



2019 Sustainable Community Indicators

Submitted to:

Oil Sands Community Alliance

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1. Introduction

1.1 Background

The Sustainable Community Indicators were developed initially through a multi-stakeholder process that began in June 2003. Representatives of a number of stakeholders, including the Regional Municipality of Wood Buffalo (Wood Buffalo) and the Regional Issues Working Group (RIWG) reviewed over 1,000 potential indicators, and in an iterative process selected 21 indicators to measure the quality of life in the Wood Buffalo region, identify pressure points, and track progress to sustainability. These indicators were first presented in detailed and summary reports published in January 2006 and then subsequently updated in 2011 and 2015 at the request of the Oil Sands Community Alliance (OSCA).

1.2 2019 Update

The Wood Buffalo region has recently undergone significant changes, including both the 2016 Horse River wildfire and the recent dampening of activity in the oil sands industry, the main driver for the local economy. The 2019 update is timely, in that it can provide a picture of how the region has changed in light of recent events.

Identifying appropriate and effective ways of measuring a community's wellbeing remains a pertinent discussion in the Wood Buffalo region. With a view to further contributing to this discussion, OSCA has commissioned an update of the sustainable community indicators last presented in 2015. These indicators reflect the social and economic pillars of community sustainability. They cover such topics as: demographics, housing, education, health services, labour force, economy, cost of living, transportation, and community. This update includes those indicators outlined in the 2006, 2011, and 2015 reports, as well as several other indicators added at the request of OSCA. Measuring a community's wellbeing is an especially complicated and broad undertaking and it is recognized that there are other potential indicators.

This document captures the key findings of the 2019 update exercise. For most indicators, it offers visual snapshots of indicator performance for the most recent year for which data is available, as well as over time for Fort McMurray / the Wood Buffalo region and comparator communities (most often Grande Prairie and Medicine Hat), against a baseline of most often Edmonton or the province as a whole. Along with key findings for each indicator, the report offers additional insights and observations to better understand the results (i.e., the story behind the findings), where possible.


1.3 Data Limitations


It is important to note that often the most recent information available relates to data collected one or more years ago. As such, the indicator data is representative of social and economic conditions prevailing at that time and not necessarily indicative of conditions in 2019. This is especially important as the Wood Buffalo region and comparator communities included in this report experience periodic fluctuations in economic and social conditions.


2. Summary of Findings


The community indicators presented in this report provide a mixed picture of the quality of life in Fort McMurray and the Wood Buffalo region, highlighting both strengths and weaknesses. Where recent data is available (i.e. 2017 and 2018), the indicator results capture many of the impacts from the 2016 Horse River and the oilsands industry slowdown. Consideration of current results within the context of historical trends is also provided for many indicators and helps to illustrate how the community has changed from previous periods (e.g. the major growth period of the early to mid 2000s). Some of the indicator findings conform to popular expectations, while other findings contradict those expectations.


The following provides a high-level summary of key indicator findings for each indicator category. Additional detail and findings can be found in Sections 4 to 11 of this report.


<p>Indicator Category:</p> <p>Demographics</p> 	<p>Indicators:</p> <ul style="list-style-type: none"> • Population Growth Rate • Population by Age and Sex • Population Migration
<p>Key Findings</p> <ul style="list-style-type: none"> • Although the Federal Census shows an average annual regional growth rate of 1.8% between 2011 and 2016, the average masks underlying year-to-year fluctuations in population. A more recent population estimate can be found in the 2018 municipal census which shows the first population decline in the region in the past two decades. Based on municipal census results, this decline was the largest among comparator communities, although it should be noted that some communities only have municipal census results to 2016. • Net migration to the Wood Buffalo region has fluctuated considerably over the years, from as high as roughly 6% in 2006 to as low as approximately -6% in 2015. Because of these fluctuations, net migration of residents to the Wood Buffalo region was consistently higher than elsewhere in Alberta to 2012, and then consistently lower than elsewhere in Alberta from 2014 to present day. These fluctuations are mostly the result of rapid expansion of the local economy followed by rapid contraction, driven by the oil sands industry. • Ample work opportunities over the past two decades have attracted relatively young workers to the region, helping to keep Wood Buffalo's median age below that of other comparator communities. Despite the relatively young population, the median age in the Wood Buffalo region has increased in recent years, from 31.7 in 2011 to 33.1 in 2016. During this timeframe the region has seen a decrease in the number of people aged 15 to 29. • The availability of high paying employment opportunities in occupations largely dominated by men helps to explain the higher proportion of males in Fort McMurray (54%) as compared to other communities (46%-51%). 	


<p>Indicator Category:</p> <p>Housing</p> 	<p>Indicators:</p> <ul style="list-style-type: none"> • House prices • Housing starts • Cost of housing to income (general) • Cost of housing to income (fixed income) • Housing availability
<p>Key Findings</p> <ul style="list-style-type: none"> • Although the average house price in Fort McMurray has declined steadily in recent years – from a high of roughly \$765,000 in 2014 to approximately \$571,00 in 2018 – prices remain above those in comparator communities. The drop in house prices, and associated erosion in home equity, is a concern for many current homeowners. Even so, the relatively high costs of home ownership in Fort McMurray continue to adversely impact the community’s competitive position in attracting workers and their families. • Housing starts for the Wood Buffalo region have fluctuated over the past decade but remain well below levels seen in the mid-2000s. In more recent years, housing starts as a percentage of the total housing stock in the Wood Buffalo region were below all comparators in 2016, then rose to a rate well above all comparators in 2017, before finally declining back to being roughly in line with other comparators in 2018. The spike in housing starts for Fort McMurray in 2017 reflects the rebuilding efforts in the community following the 2016 wildfire. • Taking into consideration income levels in each community: <ul style="list-style-type: none"> ○ rental housing in Fort McMurray was relatively more affordable in 2016 than in comparator communities. The affordability of rental housing in Fort McMurray improved slightly between 2007 and 2013 due to relatively stable rental rates coupled with increasing income levels. From 2013 to 2016, the relative affordability of rental housing in Fort McMurray improved considerably, largely due to declining rental rates. ○ the affordability of home ownership in Fort McMurray is worse than in either the Cities of Grande Prairie or Medicine Hat, but better than in the City of Edmonton. The affordability of housing in Fort McMurray has consistently improved since 2008, largely as a result of increasing incomes in the 2008 to 2014 period and then decreasing house prices in the 2014 to 2016 period. • For households with low to modest fixed incomes, rental housing is consistently less affordable in Fort McMurray in 2018 than in Edmonton and other communities. However, for these same households, rental housing in Fort McMurray is more affordable in 2018 as compared to 2007. • The availability of rental and owned housing in the Wood Buffalo region has improved considerably and is now higher than in comparator communities. 	


Indicator Category: Education 	Indicators: <ul style="list-style-type: none"> • Educational attainment • Average class size • Accountability pillar survey results
Key Findings <ul style="list-style-type: none"> • The proportion of the population in the Wood Buffalo region with trades certification decreased, while the proportion with university credentials increased over the 2006 to 2016 timeframe. This could be a reflection of shifts in the oil sands sector from construction to operations, thereby increasing the number of occupations in the local economy requiring a university credential • Although all selected communities have similar class sizes (kindergarten to grade 3), Fort McMurray had the lowest average class size in 2017 at approximately 19 students. Average kindergarten to grade 3 class size in Fort McMurray has fluctuated somewhat over time but has been generally comparable to the provincial average. • High school completion rates in Fort McMurray are higher than or comparable to most selected comparators. However, the percentage of students transitioning from high school to post-secondary, within six years of entering grade 10, is lower than in Medicine Hat and Edmonton, and lower than the provincial average. • The proportion of students meeting the acceptable PAT (Provincial Achievement Test) standard in Fort McMurray is above that of most comparators but similar to that of the City of Edmonton. 	

Indicator Category: Health Services 	Indicators: <ul style="list-style-type: none"> • Physicians per 10,000 population • Length of stay in emergency department
Key Findings <ul style="list-style-type: none"> • At the end of 2018, Fort McMurray had approximately 12 physicians per 10,000 population, which is less than that of the Cities of Edmonton, Medicine Hat and Grande Prairie. Although Fort McMurray has relatively fewer physicians per-capita, it should be noted that: <ul style="list-style-type: none"> ○ the number of physicians in a community is a reflection of a number of factors including the nature and breadth of health services, such as specialty services, and is not entirely indicative of the relative access to primary health services. ○ there is some data which points to improving access to primary care physician services in Fort McMurray (e.g. an increase in the number of physicians in the region over the past five years, several physicians at the Wood Buffalo Primary Care Network accepting new patients). • As of early 2017, patients discharged from the emergency department at the Northern Lights Regional Health Centre in Fort McMurray spent, on average, less time waiting than patients at emergency departments in comparator communities. In fact, for a number of years the Northern Lights Regional Health Centre in Fort McMurray has consistently had shorter average wait times than emergency departments in comparator communities. Average wait times at the Northern Lights Regional Health Centre have also been decreasing over time. 	

Indicator Category: Labour Force	 Indicators: <ul style="list-style-type: none"> • Labour force by industry • Labour market rates • Average work commute time
Key Findings <ul style="list-style-type: none"> • Not surprisingly, roughly 30% of Fort McMurray’s resident workforce is in the oil and gas industry, as compared to the provincial average of just six percent. Nearly half of Fort McMurray’s resident workforce is in just three industries: oil and gas (30%), construction (10%), and retail (8%). • As of 2016, the labour force participation rate in the Wood Buffalo region is comparable to or higher than in comparator communities, while the unemployment rate is lower in Wood Buffalo than comparator communities. More recent information (i.e. 2017 and 2018) for census agglomerations that encompass the comparator communities and surrounding areas suggest that the Wood Buffalo region continues to have higher labour force participation and lower unemployment rates than its comparators. • A higher proportion of commuters commute more than 15 minutes in the City of Edmonton than in Fort McMurray; however, Fort McMurray’s proportion is significantly higher than that of the Cities of Grande Prairie and Medicine Hat, and slightly higher than that of the province overall. This is largely the result of commutes to project sites and facilities which exist outside Fort McMurray. For example, roughly 1 in 5 commuters living in Fort McMurray have an average daily work commute of 60 minutes or more, well above all other comparators, including Edmonton (5%). 	

Indicator Category: Economy	 Indicators: <ul style="list-style-type: none"> • Bankruptcies • Number of business establishments
Key Findings <ul style="list-style-type: none"> • Bankruptcies declined significantly in all communities since 2009, before rising slightly after 2014 in most communities. From 2010 to 2018, Fort McMurray has had a bankruptcy rate that is relatively comparable to, or lower than, most selected communities and the provincial average. • The number of active business establishments in the Wood Buffalo region has dropped by 20% between 2015 and 2018, the largest drop among all other comparators including the provincial average. All comparators suffered a drop in number of business establishments during the 2015-2018 period, with the exception of Grande Prairie. This decrease is mostly attributable to challenging economic conditions which has led to a decrease in the number of business establishments in many communities across Alberta, including in Wood Buffalo. Business establishments in the Wood Buffalo region would also have been impacted by the 2016 Horse River wildfire. 	

Indicator Category: Cost of Living 	Indicators: <ul style="list-style-type: none"> Affordability (median income) Affordability (modest income)
Key Findings <ul style="list-style-type: none"> The affordability of the Wood Buffalo region relative to comparator communities implies that many census families in the Wood Buffalo region are earning incomes that are more than high enough to compensate for the relatively high cost of living in the region. For couples earning the median income, the Wood Buffalo region has consistently been more affordable over time than comparator communities. This also generally holds true for median income lone-parent families and non-family persons and relates mostly to incomes being higher in Fort McMurray than in comparator communities. These findings are based on the median income and do not relate to census families earning less than the median income. For lone-parent families earning relatively modest incomes, the Wood Buffalo region was slightly more affordable in 2016 than the City of Grande Prairie, but less affordable than the Cities of Edmonton and Medicine Hat. The affordability of the Wood Buffalo region for modest income earning lone-parent families in 2016 is roughly on par with what it was in 2007. This is also true for modest income earning couple families and non-family persons. 	

Indicator Category: Transportation 	Indicators: <ul style="list-style-type: none"> Traffic collision rates
Key Findings <ul style="list-style-type: none"> Collision rates on Highway 63, both north and south of Fort McMurray, are below the provincial averages for primary highways. Since about 2007, collision rates have been declining along a number of segments of Highway 63. The effect of the completion of the Highway 63 twinning project, combined with traffic safety measures taken by industry, and reduced traffic volumes along some segments of Highway 63, has translated to lower collision rates in recent years, resulting in a welcome change to a long-term issue for residents in the region and a priority for the provincial government. 	

Indicator Category:
Community

Indicators:

- Crime rates
- Donations
- Voter participation
- Recreation features
- Entertainment index
- Childcare spaces
- Ethnic origin
- Access to assisted living facilities

Key Findings

- Historically, the overall crime rate in Fort McMurray has been substantially higher than in the Cities of Edmonton and Medicine Hat as well as the province overall but similar to that in the City of Grande Prairie. However, Fort McMurray's crime rate has been declining steadily since about 2008 and is now well below that of the City of Grande Prairie and more in line with crime rates in other comparator communities and the province overall.
- Since 2012, donations in the Wood Buffalo region have remained below that of the Cities of Edmonton and Medicine Hat and the provincial average but have generally remained on par with the City of Grande Prairie. Donations have increased in the 2016 to 2017 timeframe, possibly as a result of permanent residents donating to non-profit organizations to address impacts of the 2016 wildfire.
- Voter participation rates in the Wood Buffalo region have been increasing both provincially and municipally in recent years; however, they generally remain below that of comparator districts and communities including the province overall.
- The MacDonald Island facility has over half a million square feet of interior space (excluding the municipal library), representing about 7.1 square feet on a per capita basis. Compared to the population served, the facility size is roughly 1.5 times larger than the Eastlink Centre in Grande Prairie and over 2.5 times larger than the Family Leisure Centre in Medicine Hat. The MacDonald Island was built as a flagship facility and it is truly that – providing residents with ample and varied sport, recreation and meeting space.
- Fort McMurray offers fewer food and beverage establishments, as well as gambling and racing facilities, on a per capita basis as compared to the selected communities. However, Fort McMurray does offer a similar amount of amusement, cinema, spectator sports establishments on a per capita basis as compared to most of the selected communities. It's important to note that although this indicator provides a relative comparison of the number of establishments, it does not consider other factors such as the quality of these establishments (i.e., size, age, condition).
- The demand for childcare spaces relative to the available supply for both age groups in Fort McMurray have declined since 2015, reflecting increases in the supply of regulated spaces and decreases in demand resulting from a reduced population. However, in the 0 to 5 age group, Fort McMurray remains the highest of all the comparator communities. In the 6 to 12 age group, Fort McMurray is higher only than Edmonton and Medicine Hat, remaining below the ratio for Grande Prairie and the province overall.
- The Wood Buffalo region has relatively fewer people with a European ethnic origin and relatively more people with a North American (non-Indigenous) ethnic origin than the comparator communities.
- Fort McMurray has the lowest total assisted living units per 1,000 population 65 years and over out of all the selected comparator communities. A long-awaited purpose-built continuing care facility for Fort McMurray (The Willow Square Continuing Care Centre) is set to open in the fall of 2019. The addition of the facility will substantially increase the assisted living units available in the community.

3. Demographics

3.1 Population Growth Rate

Population Growth, Federal Census Results

Community	2016 Federal Census Results	Average Annual Growth Rate (2011 to 2016)
Fort McMurray	66,573	1.9%
Wood Buffalo	71,589	1.8%
Grande Prairie (City)	63,166	2.6%
Medicine Hat (City)	63,260	1.1%
Edmonton (City)	932,546	2.8%
Alberta	4,067,175	2.2%

Source: Statistics Canada 2016 Census

Population Growth, Municipal Census Results

Community	Most Recent Municipal Census	Municipal Census Results ¹	Average Annual Growth Rates
Fort McMurray	2018	73,974	2015-2018 period: -2.7%
Wood Buffalo	2018	77,094	2015-2018 period: -2.9%
Grande Prairie (City)	2018	69,088	2015-2018 period: 0.3%
Medicine Hat (City)	2015	63,018	2012-2015 period: 1.0%
Edmonton (City)	2016	899,447	2014-2016 period: 1.2%

Source: AMA 2019a; Note: Population for Fort McMurray and Wood Buffalo includes the permanent and resident shadow populations.

INDICATOR DEFINITION: The population growth rate indicator presents annual population growth rates for Fort McMurray, the Regional Municipality of Wood Buffalo (i.e. Wood Buffalo), and other comparator communities based on the most recent federal and municipal census results.

KEY FINDINGS:

- **Federal Census:** The population growth rate in Fort McMurray and the Wood Buffalo region was higher than that of the City of Medicine Hat, but lower than that of the City of Grande Prairie, the City of Edmonton and of Alberta overall.
- **Municipal Census:** The population growth rate in Fort McMurray and the Wood Buffalo region is lower than that of all the comparator communities.

UNDERSTANDING THE RESULTS: The 2018 municipal census for the Wood Buffalo region shows the first population decline in the region in the past two decades (RMWB 2018). The areas which showed the largest population decline from 2015 to 2018 are three neighborhoods which were significantly impacted by the 2016 wildfire (RMWB 2018). Based on municipal census results, the decline in Fort McMurray's population was the largest among comparator communities, although it should be noted that some communities only have municipal census results to 2016.

Although the Federal Census shows an average annual regional growth rate of 1.8% between 2011 and 2016, the average masks underlying year-to-year fluctuations in population. In addition, the 2016 Federal Census does not take into account the more recent changes in population resulting from the 2016 Horse River wildfire.

3.2 Population by Age and Sex

Population by Age and Sex, 2016

Community	Median Age	% Male	% Female
Wood Buffalo (CA)	33.1	54%	46%
Grande Prairie (CA)	31.9	51%	49%
Medicine Hat (CA)	40.1	49%	51%
Edmonton (CMA)	36.3	50%	50%
Alberta	36.7	50%	50%

Source: Statistics Canada 2016 Census. Notes: CA is Census Area and CMA is Census Metropolitan Area. Numbers may not add due to rounding.

INDICATOR DEFINITION: This indicator provides a breakdown by age and sex of the population of the Wood Buffalo region and other comparator communities in Alberta, as well as the province as a whole.

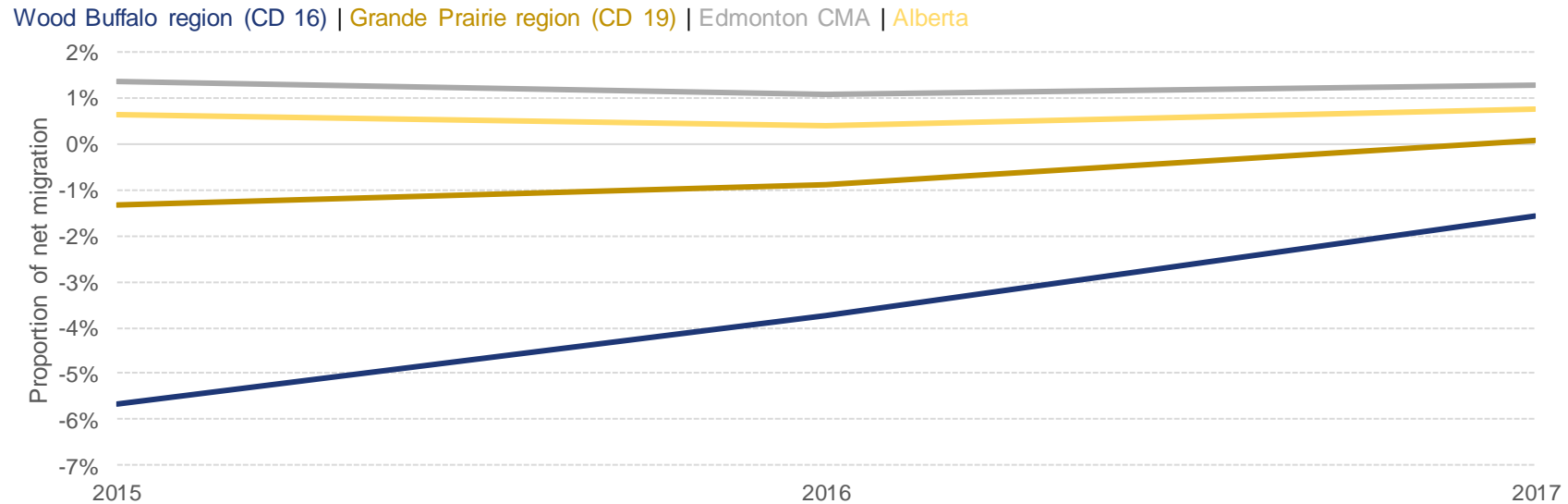
KEY FINDINGS: The population of the Wood Buffalo region is younger than the population of all comparator communities except Grande Prairie, and it has a higher proportion of males than all comparator communities (including Grande Prairie).

UNDERSTANDING THE RESULTS: Ample work opportunities over the past two decades have attracted relatively young workers to the region, helping to keep Wood Buffalo's median age below that of other comparator communities. The availability of high paying employment opportunities in occupations largely dominated by men helps to explain the higher proportion of males in Fort McMurray as compared to other communities.

Despite the relatively young population, the median age in the Wood Buffalo region has increased in recent years, from 31.7 in 2011 to 33.1 in 2016. During this timeframe the region has seen a decrease in the number of people aged 15 to 29. The proportion of males remained at 54% from 2011 to 2016. These estimates relate to the permanent population as enumerated in the Federal Census. It does not include the region's non-permanent (i.e. shadow) population.

3.3 Population Migration

Population Migration, 2015 to 2017



Source: Statistics Canada 2019a, b. Notes: CD is Census Division, CMA is Census Metropolitan Area. Migration data is for the period from July 1 to June 30, whereas population data is for January 1 to December 31. Net migration calculations exclude residents living in temporary accommodations (i.e., work camps, hotels).

INDICATOR DEFINITION: The migration indicator provides an estimate of net migration from inside and outside of Canada to Wood Buffalo and other selected regions of Alberta. Net migration considers immigration, interprovincial migration, and intra-provincial migration. **Note:** Annual migration data is available from Statistics Canada at the level of Census Metropolitan Area and Census Division.

