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TOWN OF WOODSTOCK

Town of Woodstock Housing Needs Assessment

In Support of the 2023 Housing Accelerator Fund Application

September 2023

Table of Contents

The purpose of the Woodstock Housing Needs Assessment is to better understand the Rural District's current and future housing needs. This report serves as part of the community's application to the Housing Accelerator Fund (HAF) through the Canada Mortgage and Housing Corporation and is considered one of the minimum application requirements through the Small/Rural/North/Indigenous stream.

A housing needs assessment identifies the number and percentage of households in core housing needed against current housing development trends and maintenance capacity, with analysis, gaps, and recommendations outlined in a report. These reports identify existing and projected gaps in the housing supply by collecting and analyzing quantitative and qualitative data about local demographics, economics, housing stock, and other factors. A Housing Needs Assessment is critical to developing a housing action plan.

1.0   Local Governance Reform

The Province of New Brunswick completed the initial phase of local governance reform on January 1, 2023. Woodstock now encompasses the Town of Woodstock, along with the former local service districts of Richmond, Upper and Lower Northampton, and Northampton, and portions of the local service districts of Wakefield, Woodstock, and Debec. Woodstock now has a ward system with one (1) mayor, eight (8) councillors, across five (5) wards.

Due to the shift in municipal boundaries associated with Local Governance Reform, the demographic information in this section was retrieved from Environics Analytics, a firm that provides comprehensive demographics variables that are available for standard geographies or custom areas. The custom areas feature allows for the assessment of demographic information for Town by clipping spatial statistical data to the new boundary in order to estimate demographic statistics and housing indicators for the new municipal boundary.

2.0   Assumptions

In determining current and future housing needs, it was assumed that one household was needed for every 2.3 residents, based on the average household size in 2022 according to Environics Analytics. Further, Woodstock's future permitting was determined by finding the average number of units permitted each year between 2018 and 2022. Finally, with the total population being available during census years, annual historical growth rates were derived by dividing the population growth rate between census periods (five years) by five.

2.1   Population Projections

It must be noted that population projection scenarios are estimates and that the exponential method does have flaws. The exponential growth projections in all optimistic scenarios do not consider the size of specific age groups in a population. The exponential projections presented could underestimate

Town of Woodstock
Town of Woodstock Housing Needs Assessment - In Support of the 2023
Housing Accelerator Fund Application
September 2023

DILLON
CONSULTING

population decline, because deaths will increase as the population ages. Data that supports projections that take birth rates and immigration numbers into account are available for Census Metropolitan Areas (CMAs).

2.2   Timeline & Community Engagement

This needs assessment was completed with the HAF deadline in mind. To supplement a public engagement process, workshops were held with Municipal Housing Staff during the summer of 2023.

3.0   Population Growth

The population of Woodstock grew by 367 people between 2016 and 2022, or by 3%. This growth equates to roughly an annual growth rate of between .6% and 1%. It is likely that current statistical sources, including both Statistics Canada and Environics, do not fully capture the growth that took place between 2020 and 2022.

Population Growth (2016 - 2022)

