

Housing Needs Assessment

Greater Sudbury

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Preface

[Canada's Housing Plan](#) and [Budget 2024](#) both signaled the Government of Canada's intent to use Housing Needs Assessments (HNAs) as a key tool in its evidence-based long-term approach to addressing housing needs across the country. This includes the renewal of the Canada Community-Building Fund and the previously announced permanent transit funding.

As the federal government strives to become a more informed investor, evidence-based tools that provide a clear assessment of local needs and gaps will be required to inform decision making. HNAs will help all levels of government understand the local housing needs of communities - how they may relate to infrastructure priorities - by providing the data necessary to determine what kind of housing needs to be built and where. The intent is to promote systematic planning of infrastructure that takes into consideration current and future housing needs.

Funding Requirement

Under the Housing Accelerator Fund, the Government of Canada currently requires funding recipients to complete an HNA by year 3 of the program, if one has not already been completed within two years of the 2022 federal budget announcement (April 7, 2022).

Going forward, HNAs will be required for:

- Communities with a population of 30,000 and over receiving funding through the Canada Community-Building Fund;
- Communities with a population of 30,000 and over receiving funding through permanent transit funding; and,
- Future federal infrastructure funding applicants as required.

Once an HNA has been completed as a federal program requirement, a community will not be required to complete a new one for other Housing, Infrastructure and Communities Canada programs, other than to update it every five years.

Purpose

When done properly and regularly, an HNA will allow a community to answer fundamental questions such as:

- Where does the greatest housing need exist in our community?
- How can we set meaningful housing targets and measure progress to support the right kind of housing for all residents?
- How much housing, which size and at what price point do we need to ensure that all current and future households can live in suitable, adequate and affordable housing?

HNAs will allow all levels of government (federal, provincial/territorial and municipal) to use this evidence base to inform their investments in enabling and supportive infrastructure as well as guide their policy and regulatory decision-making. HNAs as a tool can help communities plan for and build housing more effectively to address the needs of their residents and instill transparency and accountability across the board.

This HNA template has been informed by best practices from jurisdictions across Canada, consultations with experts, and engagements with provinces and territories. These include the City of Vancouver's [*Housing Needs Report*](#) and the City of Edmonton's [*Affordable Housing Needs Assessment*](#) (for the affordable housing side of needs assessments), as well as the Housing Research Collaborative at the University of British Columbia which brought together a national network of researchers and experts to develop the Housing Assessment Resource Tool (HART). The HART project provides formatted data from Statistics Canada on key housing indices such as core housing need for a wide variety of jurisdictions and geographic levels.

Based on these best practices, this guidance document includes the following necessary information, explained in more detail below.

1. Development and use of Housing Needs Assessments
2. Community profiles and trends
3. Household profiles and economic characteristics
4. Priority groups
5. Housing profiles
6. Projected housing needs and next steps

Communities completing an HNA as a requirement for federal infrastructure programming will be expected to complete all sections outlined in this template. Communities may use a previously completed HNA if an updated version is available; however, communities would be expected to address any gaps related to any of the sections of the guidance document – both qualitative and quantitative – between their existing HNA and this federal template. Additional details about the timelines for completion and submission of HNAs will be provided with specific infrastructure funding programs (e.g. Canada Community-Building Fund).

While responding to the written questions, please use as much space as required.

1. Methodology

In this section, applicants should outline the research methodology used to inform the completion of the assessment, where the methodology is derived from, any assumptions used, and any necessary justification. While different assessments may incorporate unique methodological elements or considerations depending on context, the following methods should generally be outlined:

- **Quantitative research** such as economic data, population and household forecasts; and,
- **Qualitative research** such as interviews, policy analysis and stakeholder engagement.

Both qualitative and quantitative aspects of this guidance document are equally important.

Communities will be required to engage with key stakeholders in the housing sector, including non-profit housing providers, developers, and public entities, as well as those with specific lived experiences, to develop a comprehensive Housing Needs Assessment (HNA). This section should include what forms of engagement were conducted, with whom, how learnings were incorporated into or informed the HNA's findings, and what engagement opportunities may exist to share findings with the community.

To the extent possible, publicly available data from the following sources will be prepopulated to facilitate automated completion of the quantitative components of the assessments:

- [Statistics Canada Census Data](#)
- [CMHC Housing Market Information Portal](#)
- [Statistics Canada Housing Statistics Dashboard](#)
- [CMHC Demographic Projections: Housing Market Insights, June 2022](#)
- [CMHC Proximity Measures Database](#)
- [Housing Assessment Resource Tool Dashboard](#)
- [Canadian Housing Evidence Collaborative – Housing Intelligence Platform](#)

In addition to this data, communities are required to incorporate internal and non-public facing, non-confidential data, into their HNAs in order to more fully capture local contexts and realities as needed.

Data fields highlighted in yellow identify where municipalities will have to source the data.

If this data is unavailable at the time of completion of the first HNA, communities are expected to collect these data points for future iterations. Other fields will be pre-populated. Fields marked with an asterisk (*) indicate data points which are unavailable from the source or suppressed due to low counts.

Please provide data from the latest census except where otherwise indicated.

1.1 Please provide an overview of the methodology and assumptions used to develop this Housing Needs Assessment, using the guidelines above. This should include both quantitative and qualitative methods. Please also identify the publicly available data sources used to complete this assessment beyond the sources listed above, if applicable.

The data used in this Housing Needs Assessment uses sources from all of the items listed above in addition to real estate data from local real estate boards, MLS, Geowarehouse, and primary research collected through surveys of rental buildings and new housing developments.

The Assessment also relies on information and data provided directly by the City (e.g., subsidized housing waitlist data, demolition permit data), information found in City reports and other publications (e.g., Housing Supply Strategy, Housing and Homelessness Plan, Roadmap to End Homelessness, Social Housing Revitalization Plan, City's incentive program for downtown investment and affordable housing, City's Growth projections, and others.), and statistics posted by Invest Sudbury and Workforce Planning for Sudbury & Manitoulin.

Qualitative information collected through interviews and consultation are also utilized, which is expanded on further in 1.2 and 1.3 to follow.

1.2 Please provide an overview of the methodology and assumptions used to engage with stakeholder groups, e.g. non-profit housing organizations, in the development of this Housing Needs Assessment. This should include qualitative and quantitative methods. Please provide a description of who was engaged, the type of engagement that took place, and the nature of the engagement (e.g. interviews, consultations)

Housing Supply Strategy

Consultation for the Housing Supply Strategy employed both qualitative and quantitative methods and took place in 2 phases (seeking input on the development of the plan, seeking input on the draft plan). The following methods were utilized to gather this input:

Stakeholder Group Engagement

- Housing First Steering Committee (comprised of leadership and management staff from agencies that are service providers or stakeholders within the housing and homelessness response system in the City of Greater Sudbury).

- Development Liaison Advisory Committee (comprised of local professionals in the development community, including Engineering/Planning Firms, developers, and real estate agents)
- Sudbury Local Immigration Pilot (SLIP) – Housing Sub-Committee (comprised of representatives from 3 post-secondary institutions (Laurentian University, College Boreal and Cambrian College), local real estate professionals, Science North and the United Way. The sub-committee also works with the Northern Policy Institute.

Online Survey

- During Phase 1 development of the HS Strategy, an on-line survey focused on the proposed content of the HS Strategy, opportunities and barriers to increase housing supply, roles of the City and development community in housing supply and the type of housing most needed. 409 individual participants visited the page at least once, with 240 visiting multiple project pages or downloading related documents. The Over To You Survey was completed by 92 engaged visitors who provided detailed feedback on the proposed strategy.
- During Phase 2 Consultation, a draft of the Housing Supply Strategy was posted on the Over To You website and the public was able to provide written feedback. Over 600 individuals visited the page at least once, with 15 guests contributing comments on the draft Strategy. Comments were considered and informed the final Housing Supply Strategy where appropriate.

Oracle Poll phone survey

- The Oracle Poll surveyed 600 respondents, with a phone survey focused on housing needs and demand, with the goal of confirming trends projected through recent studies and determining factors that most influence those preferences to inform policies and incentives.