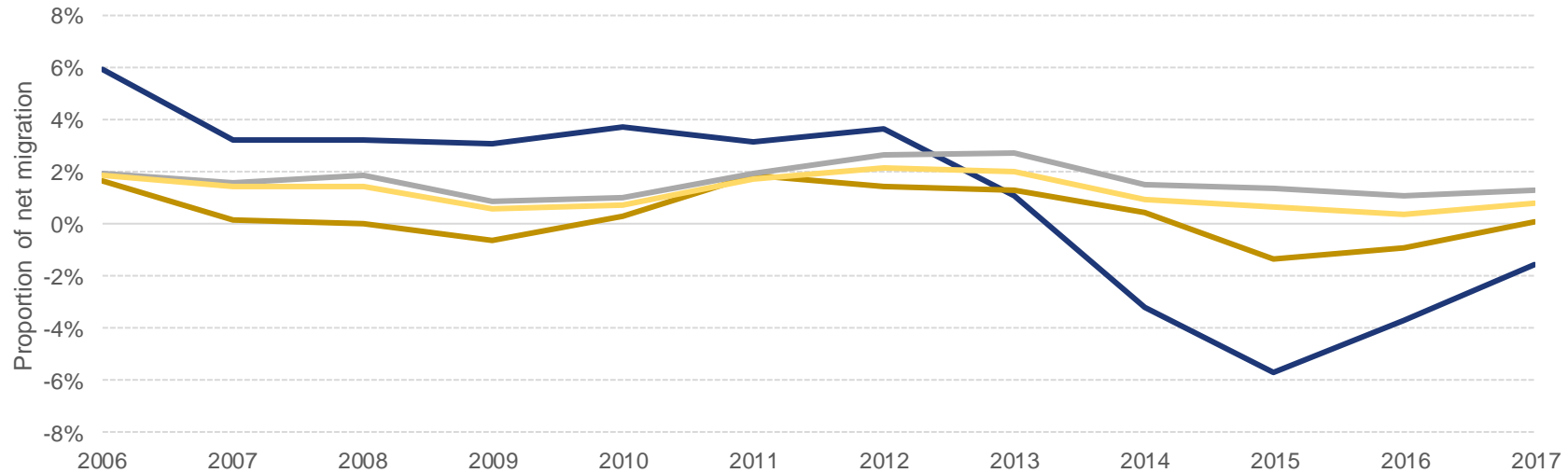
KEY FINDINGS: Net migration of residents (excluding those living in temporary accommodations) to the Wood Buffalo region has been negative and consistently lower than elsewhere in Alberta for the last few years. Net migration to Wood Buffalo has increased, from approximately -6% in 2015 to -2% in 2017

UNDERSTANDING THE RESULTS: The recent contraction of the oil and gas industry has reduced the number of jobs available in the Wood Buffalo region, which in turn has meant more people are leaving the community than are moving into the community. Net migration to Wood Buffalo remains negative in 2017, but is higher than preceding years, likely because the bulk of out migration related to poor economic conditions already occurred in the 2015 to 2016 period.



Population Migration, Historical Trend

Wood Buffalo region (CD 16) | Grande Prairie region (CD 19) | Edmonton CMA | Alberta



Source: Statistics Canada 2019a, b. Notes: CD is Census Division, CMA is Census Metropolitan Area. Migration data is for the period from July 1 to June 30, whereas population data is for January 1 to December 31. Net migration calculations exclude residents living in temporary accommodations (i.e., work camps, hotels).

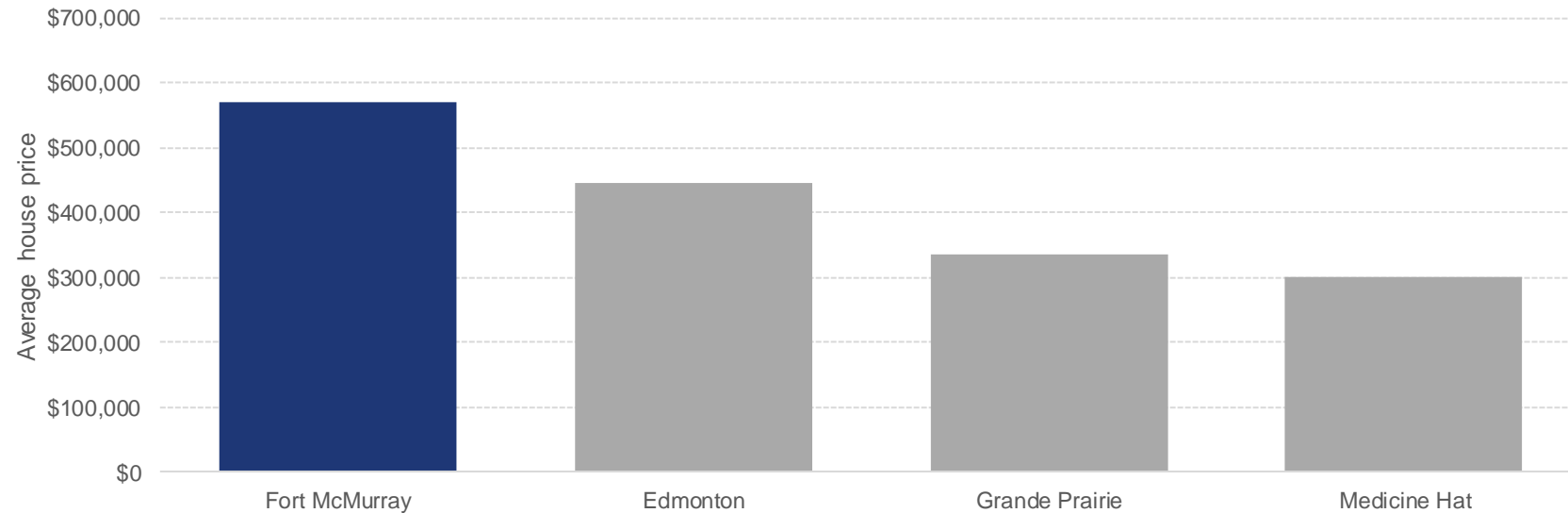
THE HISTORICAL TREND: Net migration of residents to the Wood Buffalo region was consistently higher than elsewhere in Alberta to 2012, and then consistently lower than elsewhere in Alberta from 2014 to present day. Net migration to the Wood Buffalo region has fluctuated considerably over the years, from as high as roughly 6% in 2006 to as low as approximately -6% in 2015.

Over the past decade, rapid expansion of the local economy followed by a rapid contraction, driven by the oil sands industry, has created fluctuations in population migration to the Wood Buffalo region.

4. Housing

4.1 House Prices

Average Single-Family Dwelling Price, 2018



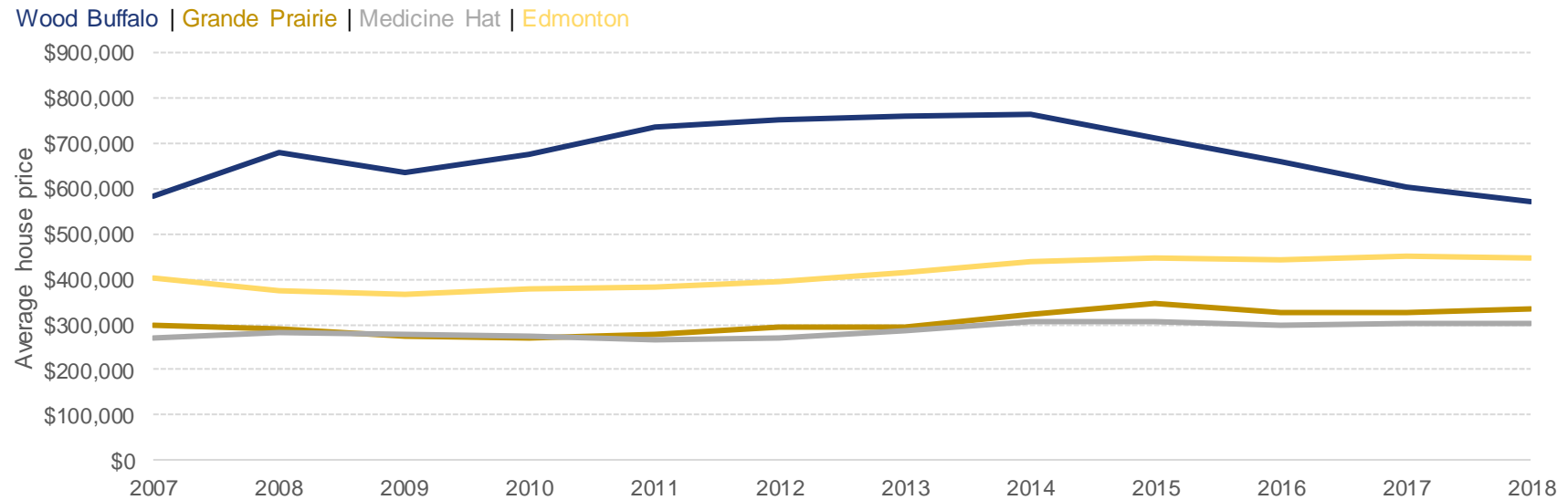
Source: FMREB 2019a, MHREB 2019a, RAE 2019a, GPAAR 2019.

INDICATOR DEFINITION: The housing indicator provides the price of an average single-family dwelling in selected communities.

KEY FINDINGS: The price of a single-family home in Fort McMurray in 2018 was higher than all other comparators.

UNDERSTANDING THE RESULTS: Although house prices are higher in Fort McMurray, incomes are also higher, as shown in section 4.3, helping to offset the relatively higher housing costs for some households.

Average House Prices, Historical Trend

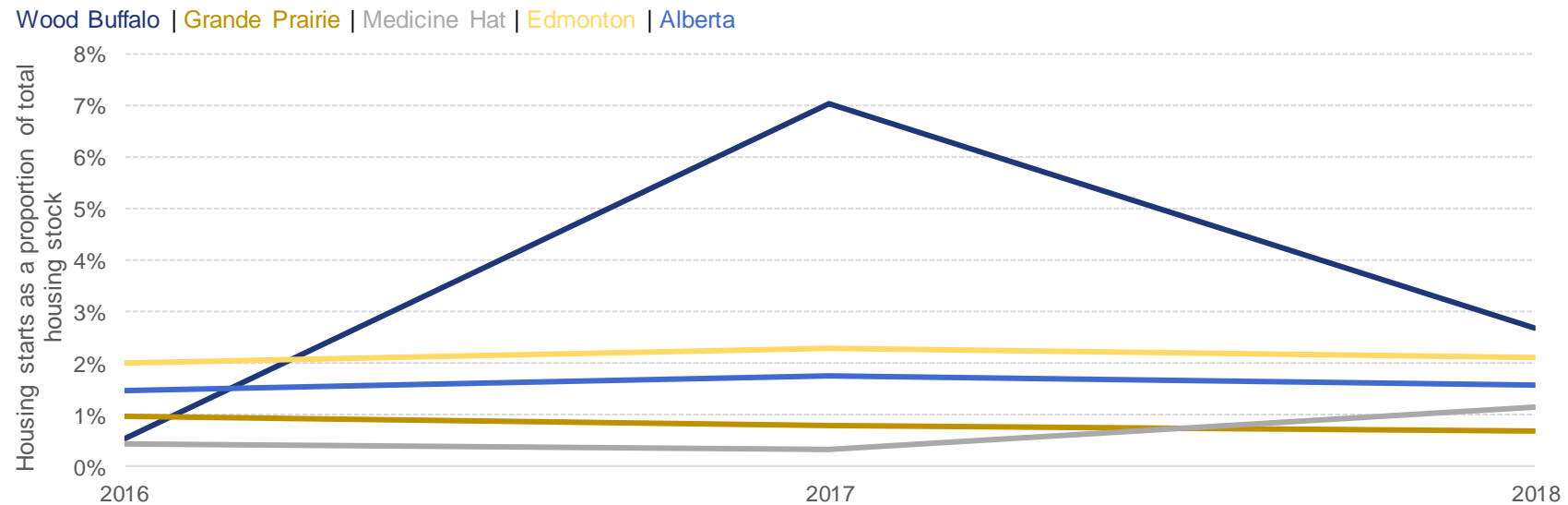


Source: FMREB 2019a, FMREB 2019b, MHREB 2019a, MHREB 2019b, RAE 2019a, RAE 2019, GPAAR 2019.

THE HISTORICAL TREND: The price of a home in Fort McMurray has been higher than all other comparators for more than a decade. Although average house price has been declining steadily since 2014, it remains above prices in comparator communities. On one hand, the recent drop in house prices, and associated erosion in home equity, is a concern for many current homeowners. On the other hand, the relatively high costs of home ownership continue to adversely impact the community's relative competitiveness in attracting workers and their families.

4.2 Housing Starts

Housing Starts as a Proportion of Total Housing Stock, 2016 to 2018



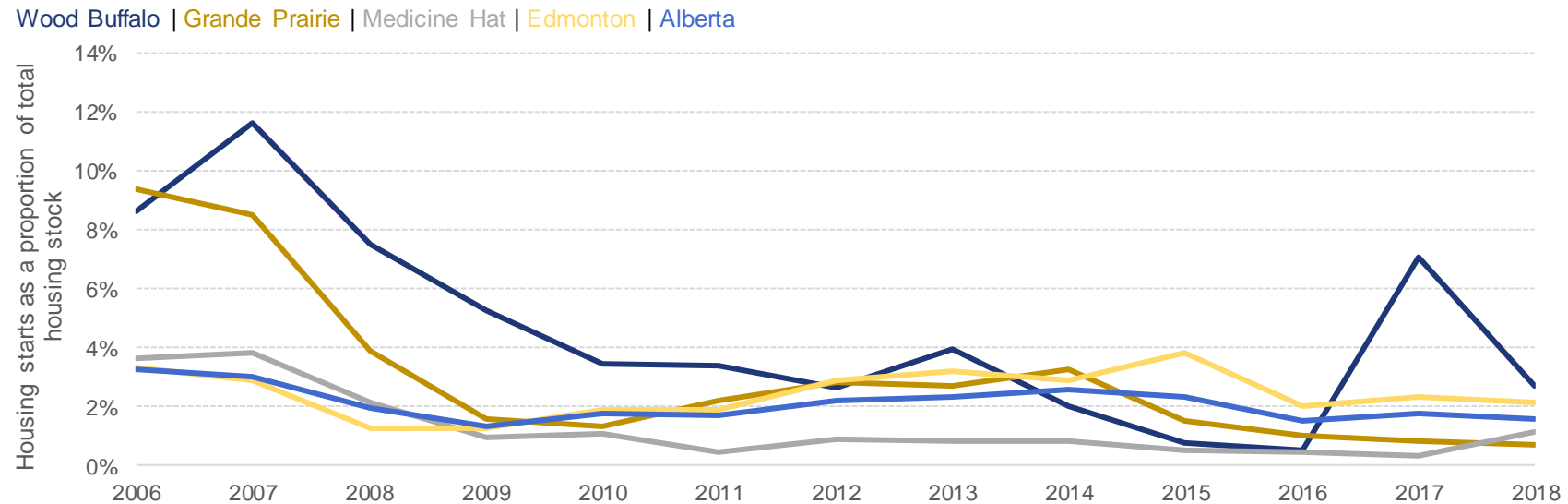
Source: CMHC 2019a, Statistics Canada 2016.

INDICATOR DEFINITION: The housing starts indicator provides an estimate of the number of residential buildings for which construction has begun (i.e., when concrete has been poured) as a proportion of the total housing stock.

KEY FINDINGS: Housing starts as a percentage of the total housing stock in the Wood Buffalo region were below all comparators in 2016, then rose to a rate well above all comparators in 2017, before finally declining back to being roughly in line with other comparators in 2018.

UNDERSTANDING THE RESULTS: Although housing starts are generally indicative of construction activity in a region, the spike in housing starts for Fort McMurray in 2017 reflects the rebuilding efforts in the community following the 2016 wildfire.

Housing Starts as a Proportion of Total Housing Stock, Historical Trend



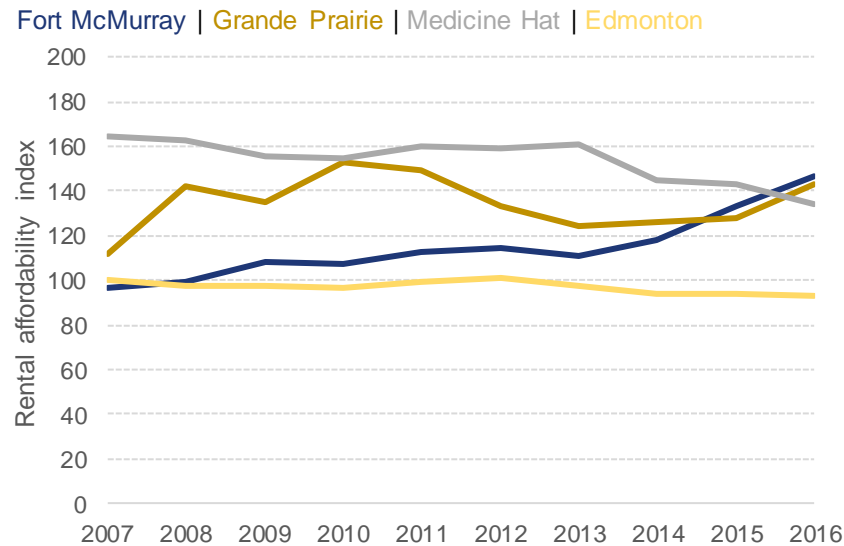
Source: CMHC 2019a, Statistics Canada 2016.

THE HISTORICAL TREND: Housing starts for the Wood Buffalo region have fluctuated over the past decade but remain well below levels seen in the mid-2000s. Starts as a proportion of total housing stock in Fort McMurray have generally been in line with other comparator communities, including the province as a whole, except for highs in both 2007 and 2017.

4.3 Housing Affordability Measure 1 (General)

See following page for indicator definition and more fulsome description of the results.

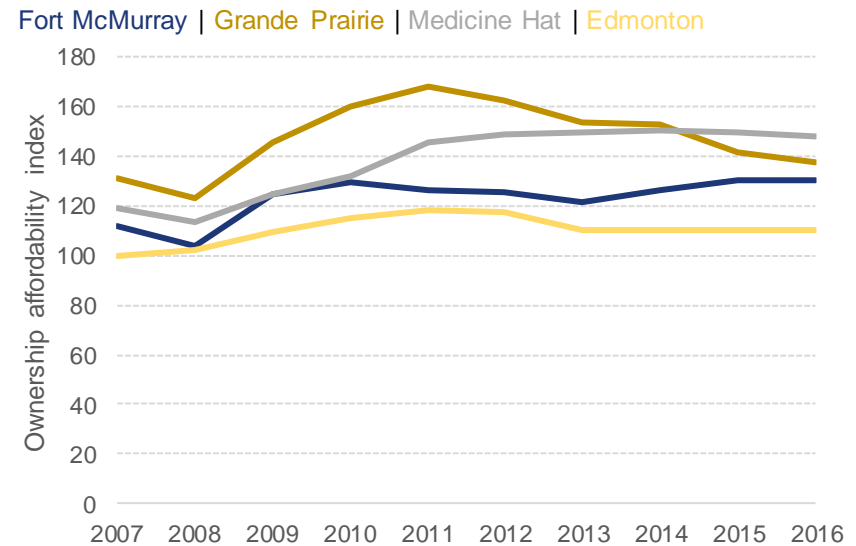
One Bedroom Apartment (Rental) Affordability Index (Edmonton 2007=100)



Source: Statistics Canada 2019c, CMHC 2019a. Note: The higher the value, the more affordable the cost of housing is compared to Edmonton.

KEY FINDINGS: As of 2016, rental housing in Fort McMurray is relatively more affordable than in the comparator communities. The affordability of rental housing in Fort McMurray improved slightly between 2007 and 2013 due to relatively stable rental rates coupled with increasing income levels. From 2013 to 2016, the relative affordability of rental housing in Fort McMurray improved considerably, largely due to declining rental rates.

Single-Family Dwelling (Ownership) Affordability Index (Edmonton 2007=100)



Source: Statistics Canada 2019c, GoA 2019, AMA 2019b, FMREB 2019a, MHREB 2019a, RAE 2019a, GPAAR 2019. Note: The higher the value, the more affordable the cost of housing is compared to Edmonton.

KEY FINDINGS: Although the affordability of home ownership in Fort McMurray is worse than in either the Cities of Grande Prairie or Medicine Hat, it is better than in the City of Edmonton. Housing affordability in Fort McMurray has consistently improved since 2008, largely as a result of increasing incomes in the 2008 to 2014 period and then decreasing house prices in the 2014 to 2016 period.

INDICATOR DEFINITION: The One Bedroom Apartment and Single Family Dwelling Affordability indices are relative measures of housing affordability, based on the proportion of families – couple families, lone-parent families and non-family persons (individuals) – earning less than the required income to obtain housing of that type in Fort McMurray and comparator communities. The indices track changes in relative affordability within and between communities, using the average Edmonton rental and ownership costs in 2007 as the respective index reference.

Income level thresholds are based on the income required to rent an average one-bedroom apartment or own an average single-family dwelling and stay within the widely accepted housing cost-to-income ratio of 30%. With respect to housing costs:

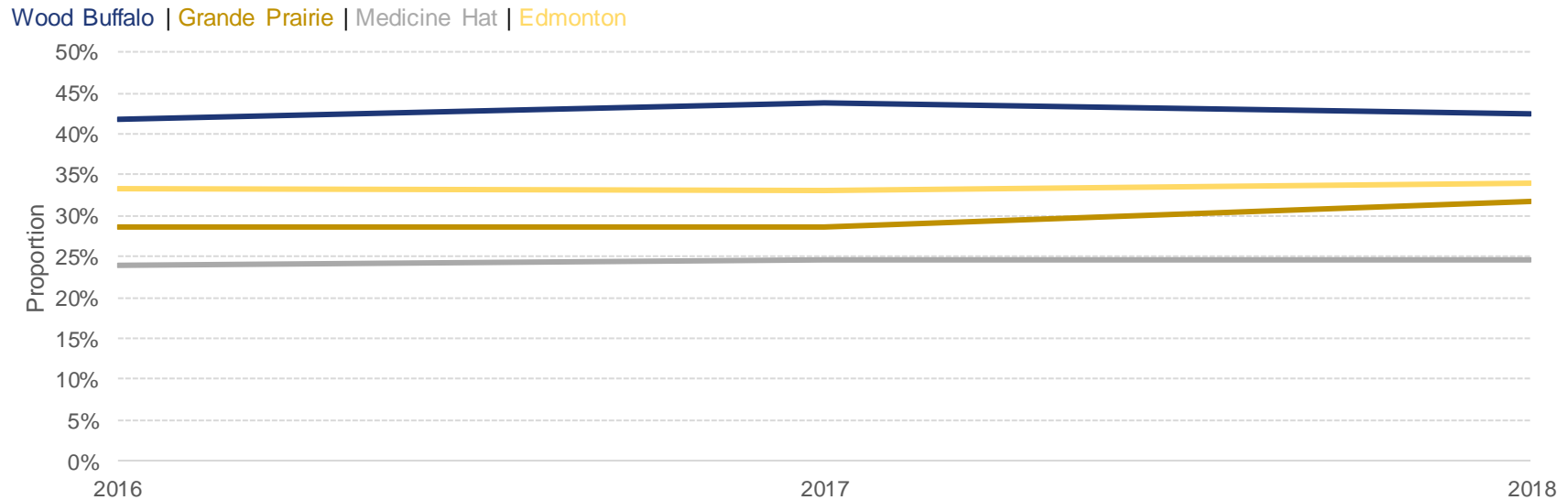
- For rental housing, costs are based on average rental rates as reported by the Canada Mortgage and Housing Company (CMHC). CMHC rates are based on all rental units captured in their annual survey, representing a mix of services and amenities, such as heat, power, water and parking that may be included or excluded, depending on the property manager.
- For home ownership, costs are based on the average annual sale price for single family homes, average monthly carrying costs (assuming a 10% down payment, 20-year amortization period, and a 5-year fixed term at competitive interest rates), and average monthly property taxes and utility costs.

