stratford west of O'Loane Avenue.
Source: Google Earth.

As previously discussed, high-density housing developments in the City of Stratford have an average of 84 units per net hectare. Recently constructed high-density developments in Stratford largely comprise four- to five-storey apartment buildings with large surface parking lots. Figure 22 provides examples of high-density development within the City of Stratford. Over the forecast period, it is anticipated the City of Stratford will continue to accommodate mid-rise apartment buildings (up to six storeys), as well as other high-density housing options, including stacked townhouses (i.e., units stacked in two- to three-storey developments).



Figure 22
City of Stratford
Examples of Average Units Per Net Hectare
High-Density Housing Developments



Notes: The locations above include developments in Stratford at 255 John Street North (63 units/net hectare) and 105 Oxford Street (102 units/net hectare).
Source: Google Earth.

4. Stratford Employment and Non-Residential Development Growth Trends

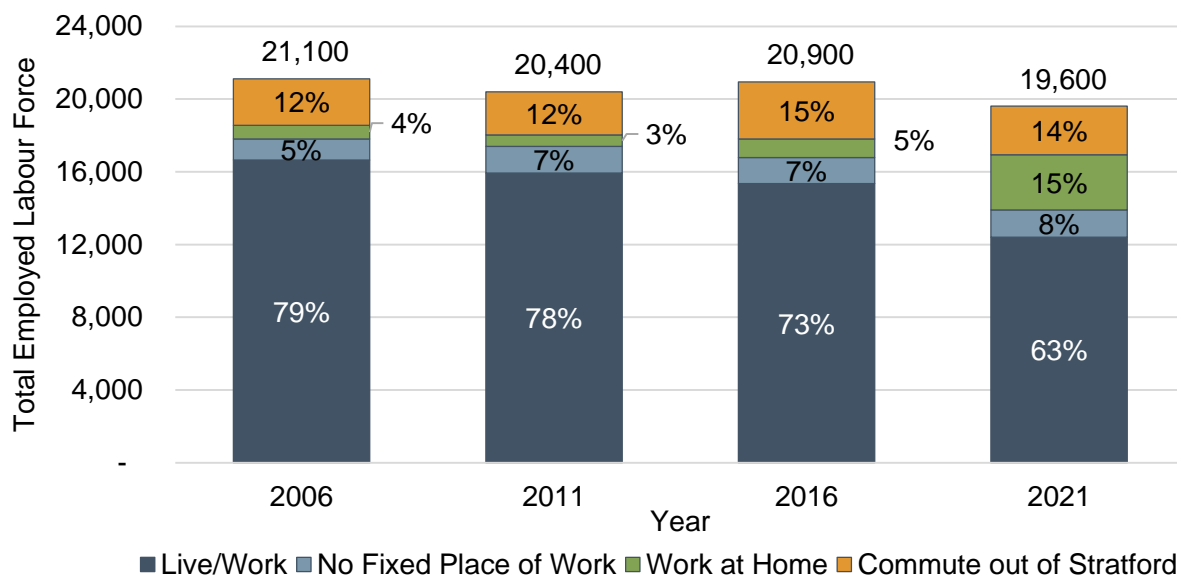
4.1 Labour Force and Commuting Trends

Figure 23 summarizes historical trends in the City of Stratford's labour force base by place of work. The size of Stratford's employed labour force decreased marginally over the 2006 to 2021 period, with a total employed labour force of 19,600 in 2021. As of 2021, approximately 86% of Stratford's employed labour force lives and works in the municipality or works from home. A relatively large share (14%) of the City's employed labour force commutes outside Stratford for employment.

Figure 24 summarizes the locations to where Stratford residents commute for employment, and from where those employed in Stratford commute. Of the employed labour force, 79% work within Stratford; meanwhile, 3% commute to Kitchener, 2% commute to Perth East, 2% commute to St. Marys, 2% commute to Waterloo, 2% commute to West Perth, and 10% commute to the remaining municipalities. Of the total employment base in Stratford, 59% of jobs are held by Stratford residents, while 41% commute from other municipalities: 7% from Perth East, 6% from West Perth, 3% from St. Marys, 3% from Perth South, 3% from London, 3% from Kitchener, and the remaining from other municipalities.



Figure 23
City of Stratford
Employed Labour by Place of Work (2006 to 2021)