Virtual Open House

- A virtual Open House was held in February of 2024 to seek input on the plan. Twelve (12) members of the public attended the virtual consultation. A video of the consultation session, which included a presentation and Q&A was posted on the Housing Supply Strategy Over To You page to be provide access to the materials for interested parties that were not able to attend the session.

Roadmap to End Homelessness

The City of Greater Sudbury released the Roadmap to End Homelessness, as the City's official strategy to address, prevent and end homelessness by 2030. The Roadmap to End Homelessness includes 26 action items to reach a functional end to homelessness in Greater Sudbury, including investments in supportive, deep-core, and affordable housing with associated targets. The following entities participated in a community consultation with an independent consultant, retained by the City to inform the development of the strategy:

- Canadian Mental Health Association – Sudbury/Manitoulin,
- Centre de Sante Communautaire du Grand Sudbury,
- Community Builders North,
- Elgin Street Mission,
- Greater Sudbury Housing Corporation,
- Greater Sudbury Police Services,
- Health Sciences North,
- Infrastructure Canada,
- Kina Gbezhgomi Child and Family Services,
- Monarch Recovery Services,
- N'Swakamok Native Friendship Centre,
- Northern Initiative for Social Action,
- Ontario Aboriginal Housing Services,
- Salvation Army – Cedar Place,
- Samaritan Centre,
- Sudbury Action Centre for Youth,
- United Way North East,
- YMCA Employment and Immigration Services,
- YWCA – Genevra House and
- people with lived and living experience of homelessness in Greater Sudbury

BuildingIN

A series of 3 virtual consultation sessions were held in late 2024 and early 2025 for the BuildingIN Project which helps Canadian municipalities address the housing crisis by enabling multi-unit low-rise infill. The consultation workshops engaged municipal planners, industry leaders and priority audiences through exploring simulated outcomes of policy decisions, understanding cause and effect and design strategies that balance housing needs with community expectations.

Planned Consultations

One of the recommendations of the Housing Supply Strategy was the development of the Education and Outreach Strategy. The strategy will be developed in alignment with similar recommendations from the Roadmap to End Homelessness. The strategy will be designed to inform and engage a range of community partners on recent policy updates, initiatives underway, funding opportunities and resources available. The strategy will demonstrate diversity, equity and inclusion principles with the goal of building awareness and capacity of all community partners. An External Advisory Panel will also be formed. The membership of the panel will include members of the public.

Housing and Homelessness Plan

Greater Sudbury updated their Housing and Homelessness Plan in 2019, which also included significant consultation efforts with key stakeholders (e.g., shelters, non-profits, housing operators), vulnerable households and those with lived experiences, as well as the public. This Plan provides an assessment of current and future housing need in the

local area, objectives and targets related to local housing and homelessness issues, and a description of measures proposed to meet the objectives and targets, as well as the methods to measure progress.

Community Housing Revitalization Plan

The City undertook a Social Housing Revitalization Plan in 2019 designed to review the City's current community housing portfolio, identify key housing needs, current challenges facing the portfolio, and identified several actions the City can take to revitalize current assets, realign the portfolio with current and projected demand, and ultimately strategies to redevelop sites and expand the social and affordable housing stock in the City.

This work involved significant consultation with the public, tenant groups, non-profits, and other groups.

Downtown Master Plan

The City of Sudbury is currently preparing an updated Downtown Master Plan that will help guide development and investment in the downtown. While currently underway, this work has involved consultation with the public, landowners, the Business Improvement Area (BIA), developers, non-profits, shelters, and other groups to dissect current economic and social challenges in the downtown and recommend solutions.

All of these consultation efforts and information have been incorporated into the preparation of this HNA.

1.3 Please provide an overview of the methodology and assumptions used to conduct engagement with the priority groups (identified in Section 4) in the development of this Housing Needs Assessment. This should include qualitative and quantitative methods. Please provide a description of who was engaged, the type of engagement that took place, and the nature of the engagement (e.g. interviews, consultations). If a private individual has been engaged, please anonymize and remove any identifying features from the narrative.

Through the consultations described in **Section 1.2**, several of the priority groups identified in **Section 4** were consulted. Information on the Housing Supply Strategy project and invitation to participate were sent to the following groups:

- Older adults Panel (13),
- Community Safety & Well Being Panel (13),
- Mental Health and Addictions Systems Priority Committee (78),
- Greater Sudbury Seniors Community Network (198),
- Age Friendly Working Group (8),
- Community Action Networks (CANs),

- Residents at large (300+),
- Indigenous Partners (12 Urban Indigenous Organizations and both First Nations (Atikameksheng Anishnawbek and Wahnapiatae First Nation),
- Homelessness Network, Arts Community, Violence Threat Assessment Steering Committee (30 Partners),
- Youth Organizations (15),
- 4 School Boards, 3 Post Secondary Institutions (Laurentian University, College Boreal and Cambrian College),
- Nigerian Association,
- Sudbury Multicultural Folk Arts Association,
- Older Adult Centres (14),
- Greater Sudbury Police Service (GSPS),
- Public Health Sudbury and District (PHSD),
- Centre de Sante Communautaire du Grand Sudbury,
- Canadian Mental Health Association – Sudbury/Manitoulin (CMHA)
- Centre for Addiction and Mental Health (CAMH)
- Reseau Access Network,
- Greater Sudbury Housing Corporation (GSHC) and tenants,
- Developers (e.g., Dalron, SLV, Zullich, etc.),
- Sudbury Chamber of Commerce,
- JL Richards,
- Belanger Architects,
- Various healthcare professionals, including local doctors and psychiatrists, City of Lakes Family Health Team, Sudbury & District Nurse Practitioners Clinics, Health Sciences North (HSN), Emergency Department, Mental health Department, Long Term Care Homes, Assisted Living Homes, Chartwell, Meadowbrook, NOSM, Suicide Safer Network.
- Various charitable, not-for-profit organization, such as shelters, United Way North East Ontario, Volunteer Sudbury,
- MPPs & MPs.

The above consultation efforts have all influenced the City's various housing plans and strategies, and have been incorporated into the findings and discussion in this HNA.

2. Community Profile and Trends

In this section, communities are expected to tell their housing story through the lenses of their community and household profiles using both qualitative and quantitative data. Communities may structure this information in different ways, including by providing past benchmarks, present figures, future projections, and current growth rates at a local, regional and provincial level.

2.1 Please detail the existing municipal housing policy and regulatory context, such as approved housing strategies, action plans and policies within Official Community Plans.

The City of Greater Sudbury is a single-tier municipality and also Service Manager for the City.

Official Plan

The City's Official Plan highlights its land use planning vision, objectives, and policies around housing in Chapter 17. These have been designed to improve the availability of housing for all current and future residents of Greater Sudbury. Diversity in the housing supply is achieved by providing a range of housing types, maintaining a balanced mix of ownership and rental housing, and addressing housing requirements for low-income groups and people with special needs. Policies in this Plan ensure that a variety of dwelling types are permitted subject to regulations contained in the Zoning By-law.

Key policies include:

- Promoting housing diversity in the mix of tenures, housing types, unit types, and accessibility features. This includes supporting housing development that is designed to contribute to complete community, such as through integrating a mix of uses, locating near transit development, and providing a mix of housing as noted above.
- Promoting residential development in the Downtown (to support its revitalization) and along main commercial nodes (to promote residential intensification and urban development).
- Maintaining the quality of existing housing stock and ensuring acceptable health and safety to all residents living in this stock. This is to be achieved by enforcing property maintenance standards, and with assistance from federal and provincial funding programs.
- Support the expansion and maintenance of supportive housing, transitional housing, student housing, and shelters, as well as other temporary housing facilities in collaboration with relevant institutions and housing providers.
- Protecting existing rental housing stock by preventing rental conversions where the specific unit type proposed for conversion is at risk of falling below a 2% vacancy rate in the City and the specific local housing market zone. Moreover,

where conversion is allowed, and where units proposed for conversion have a market rent of 90% AMR or below, that the City may consider:

- Requiring replacement units to be provided with rents at no more than 90% of AMR for 10 years,
- Requiring the units to be sold as affordable ownership units at 90% of the average resale price, and that the tenant of unit be given first right of refusal to purchase the units,
- Requiring the developer to make a contribution to the City's Affordable Housing Fund at a percentage of an average housing price for a similar unit in the market area.