UNDERSTANDING THE RESULTS:

- Information for this indicator is only available to 2016 as that is the most recent year for which taxfiler data is available from Statistics Canada. With respect to more recent changes in dwelling costs:
 - In 2018 the average rent for a one-bedroom apartment in Fort McMurray was \$1,233, roughly equal to that in 2016 (\$1,251).
 - In 2018 the average sale price for a single-family dwelling in Fort McMurray was \$571,579, a drop of roughly 13% since 2016. The lack of post-2016 income data precludes the updating of this indicator to reflect recent developments in the Fort McMurray owned housing market. However, the drop in housing prices suggest that the affordability of single-family dwellings has improved, assuming incomes have remained largely comparable to 2016 levels.
- Even with recent decreases in average rental rates and house prices in Fort McMurray, they are still among the highest for major centres in Alberta. For example, in 2018 the average rental rate for a one-bedroom apartment and the price of a single-family house were 21% and 28% higher than in Edmonton, respectively. Even so, when median income levels are considered, the affordability of rental and ownership housing in Fort McMurray remains better than in Edmonton.
- Rental rates in northern communities with resource-based economies, such as Fort McMurray and Grande Prairie, are typically more volatile than rates in communities elsewhere in the province, such as Edmonton and Medicine Hat. All four communities, however, demonstrate similar price trends for home ownership.

4.4 Housing Affordability Measure 2 (Fixed Income)

Average Apartment Rent as a Proportion of Modest Income, 2016 to 2018



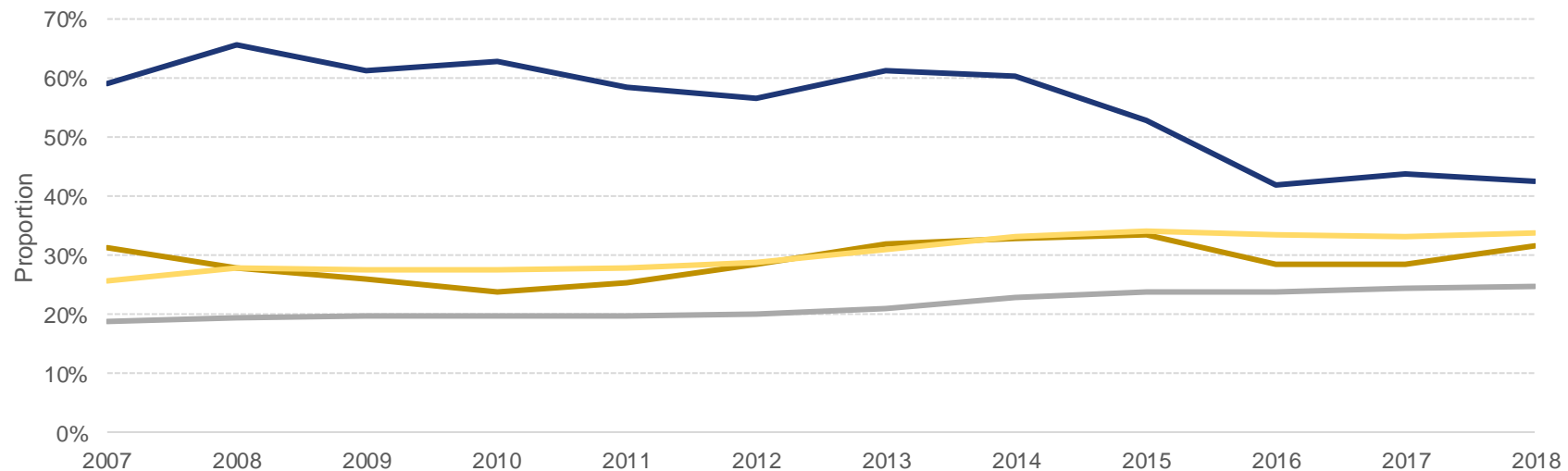
Source: CMHC 2019a

INDICATOR DEFINITION: The cost of housing to income indicator is a measure of housing affordability for residents with relatively modest income based on the percentage of a \$40,000 per year income required to rent an average apartment in Fort McMurray and other comparator communities over time. A household income of \$40,000 has been selected as a 'representative income' for households with a modest income. For reference, median household income in Alberta in 2015 was \$93,835.

KEY FINDINGS: For households with modest incomes, rental housing is consistently less affordable in Fort McMurray than in Edmonton and other communities, representing between 40% and 45% of an income of \$40,000 over the past few years.

Average Apartment Rent as a Proportion of Modest Income, Historical Trend

Wood Buffalo | Grande Prairie | Medicine Hat | Edmonton



Source: CMHC 2019a

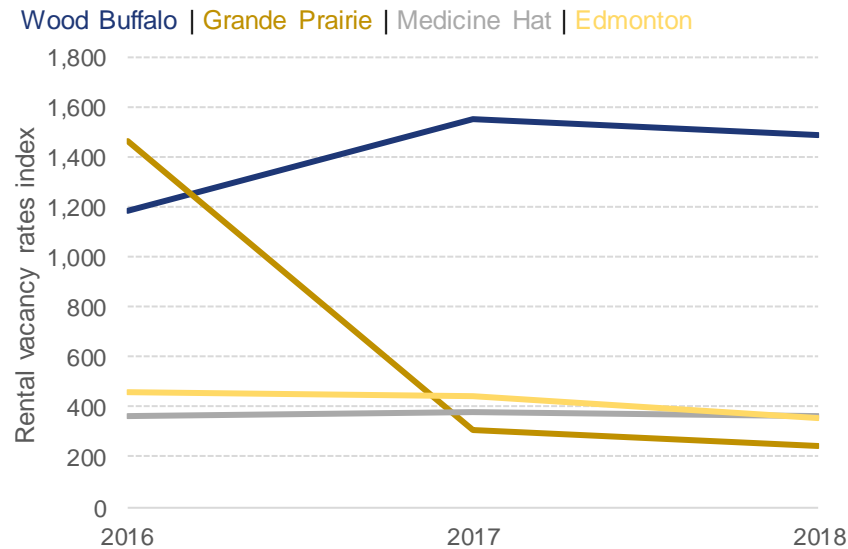
THE HISTORICAL TREND: For residents living on modest incomes, rental housing in Fort McMurray is more affordable in 2018 as compared to 2007. Rental rates in the Wood Buffalo region declined from 2014 to 2016 and have remained at an average of approximately \$1,400 per month to 2018. This has reduced the differential between Wood Buffalo and the comparator communities.

Not all Fort McMurray residents benefit from relatively higher-earning opportunities or housing allowances as a means of offsetting relatively high housing costs. Modest-income residents (e.g., workers employed in the service sector, lone-parent, and single-income households) are under particular pressure to find affordable accommodation.

Despite decreasing in recent years, the price of housing in Fort McMurray remains a challenge to recruiting and retaining staff, especially in sectors where wage rates are relatively low, such as social services and the service sector. Housing costs also disproportionately affect vulnerable groups in the region, such as single mothers and those with low levels of engagement in the labour market.

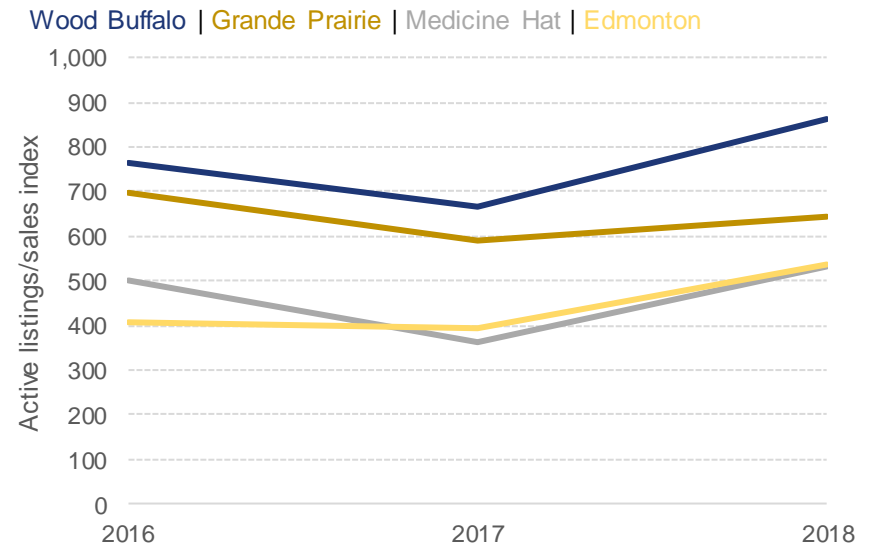
4.5 Housing Availability

Rental Vacancy Rate Index (Edmonton 2007=100), 2016 to 2018



Source: CMHC 2019a

Owned Housing Availability Index (Edmonton 2007=100), 2016 to 2018



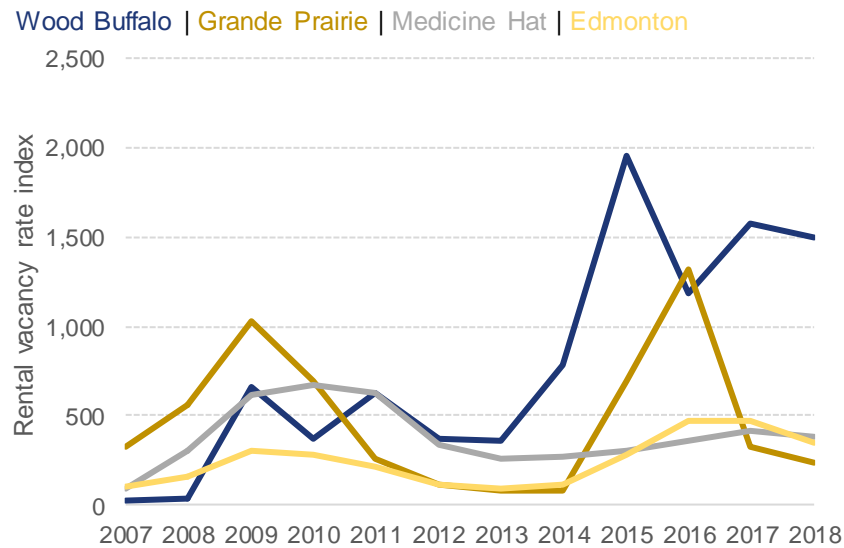
Source: FMREB 2019a, FMREB 2019b, RAE 2019a, MHREB 2019a, MHREB 2019b, RAE 2019b, GPAAR 2019.

INDICATOR DEFINITION: The Rental Vacancy Rate Index is a relative measure of the availability of rental housing based on a comparison of rental vacancy rates in Fort McMurray and comparator communities over time with Edmonton in 2007. The Owned Housing Availability Index is a relative measure of the availability of owned housing in Fort McMurray and comparator communities over time with Edmonton in 2007. The availability of owned housing is based on a supply/demand ratio determined from MLS data from various Alberta real estate boards.

KEY FINDINGS: The availability of both owned and rental housing in Fort McMurray has increased in recent years and is relatively higher than in comparator communities.

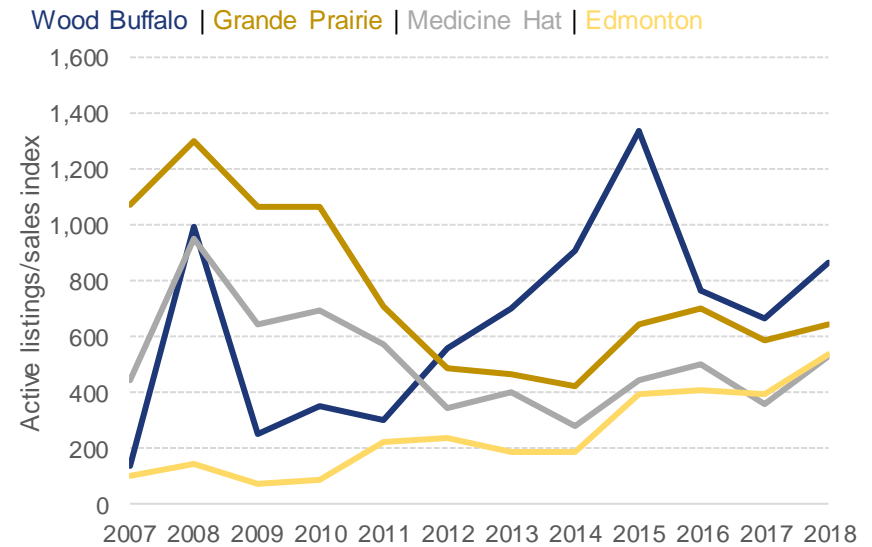
UNDERSTANDING THE RESULTS: Improvements in owned housing availability in Fort McMurray in recent years is the result both of an increase in active listings and a decrease in the number of sales. Rental vacancy rates in Fort McMurray have also increased in recent years, reaching 22% in 2018, higher than all other comparators.

Rental Vacancy Rate Index (Edmonton 2007=100), Historical Trend



Source: CMHC 2019a

Owned Housing Availability Index (Edmonton 2007=100), Historical Trend



Source: FMREB 2019a, FMREB 2019b, RAE 2019a, MHREB 2019a, MHREB 2019b, RAE 2019b, GPAAR 2019.

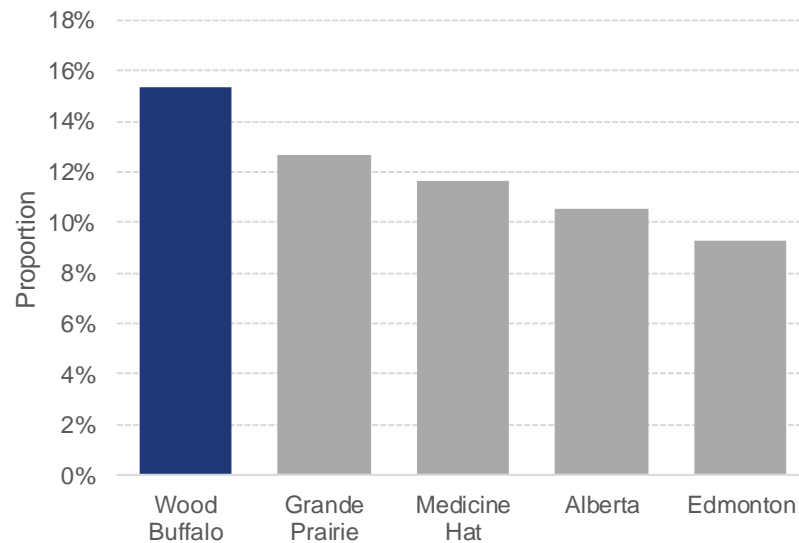
THE HISTORICAL TREND: The availability of rental and owned housing in the Wood Buffalo region has improved considerably and is now much higher than in comparator communities. The largest increases for the availability of both rental and owned housing since 2007 have occurred in the Wood Buffalo region.



5. Education

5.1 Educational Attainment

Proportion of Population with an Apprenticeship or Trades Certificate or Diploma, 2016



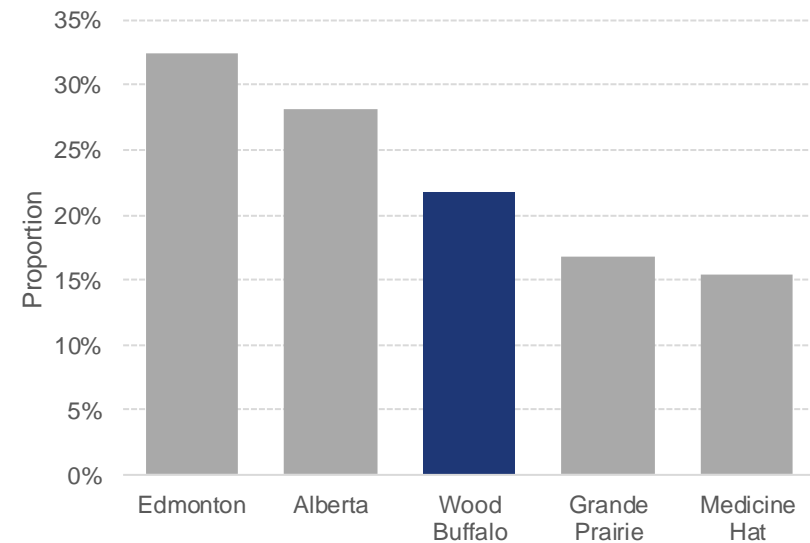
Source: Statistics Canada 2016

INDICATOR DEFINITION: This indicator presents the proportion of the population (aged 25 to 64) with either: an apprenticeship, trade certificate or diploma; or, a university certificate, diploma or degree.

KEY FINDINGS: The Wood Buffalo region has a higher percentage of persons with trades certification than all other comparator communities. The Wood Buffalo region has a higher percentage of persons with university credentials than the City of Medicine Hat and the City of Grande Prairie, but a lower percentage than that of the City of Edmonton and the province overall.

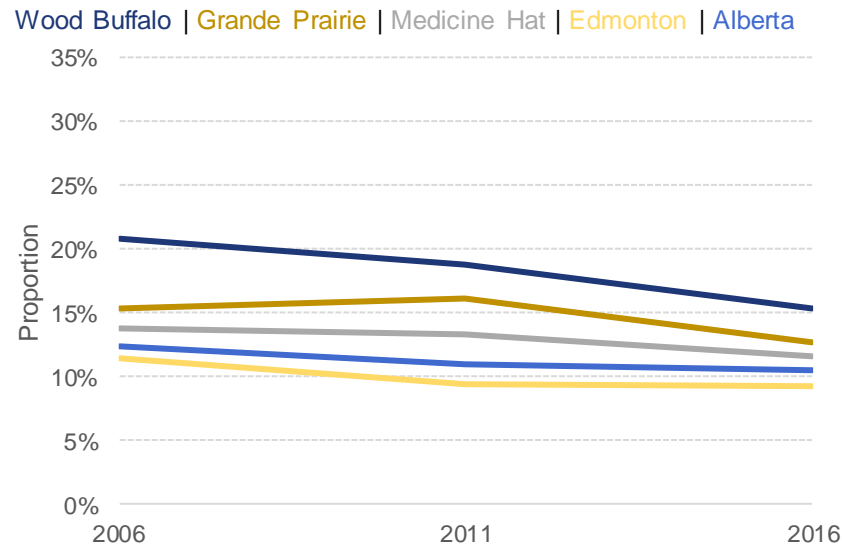
UNDERSTANDING THE RESULTS: The relatively higher proportion of persons with trades certification in the Wood Buffalo region is reflective of the engagement of the regional labour force in the oil sands industry and the educational requirements for many positions within the industry.

Proportion of Population with a University Certificate, Diploma or Degree, 2016



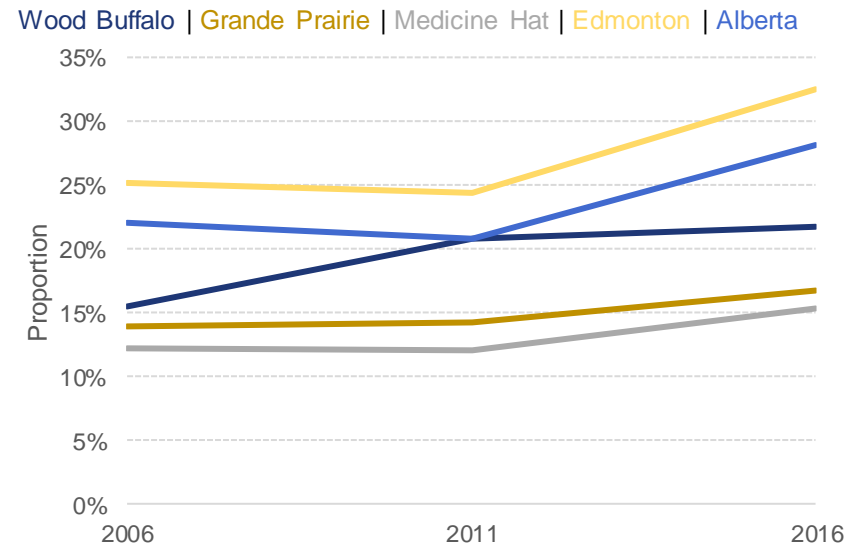
Source: Statistics Canada 2016

Proportion of Population with an Apprenticeship or Trades Certificate or Diploma, Historical Trend



Source: Statistics Canada 2006, 2011 and 2016. Note: Data is only available for census years.

Proportion of Population with a University Certificate, Diploma or Degree, Historical Trend

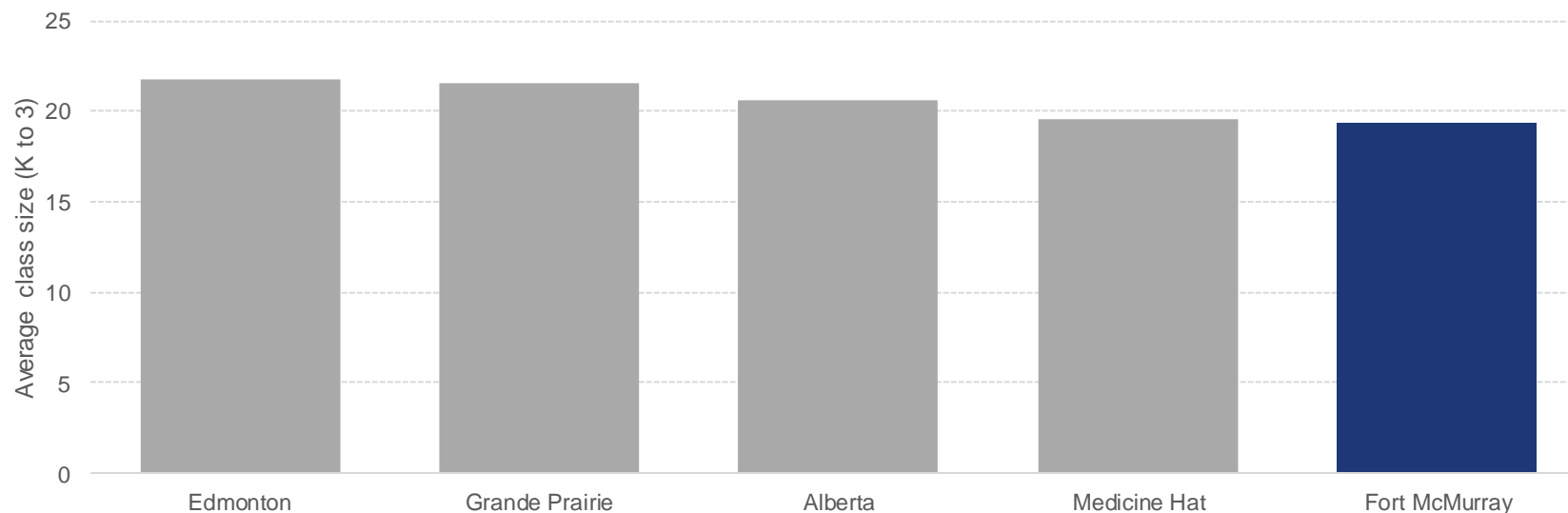


Source: Statistics Canada 2006, 2011 and 2016. Note: Data is only available for census years.

THE HISTORICAL TREND: The proportion of the population in the Wood Buffalo region with trades certification decreased, while the proportion with university credentials increased over the 2006 to 2016 timeframe. This could be a reflection of shifts in the oil sands sector from construction to operations, thereby increasing the number of occupations in the local economy requiring a university credential.