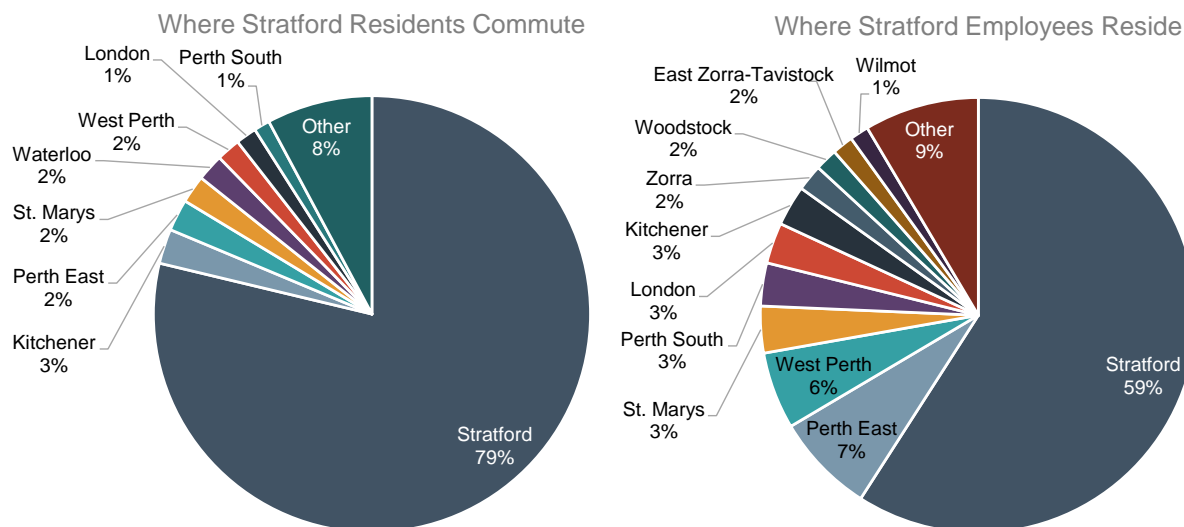
Notes:

- Total employed labour force metrics include work at home and no fixed place of work.
- No fixed place of work is defined by Statistics Canada as "persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc."
- Numbers have been rounded.

Source: Derived from Statistics Canada, 2006 to 2021, by Watson & Associates Economists Ltd., 2023.



Figure 24
City of Stratford
Commuting Patterns, 2016



Source: Statistics Canada, 2016 Census; analysis by Watson & Associates Economists Ltd., 2023.

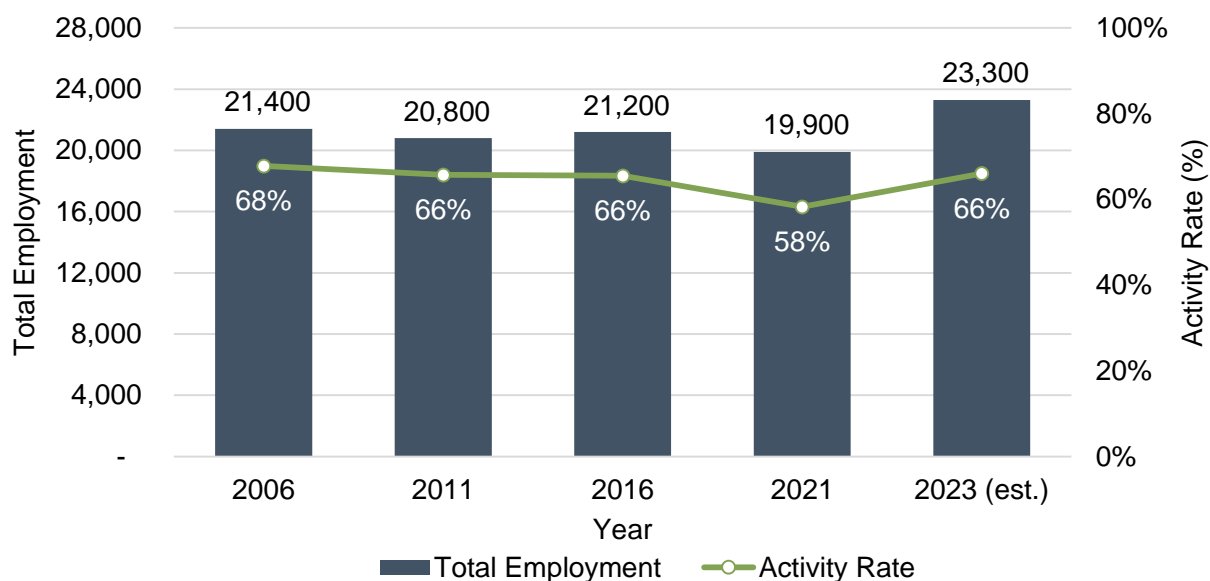
4.2 Employment Growth Trends and Industry Clusters

Figure 25 illustrates the City of Stratford's employment base over the 2006 to 2023 period. Key observations include:

- Stratford's employment base remained relatively stable from 2006 to 2016 and then declined from approximately 21,200 in 2016 to 19,900 in 2021 due to COVID-19 pandemic;
- The city's employment base is estimated to have increased to 23,300 in 2023 reflecting the post COVID-19 economic recovery and broader growth drivers; and
- Over the 2006 to 2021 period, Stratford's employment activity rate (ratio of jobs per population) declined from 68% to 58%, and then rebounded to 66% in 2023.