The Official Plan also notes programs operated by the City to support these policies, including partnerships with public, private, and non-profit sectors to develop housing and support service programs, periodic monitoring of housing market conditions, housing targets and policies, and the supply of available lands for development.

Housing Supply Strategy

The City's Housing Supply Strategy, developed in December 2024, works towards ensuring current and future residents have access to attainable housing options that meet the needs at all stages of life. The Strategy established a governance model to encourage housing supply growth through policy amendments, process improvements, incentives, education, outreach, and monitoring. This contains 17 Key Focus Areas, including:

- Housing Access, particularly when it comes to Housing Stability and Community Housing,
- As-of-right Policies for secondary dwelling units and mixed-use development,
- Strategic plans for nodes and corridors, for the Downtown, and for Residential Land,
- Incentives for development, as provided through Community Improvement Plans and Land Banking,
- Development Charges,
- Strategic Opportunities and Collaboration,
- Education and Outreach.

Each focus area is tied to goals and actions, as well as ongoing activities that support these focus areas. Notable actions to be implemented or are currently underway include:

- Reviewing options for Zoning By-law updates to allow for up to 4 additional units.
- Developing a policy framework and Zoning By-law amendments to allow for low- and medium-density residential units as-of-right on institutionally zoned land.

- Participating in the BuildingIN project to help increase multi-unit, low-rise infill that works at scale to meet housing targets.
- Identifying and rezoning surplus municipal lands for land banking.
- Completing the construction of a 40-unit and 14-unit affordable housing developments funded through the Federal government's Rapid Housing Initiative and Federal Lands Initiative respectively.
- Providing a consolidated quarterly housing data report, including progress towards meeting housing targets.

Some actions that have been completed include:

- Updating the Official Plan to allow for additional secondary dwelling units as-of-right.
- Approving Official Plan amendments for corridors to support medium- and high-density uses at transit supportive densities as-of-right in compact, pedestrian-friendly built forms.
- Developing a Community Improvement Program to incentivize multi-residential units along major corridors.

This document is to be updated regularly. The consultation that was conducted towards developing this Strategy is noted in **Section 1.2**.

Roadmap to End Homelessness

The Roadmap to End Homelessness outlines the City's strategy towards ending homelessness by 2030. The number of actively homeless individuals in the City's By-Name List has more than doubled between mid-2022 and late 2023 (**Figure 1**). Recommendations in the Roadmap are based on four pillars:

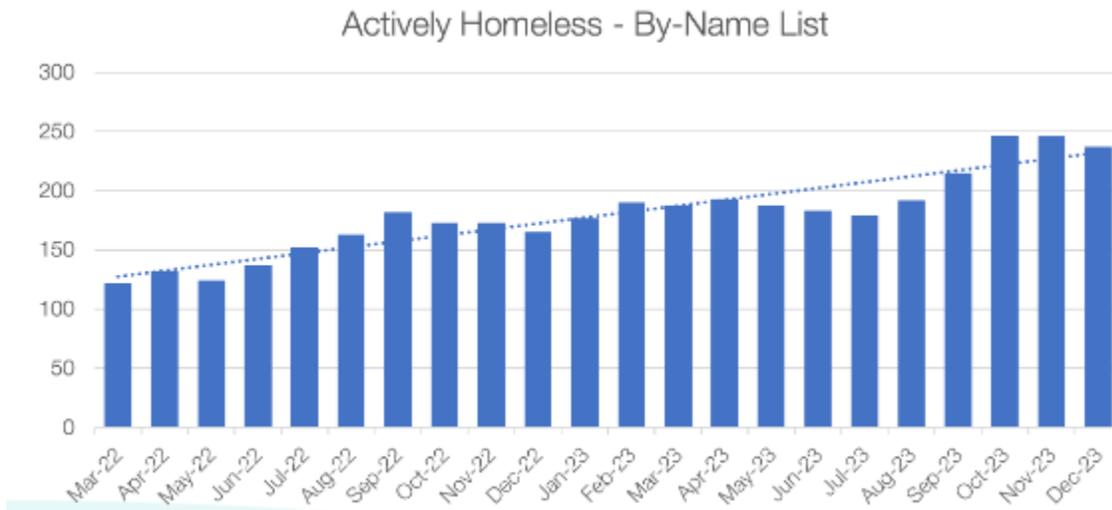
- Homelessness prevention, or ensuring that people have access to what they need in order to prevent homelessness from occurring in the first place, such as access to affordable housing and to appropriate emergency supports where needed. Recommendations here include the development of deep-core and affordable housing with additional strategies to increase housing affordability, establishing a rent bank program, partnerships with local non-profits to support eviction prevention, and developing a communication strategy to address NIMBY-ism.
- Rapid re-housing/diversion, or ensuring that homelessness is as brief as possible. Recommendations include transitioning to a 24-hour emergency shelter/transitional housing model and establishing support programs such as an identification bank and a formalized rapid re-housing program.
- Supportive housing and wrap-around services, or ensuring that people who were homeless and are now housed have the resources to prevent re-entry into homelessness. Recommendations include additional supportive housing and

community programs, and the conversion of emergency shelter programs into transitional housing.

- System-level improvements, including the strengthening of existing services, increasing trauma-informed approaches in providing support services, and the development of strategies to support Indigenous healing and well-being among those at-risk of or experiencing homelessness.

This Roadmap estimates that roughly \$350 million is needed to functionally end homelessness in the City. This includes \$322 million in capital and start-up costs, \$13.6 million in annual operating costs, and \$11 million in annual additional rent supplements.

Figure 1



Source: Greater Sudbury's 2024 Roadmap to End Homelessness.

Housing and Homelessness Plan

The City developed a 10-Year (2013-2023) Housing and Homelessness Plan containing 7 priority areas:

- Improve housing options across the housing continuum;
- Improve housing access and affordability for low-income households;
- Strengthen approaches to preventing homelessness increase the diversity of emergency shelter options and support individuals with multiple barriers in obtaining and maintaining their housing;
- Additional supportive services coupled with permanent housing (both supportive housing and supports in private homes);
- Improve co-ordination, collaboration and partnerships among a broad range of stakeholders;
- Develop an Indigenous Housing and Homelessness Strategy in the Community; and

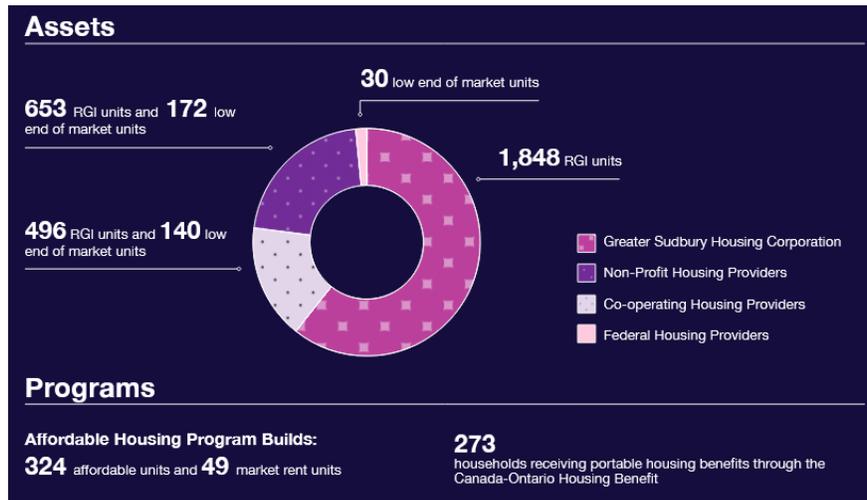
- Monitor and report on progress towards meeting the Housing and Homelessness Plan objectives and targets.

Annual and 5-year reports are published to discuss City actions that have been taken or are planned towards addressing these priority areas. The following figures show the City's achievements in various housing metrics and outcomes.

Figure 2



Figure 3



Source: Housing Services Report Card 2023

Ontario's Ministry of Municipal Affairs and Housing provided \$4.2 million in funding in support of the Plan for the 2024-2025 period

Community Improvement Plans

The City also funds incentives through Community Improvement Plans and currently have Plans in place to encourage residential development within the City's Strategic Core Areas that includes the Downtown, an incentive program to encourage affordable housing, and incentives to remediate and development of brownfields.