5.2 Average Class Size

Average Class Size, Kindergarten to Grade 3, 2017



Source: Alberta Education 2019

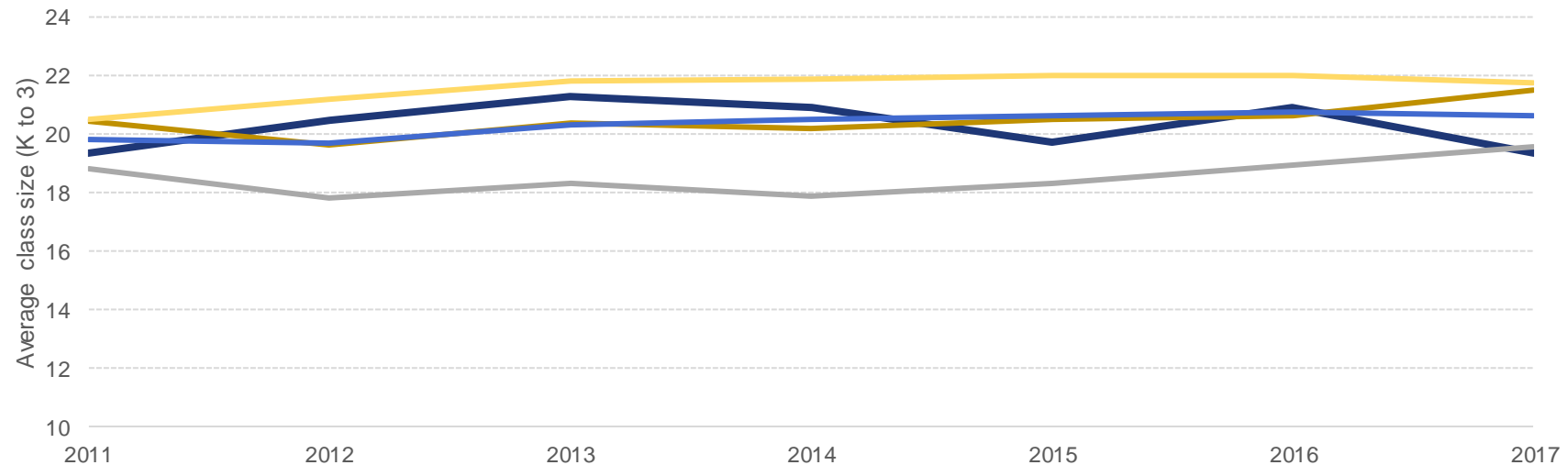
INDICATOR DEFINITION: This indicator presents the average class size for each community for all kindergarten to grade 3 classes. The kindergarten to grade 3 group was chosen as this is the group that most benefits from having smaller class sizes and is a focus of the province's recent class size initiative (Auditor General of Alberta 2018).

KEY FINDINGS: Although all selected communities have similar class sizes, Fort McMurray had the lowest average class size in 2017 at approximately 19 students.

UNDERSTANDING THE RESULTS: The province has noted that smaller class sizes can positively impact learning outcomes, especially at younger grades. Funding for and monitoring of class sizes has been an initiative since 2004. The target of 17 students for the kindergarten to grade 3 group has not yet been reached for any of the comparator communities (Auditor General of Alberta 2018).

Average Class Size, Kindergarten to Grade 3, Historical Trend

Fort McMurray | Grande Prairie | Medicine Hat | Edmonton | Alberta



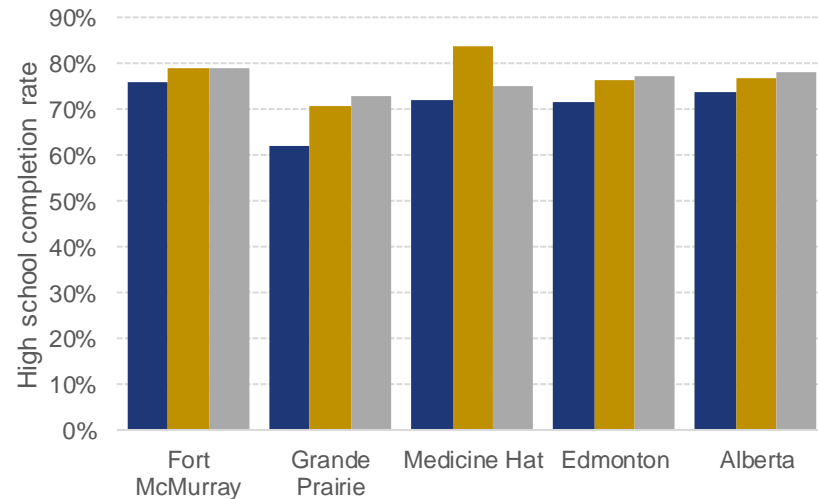
Source: Alberta Education 2019. Notes: The y-axis does not begin at zero in order to show more detail in the variability between communities.

THE HISTORICAL TREND: As shown above, average kindergarten to grade 3 class sizes for the selected comparators have typically ranged between roughly 18 and 22 students. Average kindergarten to grade 3 class size in Fort McMurray has fluctuated somewhat over time but has been generally comparable to the provincial average.

5.3 Accountability Pillar Survey Results

Percentage of Students Completing High School Within Three Years of Entering Grade 10

2011 to 2013 | 2015 to 2017 | 2018



Source: FMPSD 2018, FMCS D 2018, GP No. 2357 2018, GP Catholic 2018, MH No. 76 2018, MH Catholic 2018, Edmonton No. 7 2018, Edmonton Catholic 2018.

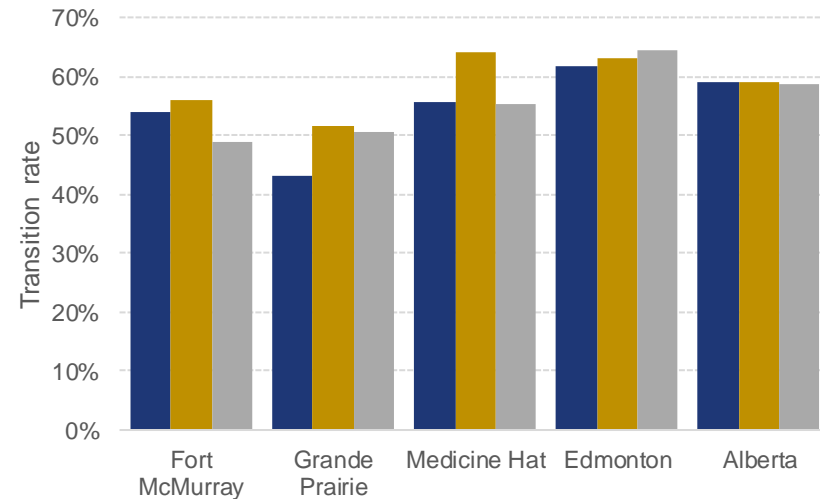
INDICATOR DEFINITION: This indicator measures the percentage of students who complete high school within three years of entering grade 10.

KEY FINDINGS: High school completion rates have generally improved over time for all selected communities. Although Fort McMurray shows one of the smallest increases over time, its rate is still higher than or comparable to most selected comparators.

UNDERSTANDING THE RESULTS: The accountability pillar survey is completed by each school jurisdiction in the province each year and is used to measure progress over time. Recent changes in Fort McMurray's accountability pillar survey results is likely influenced by a number of factors, including changing economic conditions in the region, the impact of the 2016 wildfire, and the relative availability of post-secondary opportunities.

Percentage of Students Transitioning from High School to Post-Secondary Within Six Years of Entering Grade 10

2011 to 2013 | 2015 to 2017 | 2018



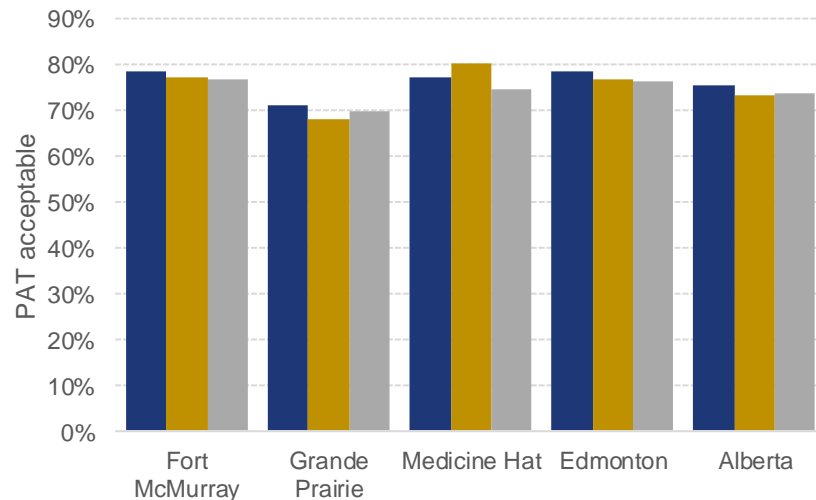
Source: FMPSD 2018, FMCS D 2018, GP No. 2357 2018, GP Catholic 2018, MH No. 76 2018, MH Catholic 2018, Edmonton No. 7 2018, Edmonton Catholic 2018.

INDICATOR DEFINITION: This indicator measures the percentage of students who have enrolled in a post-secondary program within six years of entering grade 10.

KEY FINDINGS: Transition rates are variable from year-to-year. The transition rate in Fort McMurray increased from the 2011 to 2013 period to the 2015 to 2017 period, but then declined in 2018. The transition rate in Fort McMurray is similar to the City of Grande Prairie, but lower than all other comparator communities including the provincial average.

Percent of Students Meeting Acceptable Provincial Standards

2011 to 2013 | 2015 to 2017 | 2018



Source: FMPSD 2018, FMCSO 2018, GP No. 2357 2018, GP Catholic 2018, MH No. 76 2018, MH Catholic 2018, Edmonton No. 7 2018, Edmonton Catholic 2018.

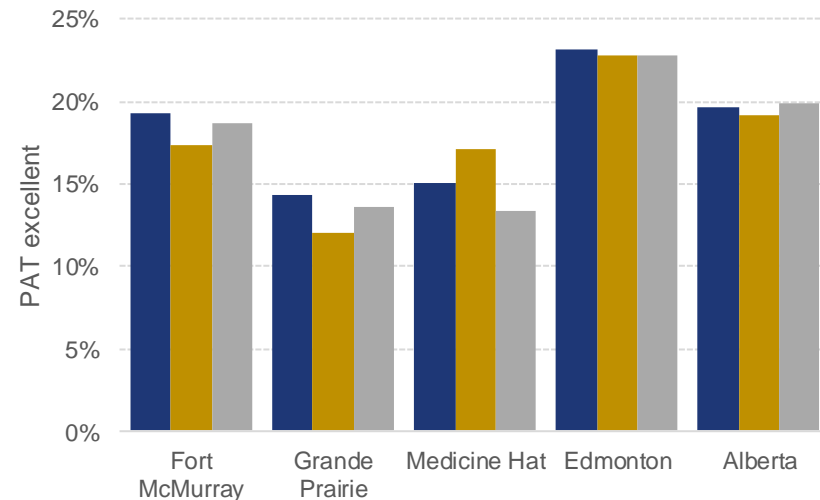
INDICATOR DEFINITION: This indicator shows the percentage of students who achieve the acceptable standard on grades 3, 6 and 9 Provincial Achievement Tests (PATs) overall for all subjects.

KEY FINDINGS: The proportion of students meeting the acceptable PAT standard in Fort McMurray is above that of most comparators but similar to that of the City of Edmonton. Fort McMurray's rate has declined from the 2011 to 2013 period to 2018.

UNDERSTANDING THE RESULTS: The accountability pillar survey is completed by each school jurisdiction in the province each year and is used to measure progress over time. Recent changes in Fort McMurray's accountability pillar survey results is likely influenced by a number of factors, including changing economic conditions in the region and the impact of the 2016 wildfire.

Percent of Students Meeting Excellent Provincial Standards

2011 to 2013 | 2015 to 2017 | 2018



Source: FMPSD 2018, FMCSO 2018, GP No. 2357 2018, GP Catholic 2018, MH No. 76 2018, MH Catholic 2018, Edmonton No. 7 2018, Edmonton Catholic 2018.

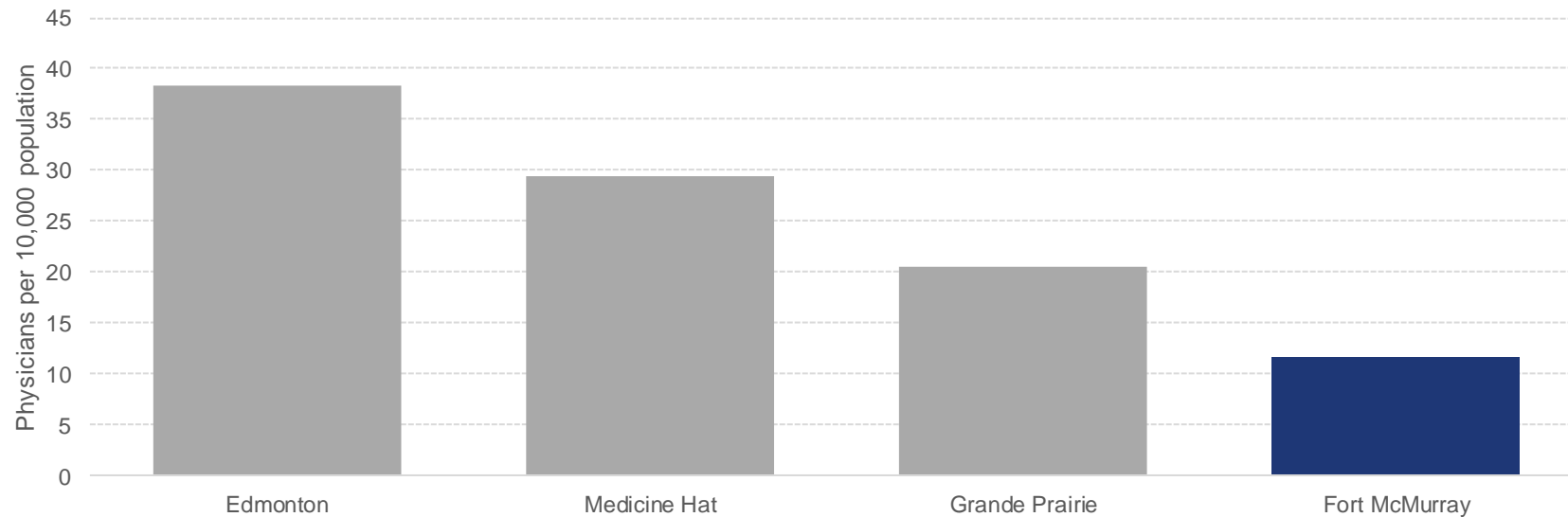
INDICATOR DEFINITION: This indicator shows the percentage of students who achieve the excellent standard on grades 3, 6 and 9 Provincial Achievement Tests (PATs) overall for all subjects.

KEY FINDINGS: The proportion of students meeting the excellent PAT standard in Fort McMurray is roughly similar to the province overall, lower than the City of Edmonton, and above the Cities of Grande Prairie and Medicine Hat. Fort McMurray's rate has been variable over time declining from the 2011 to 2013 period to the 2015 to 2017 period, and then increasing in 2018.

6. Health Services

6.1 Physicians per 10,000 Population

Physicians per 10,000 Population by Community, October 1, 2018 to December 31, 2018



Source: CPSA 2018a.

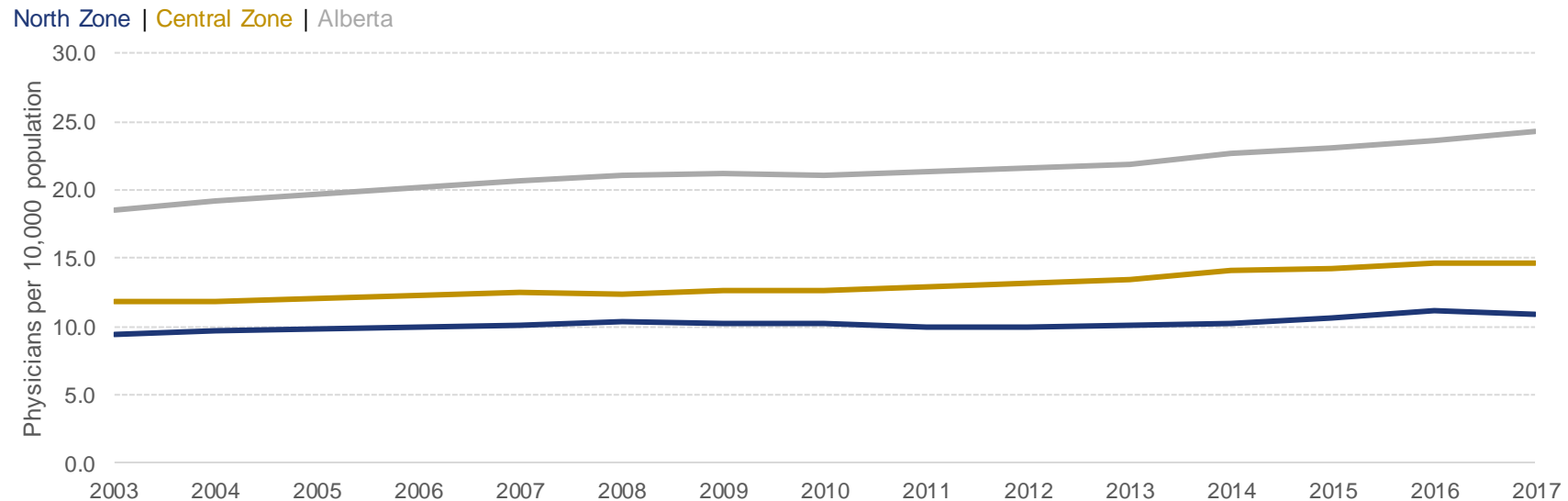
INDICATOR DEFINITION: This indicator presents the number of physicians per 10,000 population for selected communities.

KEY FINDINGS: At the end of 2018, Fort McMurray had approximately 12 physicians per 10,000 population, which is less than that of the Cities of Edmonton, Medicine Hat and Grande Prairie.

UNDERSTANDING THE RESULTS: The recruitment and retention of health care professionals and support staff is a challenge experienced by health care facilities across the country that is intensified in northern communities, often due to their remote location, limited supply of housing options, and higher cost of living.

It should be noted that the number of physicians in a community is a reflection of a number of factors including the nature and breadth of health services, including specialty services, and is not entirely indicative of the relative access to primary health services. For example, the relatively high number of physicians per capita in Edmonton is at least partially attributable to the city being a centre for many province-wide services (e.g. specialists).

Physicians per 10,000 Population by Health Care Zone, Historical Trend



Source: CPSA 2018b.

Notes: Community-specific data is only available for 2018. The historical trend is only available by health care zone. The Wood Buffalo Region is in the North Zone.

THE HISTORICAL TREND: The number of physicians per 10,000 population in the North Zone, which encompasses the Wood Buffalo region, has remained below that of the Central Zone, which encompasses the City of Edmonton, as well as the provincial average for over 15 years.

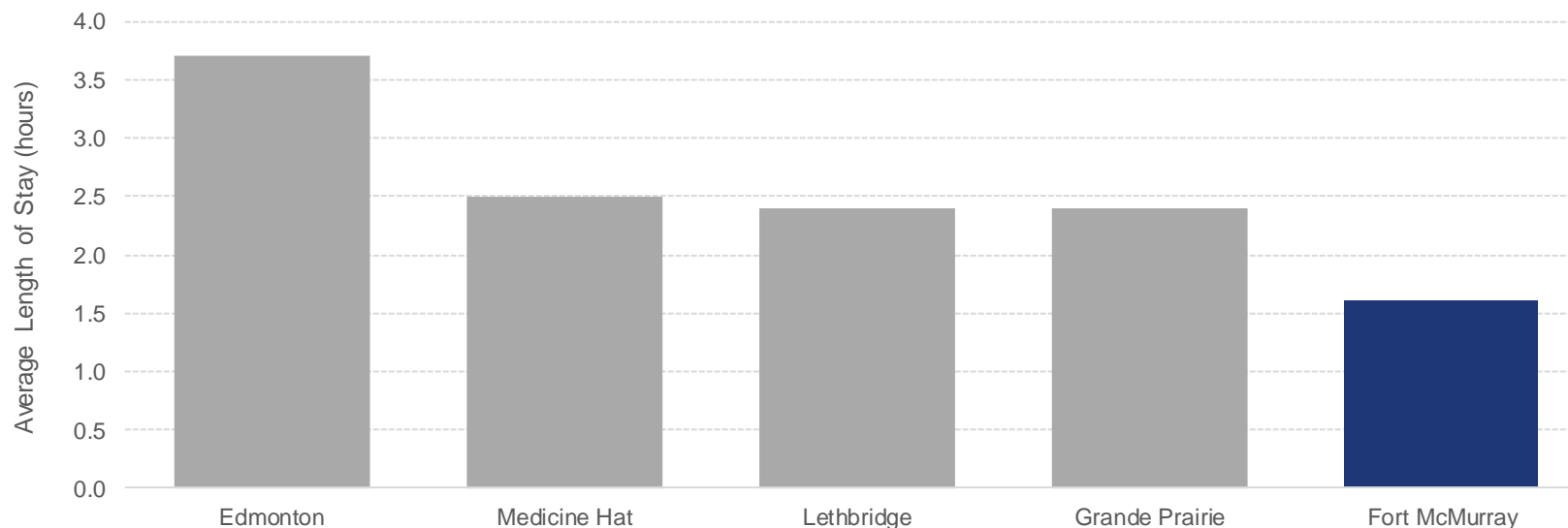
While health staffing issues remain a concern in the North Zone, improvements have been made in recent years, reaching approximately 11 physicians per 10,000 population in 2015 and remaining at that level to 2017.

Although the physician count data for Fort McMurray and comparator communities is not readily publicly available on a consistent basis over time, there is some data which points to improving access to primary care physician services in Fort McMurray. Specifically:

- According to the College of Physicians and Surgeons of Alberta (CPSA), there were 87 physicians practicing in Fort McMurray as of late 2018, an increase of over 20% from 68 physicians in 2013 (CPSA 2013, 2018a).
- According to the Wood Buffalo Primary Care Network website, there are 10 physicians accepting new patients as of May 2019, up slightly from nine physicians in 2013 (WBPCN 2013, 2019).

6.2 Length of Stay in Emergency Department

Average Length of Stay in the Emergency Department for Discharged Patients (2016/17)



Source: AHS 2015, 2016, 2017.

Note: The data relates to the following emergency departments: Northern Lights Regional Health Centre (Fort McMurray); Chinook Regional Hospital (Lethbridge); Queen Elizabeth II Hospital (Grande Prairie); Medicine Hat Regional Hospital (Medicine Hat); and average of emergency departments across Edmonton Zone (Edmonton).