Figure 25
City of Stratford
Total Employment and Activity Rate, 2006 to 2023



Notes:

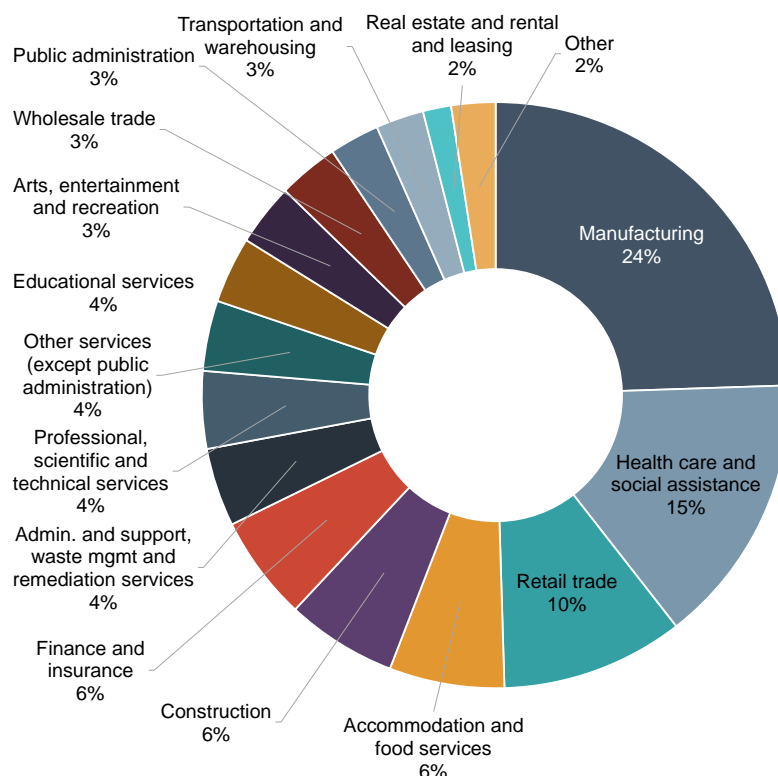
- Total employment metrics include work at home and no fixed place of work.
- Activity rates include net Census undercount estimated at 2.8%.
- Numbers have been rounded.

Source: Derived from Statistics Canada, 2006 to 2021, by Watson & Associates Economists Ltd., 2023.

As illustrated in Figure 26, Stratford's employment base is highly oriented to commercial and institutional sectors. The largest sectors, manufacturing, health care and social assistance, and retail trade, account for 49% of total employment, followed by accommodation and food services (6%), construction (6%), finance and insurance (6%), administrative and support, waste management and remediation services (4%), and professional and scientific and technical services (4%).



Figure 26
City of Stratford
Employment Structure, 2022



Note: Figures include employed and self-employed jobs. Management of companies and enterprises has been excluded from this list due to data unavailability.

Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2023.

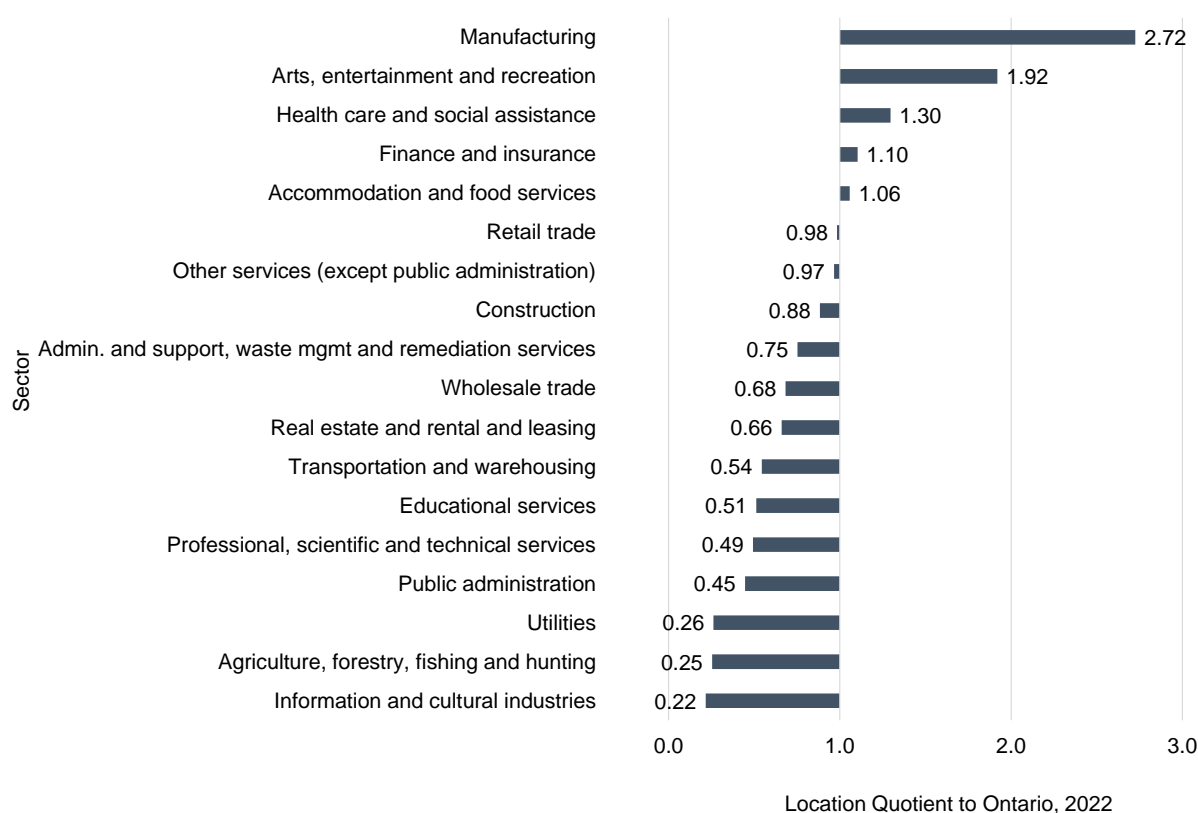
Figure 27 illustrates the strength of employment sectors in Stratford relative to the Province using Location Quotients (L.Q.).^[1] Stratford has a relatively high concentration of employment in sectors such as manufacturing; arts, entertainment and recreation; health care and social assistance; finance and insurance; and accommodation and food services. In contrast, Stratford has a relatively low concentration of employment in