2.2 Community Profile

2.2.1 Population		
Characteristic	Data	Value
Total Population (Number)	2016	161531
	2021	166004
Population Growth (Number)	Total	4473
	Percentage	2.8
Age (Years)	Average	42.9
	Median	43.2
Age Distribution	0 - 14 years	25625
	15 - 64 years	106600
	65+ years	33775
Mobility	Non-movers	144655
	Non-migrants	12435
	Migrants	4520

2.2.2 Demographic Information		
Characteristic	Data	Value
Immigrants	Total	9850
Non-Immigrants	Total	149620
Recent Immigrants (2016-2021)	Total	1635
Interprovincial migrants (2016-2021)	Total	2150

2.2.2 Demographic Information		
Characteristic	Data	Value
Indigenous Identity	Total	17930

2.3 How have population changes in your community as illustrated by the above data impacted your housing market?

Prior to 2015, Greater Sudbury had experienced cycles of population growth and decline (**Table 1 & Figure 4**). Since then, growth has been consistent and has increasingly kept pace with provincial growth levels – particularly over the last four years. This is resulting largely from the influx of international students and skilled workers (noted in the discussion below).

Key factors influencing population growth and housing demand include:

- As the City grows, aging continues to be a key factor in demographic trends (**Table 1**). Despite a boom in international students (discussed below), the overall population saw a decline in younger age groups, with only the student group (those aged 20 to 24) seeing a modest net increase of roughly 600 individuals. Demographic groups aged 55 and above saw the largest increases at roughly 20,500 persons between 2001 and 2021. These are most likely tied to local residents aging, rather than from immigrants or non-permanent residents. An aging population will also drive demand for both condominium and rental apartments as they downsize and seek maintenance-free housing. This will also drive demand for affordable housing for those on fixed incomes, and in turn also drive demand for senior and long-term care homes.
- The average household size is decreasing due to an aging population, families delaying having children, couples having fewer children, and other similar circumstances. Declining household sizes will drive demand for smaller housing units, both for downsizing empty nesters and young couples with no or just one child.
- A sudden increase in immigration following 2020 (**Figure 6**) is likely tied to federal policies which supported the influx of migrants to support the national economic recovery. This may normalize following the government’s reversal on this immigration policy due to skyrocketing housing demand and unaffordability.
- The massive influx of non-permanent residents (**Figure 7**) can be attributed largely to two circumstances:
 - o The launch of the Rural and Northern Immigration Pilot (RNIP) program. This program sought to alleviate skilled labour shortages in the City’s key industries. Between 2019 and 2024, the RNIP program brought in 1,400 approved candidates to work in key industries, as well as a total of 2,700 new residents. While this program has been discontinued, Greater Sudbury was selected to participate in the Rural Community Immigration Pilot (RCIP)

and Francophone Community Immigration Pilot (FCIP) in January 2025. These fill in a similar role as the RNIP, this time targeting rural and Francophone minority communities.

- The expansion of international student uptake in local post-secondary institutions (e.g. Cambrian College, Laurentian University). The spike results from multiple policy decisions, such as the freeze on domestic tuition in 2018, government programs which encourage international students to Ontario colleges, and the enrollment impacts of the COVID-19 pandemic. This resulted in greater housing demand, particularly for rental housing, by incoming students. However, this is likely to normalize as the federal cap on international students starts impacting the number of students local colleges and universities can attract.
- While mining and related industries can be volatile, being highly dependent on demand and investment, these are currently supporting growth. Both private and public (all levels of government) investment is being dedicated towards new mining projects and processing plants. This will allow the industry to sustain economic growth and employment, and support the growth – or at least mitigate the decline – of its working age population.
- Greater Sudbury’s colder climate is not as likely to attract residents as cities located in warmer areas. Continued movement to the city is dependent largely on sustained investment into its key industries, as well as more affordable housing relative to other municipalities further south.
- The City of Greater Sudbury is the regional service centre for much of Northeastern Ontario and is the largest city in Northern Ontario, allowing it to be more diverse and accommodate modest growth that is expected to continue (relative to flat or negative growth experienced in other northern communities).

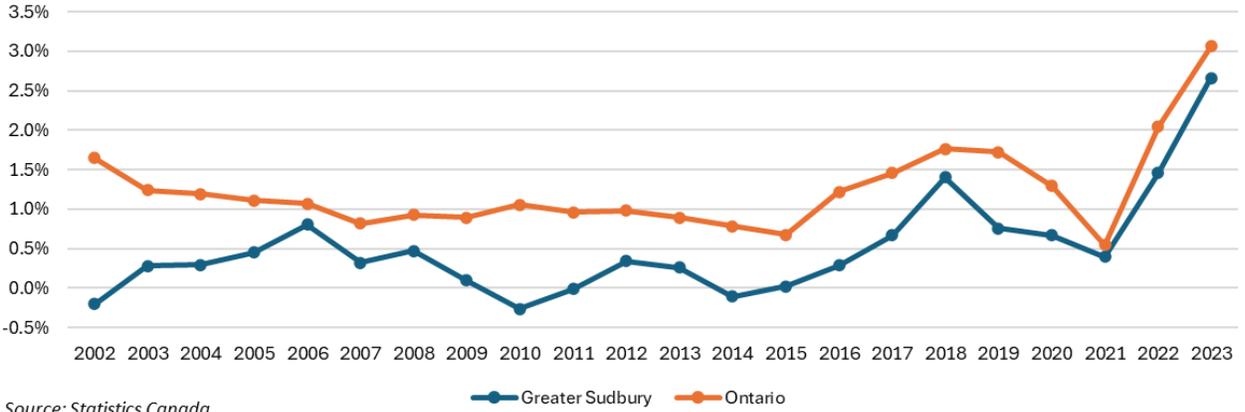
Table 1

Population Change Across Age Groups								
Age Group	Greater Sudbury				Ontario			
	2001		2021		2001		2021	
0-19 (Children)	39,225	25%	34,450	21%	3,002,170	26%	3,053,250	21%
20-24 (Students/New Grads)	9,955	6%	10,475	6%	718,420	6%	895,600	6%
25-44 (Young Adults)	44,520	29%	41,505	25%	3,518,010	31%	3,794,800	27%
45-54 (Middle-Aged Adults)	23,830	15%	20,770	13%	1,635,280	14%	1,835,850	13%
55-64 (Young Downsizers)	16,180	10%	25,020	15%	1,064,000	9%	2,006,735	14%
65-74 (Mature Downsizers)	12,505	8%	18,940	11%	818,165	7%	1,504,495	11%
75+ (Older Adults)	8,990	6%	14,835	9%	654,005	6%	1,133,215	8%
Total Population	155,205	100%	165,995	100%	11,410,050	100%	14,223,945	100%

Source: Statistics Canada.

Figure 4

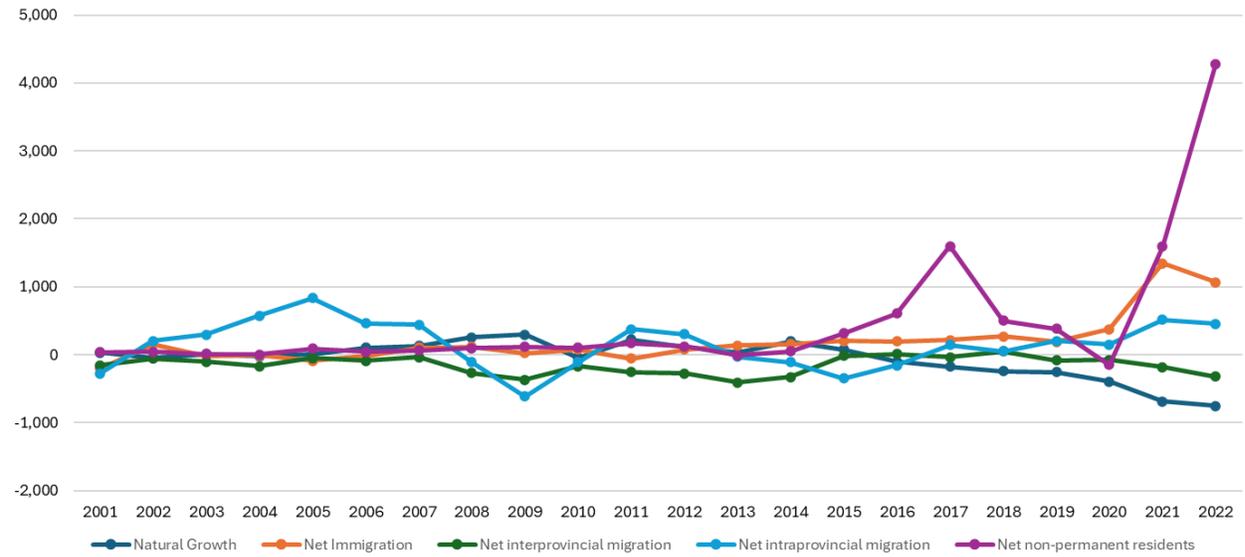
Annual Population Change Estimate (%)



Source: Statistics Canada.