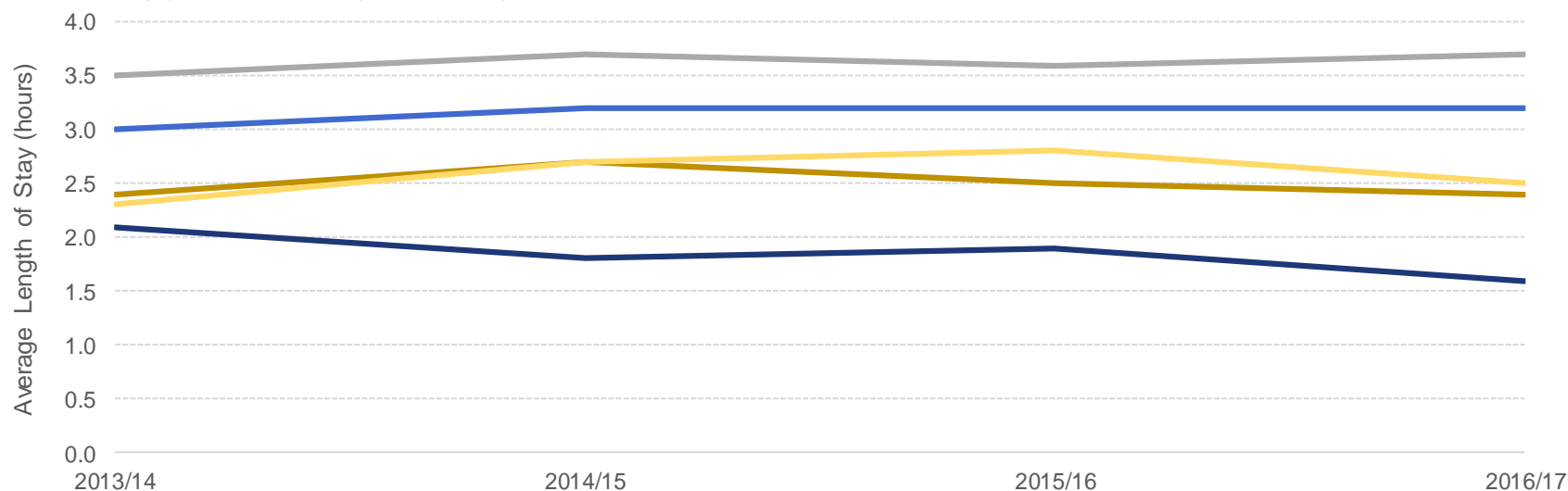
INDICATOR DEFINITION: The average patient's length of time (hours) in the emergency department from the time a patient is assessed by a nurse until the time they are discharged. This is calculated as the median length of stay which means that 50 per cent of patients stay in the emergency department this length of time or less.

KEY FINDINGS: As of early 2017, patients discharged from the emergency department at the Northern Lights Regional Health Centre in Fort McMurray spent, on average, less time waiting than patients at emergency departments in Edmonton, Medicine Hat, Grande Prairie, and Lethbridge. In fact, performance reporting from Alberta Health Services indicates that the Northern Lights Regional Health Centre had the shortest length of stay for discharged patients across all 17 of the busiest emergency departments in Alberta (AHS 2017).

UNDERSTANDING THE RESULTS: See *Historical Trend* below

Average Length of Stay in the Emergency Department for Discharged Patients, Historical Trend

Fort McMurray | Grande Prairie | Edmonton | Medicine Hat | Alberta



Source: AHS 2015, 2016, 2017.

Note: The data relates to the following emergency departments: Northern Lights Regional Health Centre (Fort McMurray); Queen Elizabeth II Hospital (Grande Prairie); Medicine Hat Regional Hospital (Medicine Hat); and average of emergency departments across the Edmonton Zone (Edmonton).

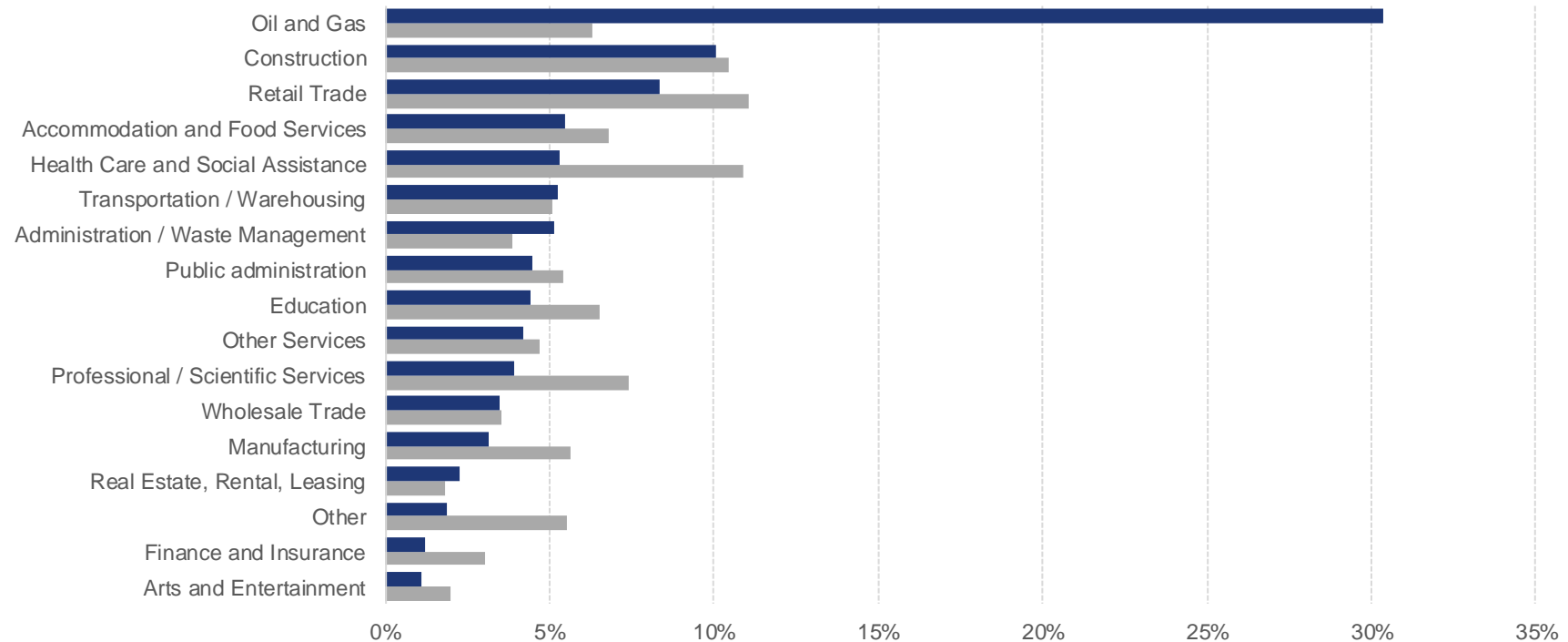
THE HISTORICAL TREND: The emergency department at the Northern Lights Regional Health Centre in Fort McMurray has consistently had shorter average wait times than emergency departments in Edmonton, Medicine Hat, and Grande Prairie. Average wait times at the Northern Lights Regional Health Centre have also been decreasing over time. This is likely attributable to a number of factors including infrastructure improvements made to the Northern Lights Regional Health Centre, including renovations of the emergency unit, and an increase in primary health care services in the community (e.g. opening of an after-hours health clinic), thereby helping to alleviate pressures on the emergency department.

Although annual data on length of stay in emergency departments for discharged patients is not readily available for more recent years, data for 2017/18 and 2018/19 on *time to physician initial assessment* for the Northern Lights Regional Health Centre indicates that the Centre continues to have shorter wait times than other comparator facilities.

7. Labour Force

7.1 Labour Force by Industry

Fort McMurray | Alberta



Source: Statistics Canada 2016.

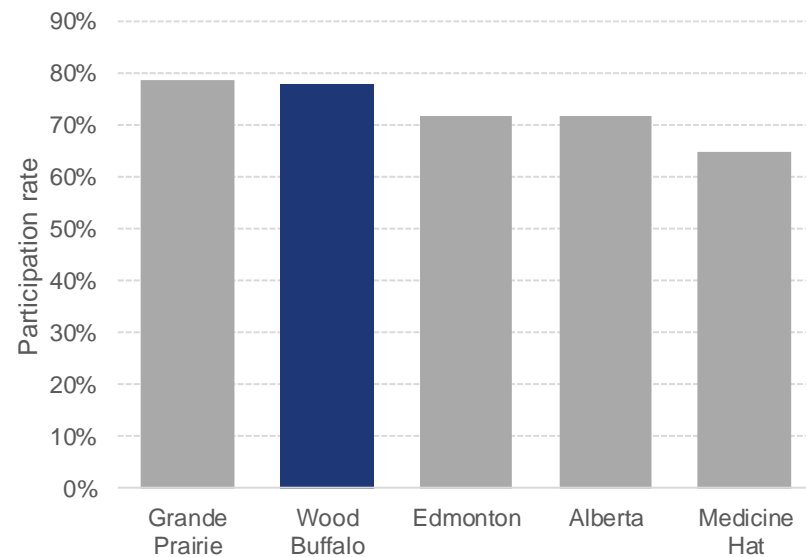
INDICATOR DEFINITION: Total labour force (aged 15 years and over) by industry (North American Industry Classification System).

KEY FINDINGS: Roughly 30% of Fort McMurray's resident workforce is in the oil and gas industry, as compared to the provincial average of just six percent. Nearly half of Fort McMurray's resident workforce is in just three industries: oil and gas (30%), construction (10%), and retail (8%).

UNDERSTANDING THE RESULTS: The composition of the local labour force provides insight into the structure of the local economy. Not surprisingly, Fort McMurray's labour force is heavily engaged directly in the oil and gas industry, as well as indirectly via other industries which rely on oil and gas activities (e.g. construction, transportation). As a result, a smaller proportion of workers are engaged in other sectors of the economy (e.g. retail, health care, professional and scientific services) as compared to the provincial average.

7.2 Labour Market Participation and Unemployment Rates

Labour Force Participation Rate, 2016



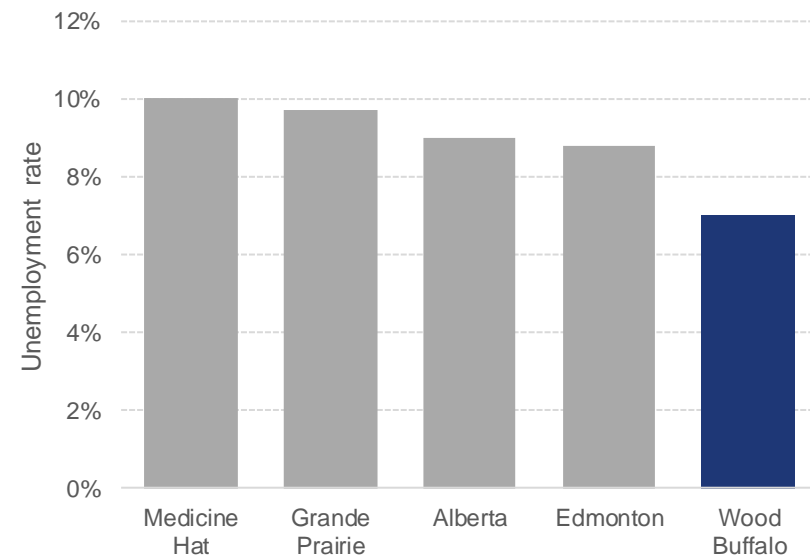
Source: Statistics Canada 2016

INDICATOR DEFINITION: This indicator presents the total labour force (employed and unemployed) relative to the size of the working-age population for selected communities.

KEY FINDINGS: The labour force participation rate in the Wood Buffalo region is similar to the rate in the City of Grande Prairie, and higher than the remaining comparator communities, including the province overall.

UNDERSTANDING THE RESULTS: Much of the resident population in the Wood Buffalo region originally came for employment opportunities, which would necessarily imply a relatively higher labour force participation rate than some other communities.

Labour Force Unemployment Rate, 2016



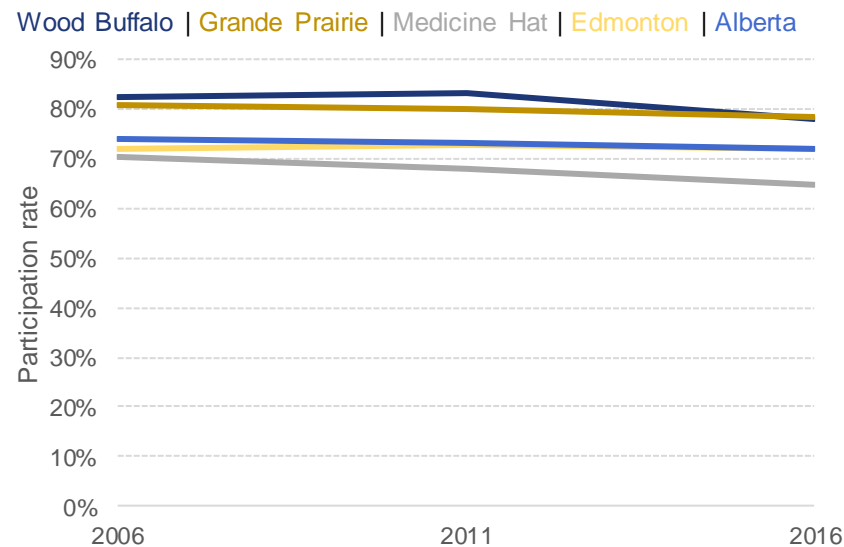
Source: Statistics Canada 2016

INDICATOR DEFINITION: This indicator presents the proportion of the working age population that is currently unemployed relative to the total labour force (employed and unemployed) for selected communities.

KEY FINDINGS: The labour force unemployment rate in the Wood Buffalo region is lower than all comparator communities, including the province overall.

UNDERSTANDING THE RESULTS: Much of the resident population in the Wood Buffalo region originally came for employment opportunities. In the absence of those opportunities being available, many residents are likely to leave the community thereby keeping the unemployment rate relatively low.

Labour Force Participation Rate, Historical Trend



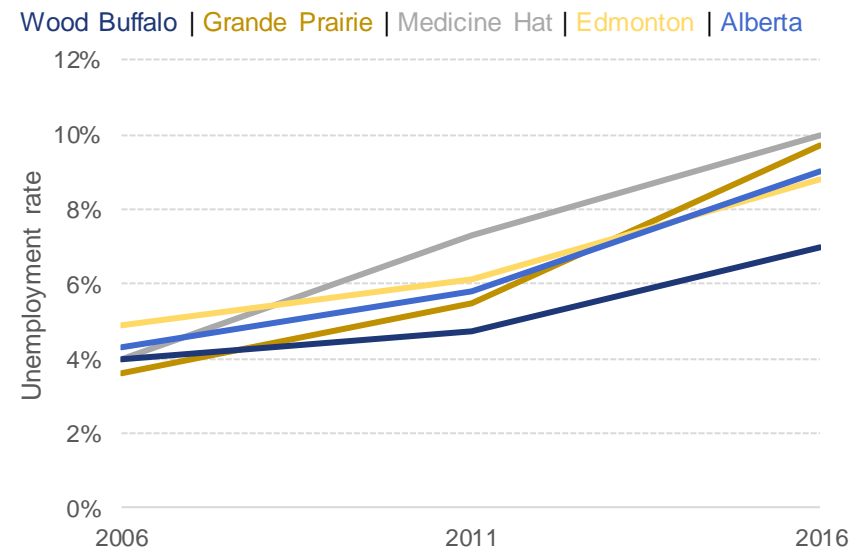
Source: Statistics Canada 2016, 2011, and 2006. Note: Data is only available for census years.

THE HISTORICAL TREND: The labour force participation rate in the Wood Buffalo region has decreased slightly from 2006 to 2016, a trend shown in most other comparator communities, including the province overall.

The labour force unemployment rate in the Wood Buffalo region has increased significantly from 2006 to 2016, a trend shown in most other comparator communities, including the province overall, and indicative of the overall change in economic conditions in the province over the timeframe.

More recent unemployment rates are available for the larger Wood Buffalo-Cold Lake region. In May 2019, the unemployment rate for this larger region was 6.0%, a decrease from 2016 and below the provincial average in May of roughly 6.7%.

Labour Force Unemployment Rate, Historical Trend

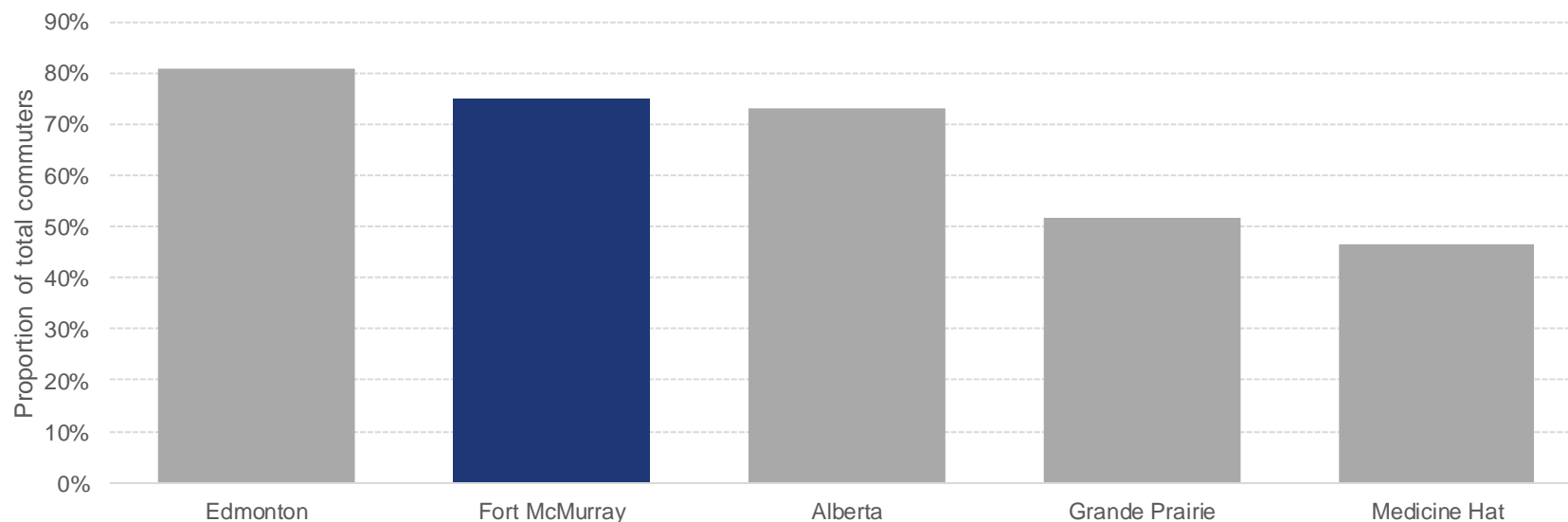


Source: Statistics Canada 2016, 2011, and 2006. Note: Data is only available for census years.



7.3 Average Work Commute Time

Proportion of Total Commuters with a Commute of More Than 15 Minutes, 2016



Source: Statistics Canada 2016. Note: Historical commute time data has not been provided due to a change in methodology in 2016.

INDICATOR DEFINITION: This indicator presents the proportion of those who commute to work with a commute time of more than 15 minutes each way.

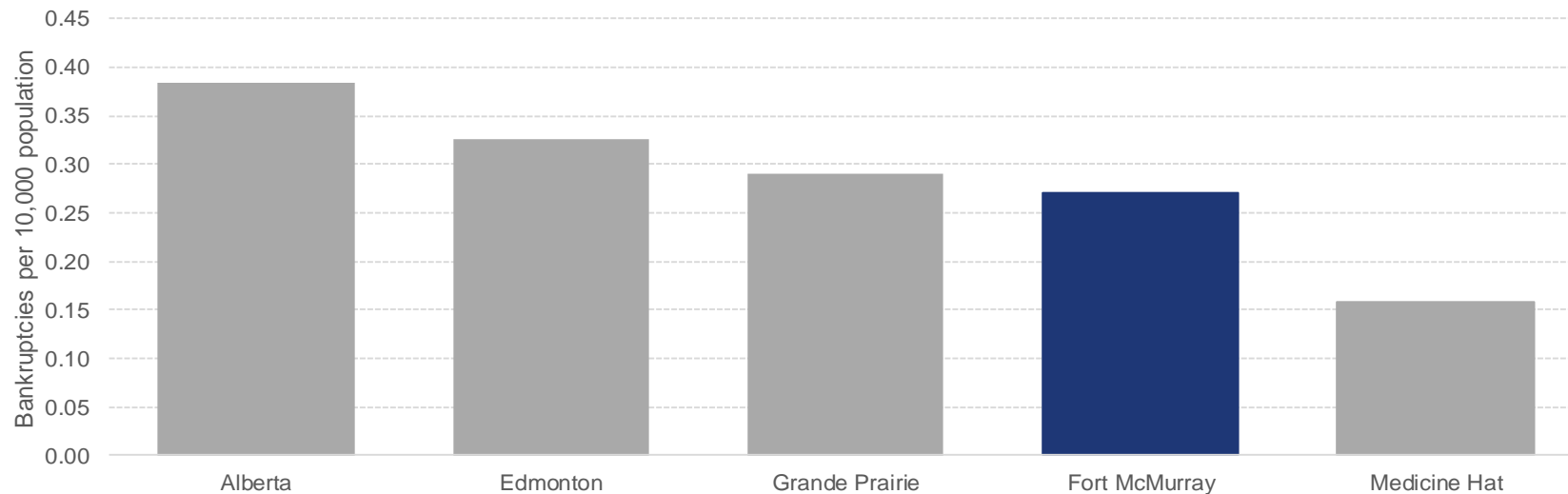
KEY FINDINGS: A higher proportion of commuters commute more than 15 minutes in the City of Edmonton than in Fort McMurray; however, Fort McMurray's proportion is significantly higher than that of the Cities of Grande Prairie and Medicine Hat, and slightly higher than that of the province overall.

UNDERSTANDING THE RESULTS: Although Fort McMurray's land area is less than half that of the Cities of Grande Prairie, Medicine Hat, and Edmonton, there is still a large proportion of the population with a commute longer than 15 minutes. This is largely the result of commutes to project sites and facilities which exist outside Fort McMurray. Although not presented in the above figure, based on 2016 commute data from Statistics Canada, roughly 1 in 5 commuters living in Fort McMurray have an average daily work commute of 60 minutes or more, well above all other comparators, including Edmonton (5%).

8. Economy

8.1 Business Bankruptcies

Business Bankruptcies per 10,000 Population, 2018



Source: GoC 2019a.