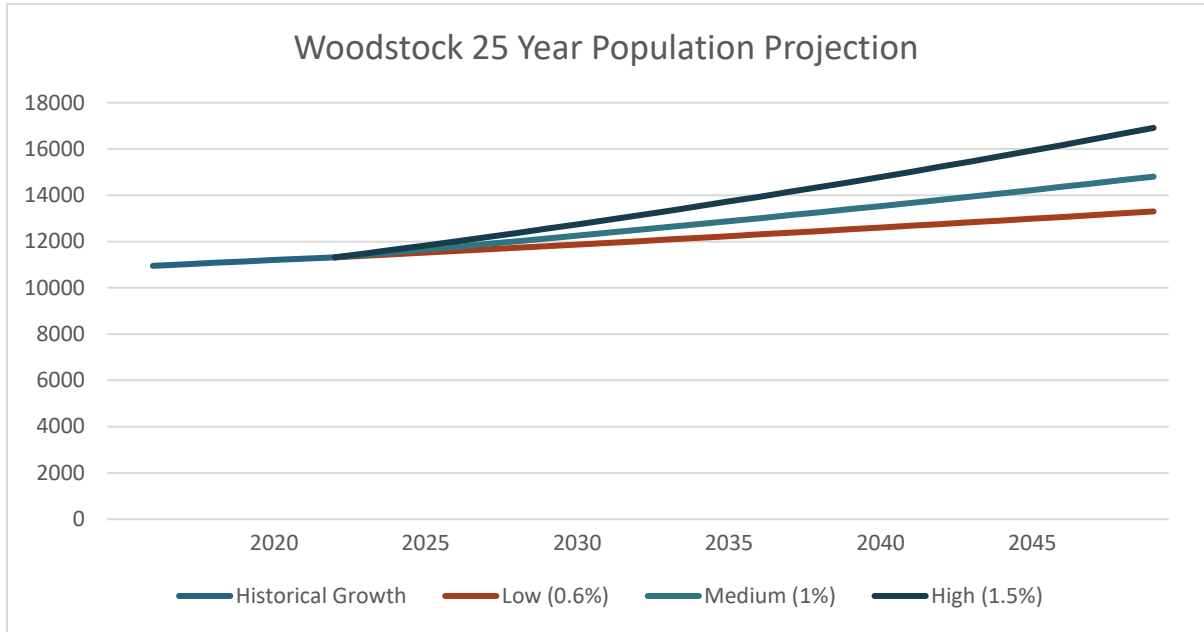| Year	Population
2016	10950
2022	11317
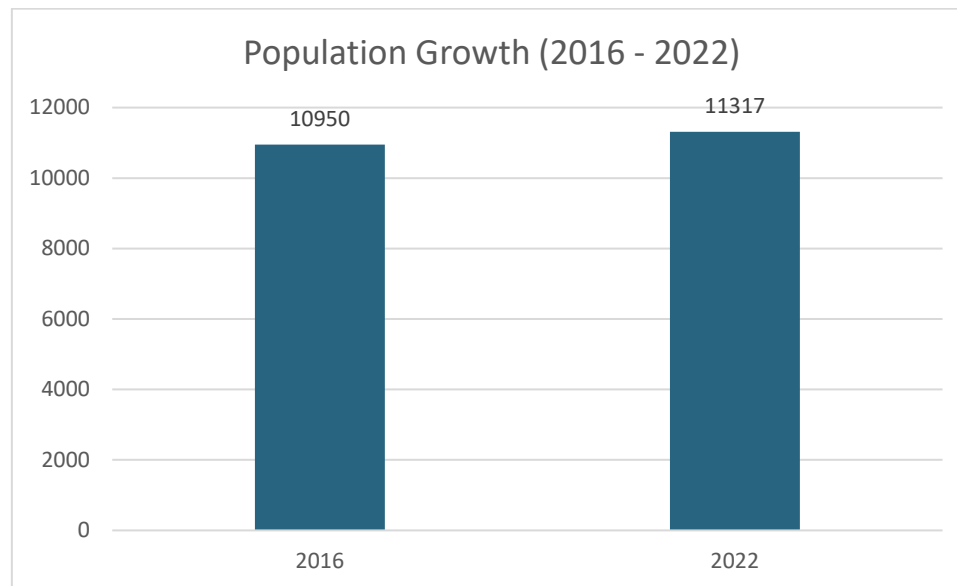
4.0   Future Trends

- A mixture of Census data and current housing wait lists were used to develop a projection of population growth over the next 25 years. Using census data involves limitations, as population growth is only captured once every five years. However, dividing the rate of population growth between census periods by 5 can provide insight into the annual rate of growth.

- According to this method, over the past six years, annual population change has taken place at between .6% and 1%. However, recent census data has not captured growth that has taken place over 2021 and 2022, with anecdotal evidence from municipal staff indicating that growth is much

Town of Woodstock
Town of Woodstock Housing Needs Assessment - In Support of the 2023
Housing Accelerator Fund Application
September 2023

DILLON
CONSULTING

higher. This information from staff, in addition to trends taking place throughout New Brunswick, was taken into account when forming population growth scenarios.

- Future population growth can be estimated by providing three possible scenarios: Low Growth (.6%), Medium Growth (1.5%), and High Growth (2.5%). The most likely scenario is a continued population growth of 1.5% each year over the next 25 years, which accounts for evidence from municipal staff, as well as regional trends associated with current and expected high immigration rates.