Figure 5

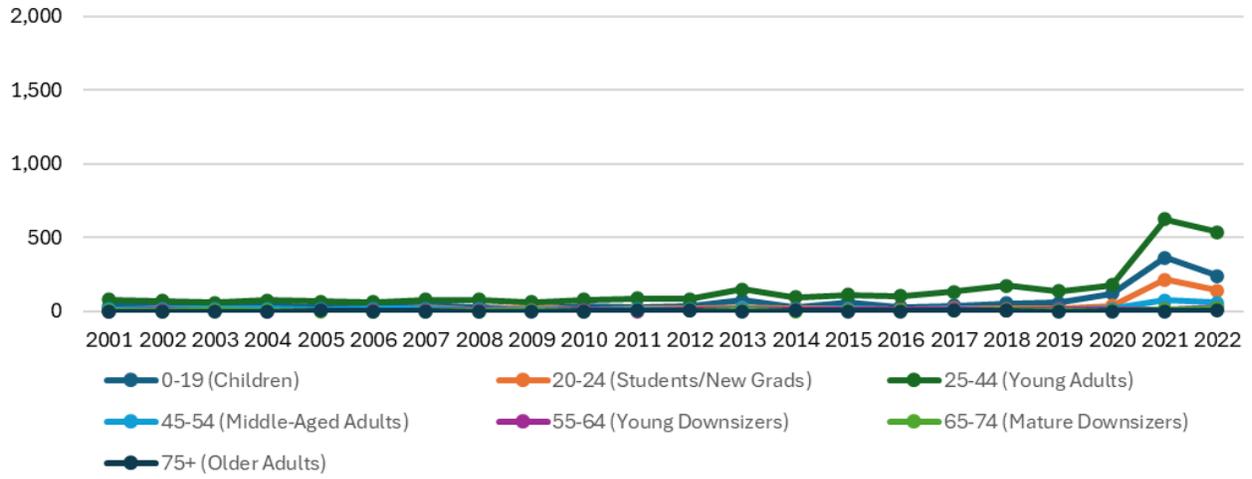
Components of Population Growth, Greater Sudbury



Source: CMHC Housing Portal.

Figure 6

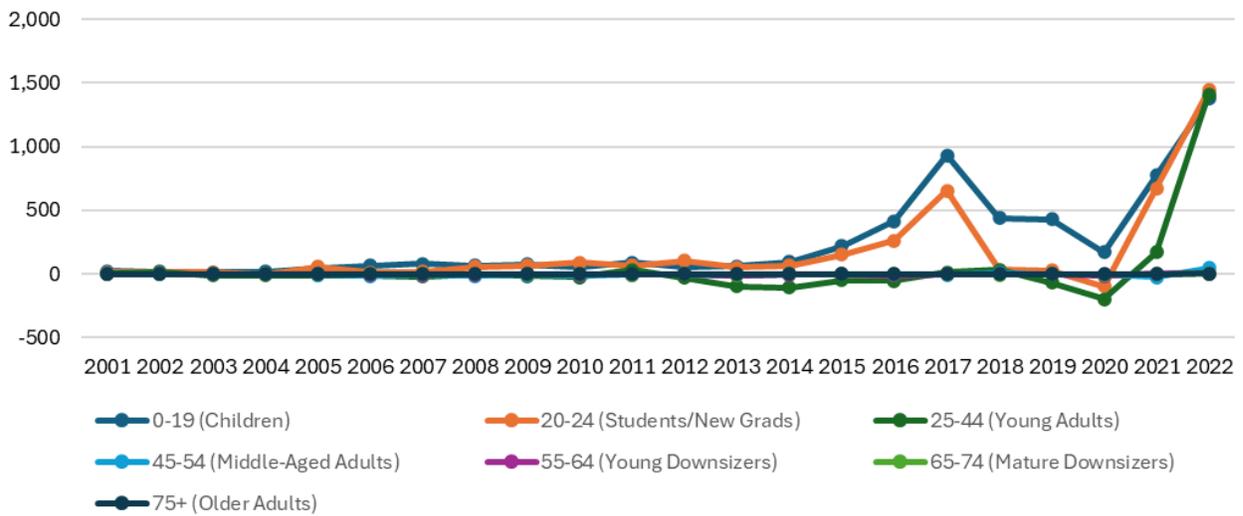
Immigration by Age Group, Greater Sudbury



Source: CMHC Housing Portal.

Figure 7

Net Non-Permanent Resident Growth by Age Group, Greater Sudbury



Source: CMHC Housing Portal.

3. Household Profiles and Economic Characteristics

This section should provide a general overview of income, housing and economic characteristics of the community being studied. Understanding this data will make it easier to observe the incidence of housing need among different socio-economic groups within the community. Income categories could be used for this analysis and can be completed in accordance with the HART methodology and CMHC data.

Area Median Household Income (AMHI) can be used as the primary basis for determining income brackets (as a percentage of AMHI) and corresponding housing cost ceilings.

This section should also outline the percentage of households that currently fall into each of the income categories previously established. This will allow a better understanding of how municipalities compare to Canadian averages, and the proportion of households that fall into each household income category. This will also allow for a better understanding of drop-off levels between total households and the number of units required to meet anticipated need or demand in each category. Housing tenures allow for the comparison of renter and owner-occupied households experiences and is important for understanding a community's housing context.

Using a stratified, income-based approach to assessing current housing needs can enable communities to target new housing development in a broader and more inclusive and equitable way, resulting in housing that can respond to specific households in core housing need. This is shown in the next section.

3.1 Household Profiles

3.1.1 Household Income and Profile		
Characteristic	Data	Value
Total number of households	2016	69152
	2021	71476
Household income (Canadian dollars per year)	Average	103400
	Median	84000
Tenant Household Income (Canadian dollars per year, only available at CMA or CA Level) - Data from Greater Sudbury (CMA), Ont.	Average	60100
	Median	50400
Owner household income (Canadian dollars per year, only available at CMA or CA Level) - Data from Greater Sudbury (CMA), Ont.	Average	126200
	Median	110000
Average household size (Number of members)	Total	2.3
Breakdown of household by size (Number of households)	Total	71475
	1 person	22040
	2 persons	25990
	3 persons	10510
	4 persons	8890
	5 or more persons	4050
Tenant households (Number of households)	Total	25400
	Percentage	35.5
	Total	46075

3.1.1 Household Income and Profile		
Characteristic	Data	Value
Owner households (Number of households)	Percentage	64.5
Percentage of tenant households in subsidized housing	Percentage	17.6
Households within 800m of a higher-order/high frequency transit stop or station (#)	Total	0 – No high order transit in Sudbury currently.
Number of one-parent families	Total	8555
	Percentage	18.1
Number of one-parent families in which the parent is a woman+	Total	6480
Number of one-parent families in which the parent is a man+	Total	2070
Number of households by Income Category	Very Low (up to 20% below Area Median Household Income (AMHI))	2625
	Low (21% – 50% AMHI)	12450
	Moderate (51 – 80% AMHI)	13345
	Median (81% - 120% AMHI)	14320
	High (>120% AMHI)	28420

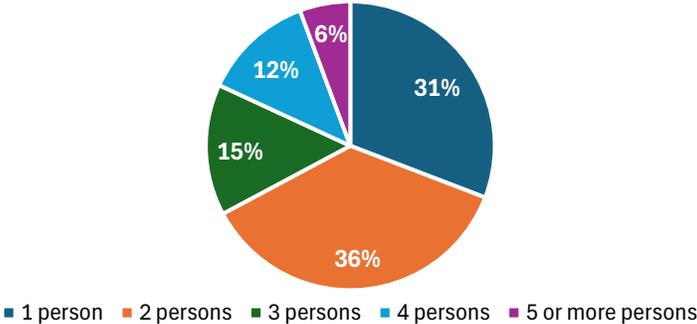
3.2 Please provide context to the data above to situate it within your municipality. For example, is there a significant number of one-parent families? Are owner household incomes far surpassing tenant household incomes?