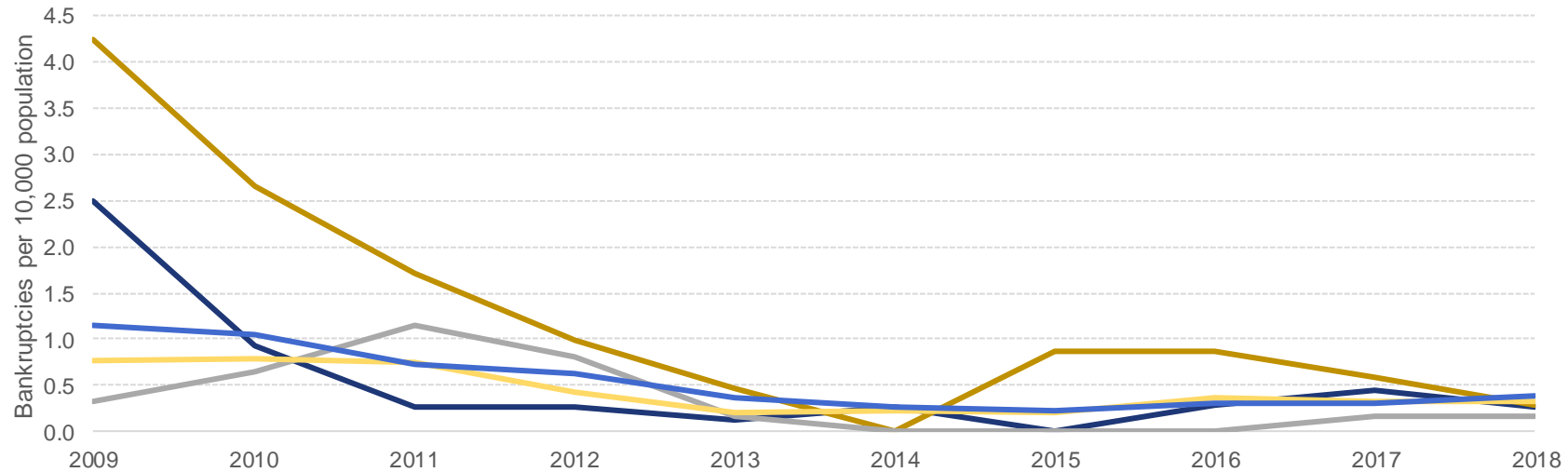
INDICATOR DEFINITION: This indicator compiles the number of commercial entities or organizations that went bankrupt per 10,000 population for selected communities. This includes individuals who have incurred 50 percent or more of total liabilities as a result of operating a business.

KEY FINDINGS: In 2018, Fort McMurray had a bankruptcy rate lower than that of all comparator communities, except the City of Medicine Hat.

UNDERSTANDING THE RESULTS: Results should be interpreted with some caution as the number of business establishments declaring bankruptcy in each community was two or less, with the exception of Edmonton (30). Across Alberta in 2018, the majority of business bankruptcies occurred in the construction industry, including specialty trade contractors and building construction; the accommodation and food services industry, including full-service restaurants; the professional, scientific and technical services industry; and the retail trade industry (GoC 2019b).

Bankruptcies per 10,000 Population, Historical Trend

Fort McMurray | Grande Prairie | Medicine Hat | Edmonton | Alberta



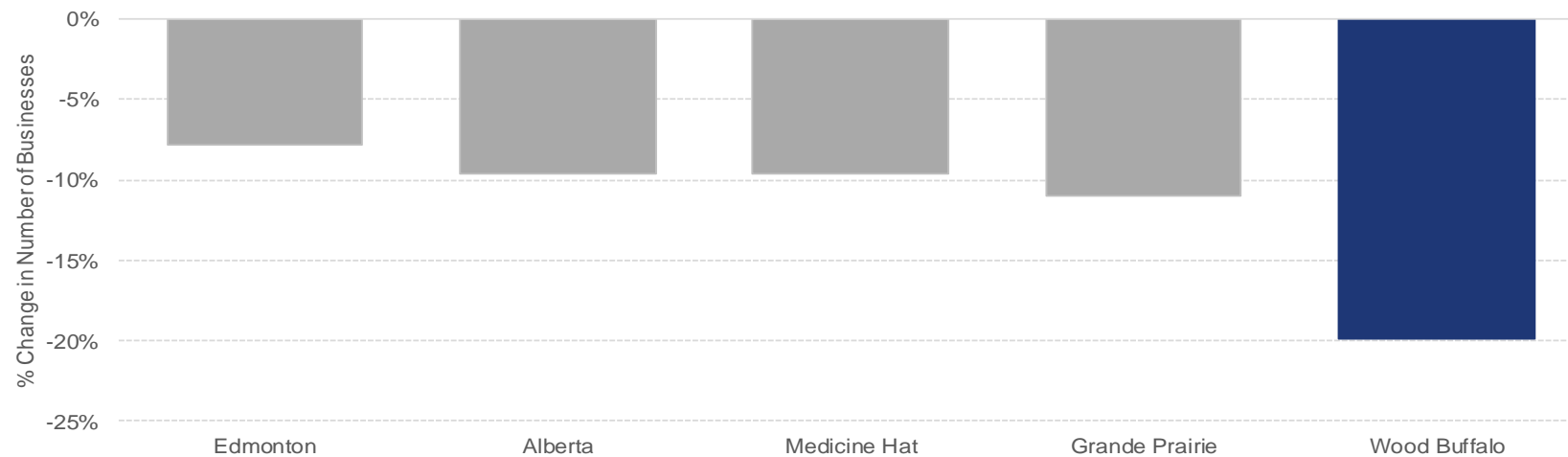
Source: GoC 2019a. Notes: Includes both consumer and business bankruptcies.

THE HISTORICAL TREND: Bankruptcies declined significantly in all communities since 2009, before rising slightly after 2014 in most communities. From 2010 to 2018, Fort McMurray has had a bankruptcy rate that is relatively comparable to, or lower than, most selected communities and the provincial average.

Across Alberta in the 2009 to 2010 period, the majority of business bankruptcies occurred in the construction industry, including specialty trade contractors and building construction; the transportation and warehousing industry, including truck transportation; the mining and oil and gas extraction industry, including support activities for mining and oil and gas extraction (GoC 2019b).

8.2 Percentage Change in Number of Business Establishments

Percentage Change in Number of Business Establishments (2015 to 2018)



Source: CBPD 2017 and 2018.

INDICATOR DEFINITION: This indicator presents the percentage change in the number of business establishments (with employees) from 2017 to 2018 for selected comparator communities.

KEY FINDINGS: The number of active business establishments in the Wood Buffalo region has dropped by 20% between 2015 and 2018, the largest drop among all other comparators including the provincial average.

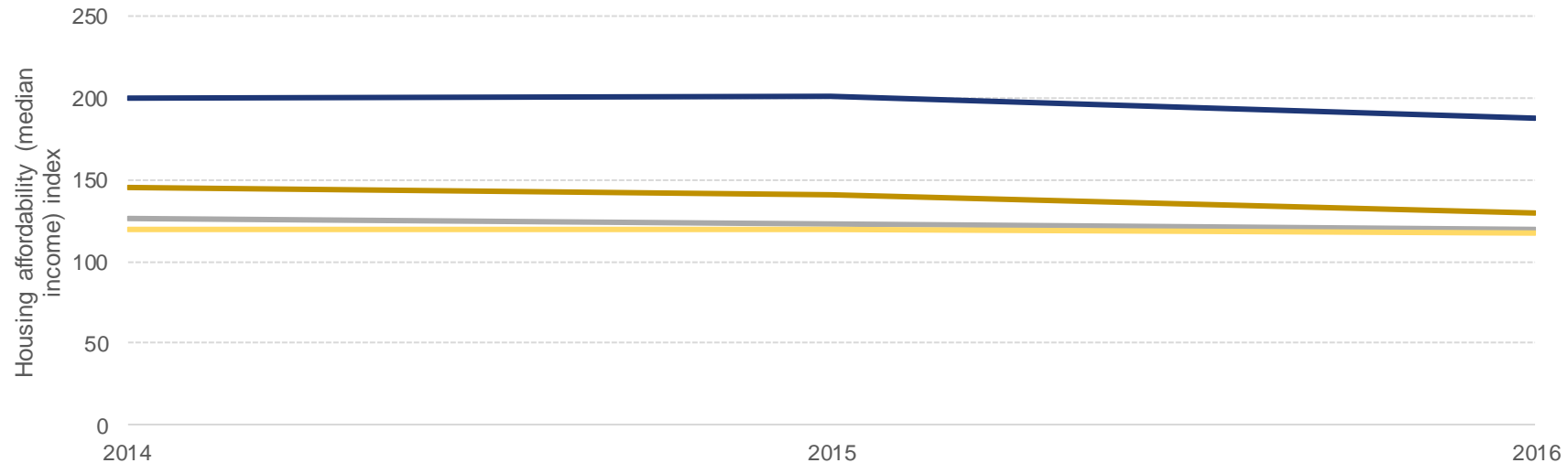
UNDERSTANDING THE RESULTS: All comparators suffered a drop in number of business establishments. This decrease is mostly attributable to challenging economic conditions which has led to a decrease in the number of business establishments in many communities across Alberta, including in Wood Buffalo. Business establishments in the Wood Buffalo region would also have been impacted by the 2016 Horse River wildfire.

9. Cost of Living

9.1 Affordability (Median Income)

Cost of Living to Median Income Index (Edmonton 2007=100), 2014 to 2016

Wood Buffalo | Grande Prairie | Medicine Hat | Edmonton



Source: Statistics Canada 2019c, GoA 2019a. Note that 2016 is the latest available year of data. Note: 1) The higher the value the more affordable the community. 2) Results presented above relate to income earning couple families (i.e. families that contain a married or common-law couple).

INDICATOR DEFINITION: The Affordability Index (Median Income) is a relative measure of affordability based on a comparison of the median income for couple families and the cost of living in the Wood Buffalo region and comparator communities with Edmonton in 2007. Median income is defined as the midpoint in the income distribution; half of the couple families earn above the median and half earn less.

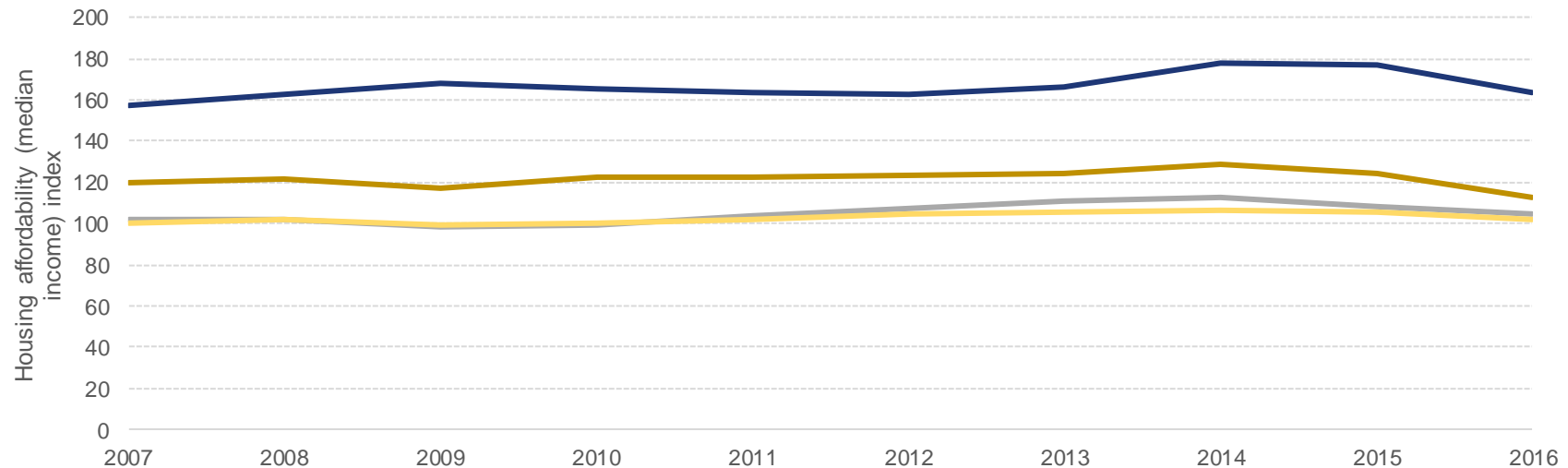
Information for this indicator is only available to 2016 as that is the most recent year for which taxfiler data is available from Statistics Canada.

KEY FINDINGS: The affordability of the Wood Buffalo region relative to comparator communities implies that many census families in the Wood Buffalo region are earning incomes that are more than high enough to compensate for the relatively high cost of living in the region. For example, while the cost of living in the Wood Buffalo region in 2016 was approximately 60% more than in the City of Edmonton, the median income in that year was approximately 83% higher than in the City of Edmonton. Despite being more affordable than its comparators, the Wood Buffalo region's affordability for couples earning the median income in 2016 was down from levels in 2014 and 2015.

UNDERSTANDING THE RESULTS: The recent (2016) drop in the relative affordability of Wood Buffalo is largely the result of a drop in the median income level for couple families in the Wood Buffalo region that is relatively larger than for couple families in comparator communities.

Cost of Living to Median Income Index (Edmonton 2007=100), Historical Trend

Wood Buffalo | Grande Prairie | Medicine Hat | Edmonton



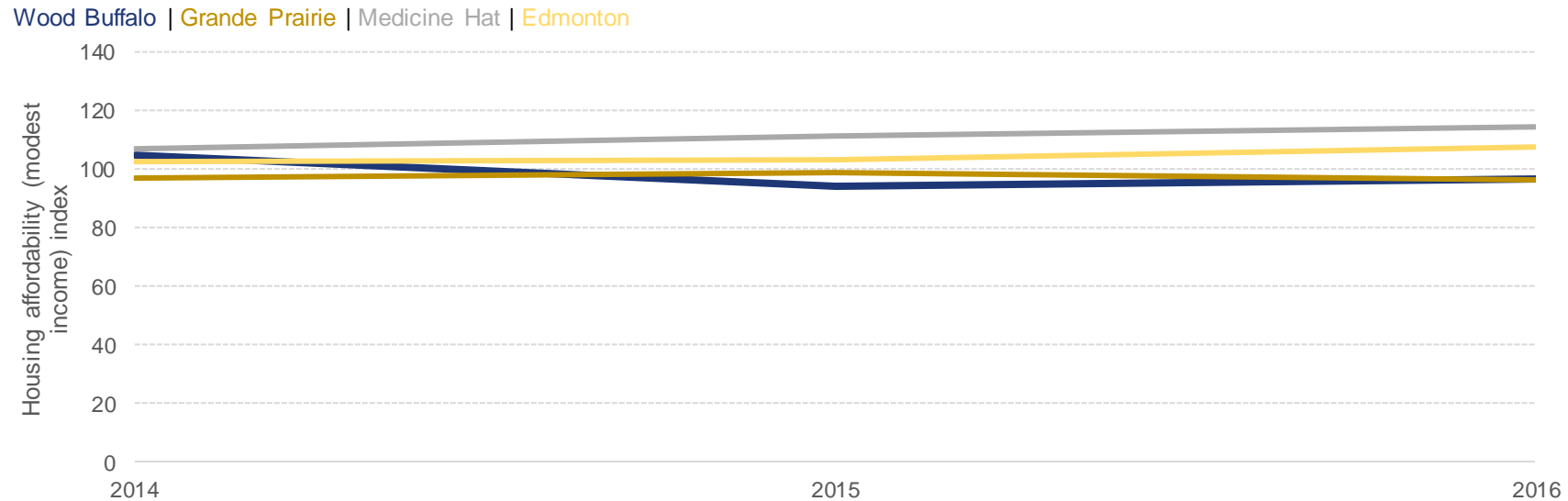
Source: Statistics Canada 2019c, GoA 2019a. Note that 2016 is the latest available year of data. Note: The higher the value the more affordable the community. Results presented above relate to income earning couple families (i.e. families that contain a married or common-law couple).

THE HISTORICAL TREND: For couples earning the median income, the Wood Buffalo region has consistently been more affordable than comparator communities. This also generally holds true for median income lone-parent families and non-family persons and relates mostly to incomes being higher in Fort McMurray than in comparator communities.

The indicator is based on the median income, which reflects the high incomes of the majority of residents of the Wood Buffalo region, especially those who are directly involved in the oil sands industry. It does not address the situation of those census families earning less than the median income.

9.2 Affordability (Modest Income)

Cost of Living to Modest Income Index (Edmonton 2007=100), 2014 to 2016



Source: Statistics Canada 2019c, GoA 2019a. Notes: The higher the value the more affordable the community. Results presented above relate to income earning lone-parent families.

INDICATOR DEFINITION: The Affordability Index (Modest Income) is a relative measure of affordability based on a comparison of modest incomes for lone-parent families and the cost of living in the Wood Buffalo region and comparator communities with Edmonton over time.

Modest income is defined as the point in the income distribution at which three-quarters of the lone-parent families earn more income and one-quarter earn less.

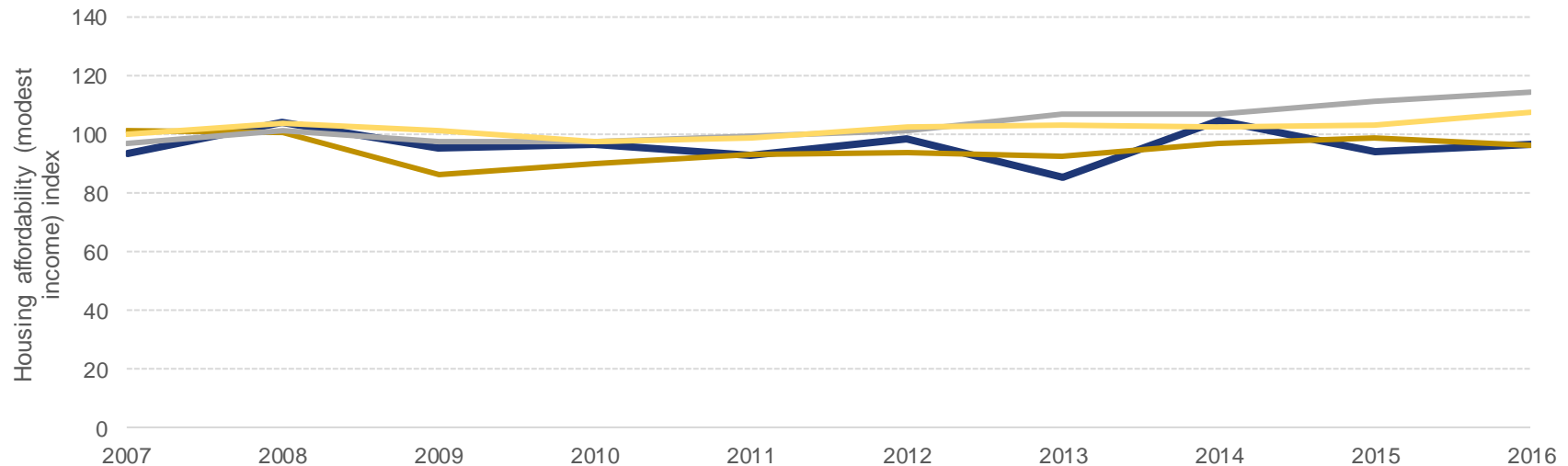
KEY FINDINGS: In 2016, the Wood Buffalo region was slightly more affordable than the City of Grande Prairie, but below that of the Cities of Edmonton and Medicine Hat. The Wood Buffalo region's affordability decreased slightly between 2014 and 2016.

UNDERSTANDING THE RESULTS: While based on modest income census families, which varies from community to community, the indicator does not capture the fact that, for any selected fixed income, the Wood Buffalo region is less affordable than any of the comparator communities. This aspect of affordability makes recruitment difficult in a number of non-oilsands sectors (e.g. public service, retail, non-profit).

The modest income indicator has the virtue of highlighting the predicament of lone-parent families, especially in the Wood Buffalo region.

Cost of Living to Modest Income Index (Edmonton 2007=100), Historical Trend

Wood Buffalo | Grande Prairie | Medicine Hat | Edmonton



Source: Statistics Canada 2019c, GoA 2019a. Note: The higher the value the more affordable the community. Results presented above relate to income earning lone-parent families.

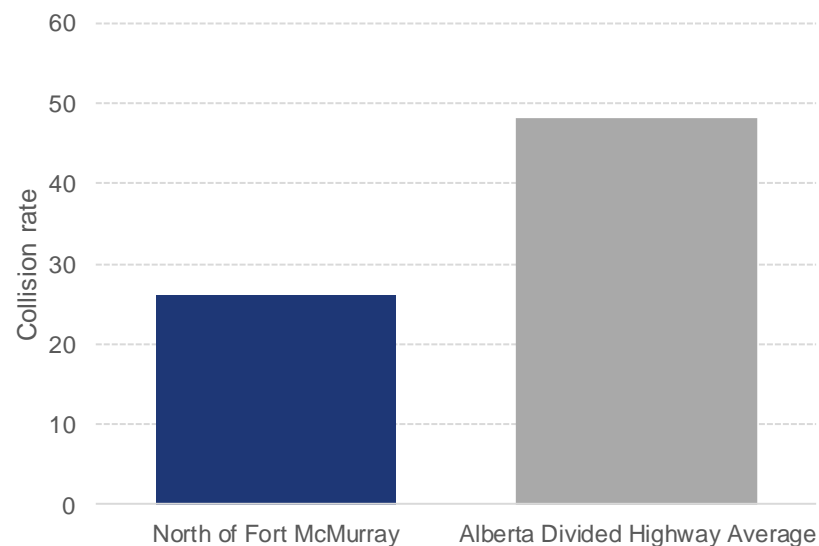
THE HISTORICAL TREND: Since 2007, the Wood Buffalo region has remained relatively on par with the comparator communities, though fluctuations in affordability were larger in the Wood Buffalo region over the 2012 to 2016 period.

The affordability of the Wood Buffalo region for modest income earning lone-parent families in 2016 is roughly on par with what it was in 2007. This is also true for modest income earning couple families and non-family persons. This is the result of modest incomes growing at a slightly faster rate than the overall cost of living.

10. Transportation

10.1 Traffic Collision Rates

Traffic Collision Rates: Highway 63, North of Fort McMurray, 2016



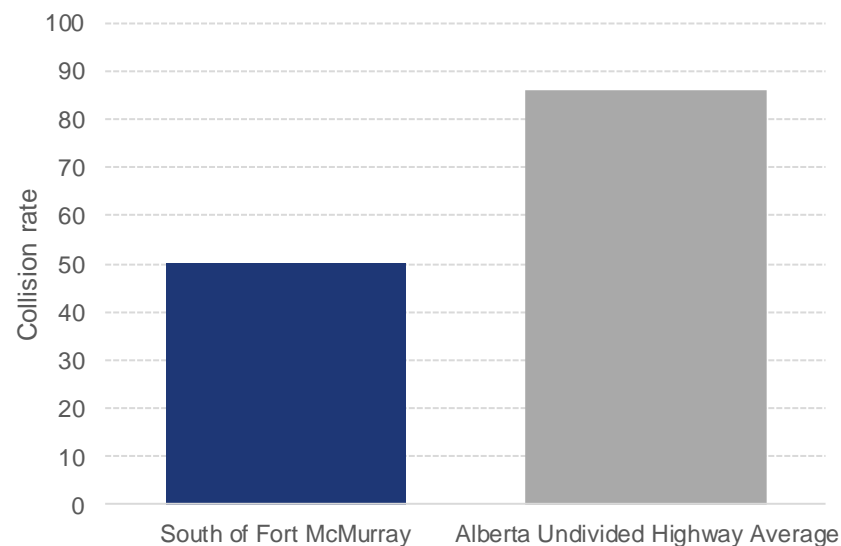
Source: AT 2019a and 2019b, Nichols Applied Management.