Woodstock 25 Year Population Projection

4.1   Scenario 1: Low Growth (.06%)

The low population growth scenario for all members for all members encompasses a growth rate of .06%. This rate of growth would result in 194 new residents over the next 25 years. Divided by 2.3, being the average number of persons per household, this growth would require 794 new housing units by 2047, or 32 new annual units over the next 25 years.

4.2   Scenario 2: Medium Growth (1%)

The medium growth rate projected for Woodstock is 1%, and if continued over the next 25 years will result in 3189 new residents over the next 25 years. This level of growth would require 700 new housing units over the next 25 years, or 56 new units per year.
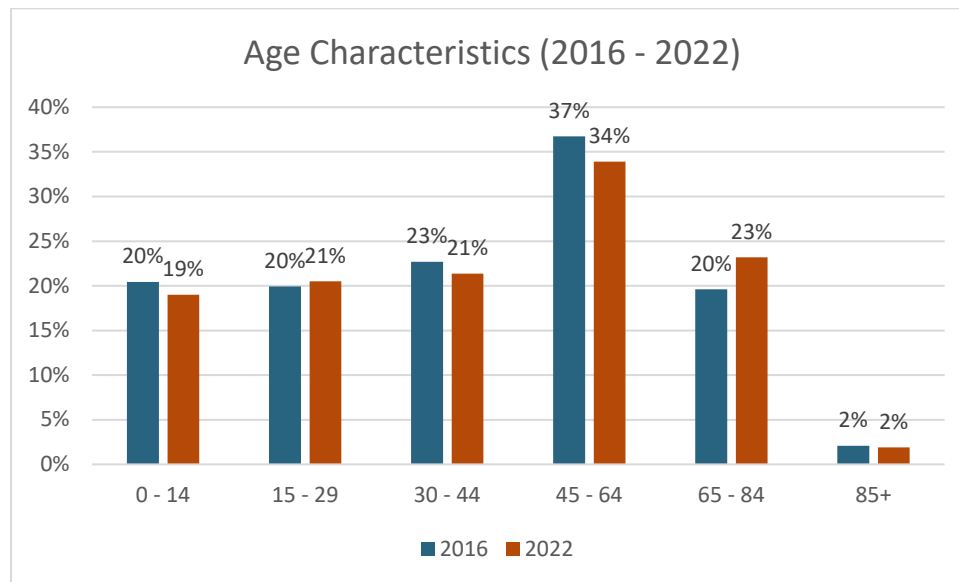
Town of Woodstock
Town of Woodstock Housing Needs Assessment - In Support of the 2023
Housing Accelerator Fund Application
September 2023

DILLON
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4.3   ### Scenario 3: High Growth (1.5%)