^[1] An L.Q. of 1.0 identifies that the concentration of employment by sector is consistent with the broader employment base average. An L.Q. of greater than 1.0 identifies that the concentration of employment in a given employment sector is higher than the broader base average, which suggests a relatively high concentration of a particular employment sector or “cluster.”



information and cultural industries; agriculture, forestry, fishing and hunting; utilities; public administration; and professional, scientific and technical services.

Figure 27
City of Stratford
Location Quotients by Sector Relative to Ontario, 2022



Note: Figures include employed and self-employed jobs. Management of companies and enterprises has been excluded from this list due to data unavailability.

Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2023.

5. Stratford's Non-Residential Market Profile

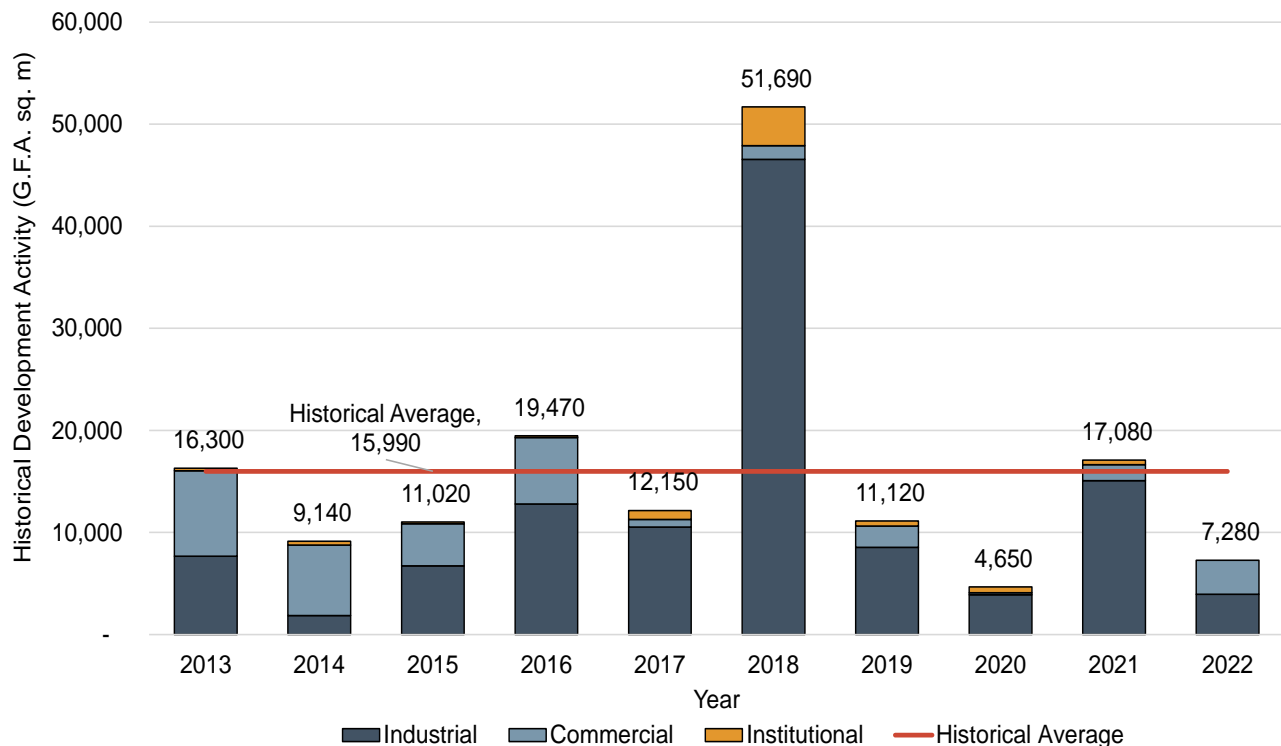
The following provides an assessment of recent urban non-residential development growth trends in Stratford, as well as a profile of the City's Employment Areas, and its retail commercial sector.



5.1 Recent Non-Residential Development Activity and Trends

Over the 2013 to 2022 period, Stratford has averaged 15,990 sq.m (172,100 sq.ft.) of non-residential development activity annually, as summarized in Figure 28. Over the past decade (2013 to 2022), industrial development accounted for approximately 73% of development activity compared to 22% and 4% in the commercial and institutional sectors, respectively, as shown in Figure 29.