INDICATOR DEFINITION: Traffic collision rates are measures of the number of traffic collisions per 100 million vehicle kilometers of traffic volumes along Highway 63 segments (north and south of Fort McMurray) and on comparable provincial highways. Note that collision rates on Highway 63 are based on five-year rolling averages.

KEY FINDINGS: Collision rates on Highway 63, both north and south of Fort McMurray, are below the provincial averages for primary highways.

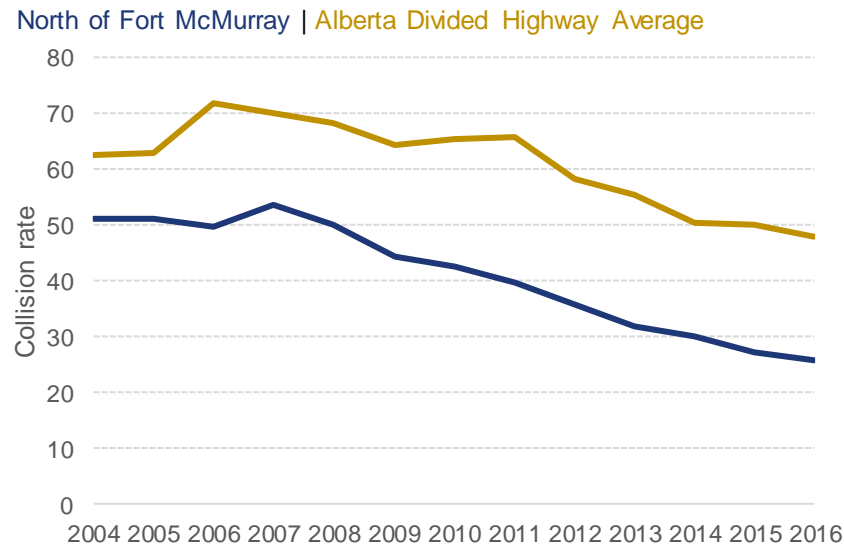
UNDERSTANDING THE RESULTS: In response to serious regional concerns with road safety through much of the early to mid-2000s, road infrastructure in the region underwent considerable change in recent years. These changes include the construction or rebuilding of bridges and interchanges in Fort McMurray, as well the completion of Highway 63 twinning in 2016. These road improvements, along with measures undertaken by industry to improve traffic safety, have helped reduce traffic collision rates in the region.

Traffic Collision Rates: Highway 63, South of Fort McMurray, 2016



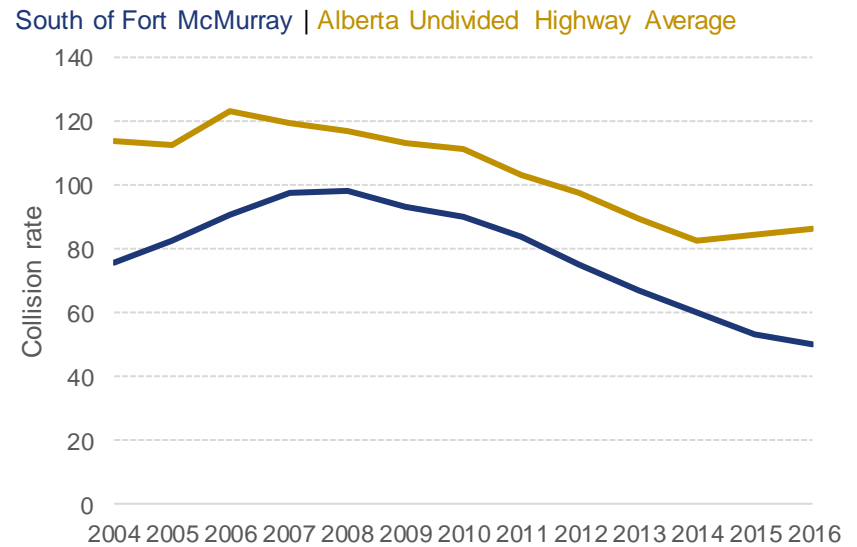
Source: AT 2019a and 2019b, Nichols Applied Management.

Traffic Collision Rates: Highway 63, North of Fort McMurray, Historical Trend



Source: AT 2019a and 2019b, Nichols Applied Management.

Traffic Collision Rates: Highway 63, South of Fort McMurray, Historical Trend



Source: AT 2019a and 2019b, Nichols Applied Management.

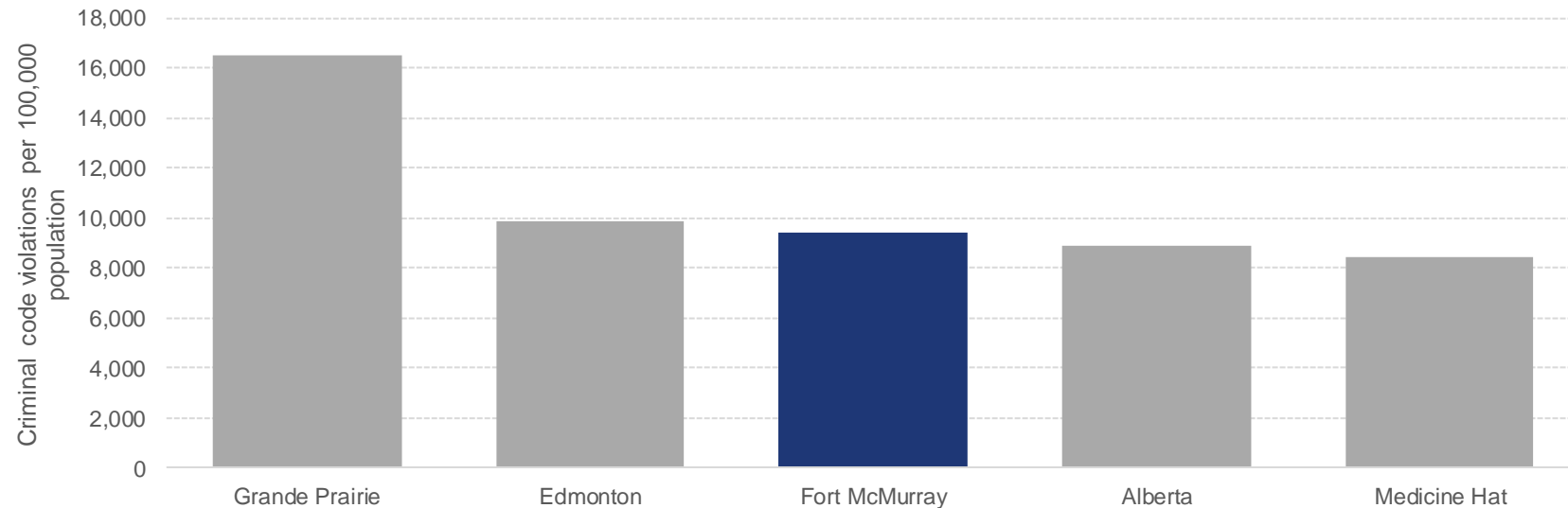
THE HISTORICAL TREND: Since about 2007, collision rates have been declining along a number of segments of Highway 63. The effect of the completion of the Highway 63 twinning project, combined with traffic safety measures taken by industry, and reduced traffic volumes along some segments of Highway 63, has translated to lower collision rates in recent years, resulting in a welcome change to a long-term issue for residents in the region and a priority for the provincial government.



11. Community

11.1 Crime Rates

Criminal Code Violations per 100,000 Population, 2017



Source: Statistics Canada 2019d. Note: Fort McMurray's reported crime rate calculation does not include the large non-resident population in the RMWB. Inclusion of the non-resident population, or some portion thereof, in the calculation would effectively reduce the crime rate.

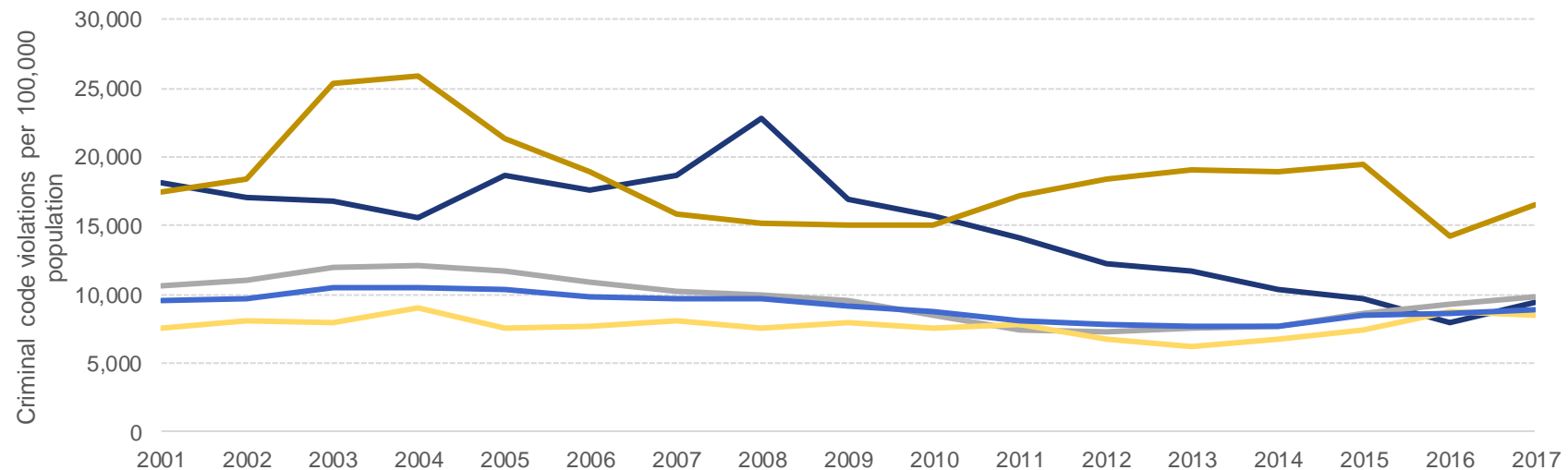
INDICATOR DEFINITION: The crime rate is a measure of the overall crime rate (all criminal code offences, including traffic) per 100,000 population in Fort McMurray and similar communities.

KEY FINDINGS: The overall crime rate in Fort McMurray is lower than that of the City of Grande Prairie and the City of Edmonton, but slightly higher than the provincial average and the City of Medicine Hat.

UNDERSTANDING THE RESULTS: Policing in Fort McMurray has benefited in recent years from increased staffing and improvements to infrastructure (e.g., new RCMP main detachment, twinning of Highway 63). The results show the frequency of crimes but does not factor in the severity of the crimes themselves. Statistics Canada's crime severity index, on the other hand, takes into account both the volume and the seriousness of crime. Fort McMurray's crime severity index was 93 in 2017, well below that of the City of Grande Prairie (163), the City of Edmonton (124), and the province overall (110), and similar to that of the City of Medicine Hat (92) (Statistics Canada 2019e).

Criminal Code Violations per 100,000 Population, Historical Trend

Wood Buffalo | Grande Prairie | Medicine Hat | Edmonton | Alberta

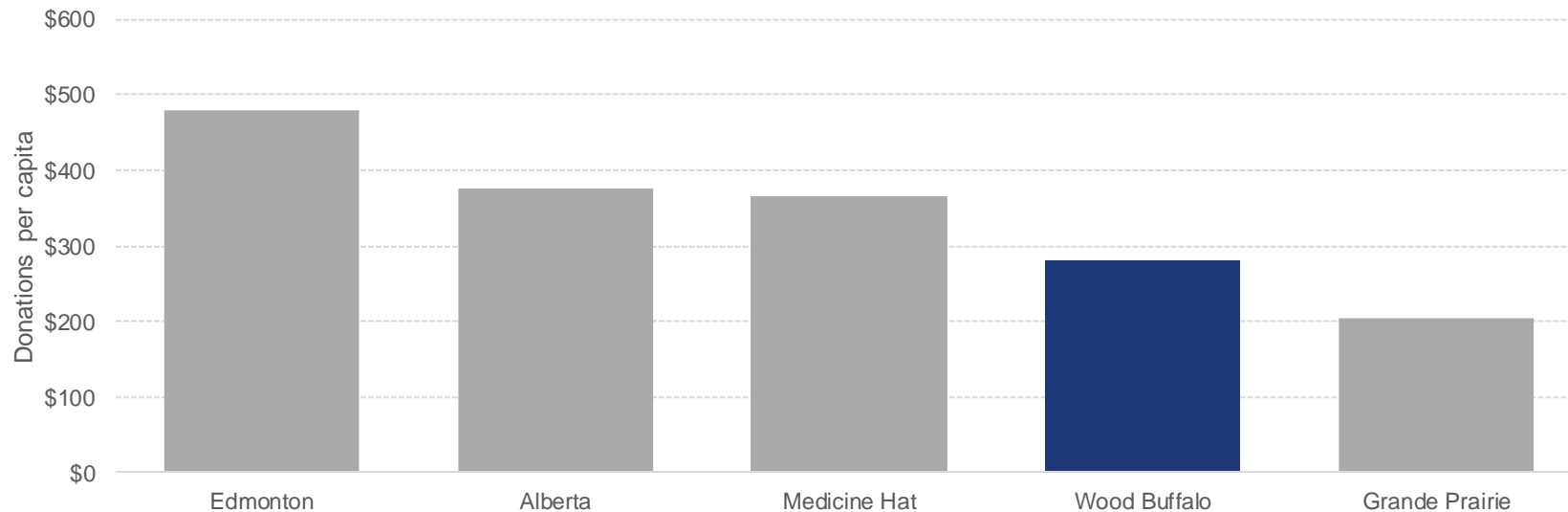


Source: Statistics Canada 2019d

THE HISTORICAL TREND: Historically, the overall crime rate in Fort McMurray has been substantially higher than in the Cities of Edmonton and Medicine Hat as well as the province overall but similar to that in the City of Grande Prairie. However, Fort McMurray's crime rate has been declining steadily since about 2008 and is now well below that of the City of Grande Prairie and more in line with crime rates in other comparator communities and the province overall.

11.2 Donations

Donations per Capita, 2017



Source: Statistics Canada 2019f

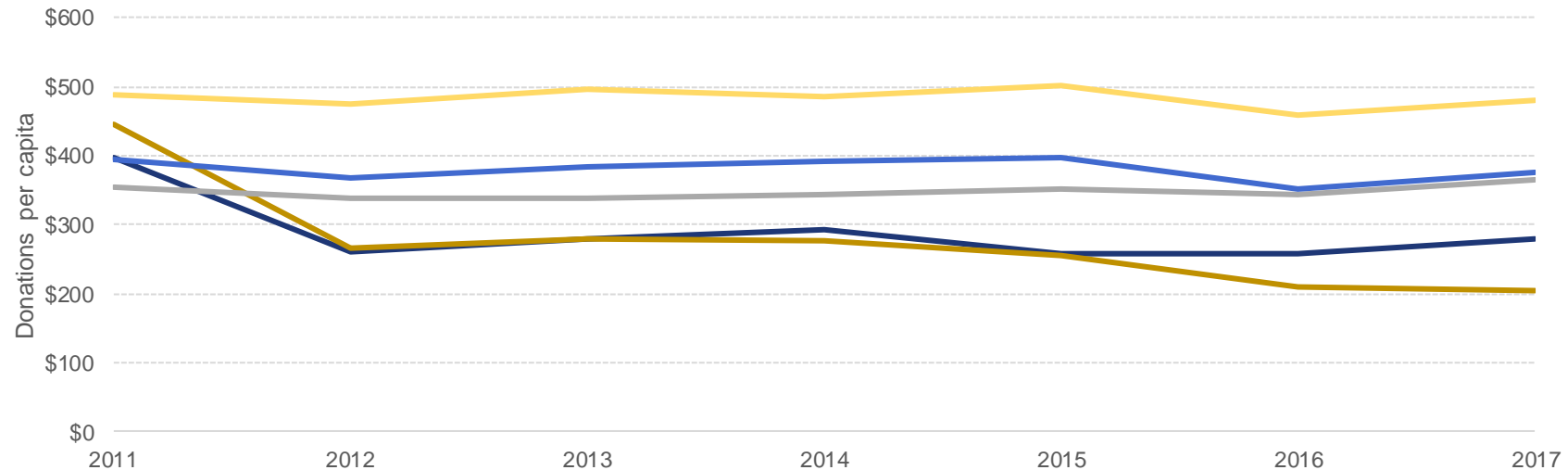
INDICATOR DEFINITION: This indicator presents annual charitable donations per capita for selected communities. The data is collected by Statistics Canada from income tax returns submitted to the Canada Revenue Agency. Charitable donors are defined as those who filed a tax return and reported a charitable donation on their income tax return for that year.

KEY FINDINGS: In 2017, the Wood Buffalo region donated approximately \$280 per capita, which is higher than that of the City of Grande Prairie, but lower than all other comparators, including the provincial average.

UNDERSTANDING THE RESULTS: Donations per capita are based on municipal census results. Had Statistics Canada census population estimates been used instead, the donations per capita estimate for Wood Buffalo would have increased but the relative position of the community vis-à-vis comparator communities wouldn't have changed.

Donations per Capita

Wood Buffalo | Grande Prairie | Medicine Hat | Edmonton | Alberta

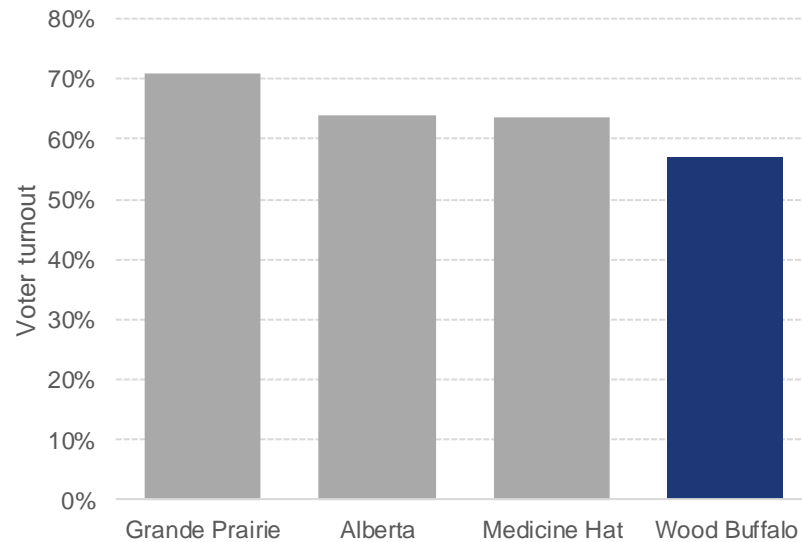


Source: Statistics Canada 2019f

THE HISTORICAL TREND: Since 2012, donations in the Wood Buffalo region have remained below that of the Cities of Edmonton and Medicine Hat and the provincial average but have generally remained on par with the City of Grande Prairie. Donations have increased in the 2016 to 2017 timeframe, possibly as a result of permanent residents donating to non-profit organizations to address impacts of the 2016 wildfire.

11.3 Voter Participation

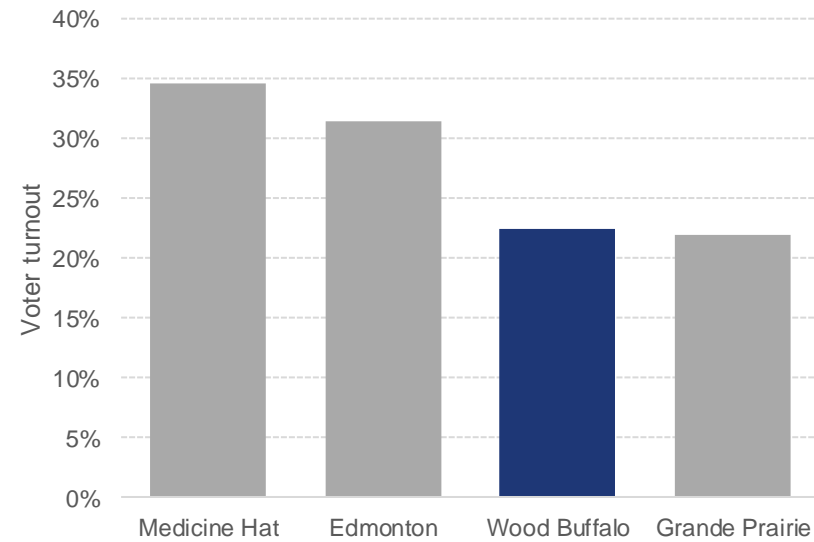
Voter Participation in Provincial Elections, 2019



Source: Elections Alberta 2019.

Notes: Electoral districts including in this analysis include: for Wood Buffalo, Fort McMurray-Wood Buffalo and Fort McMurray- Lac La Biche; for Medicine Hat, Brooks-Medicine Hat and Cypress-Medicine Hat; and, for Grande Prairie, Grande Prairie-Smoky and Grande Prairie-Wapiti.

Voter Participation in Municipal Elections, 2017



Source: AMA 2019c

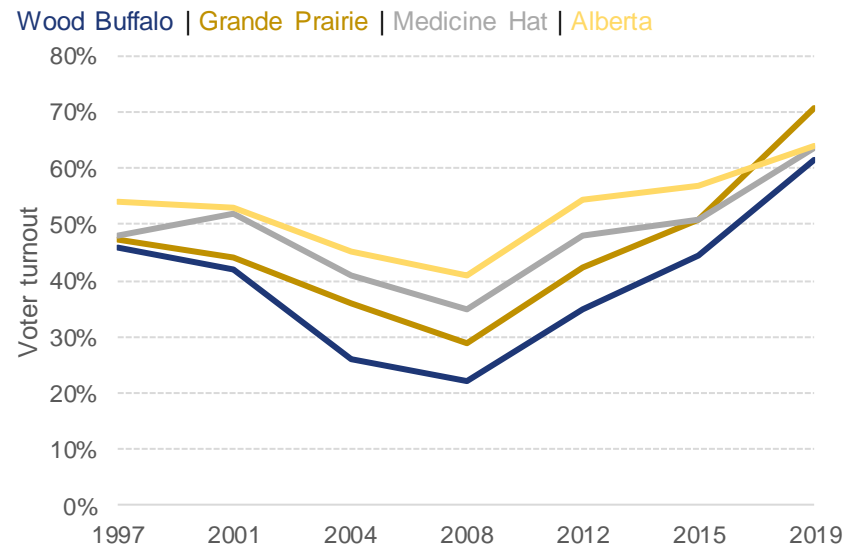
INDICATOR DEFINITION: This indicator is a measure of voter participation rates in recent provincial and municipal elections for the Wood Buffalo region as compared to other comparator electoral districts and communities.

KEY FINDINGS: In the most recent provincial election (2019), voter participation rates in the Wood Buffalo region were below that of Medicine Hat, Grande Prairie, and Alberta. In the most recent municipal election for which data was available (2017), voter participation rates in the Wood Buffalo region were below that of the Cities of Medicine Hat and Edmonton but above that of the City of Grande Prairie.

UNDERSTANDING THE RESULTS: The voter turnout rate is used as an indicator of civic engagement.