The high population growth scenario involves annual population growth of 1.5%. Between 2023 and 2047, this scenario would result in approximately 5100 new residents over the next 25 years, or 89 new units per year.
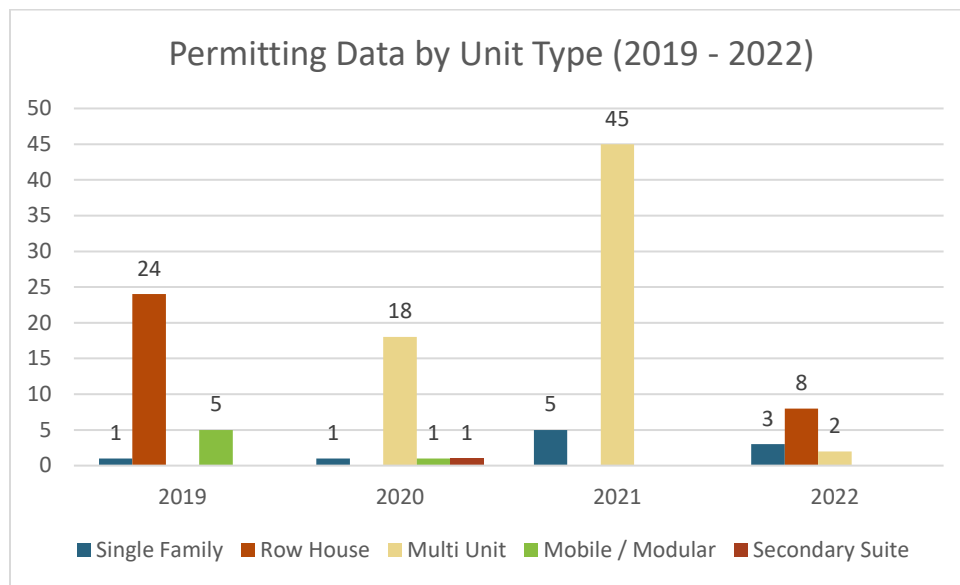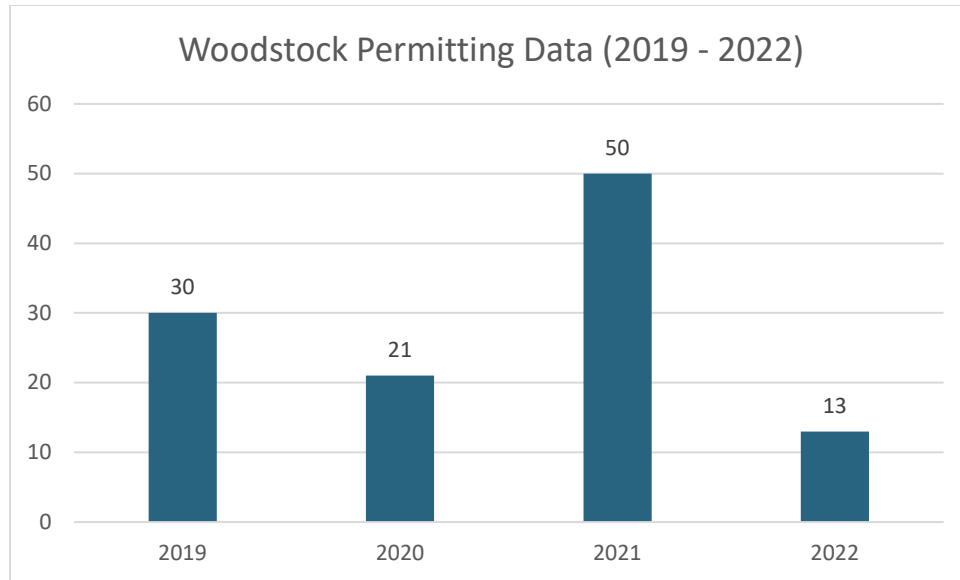
5.0   # Age Characteristics

Between 2016 and 2022, the average age in Woodstock increased from 41.5 to 42.7. There was a 3% increase in the population aged between 65 and 84, as well as a 3% decrease in the population aged 45 to 64. The age groups of 0 to 14 and 30 to 44 decreased by 1%, and there was a 1% increase in those aged between 20 to 24.
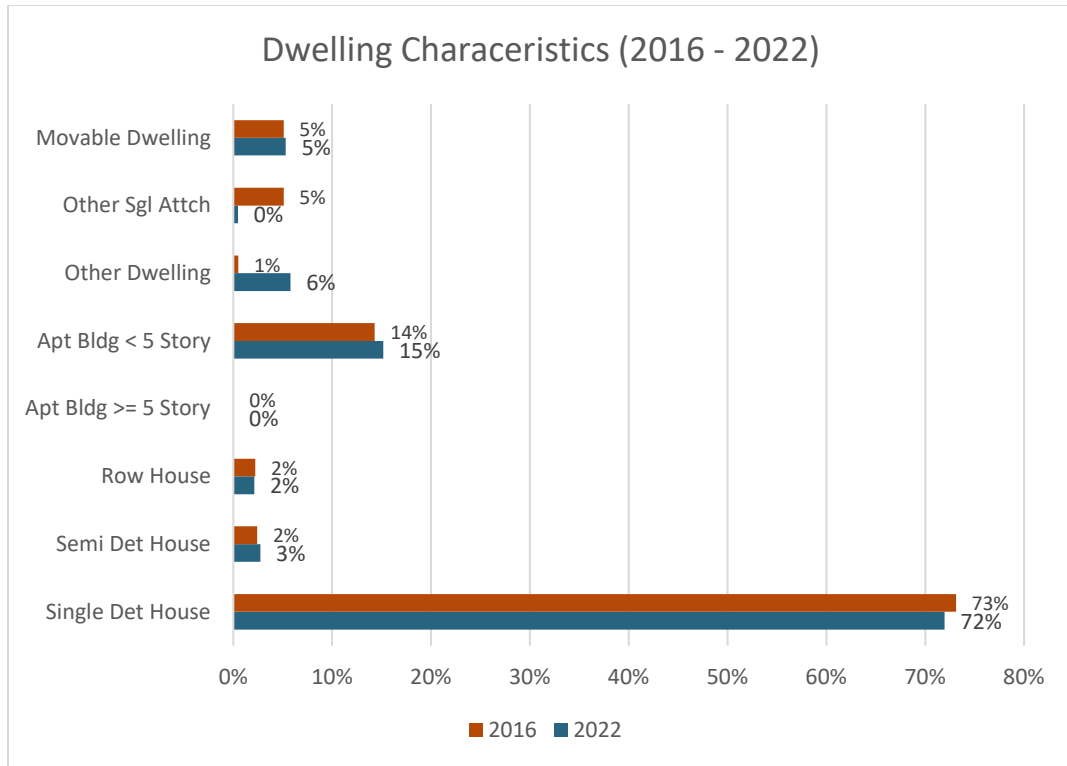