Households by Size

A plurality of households are two-person households (36%), followed by one-person households (31%).

Figure 8

Households by Size



Household Incomes by Tenure

Except for the significant increase in renter household incomes between 2016 and 2021, owner and tenant households have experienced relatively similar income increases since 2006 (Table 2). This income growth is likely tied to the significant increase in households earning over \$100,000 (Figure 9).

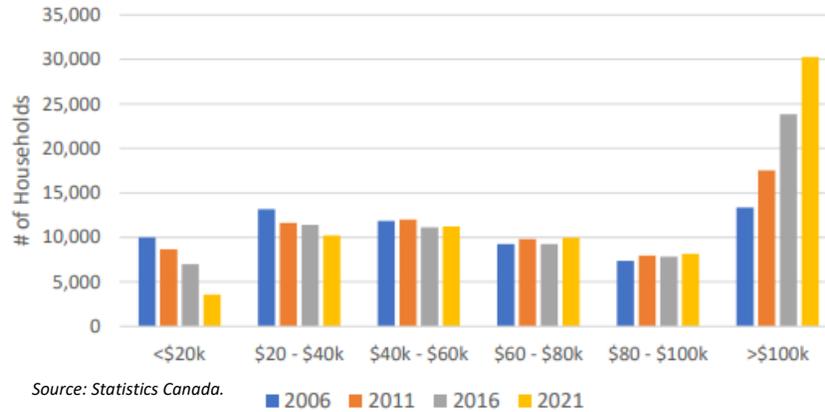
Table 2

Average Household Income Before Taxes, Greater Sudbury			
Census Year	Income	% Change	% Change ('06 - '21)
Owner Households			
2006	\$84,081	-	51.5%
2011	\$93,408	11.1%	
2016	\$112,037	19.9%	
2021	\$127,400	13.7%	
Renter Households			
2006	\$35,774	-	69.4%
2011	\$41,484	16.0%	
2016	\$46,886	13.0%	
2021	\$60,600	29.2%	

Source: Statistics Canada

Figure 9

**Income Distribution, All Households
Greater Sudbury (Statistics Canada)**



Household by Tenure

Renter households have increased faster than owner households since 2006, growing by about 4,000 households compared to 2,000 for owner households.

Table 3

Households by Tenure, Greater Sudbury				
Household Tenure	2006		2021	
Owner	43,490	67%	46,010	64%
Renter	21,450	33%	25,400	36%
Total	64,940	100%	71,410	100%

Source: StatsCan

One-Parent Families

Male one-parent families have increased faster than female one-parent families, seeing an increase of 600 households compared to 100 for female one-parent households. One-parent households' share of all families in Greater Sudbury has remained roughly the same since 2006.

Table 4

One-Parent Families by Gender of Parent, Greater Sudbury				
Gender of Parent	2006		2021	
Male	1,445	19%	2,070	24%
Female	6,350	81%	6,480	76%
Total	7,795	100%	8,550	100%
Share of Total Census Families	17%		18%	

Source: Statistics Canada.

Average Household Size

Average household size has declined slightly since 2006. This is likely due to the decline of couple households and the substantial increase in one-person households over this period and the general aging of the population discussed earlier.

Table 5

Total Population and Households, Greater Sudbury				
	2006		2021	
Total Population	157,857		161,531	
Total Households	64,940		71,475	
Average Household Size	2.4		2.3	
Household Type				
Couple Households	37,665	58%	35,850	50%
Couples with children	17,485	27%	16,480	23%
Couples without children	20,180	31%	19,375	27%
One-parent households	n/a*	-	7,015	10%
One-person households	17,515	27%	22,040	31%
Other Households (Other Non-Family, Multi-family, etc.)	9,760	15%	6,570	9%
Total Households	64,940	100%	71,475	100%
<i>Source: Statistics Canada.</i>				
<i>* - One-parent households are included in "Other Households".</i>				

Number of Households by Income Category

Looking at households by income category, high-income households form the largest share at just over 40% of all households. By contrast, low- and very low-income households formed 18% and 3% of all households respectively – consisting the lowest shares.

Table 6

2021 Income Categories and Affordable Shelter Costs, Greater Sudbury			
Income Category	% of Total HHs	Annual HH Income	Affordable Shelter Cost (2020 CAD\$)
Area Median Household Income		\$85,000	\$2,125
Very Low Income (20% or under of AMHI)	2.77%	<= \$17,000	<= \$425
Low Income (21% to 50% of AMHI)	17.51%	\$17,000 - \$42,500	\$425 - \$1,063
Moderate Income (51% to 80% of AMHI)	18.93%	\$42,500 - \$68,000	\$1,063 - \$1,700
Median Income (81% to 120% of AMHI)	20.36%	\$68,000 - \$102,000	\$1,700 - \$2,550
High Income (121% and more of AMHI)	40.43%	>= \$102,001	>= \$2,551
<i>Source: UBC HART.</i>			

3.3 Suppression of household formation (e.g., younger people living with their parents due to affordability pressures) and housing demand (e.g., “driving until you qualify”) can both indicate strained local housing market conditions. Please provide any data or information that speaks to how suppression of the formation of new households and suppression of housing demand has impacted your community since 2016, and how projected formation patterns are expected to be impacted over the next 5 to 10 years. Please indicate methods used to determine expected household formation, such as calculating headship rates broken down by specific age estimate impacts.¹

The primary maintainer is defined by Statistics Canada as the first person in the household identified as the one who pays the rent or the mortgage, or the taxes, or the bills for the dwelling.

The population forecast is translated into a forecast of households by distributing future population growth to areas that have the ability to accommodate different types of housing. The distribution method involves three steps:

- First, the population is translated into a forecast of households based on the age structure and headship rates forecast.
- Second, the household forecast is converted into a forecast of housing units by type based on unit type preferences by age of primary household maintainer. The 2021 age-specific household formation rates, as seen in **Table 7**, have been held constant to 2031 which is considered a conservative assumption given the gradual declines of the last 25 years.

Based on Census definitions, four group unit types are used: single-detached, semi-detached, townhouse and apartment. The new housing units are then allocated to the current housing base to provide a total housing forecast. The allocation is based on historical patterns, land-use policies, land available to support development, and the capacity of each area to accommodate the forecast growth. Key information used in this analysis is data on units approved for construction or under application review.

- Third, the forecast housing units by type are populated using an average household size by unit type. This is initially based on current average household sizes for each sub-municipal area. Household sizes are then forecast to change over time in line with anticipated changes in average household size; these changes have already been established in the household forecast.