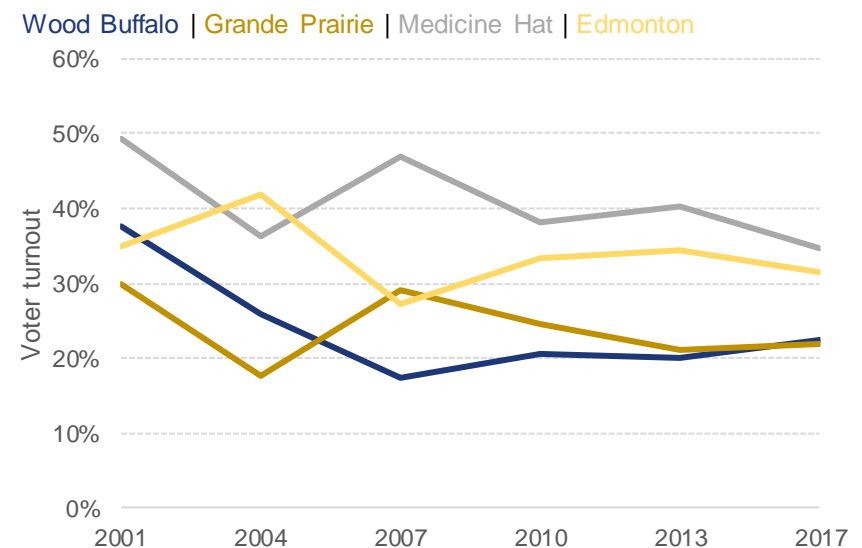
Factors associated with voting include age, education level, family type, and employment status (Uppal and LaRochelle-Cote 2012). In the Wood Buffalo region, voter turnout might also be affected by the nature of work in the region (i.e., shift work, worksites away from home).

Voter Participation in Provincial Elections, Historical Trend



Source: Elections Alberta 2019. Note: 1) Data is only available for election years. 2) Caution should be exercised when comparing results over time as the boundaries of individual electoral districts periodically change.

Voter Participation in Municipal Elections, Historical Trend



Source: GoA 2019c, RMWB 2019, Big Country 2017, Chat News Today 2017, Edmonton Journal 2017. Note: Data is only available for election years.

THE HISTORICAL TREND: Voter participation rates in the Wood Buffalo region have been increasing both provincially and municipally in recent years; however, they generally remain below that of comparator districts and communities including the province overall. The Wood Buffalo region consistently has one of the lower voter participation rates in provincial elections among Alberta's electoral districts.

11.4 Recreation Features

Size of Principal Community Recreation Centre per Capita Population, 2018

Community	Large-Scale Multiplex	Facility Size (Interior ft2) ¹	Population Served ²	Size (ft2) / Capita	Operating Model	Monthly Membership (Adult) ³	Amenities
Fort McMurray	MacDonald Island Park	544,000	77,094	7.1	Non-profit	\$59	Fitness centre, aquatic centre (pool and waterpark), twin arenas and leisure skating, field house, badminton centre, child minding, playground, climbing wall, studio, curling, golf, ballrooms, outdoor field complex/stadium.
Grande Prairie	Eastlink Centre	450,000	98,191	4.6	Municipal	\$61	Aquatic centre (pool, waterpark, surf simulator), fieldhouse, court, fitness centre, studio, squash/racquetball, playground, meeting rooms, kitchen classroom, childcare.
Medicine Hat	Family Leisure Centre	200,000	76,522	2.6	Municipal	\$52	Olympic-size ice arena, aquatic park (pool and waterpark), fitness centre, fieldhouse with twin boarded fields, gymnasium, meeting rooms, outdoor field complex.

Notes: 1) The facility size consists of total interior space as measured in square feet. 2) *Population Served* includes: MacDonald Island: the RMWB's permanent and resident shadow population; Eastlink Centre: City of Grande Prairie, County of Grande Prairie, and towns of Sexsmith, Wembley, and Beaverlodge; Medicine Hat: City of Medicine Hat, Cypress County, and Town of Redcliff. 3) Membership costs based on a monthly renewal adult pass.

INDICATOR DEFINITION: This indicator examines the presence and size of a major multiplex recreation centre, relative to the size of population base served. The population base (market served) includes the host community plus surrounding urban centres and rural populations.

KEY FINDINGS: MacDonald Island Park is operated by the Regional Recreation Corporation (RRC) on behalf of the RMWB and has been claimed to be the largest community recreation, leisure, and social centre in Canada. Other large-scale recreation complexes exist elsewhere in Canada, but typically are based in large metropolitan (one million+ residents) centres. Industry, which along with the Municipality sees the facility as a key community asset for family attraction and retention, has supported the facility since inception through naming rights and other corporate sponsorships. The MacDonald Island facility has over half a million square feet of interior space (excluding the municipal library), representing about 7.1 square feet on a per capita basis. Compared to the population served, the facility size is roughly 1.5 times larger than the Eastlink Centre in Grande Prairie and over 2.5 times larger than the Family Leisure Centre in Medicine Hat.

UNDERSTANDING THE RESULTS: The MacDonald Island was built as a flagship facility and it is truly that – providing residents with ample and varied sport, recreation and meeting space. Taking into account the surrounding outdoor facilities including the Shell Place stadium complex, MacDonald Island is a leading recreation facility in the province. The membership rates are competitive with those charged in other communities. As compared to other municipalities, the ongoing operation of this facility implies a larger-than-typical municipal subsidization largely supported by the municipality's mostly industrial-funded tax base.

11.5 Entertainment Facilities

Number of Entertainment Facilities per 100,000 Population, 2018

Establishment Type	Fort McMurray	Grande Prairie	Medicine Hat	Edmonton	Alberta
Food and beverage establishments	184	230	239	295	243
Amusement, cinema, and spectator sports	14	20	13	9	14
Gambling and racing facilities	3	9	9	6	6

Source: CBPD 2018.

INDICATOR DEFINITION: This indicator compiles the number of entertainment establishments/facilities per 100,000 population. The information is sourced from the Canadian business pattern data set from Statistics Canada's Business Register and provides counts of active businesses by industry classification.

For this analysis, entertainment facilities have been grouped into three general categories:

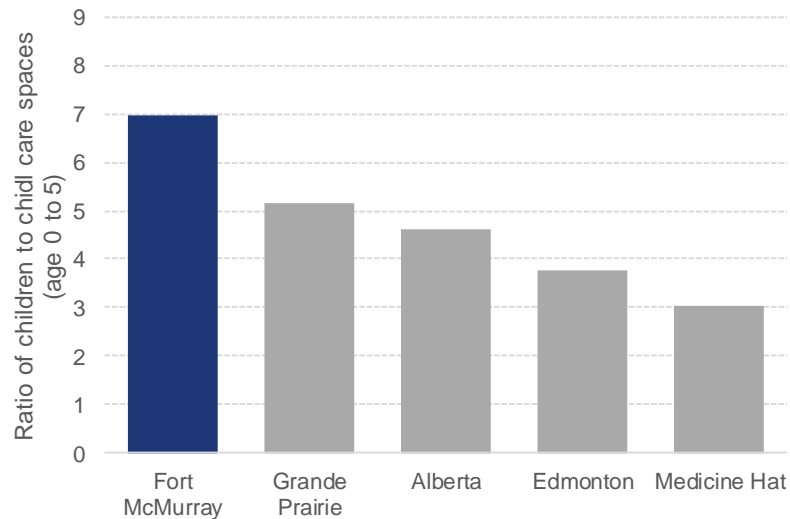
- Food and beverage establishments, including full-service restaurants, bars, and limited service eating establishments;
- Amusement, cinema, and spectator sports, including amusement and theme parks, arcades, bowling centers, sports teams and performance clubs, and motion picture and video exhibition; and
- Gambling and racing facilities, including horse racetracks, other racetracks, and casinos.

KEY FINDINGS: Fort McMurray offers fewer food and beverage establishments, as well as gambling and racing facilities, on a per capita basis as compared to the selected communities. However, Fort McMurray does offer a similar amount of amusement, cinema, spectator sports establishments on a per capita basis as compared to most of the selected communities.

UNDERSTANDING THE RESULTS: Although this indicator provides a relative comparison of the number of establishments, it does not consider the quality of these establishments (i.e., size, age, condition). Recent changes to Fort McMurray's entertainment business sector include relocation of the Landmark Cinema from downtown to the Commons at Eagle Ridge, and closure of the bowling alley since fall 2018 due to an on-site accident. The relatively low number of food and beverage establishments could have been impacted by the 2016 Horse Rive fire and the community's subsequent recovery.

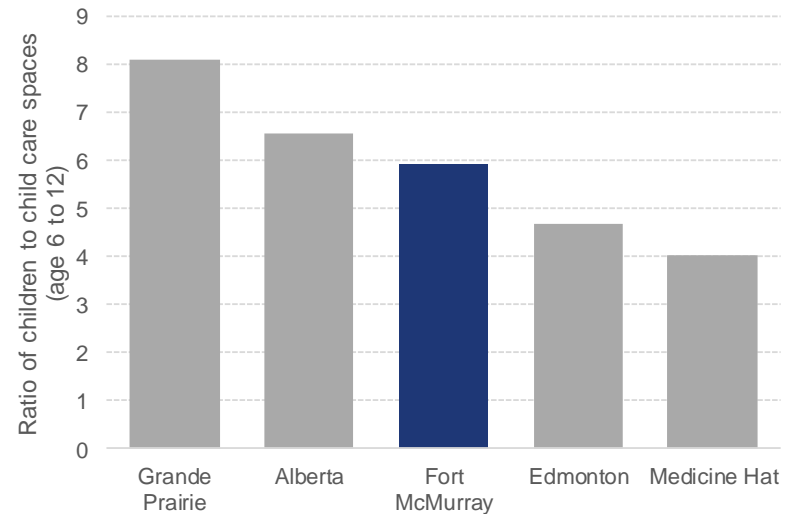
11.6 Childcare Spaces

Ratio of Number of Children to Number of Regulated Childcare Spaces, Age 0 to 5, 2018



Source: Statistics Canada 2016, GoA 2019d.

Ratio of Number of Children to Number of Regulated Childcare Spaces, Age 6 to 12, 2018



Source: Statistics Canada 2016, GoA 2019d.

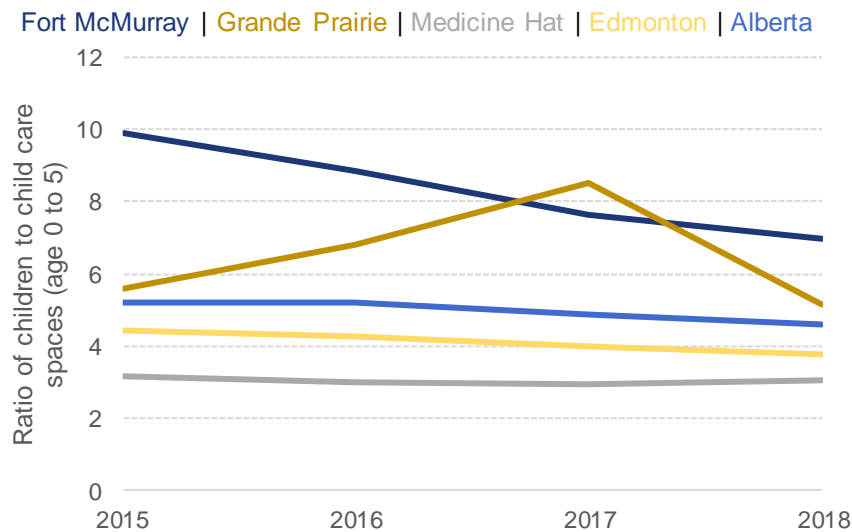
INDICATOR DEFINITION: This indicator presents the ratio of the total number of children¹ to the total number of regulated childcare spaces available. The findings are presented in two different age groupings, age 0 to 5 and age 6 to 12, to reflect the fact that school-aged children require different levels of care than those aged 0 to 6. Please note that this ratio is not expected to be 1-to-1 since not all children require full-time care and many parents have informal or familial child-care arrangements, neither of which is included in the measure of regulated spaces. A higher ratio indicates there are more children per regulated space in a community as compared to where the ratio is lower.

KEY FINDINGS: The demand:supply ratio for the 0 to 5 age group is highest in Fort McMurray, indicating that the need for additional supply is greatest in this community as compared to other communities. In contrast, the demand for spaces relative to the available supply for the 6 to 12 age group in Fort McMurray is lower than that of Grande Prairie and the province as a whole, but higher than that of Edmonton and Medicine Hat.

¹ The standard metric for expressing the relationship between childcare supply and demand uses the number of children with working mothers; however, time considerations in obtaining this dataset required that the number of children be used as a proxy instead.

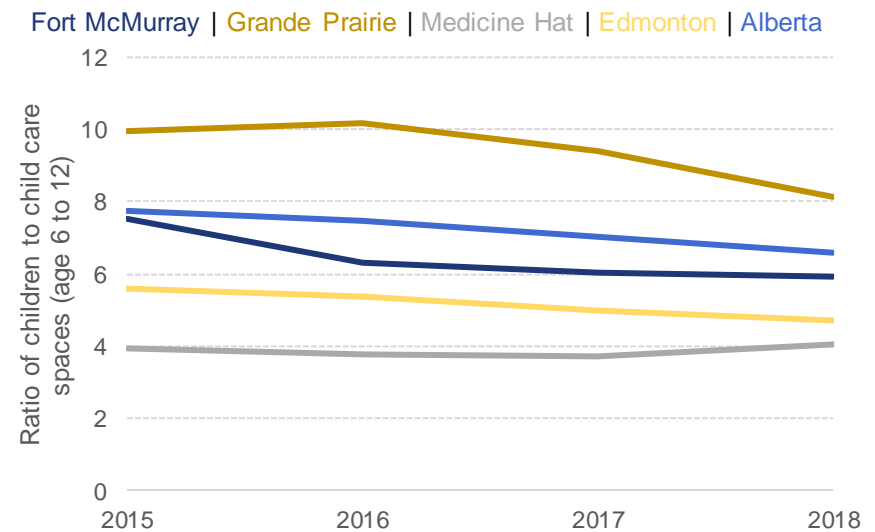
UNDERSTANDING THE RESULTS: Although this measure provides a useful guideline to track changes in the demand and supply conditions within a region over time and can facilitate comparison between different regions, there are other aspects of the childcare market impacting both the demand and supply which are not included in this measure; namely, the propensity of families to choose regulated over familial or private non-regulated care as well as the size of the informal childcare market, including after-hours and specialized care. It should be noted that childcare is a localized service and many families seek care in the immediate vicinity of their home or a parent's place of employment. Accordingly, a single supply:demand ratio for a community may not fully reflect the localized experience of some users.

Ratio of Number of Children to Number of Childcare Spaces, Age 0 to 5, Historical Trend



Source: Statistics Canada 2016, GoA 2019d.

Ratio of Number of Children to Number of Childcare Spaces, Age 6 to 12, Historical Trend



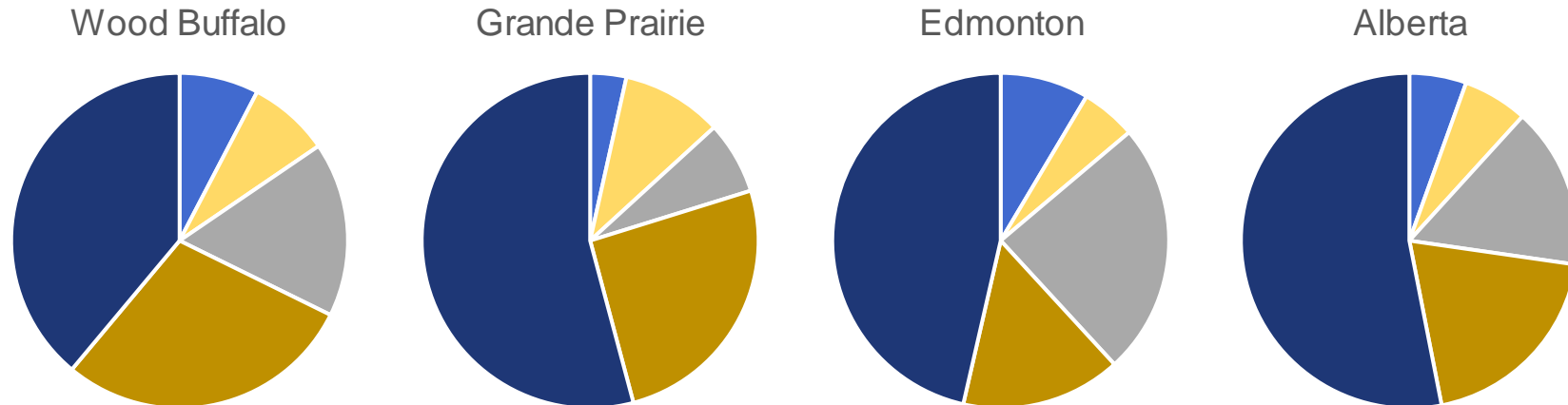
Source: Statistics Canada 2016, GoA 2019d.

THE HISTORICAL TREND: The demand for childcare spaces relative to the available supply for both age groups in Fort McMurray have declined since 2015, reflecting increases in the supply of regulated spaces and decreases in demand resulting from a reduced population. However, in the 0 to 5 age group, Fort McMurray remains the highest of all the comparator communities. In the 6 to 12 age group, Fort McMurray is higher only than Edmonton and Medicine Hat, remaining below the ratio for Grande Prairie and the province overall.

11.7 Ethnic Origin

Proportion of Population by Ethnic Origin, 2016

European | Other North American | Asian | North American Indigenous | Caribbean, Latin, African



Source: Statistics Canada 2016

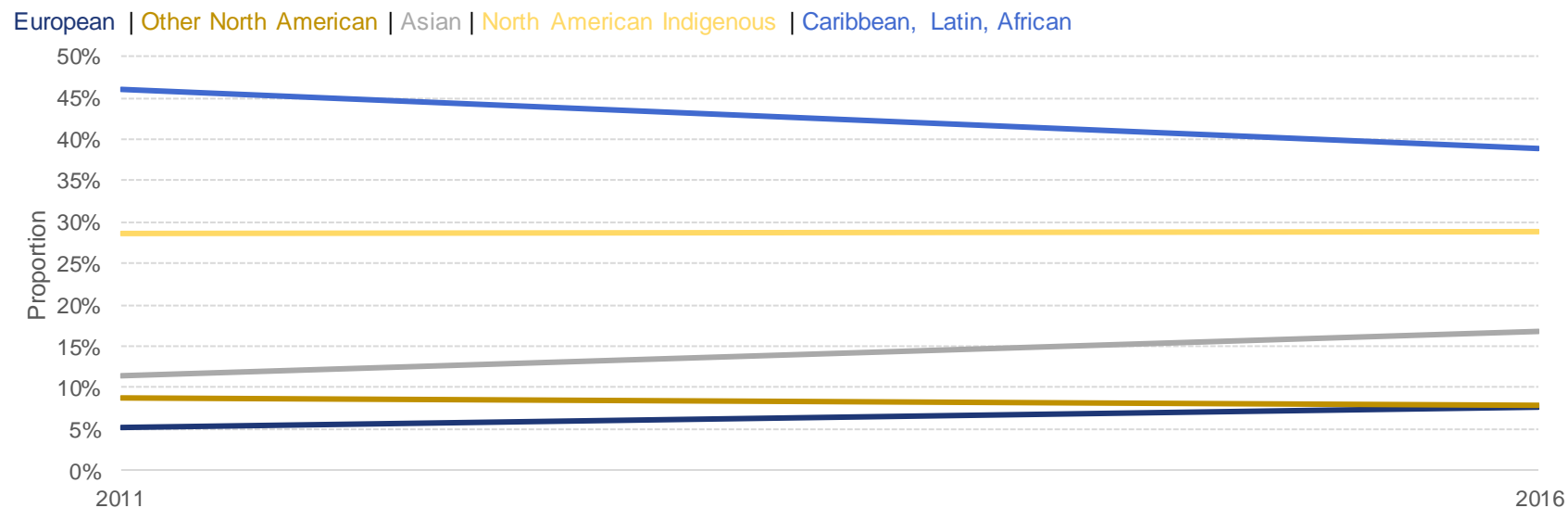
INDICATOR DEFINITION: This indicator presents ethnic origin data from Statistics Canada for selected communities. Ethnic origin refers to the ethnic or cultural origins of the person's ancestors. A person may report more than one ethnic origin.

KEY FINDINGS: The Wood Buffalo region has relatively fewer people with a European ethnic origin and relatively more people with a North American (non-Indigenous) ethnic origin than the comparator communities.

UNDERSTANDING THE RESULTS: Employment opportunities have attracted people from elsewhere in Alberta, across Canada, and from around the world leading to a relatively diverse population in the Wood Buffalo region. Even with the attraction of newcomers from outside the region, Wood Buffalo continues to have a strong Indigenous presence as compared to other selected communities due to the relatively larger number of Indigenous (First Nation and Metis) communities in and around the region.



Proportion of Population by Ethnic Origin, Wood Buffalo, Historical Trend



Source: Statistics Canada 2016 and 2011. Note: Data is only available for census years. Ethnic origin is not available in Statistics Canada's 2006 census.

THE HISTORICAL TREND: In Wood Buffalo, the proportion of people with a Caribbean, Latin or African ethnic origin decreased significantly between 2011 and 2016, whereas the proportion of people with either an Asian ethnic origin or a European ethnic origin increased over that same time period. The proportion of people with a North American ethnic origin remained relatively constant.

11.8 Access to Assisted Living

Public and Private Assisted Living Facilities, 2018

Community	Supportive Living		Long-Term Care		Total		Total Units per 1,000 Population 65 Years and Over
	Facilities	Units	Facilities	Units	Facilities	Units	
Fort McMurray	1	42	1	40	2	82	48
Grande Prairie	18	539	2	110	20	649	144
Medicine Hat	18	1,089	7	450	25	1,539	137
Edmonton	221	8,496	27	4,020	248	12,516	111

Source: Alberta Health 2019, Statistics Canada 2016.

INDICATOR DEFINITION: This indicator presents the number of facilities and number of units of both public and private assisted living facilities in Fort McMurray and select comparator communities in 2018. Facilities are presented in two categories: supportive living accommodations which offer a relatively lower level of medical care and support; and, long-term care accommodations which offer a relatively higher level of medical care and support. To facilitate a comparison between comparator communities, the total units (both supportive living and long-term care) per 1,000 population 65 years and over is presented in the last column of the table.

KEY FINDINGS:

Fort McMurray has the lowest total units per 1,000 population 65 years and over out of all the selected comparator communities. This means that some prospective assisted living tenants living in Fort McMurray might need to access supportive living or long-term care outside of the community.

UNDERSTANDING THE RESULTS: The need for long-term care space has been a long-standing issue in the region. While independent living options were available, seniors requiring more supports including continuous medical care relied on the Fort McMurray hospital, which allocated 40 beds to long term care. A purpose-built continuing care facility for Fort McMurray, with both supportive living and long-term care, is nearing completion and is set to open in the fall of 2019. The Willow Square Continuing Care Centre will offer 144 beds, an initial 36 of which will be used for long-term and palliative care, and an initial 72 of which will be used for supportive living. The former long-term care unit space at the Northern Lights Regional Health Centre will be repurposed for other community health needs (AHS 2019). The addition of the Willow Square Continuing Care Centre units will increase the total units per 1,000 population 65 years and over to roughly 84, well above current levels but still below other comparator communities.

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