Age Characteristics (2016 - 2022)

Age Group	2016	2022
0 - 14	20%	19%
15 - 29	20%	21%
30 - 44	23%	21%
45 - 64	37%	34%
65 - 84	20%	23%
85+	2%	2%

6.0   # Housing Stock

- Woodstock has permitted an average of 28 units per year between 2019 and 2022, including single detached dwellings, duplexes, condominiums, and apartment units. The year with the most units permitted was 2021 (50), followed by 2018 (30), and then 2019 (21). The year with the least number of units permitted was 2022 (13).

- The majority of permitted units in Woodstock between 2018 and 2022 were in multi-unit apartments (63), followed by row houses (32). There were 10 single detached units permitted during this timeframe, six mobile units and one secondary suite.

Town of Woodstock
Town of Woodstock Housing Needs Assessment - In Support of the 2023
Housing Accelerator Fund Application
September 2023

DILLON
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Woodstock Permitting Data (2019 - 2022)

Permitting Data by Unit Type (2019 - 2022)

As with communities throughout New Brunswick, the majority of housing units in Woodstock are single detached dwellings. There was a one percent decrease in the share of single detached dwellings from 2016 to 2022, from 73% to 72%. The next largest percentage of dwelling type are apartment buildings under five stories, which increased from 14% to 15%. The next most common type of residents are moveable dwellings (5%) followed by semi-detached homes and row-houses.

Town of Woodstock
Town of Woodstock Housing Needs Assessment - In Support of the 2023 Housing Accelerator Fund Application
September 2023

DILLON
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Dwelling Characeristics (2016 - 2022)

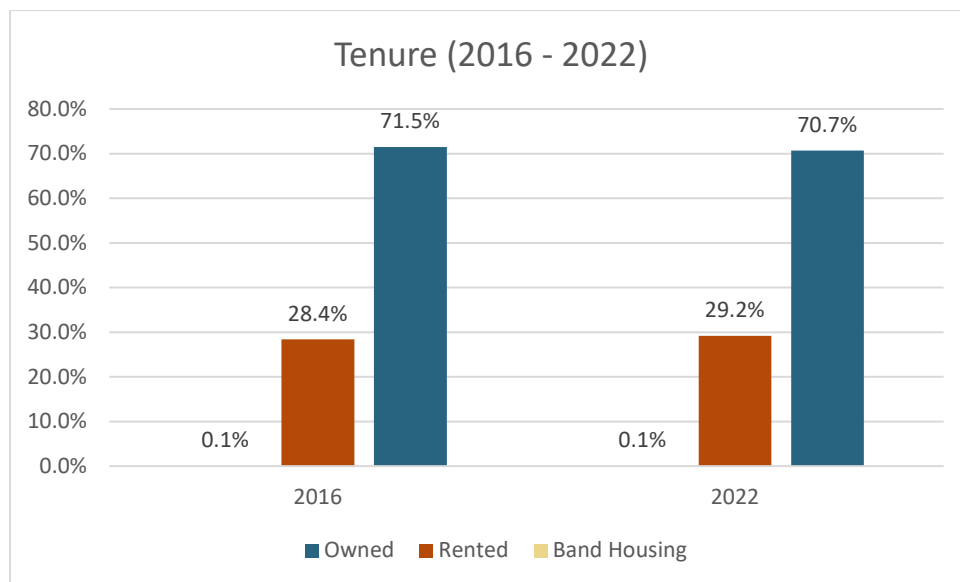| Dwelling Type	2016	2022
Movable Dwelling	5%	5%
Other Sgl Attch	5%	0%
Other Dwelling	1%	6%
Apt Bldg < 5 Story	14%	15%
Apt Bldg >= 5 Story	0%	0%
Row House	2%	2%
Semi Det House	2%	3%
Single Det House	73%	72%