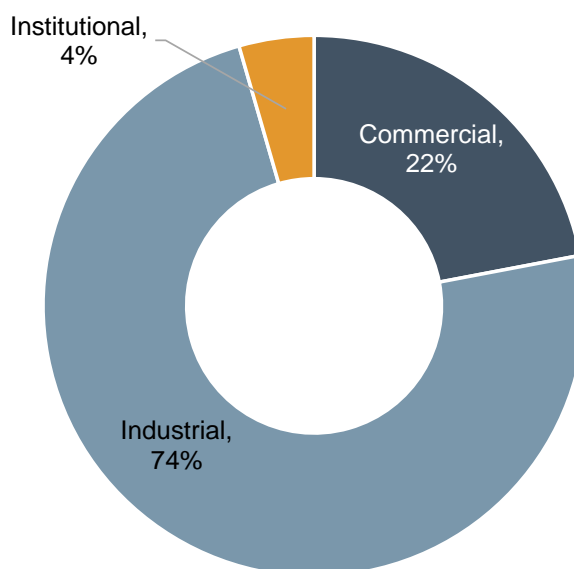
Figure 28
City of Stratford
Annual Non-Residential Development Activity, 2013 to 2022



Source: Derived from the City of Stratford's non-residential building permits 2013 to 2022 by Watson & Associates Economists Ltd., 2023.



Figure 29
City of Stratford
Non-Residential Development Activity by Sector, 2013 to 2022



Source: Derived from the City of Stratford's non-residential building permits 2013 to 2022 by Watson & Associates Economists Ltd., 2023.

5.2 Employment Areas Profile

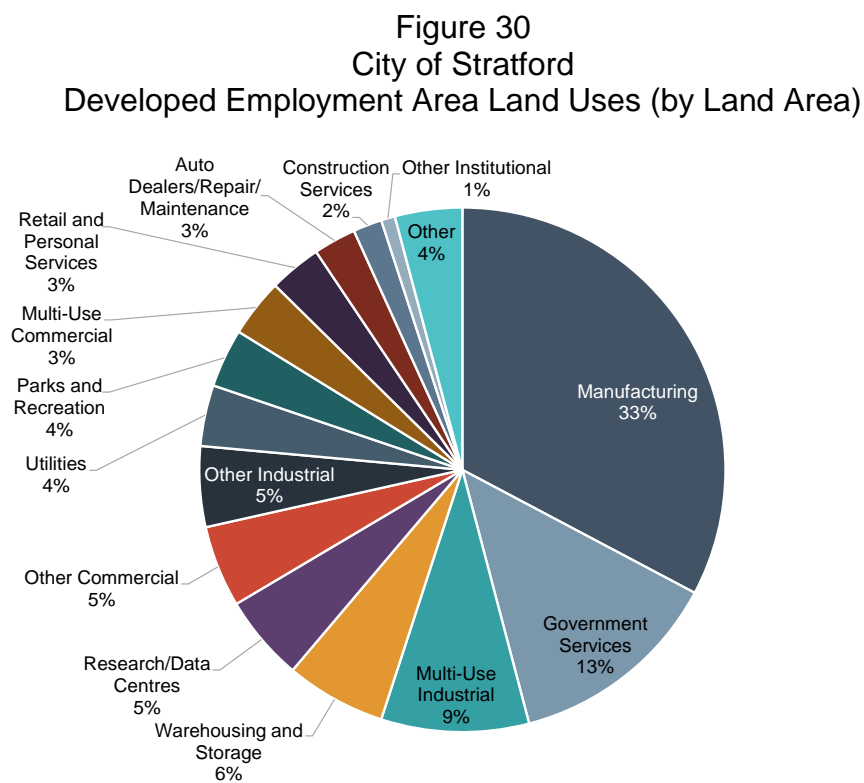
Stratford has approximately 440 net hectare (1,087 net acres) of developed employment land. Stratford's employment lands are organized into two main delineated Employment Areas located in southwest and southeast areas of the City. Stratford also has some employment lands outside these Employment Areas.

Employment Areas are an integral part of Stratford's economic development potential and accommodate a significant share of the City's businesses and employment. Employment Areas accommodate primarily export-based employment, including a wide range of industrial uses (e.g., manufacturing, distribution/logistics, transportation services), as well as specific commercial and institutional uses (e.g., office, service, ancillary/accessory retail) which generally support the industrial/business function of the industrial area. In contrast to other urban land uses (e.g., commercial and mixed-use areas), employment lands provide the opportunity to accommodate export-based



employment sectors that cannot be easily accommodated in other areas of the municipality.

Of Stratford's developed employment lands base, approximately 56% is within industrial sectors including construction, manufacturing, wholesale trade, and transportation and warehousing, as shown in Figure 30. Stratford's Employment Areas also accommodate a range of commercial and institutional sectors including professional, scientific and technical services, auto dealerships, places of worship, long-term care homes, and government services.



Source: Derived from City of Stratford's data by Watson & Associates Economists Ltd., 2023.

Stratford has a strong and successful history of municipal employment land development. The City continues to be a key employment land developer in the municipality, assembling and servicing land. The municipality is responsible for subdivision design, infrastructure development, and land sales. The City's two active Employment Areas are summarized below:



- **Wright Business Park** is a 40-hectare (100-acre) municipally owned Employment Area located in the southwest part of Stratford. The Wright Business Park has been highly successful at attracting a range of industrial uses including manufacturing, warehousing and construction and has accommodated the majority of the City's new industrial development over the past decade. The Employment Area is largely built out with only a few vacant parcels remaining.
- **Crane West Business Park** is a 10-hectare (24-acre) development ready municipally owned Employment Area located in southwest part of Stratford. The Employment Area features four 2-hectare (5-acre) lots of which two are available for sale.