¹ *We recognize that some municipalities may not have this data available at the time of completion, but encourage them to do their best in addressing this question. Municipalities will be expected to build this expertise in subsequent iterations of their Housing Needs Assessments.*

Table 7

City of Greater Sudbury, 2021			
Total - Age groups of primary household maintainer	Census Population	Total Households	Headship Rate
15 to 19 years	8,830	210	2.4%
20 to 24 years	10,475	2,530	24.2%
25 to 29 years	10,790	4,590	42.5%
30 to 34 years	10,310	5,280	51.2%
35 to 39 years	10,235	5,675	55.4%
40 to 44 years	10,190	5,695	55.9%
45 to 49 years	10,265	5,885	57.3%
50 to 54 years	10,530	5,985	56.8%
55 to 59 years	12,820	7,555	58.9%
60 to 64 years	12,225	7,155	58.5%
65 to 69 years	10,350	6,150	59.4%
70 to 74 years	8,605	5,460	63.5%
75 to 79 years	6,060	3,925	64.8%
80 to 84 years	4,360	2,840	65.1%
85 to 89 years	2,770	1,790	64.6%
90 years and over	4,420	795	18.0%
Total	143,235	71,520	49.9%

3.4 Economic Conditions

3.4.1 Economy and Labour Force		
Characteristic	Data	Value
Number of workers in the Labour Force	Total	84005
Number of workers by industry (Top 10 only)	Health care and social assistance	13060
	Retail trade	10015
	Mining, quarrying, and oil and gas extraction	7620
	Public administration	7545

3.4.1 Economy and Labour Force		
Characteristic	Data	Value
	Educational services	6780
	Construction	6465
	Accommodation and food services	4415
	Professional, scientific and technical services	4220
	Transportation and warehousing	3405
	Manufacturing	3380
Unemployment rate and participation rate (Percent)	Unemployment rate	10.4
	Participation rate	61.1
All classes of workers (Number)	Total	82110
Employees (Number)	Total	74920
Permanent position (Number)	Total	62975
Temporary position (Number)	Total	11945
Fixed term (1 year or more, Number)	Total	3655
Casual, seasonal or short-term position (less than 1 year, Number)	Total	8295
Self-employed (Number)	Total	7185
Number of commuters by commuting destination	Within census subdivision	49480
	To different census subdivision	0

3.4.1 Economy and Labour Force		
Characteristic	Data	Value
	To different census division	1510
	To another province/territory	160
Number of commuters by main mode of commuting for the employed labour force with a usual place of work or no fixed workplace address	Car, truck or van	54715
	Public transit	2515
	Walked	2075
	Bicycle	245
	Other method	1290

3.5 How have labour conditions (e.g., prevalence of precarious employment, temporary or seasonal workforces, reliance on sectors such as natural resources, agriculture, tourism, etc.) in your community impacted housing supply and demand?

As identified above, Greater Sudbury’s labour force is diversified, with key concentrations in health care, retail, industrial and mining, construction, education, and others. The vast majority of employees live and work within Sudbury, with most commuting by automobile given Sudbury’s largely auto-oriented built form and city structure. However, mining and related industries retain a significant portion of the local workforce and incomes, and are impacted by global and national economic volatility and investments. The growth of the service sector, primarily in healthcare and education, have encouraged migration into the municipality. This is also dependent on continued government investment, as well as the influx of domestic and international students. Population growth is tied mainly to the continued growth of these sectors into the future.

An Employment Land Strategy was put together by Hemson Consulting in 2022 for the City of Greater Sudbury. Within this were population and employment projections for 2046. As illustrated below, population and employment growth in the reference scenario projection is expected to be just over 6,800 and 6,300 respectively by 2046 (**Table 8**). This reflects assumptions about the City’s demographic and economic trajectory, namely continued outmigration of youth, mitigated by sustained investment in the key industries and some growth in service/administrative sector.

Employment projections across industries indicate that social services & health, food & accommodation, and transportation & warehousing are the likely strongest industries for employment growth, while retail, wholesale trade, and manufacturing are the likely weakest industries (**Table 9**). This reflects a continued shift towards more service-

oriented local economy, while maintaining a relatively large workforce in goods-producing industries such as mining, oil & gas.

Table 8

FORECAST POPULATION AND EMPLOYMENT BY SCENARIO						
Year	Population			Employment		
	Low	Reference	High	Low	Reference	High
2016	166,130	166,130	166,130	79,440	79,440	79,440
2021	167,130	167,800	168,720	80,570	80,970	81,520
2026	167,870	169,400	171,340	81,390	82,300	83,470
2031	167,320	170,400	174,210	80,960	82,810	85,080
2036	166,890	171,490	176,840	81,260	83,990	87,140
2041	166,180	172,000	179,200	81,590	84,970	89,160
2046	165,090	172,990	181,290	81,230	85,750	90,460
2016-2046	-1,040	6,860	15,160	1,790	6,310	11,020

Table 9

POPULATION AND EMPLOYMENT PROJECTIONS (2021-2046)					
Category	Change (2021-2046)			Share of EPOW	
	Reference Scenario	Low Scenario	High Scenario	2021	2046
Total Population (persons)	5,190	-2,040	12,570		
All Industries EPOW (jobs)	7,136	3,420	10,943	100.0%	100.0%
Agriculture, forestry	-46	-67	-24	0.5%	0.4%
Mining, oil and gas	452	28	892	8.2%	8.1%
Utilities	-89	-106	-72	0.6%	0.5%
Construction	453	278	633	4.5%	4.7%
Manufacturing	-387	-559	-210	4.3%	3.4%
Wholesale trade	-598	-665	-529	2.9%	1.9%
Retail trade	-693	-1,104	-274	13.2%	11.1%
Transportation, warehousing	837	677	1,001	3.4%	4.2%
Information, culture	-78	-120	-36	1.4%	1.1%
Finance, insurance, real estate, leasing	-65	-219	92	4.6%	4.1%
Professional, scientific, technical	525	326	728	5.1%	5.3%
Other business services	279	151	411	3.4%	3.4%
Education	852	493	1,220	9.3%	9.6%
Health, social services	3,630	3,035	4,236	16.4%	19.7%
Arts, entertainment, recreation	218	153	285	1.6%	1.7%
Accommodation, food	2,054	1,685	2,434	7.7%	9.7%
Other services	-48	-189	96	4.3%	3.8%
Government	-159	-376	60	8.5%	7.5%
<i>Note: "EPOW" = Employed by Place of Work</i>					

Overall, the City's employment market has not seen sizeable shifts or growth in recent years that would result in significant changes in pricing or availability, at least in isolation. Nor is the City's economy and job growth expected to increase substantially looking forward. Rather, the City's stable and diversifying employment base has created balance conditions for most of the City's owner and renter households.

Despite the above, it is acknowledged that home prices have increased and the rental market remains expensive with low availability (see discussion to follow). This has limited the availability of home that are suitable for lower income households. However, these conditions have less to do with changes in the City's employment base, with other factors having a larger contribution to current conditions (e.g., lack of rental housing overall, lack of new affordable and community housing, large growth in international students, and other considerations expanded on later in this HNA).

3.6 Households in Core Housing Need

A household is considered to be in core housing need if it meets two criteria:

1. A household is below one or more of the national adequacy, suitability and affordability standards; and,
2. The household would have to spend 30% or more of its before-tax household income to access local housing that meets all three standards.

Housing is considered to be affordable when housing costs less than 30% of before-tax household income. Housing is considered to be suitable when there are enough bedrooms for the size and make-up of the household. Housing is considered to be adequate when it is not in need of major repairs. Determining the percentage of core housing need would facilitate comparison with forecasts of population growth and household formation, in turn enabling more accurate projection of anticipated housing needs broken down by different factors such as income, household size and priority population, as explained below. It is important to note that official measures of those in core housing need exclude key groups, including those experiencing homelessness, students living independently of their guardians, people living in congregate housing, and migrant farm workers. This means that core housing need figures may underestimate overall housing need. Due to this, communities should also strive to include as much information as possible about these groups in the Priority Groups section below, in order to provide a comprehensive picture of who is affected by core housing need.