■ 2016   ■ 2022

Most households have two persons (38%), followed closely by households with 1 person (28%), and households with 3 persons (16%). This statistic is consistent with trends associated with aging populations and decreasing family sizes and indicates a shift toward alternative housing types.

Household Size (2016 - 2022)

Household Size	2022	2016
1 Person	28%	28%
2 Persons	38%	38%
3 Persons	16%	16%
4 Persons	13%	13%
5+ Persons	6%	6%

■ 2022   ■ 2016
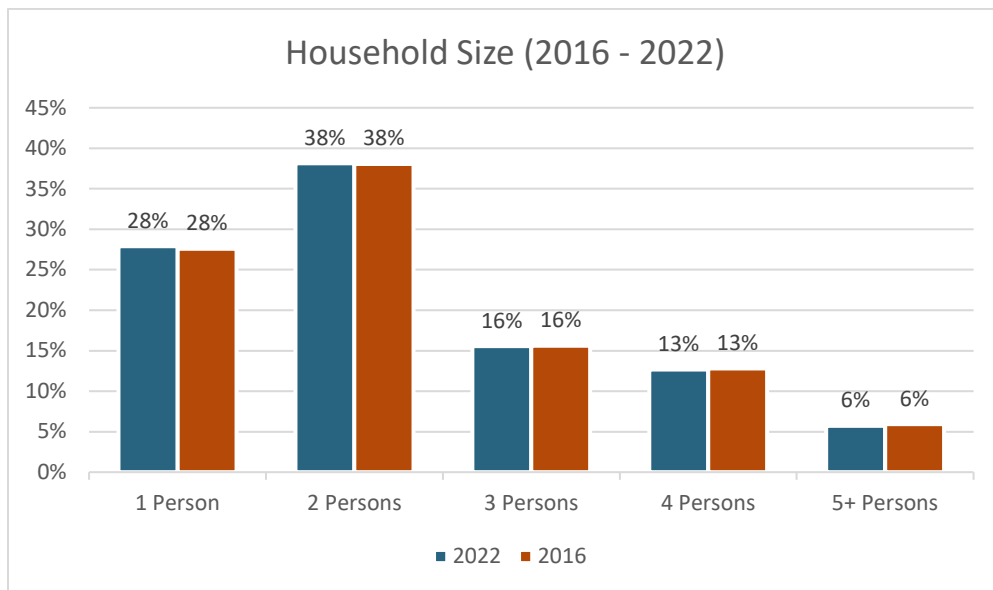
The housing stock in Woodstock is aging. The chart below shows that the amount of housing constructed decreases between each census period. Half (50%) of the housing stock was built before 1980, with over a quarter being built before 1961. Only 7% of the housing stock was built after 2011.

Town of Woodstock
Town of Woodstock Housing Needs Assessment - In Support of the 2023
Housing Accelerator Fund Application
September 2023