It is estimated that the Employment Areas have no available industrial building space for lease, which limits the City's ability to accommodate the immediate need for businesses seeking to expand or set-up a business in the City's Employment Areas.^[1] As such, opportunities to accommodate industrial growth in the City will require development of vacant Employment Area lands, which are in short supply.

Over the 2017 to 2022 period, 34 net hectares (83 net acres) of employment lands were absorbed in Stratford, representing an average of approximately 6 hectares (14 acres) per year. The development accommodated largely consisted of manufacturing, construction services, warehousing and utilities. Employment densities averaged 15 jobs per net hectare (6 jobs per net acre).^[2]

5.3 Retail Commercial Market

Stratford's commercial base is an integral part of the community, supporting jobs, as well as providing residents access to goods and services which enhances the overall quality of life for residents. Stratford has approximately 192,800 sq.m (approximately 2.1 million sq.ft.) of purpose-built retail and accommodation space on designated commercial lands (Commercial Area and Downtown Core). It is important to recognize that purpose-built retail space also accommodates institutional and office uses. On a per capita basis, Stratford has approximately 5.3 sq.m (57 sq.ft.) of retail space per

^[1] CBRE estimates that the City of Stratford has no available vacant building space for lease as of the second quarter of 2023 according to *CBRE Waterloo Industrial Figures, Q2 2023*.

^[2] Watson & Associates Economists Ltd. survey data, 2023.



resident. Relative to the population base, the size of the retail base in Stratford is considered high. The high per capita level of retail is largely a result of a supporting a vibrant tourism market, as well as supporting a trade area that extends beyond the City of Stratford.

The City has a small supply of vacant retail floorspace, 4,900 sq.m (approximately 53,000 sq.ft.). The City's retail building space vacancy rate as of 2023 is approximately 3% which is considered low.^[1] A healthy market range for a commercial vacancy is between 5% to 8% which allows for market choice for new retail businesses looking for retail space in the immediate term, as well as accommodating opportunities for existing retail businesses to review lease renewal options (i.e., expansion or relocation).

Over the 2018 to 2022 period, the City added approximately 1,710 sq.m or 18,400 sq.ft. of commercial building floorspace annually.^[2] Based on the City's population growth over this period, the City commercial floorspace is growing at a slightly lower pace (0.9% annually) than the growth rate of the City's population base (1.1% annually). This is generally consistent with trends experienced in other smaller markets in Ontario.

As summarized in Figure 31, approximately 70% of the purpose-built retail and accommodation space is accommodated on lands designated Commercial Area, while just under a third is accommodated in the City's Downtown Core.^[3] Lands designated Commercial Area support a range of commercial uses, including large format retail, while the Downtown Core supports a range of commercial uses, accommodated in smaller footprints. In addition to the Downtown Core there are four commercial corridors in the City on lands designated Commercial Area: Ontario Street, Erie Street, Huron Street, and Lorne Avenue. These commercial corridors are situated on the edge of the City and are orientated towards motorists, including providing convenient access to shoppers travelling on regional highways from beyond the local area.

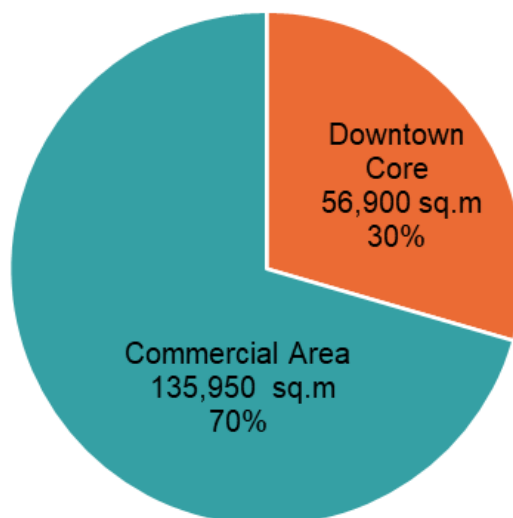
^[1] Retail vacancy excludes the following uses in the calculation: accommodation space (hotels/motels), automotive uses (e.g., gas stations, dealerships, car repairs, etc.), stand-alone office and medical clinics/office buildings.

^[2] Based on City of Stratford Non-Residential Building Permit Activity.

^[3] It is important to note that the City's Employment Areas also accommodate a small portion of the City's retail commercial base. Commercial uses on employment lands are included in the Employment Area analysis.



Figure 31
City of Stratford
Location of Commercial Building Space by Designation
Retail Commercial Gross Leasable Area (G.L.A.) as of 2023



Source: Watson & Associates Economists Ltd., 2023.

6. Opportunities to Accommodate Growth in Stratford

The following summarizes Stratford's potential to accommodate future housing and employment growth within its designated areas and potential future growth areas. With respect to the City's designated urban residential areas, future residential development opportunities are summarized by active development applications, vacant designated greenfield areas, and intensification opportunities. Consideration has also been given to Stratford's ability to accommodate future non-residential growth on designated commercial and employment lands, as well as through non-residential intensification.

6.1 Housing Supply Potential

The following section assesses Stratford's capacity to accommodate future housing growth, including opportunities for residential intensification. The City has vacant residential units in the form of registered subdivisions (remaining to be built) and subdivisions that are draft approved. In addition, potential units can be accommodated



through residential intensification, primarily infill and longer-term redevelopment opportunities. Stratford also has vacant designated residential lands (i.e., greenfield lands) that can accommodate future housing growth. Housing supply opportunities across the development approvals process, intensification and redevelopment, and greenfield development are discussed below.

6.1.1 Housing Supply in Development Approvals Process

Stratford has approximately 4,190 housing units within the development approvals process (registered unbuilt, draft approved and under review) across the City, as illustrated in Figure 32. This includes 2,195 units in registered plans of subdivision, 850 units in draft approved plans and 1,145 units in draft plans under review. Of the total units in development approvals, 665 units (16%) are low density, 945 units (23%) are medium density, and 2,580 units (62%) are high density.

Figure 32
City of Stratford
Residential Units in Development Approvals

Status	Low Density	Medium Density	High Density	Total
Registered	294	145	1,755	2,194
Draft Approved	343	361	146	850
Plans under Review	26	440	677	1,143
Total	663	946	2,578	4,187

Source: Data provided by the Municipality of City of Stratford (July 2023), presented by Watson & Associates Economists Ltd., 2023.

6.2 Intensification Supply Potential

Stratford has intensification opportunities both through infill and redevelopment, which are identified and assessed from both a physical capacity perspective herein. Opportunities also exist for further development of second suites within Stratford's single, semi-detached, and townhouse dwelling stock.



As part of the intensification analysis, the Consultant Team has reviewed and updated redevelopment site inventory prepared as part of the City's 2012 Residential Intensification Assessment. Infill lots were also considered and include vacant designated residential lands within the built boundary that are not in the development approvals process. Mapping data, aerial photography, and other existing information sources were used to develop this inventory.

6.2.1 Infill Opportunities

Infill lots include vacant designated residential lands that are not in the development approvals process. Potential infill opportunities were identified and inventoried on a site-by-site basis and further categorized by lot size (i.e., greater or less than 0.4 hectares (1 acre) in size). The net developable areas of each inventoried site were identified based on gross land area less physical and environmental constraints. Redevelopment sites, meanwhile, are those which are currently utilized for non-residential uses (i.e., underutilized industrial and commercial properties, including brownfield sites), but which have the potential to be converted to residential or mixed-use development.

Infill opportunities in Stratford and the corresponding housing unit potential are presented in Figure 33. As shown, it is estimated that 183 housing units could be accommodated on infill lots, including 37 low-density, 30 medium-density and 116 high-density units.

Figure 33
City of Stratford
Potential Infill Supply

Dwelling Unit Potential	Low Density	Medium Density	High Density	Total
Number of Units	37	30	116	183

Source: Watson & Associates Economists Ltd., 2023.



6.2.2 Redevelopment Opportunities

Redevelopment opportunities in Stratford and the corresponding housing unit potential are presented in Figure 34 under a low-range and high-range scenario adapted and updated from the 2012 Stratford Residential Intensification Assessment. Under the low range scenario, the updated analysis identified a total supply of 805 housing units, while under the high range, the supply potential totals 1,055. Under both scenarios, the majority of housing units are a mix of low- and mid-rise stacked townhouse or low-rise and mid-rise apartment developments, generally with a maximum density of 100 units per net hectare, except for a few exceptions based on current zoning or other factors.

Figure 34
City of Stratford
Redevelopment Supply Potential

Dwelling Unit Potential	Low Density	Medium Density	High Density	Total
Low Range	345	-	455	805
High Range	120	360	570	1,055

Numbers may not add due to rounding.

Source: Derived and updated from 2012 City of Stratford Residential Intensification Assessment by Watson & Associates Economists Ltd., 2023.

6.2.3 Residential Greenfield Development Opportunities

City staff provided the Consultant Team with an inventory of designated urban “greenfield” lands that are currently not active in the development approvals process. Non-developable environmental features (e.g., wetlands, woodlands, and Areas of Natural & Scientific Interest) were removed from the gross land area. Figure 35 identifies that the gross land area (less environmental take-outs) totals 58 hectares (143 acres). A net to gross ratio of 55% was applied to determine the net developable land area of 32 net hectares (79 acres).



Figure 35
City of Stratford
Summary of Greenfield Land Supply (gross to net hectares)

Greenfield Land Supply	Hectares
Gross Greenfield Lands Adjusted for Non-Developable Environmental Features	58
Net Developable Land Area	32

Notes:

- Net to gross ratio of 55% applied after environmental takeouts were applied.
- Environmental takeouts did not include flood-prone and critical floodplain lands.
- Numbers may not add precisely due to rounding.

Source: Derived from data provided by the City of Stratford by Watson & Associates Economists Ltd., 2023.

A more detailed assessment of the housing potential on vacant greenfield lands in Stratford will be prepared in Phase 2 and will include a total estimate of housing unit supply potential on vacant lands once an appropriate density assumption is established.