DILLON
CONSULTING

Period Built
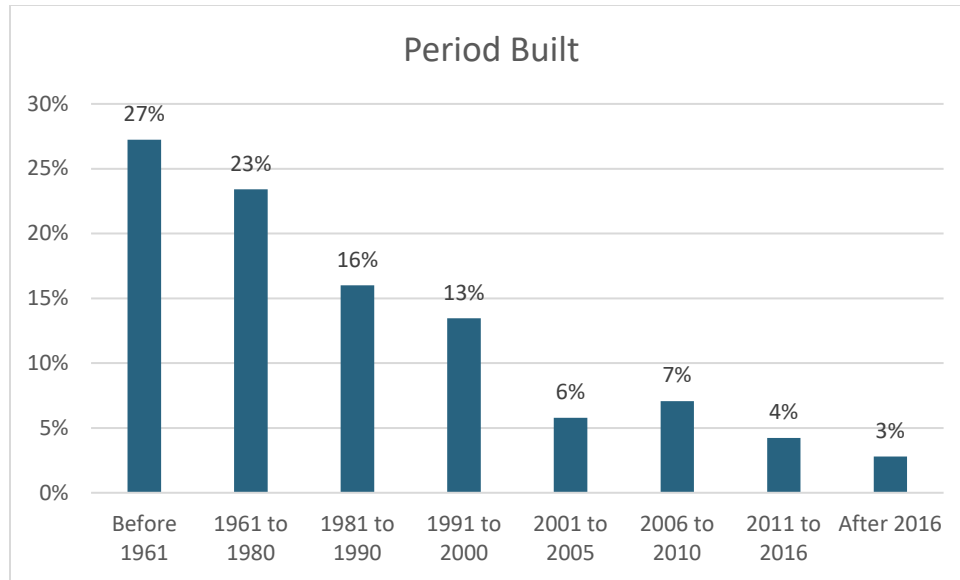
The majority of residents in Woodstock are homeowners, with just over a quarter of residents renting. The percentage of homeowners dropped slightly between 2016 and 2022 from 71.5% to 70.7%, with a proportionate increase in the share of renters (from 28.4% to 29.2%). There is a small percentage of residents living in homes owned by an Indigenous community.

Tenure (2016 - 2022)

Town of Woodstock
Town of Woodstock Housing Needs Assessment - In Support of the 2023
Housing Accelerator Fund Application
September 2023

DILLON
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7.0 | Gaps

Using the three population growth scenarios allows a prediction of potential housing gaps. According to permitting data, the municipality has been processing an average of 21 new units annually between 2018 and 2022. This average was projected each year over the next 25 years to determine if current permitting and development trends can meet future housing demand. Current housing development patterns can support a growth rate of 0.6% (Low Growth). Medium (1%) and High (1.5%) Growth Scenarios are beyond the Town's current permitting and development capacity.

The table below contains a breakdown of each growth scenario and corresponding housing gap. The table contains:

- **Projected Total Population:** Results of the population projection for each scenario, focusing on the years 2023, 2036 and 2046.

- **Projected New Residents:** The difference between the projected population in each sample year and the Town's population in 2021 according to Statistics Canada (11,317).

- **New Housing Units Required:** The projected new residents divided by the average number of persons per housing unit in 2022 (2.3) according to Environics Analytics.

- **Housing Units**: The projected future housing units that the Town is expected to develop based on the average number of units permitted between 2018 and 2022 (28). This number accounts for single detached dwellings, two units, and multi unit developments permitted over this time period.

- **Housing Gap:** The difference between the New Housing Units Required, and the Projected Housing Units (based on permitting trends).

Under Scenario 2 (Medium Growth), Woodstock has a current gap between required and developed housing units during the year 2023 of 43 units. By 2036, this gap will grow to 371 housing units, if the Town does not increase its development and permitting capacity. This gap will nearly double by 2046 to 689 housing units if current permitting and development trends persist over 25 years.

This gap can be closed through the planning, permitting and development of a mixture of housing types, including apartments, row houses, duplexes, detached dwellings, and moveable dwellings. Scenario 1: Low Growth (1%)

GAPS ANALYSIS		YEAR		
		2023	2036	2046
Low Growth (0.6%)	Projected Total Population	11,453	12,379	13,143
	Projected New Residents	136	1,062	1,826
	Projected Units Needed (2.3 persons per unit)	59	462	794
	Units (based on permitting trends)	56	420	700
	Gap	3	42	94
	Units Needed Per Year	30	31	32
Medium Growth (1%)	Projected Total Population	11,544	13,137	14,512
	Projected New Residents	227	1,820	3,195
	Projected Units Needed (2.3 persons per unit)	99	791	1,389
	Units (based on permitting trends)	56	420	700
	Gap	43	371	689
	Units Needed Per Year	49	53	56
High Growth (1.5%)	Projected Total Population	11,657	14,146	16,417
	Projected New Residents	340	2,829	5,100
	Projected Units Needed (2.3 persons per unit)	148	1,230	2,217
	Units (based on permitting trends)	56	420	700
	Gap	92	810	1,517
	Units Needed Per Year	92	82	89

Town of Woodstock
Town of Woodstock Housing Needs Assessment - In Support of the 2023 Housing Accelerator Fund Application
September 2023

DILLON CONSULTING