6.3 Employment Lands Supply

Stratford's vacant employment land inventory was developed based on employment land inventory provided by City staff and using geographic information systems (G.I.S.) based mapping software with various mapping overlays, including O.P. designations and orthophotos. Vacant designated employment lands were identified as those that fall under the O.P. designation of "Industrial." Figure 36 summarizes the total gross and net vacant employment land supply for Stratford (as of 2023). As illustrated, Stratford has a total of 250 gross hectares (618 gross acres) of vacant employment land. In determining the net vacant land inventory, downward adjustments were made to reflect environmentally sensitive lands/environmental features and internal infrastructure (i.e., roads, stormwater ponds, easements, etc.), where applicable.

Larger vacant unsubdivided parcels (i.e., 4 hectares or greater) were subject to an additional downward adjustment to reflect internal infrastructure with a net to gross adjustment of 80%. In accordance with the adjustments for internal infrastructure and



environmentally sensitive/constrained lands, Stratford's net developable employment land supply is estimated at 199 net hectares (492 net acres)

Figure 36
City of Stratford
Vacant Designated Employment Land Supply Gross and Net Hectare

Employment Land Supply	Gross Hectares	Net Hectares
Vacant Designated Employment Lands	250	199

Source: Watson & Associates Economists Ltd., 2023.

Figure 37 summarizes Stratford's total vacant designated employment land supply and shovel-ready employment lands by ownership. As shown, approximately 5% of vacant designated employment land (10 net hectares or 25 net acres) is owned by the City. The remaining 189 net hectares (467 net acres) are privately owned lands located throughout Stratford. Of Stratford's shovel-ready employment lands totalling 54 net hectares (133 net acres), 10 net hectares (25 net acres) are City-owned, accounting for 19% of the total.

Figure 37
City of Stratford
Vacant Employment Lands by Ownership

Vacant Employment Lands	City Owned (Net ha)	Privately Owned (Net ha)	Total (Net ha)	City Owned (%)	Privately Owned (%)	Total (%)
Net Vacant Designated Employment Lands	10	189	199	5%	95%	100%
Shovel-Ready Employment Lands	10	44	54	19%	81%	100%

Source: Watson & Associates Economists Ltd., 2023.

6.3.1 Underutilized Employment Lands

It is anticipated that a share of future employment growth within Stratford may be accommodated within existing developed Employment Areas. Intensification can take a number of forms, including development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and redevelopment of sites.



Intensification offers the potential to accommodate future employment growth and achieve improved land utilization resulting in higher employment density on developed employment lands. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g., roads, water/sewer servicing), a built form that is more conducive to support public transit, resulting in communities that are more functional and complete. Through a high-level desktop review using the developed employment land parcel inventory, building footprints and orthophoto overlays, 82 hectares (203 acres) of Stratford's developed employment lands were identified as underutilized. The underutilized parcels account for 19% of the total developed employment land base in Stratford.

Redevelopment activity has been limited and most of the recent activity has been related to expansion activity of existing businesses. Infill and redevelopment of existing developed lands are expected to continue to gradually increase over time, largely driven by rising employment land values and related development costs, and the continued buildout of Stratford's employment lands, especially in the most marketable locations.

6.4 Commercial/Mixed Use Lands Inventory

Stratford's vacant commercial/mixed-use land inventory was prepared by City staff using G.I.S.-based mapping software with various mapping overlays, including O.P. designations and orthophotos. Vacant designated commercial/mixed-use lands were identified as those that fall under the O.P. designation of "Commercial Area," "Downtown Core," and "Gateway Mixed-Use Area." Figure 38 summarizes the net developable supply of commercial/mixed-use lands. As summarized in Figure 38, the City of Stratford has a very minimal supply of vacant commercial/mixed-uses lands, totalling only 4 hectares. Furthermore, while the City has 20 vacant commercial/mixed-uses sites, the vast majority of the sites measure less than 1 hectare, which limits the opportunities for a range of commercial uses.



Figure 38
City of Stratford
Vacant Designated Commercial/Mixed-Use Lands

Designation	Number of Sites	Number of Sites 1 hectare+	Average Lot Size, hectares	Total Land Area, hectares
Commercial Areas	9	0	0.1	1.3
Downtown Core	10	0	0.1	0.9
Gateway Mixed-Use Area	1	1	2.0	2.0
Total	20	1	0.8	4.2

Source: Watson & Associates Economists Ltd., 2023.

7. Conclusions

The City of Stratford has experienced strong population growth and demand for housing over the past five years. A range of demographic and economic factors is driving this shift, including growth in local employment opportunities, net migration, an aging population, and affordability considerations.

Over the planning horizon, Stratford is anticipated to experience continued growth, building on development trends experienced over the past decade. A broad range of considerations related to demographics, economics, and socio-economics are anticipated to impact future population and employment growth trends throughout Stratford over the 2021 to 2051 planning horizon. These factors will not only affect the rate and magnitude of growth but will also influence the form, density, and location of residential and non-residential development.

This study represents an important background document to the City's O.P. Review exercise. Building on Phase 1, Phase 2 of the study will provide an in-depth analysis of forecast population, employment and housing growth and corresponding urban land needs. Integral to this analysis for the City will be a comprehensive review of how growth will be accommodated through the 2051 planning horizon. This analysis is critical to guiding the timing and amount of future land needs, hard and soft infrastructure requirements, and municipal finance impacts associated with new development.