Please use the following section to insert the following Housing Assessment Resource Tools Data Tables ([Housing Needs Assessment Tool | Housing Assessment Resource Project](#))

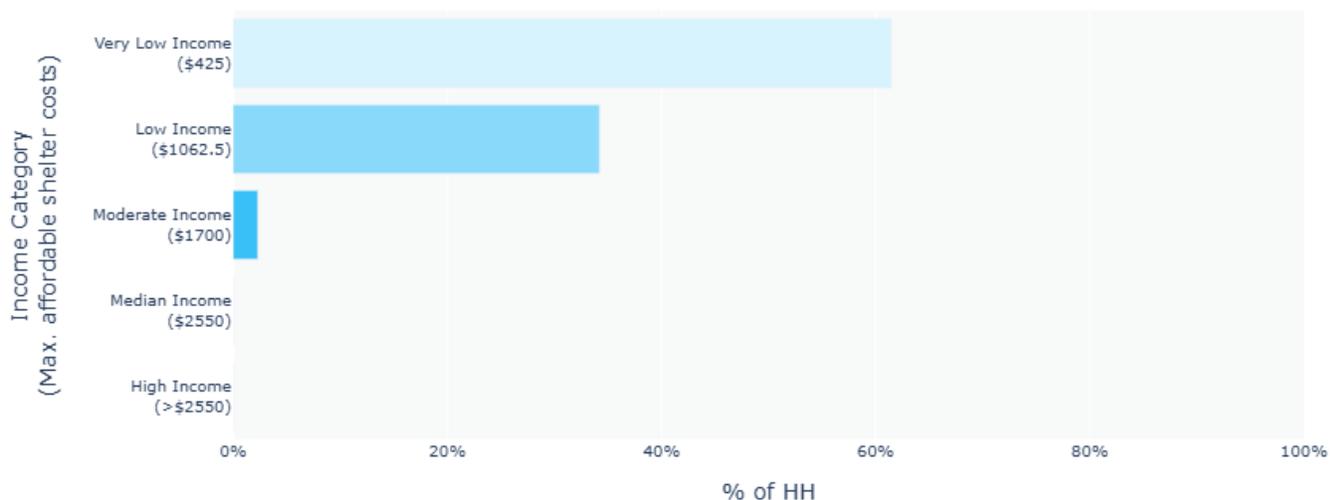
Income Categories and Affordable Shelter Costs:

2021 Income Categories and Affordable Shelter Costs, Greater Sudbury			
Income Category	% of Total HHs	Annual HH Income	Affordable Shelter Cost (2020 CAD\$)
Area Median Household Income		\$85,000	\$2,125
Very Low Income (20% or under of AMHI)	2.77%	<= \$17,000	<= \$425
Low Income (21% to 50% of AMHI)	17.51%	\$17,000 - \$42,500	\$425 - \$1,063
Moderate Income (51% to 80% of AMHI)	18.93%	\$42,500 - \$68,000	\$1,063 - \$1,700
Median Income (81% to 120% of AMHI)	20.36%	\$68,000 - \$102,000	\$1,700 - \$2,550
High Income (121% and more of AMHI)	40.43%	>= \$102,001	>= \$2,551

Source: UBC HART.

Percentage of Households in Core Housing Need, by Income Category and Household Size:

Percentage of Households in Core Housing Need, by Income Category, 2021
Greater Sudbury / Grand Sudbury CV (CSD, ON)



2021 Affordable Housing Deficit:

2021 Affordable Housing Deficit, Greater Sudbury						
Income Category (Max. affordable shelter cost)	1 Person HH	2 Person HH	3 Person HH	4 Person HH	5+ Person HH	Total
Very Low Income (\$425)	1,140	50	0	0	0	1,190
Low Income (\$1062)	2,580	1,110	345	120	60	4,215
Moderate Income (\$1700)	0	125	90	45	45	305
Median Income (\$2550)	0	0	0	0	0	0
High Income (>\$2550)	0	0	0	0	0	0
Total	3,720	1,285	435	165	105	5,710

Source: UBC HART.

3.6.1 Households in Core Housing Need		
Characteristic	Data	Value
Affordability – Owner and tenant households spending 30% or more on shelter costs (# and %)	Total	12260
	Percentage	17.2
Affordability – Owner and tenant households spending	Total	5195
	Percentage	7.4

3.6.1 Households in Core Housing Need		
Characteristic	Data	Value
30% or more on shelter costs and in core need (# and %)		
Affordability – Tenant households spending 30% or more of income on shelter costs (# and %)	Total	7960
	Percentage	31.5
Affordability – Tenant households spending 30% or more of income on shelter costs and in core need (# and %)	Total	4045
	Percentage	5.8
Affordability – Owner households spending 30% or more of income on shelter costs (# and %)	Total	4300
	Percentage	9.4
Affordability – Owner households spending 30% or more of income on shelter costs and in core need (# and %)	Total	1145
	Percentage	1.6
Adequacy – Owner and tenant households in dwellings requiring major repair (# and %)	Total	4950
	Percentage	6.9
Adequacy – Owner and tenant households in dwellings requiring major repair and in core need (# and %)	Total	910
	Percentage	1.3
Adequacy – Tenant households in dwellings requiring major repairs (# and %)	Total	2215
	Percentage	8.7
Adequacy – Tenant households in dwellings requiring major repairs and in core need (# and %)	Total	635
	Percentage	0.9
Adequacy – Owner households in dwellings requiring major repairs (# and %)	Total	2740
	Percentage	5.9

3.6.1 Households in Core Housing Need		
Characteristic	Data	Value
Adequacy – Owner households in dwellings requiring major repairs and in core need (# and %)	Total	270
	Percentage	0.4
Suitability – Owner and tenant households in unsuitable dwellings (# and %)	Total	2005
	Percentage	2.8
Suitability – Owner and tenant households in unsuitable dwellings and in core need (# and %)	Total	295
	Percentage	0.4
Suitability – Tenant households in unsuitable dwellings (# and %)	Total	1385
	Percentage	5.5
Suitability – Tenant households in unsuitable dwellings and in core need (# and %)	Total	280
	Percentage	0.4
Suitability – Owner households in unsuitable dwellings (# and %)	Total	620
	Percentage	1.3
Suitability – Owner households in unsuitable dwellings and in core need (# and %)	Total	0
	Percentage	0
Total households in core housing need	Total	5715
Percentage of tenant households in core housing need	Percentage	17.9
Percentage of owner households in core housing need	Percentage	2.8

3.7 Please provide any other available data or information that may further expand on, illustrate or contextualize the data provided above.

Core Housing Need by Tenure

The share of owner households in Core Housing Need (CHN) has remained very low throughout this period, likely due to the relative affordability and stability of housing prices in Greater Sudbury up to 2021 (**Table 10**). This has likely risen since then due to the subsequent spike in housing prices (**Figure 9**).

The share of renter households in CHN has declined substantially over the observed period. This may be attributed to federal support programs launched during the pandemic to assist households impacted by the economic fallout, as well as lower rents that were experienced during this period. This has likely also risen since 2021 due to sudden increase in the non-permanent resident population, who are very likely to be renters, adding to the local demand for rental housing and pushing up rents.

Some key observations that can be made when comparing household sub-groups (**Table 11**) include:

- One-parent and one-person households are significantly more likely to be in CHN than other household types. This is likely due to single income streams present in these households, as well as the presence of a dependent in one-parent households.
- Other non-family households, which include roommates, are slightly more likely to be in CHN than other household types. However, this group is constitutes a very small portion of the Town’s population (4% of all households) – this may have grown since then due to the surge in international students and temporary foreign workers.
- Households led by persons aged over 55 are significantly more likely to be in CHN than other households. This is likely due to more limited income streams, such as old age security and pensions, as well as additional living costs associated with health and aging.

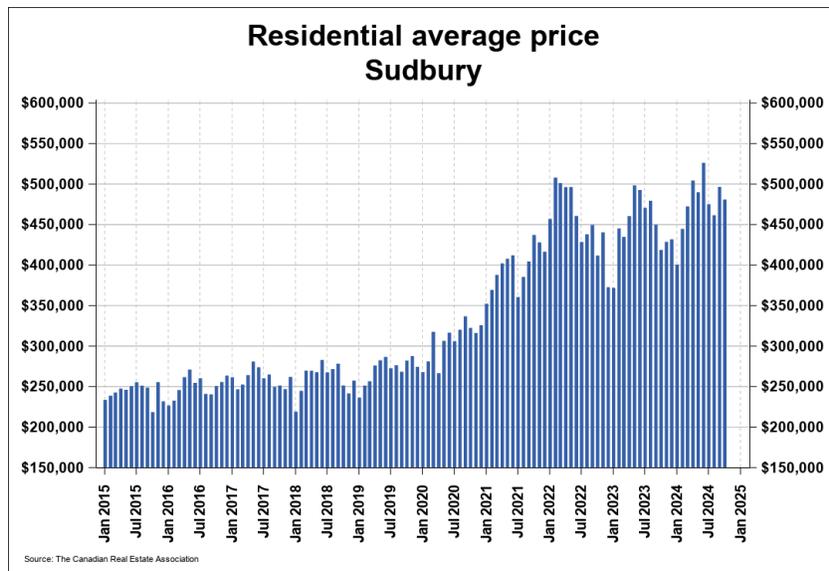
Table 10

% of Households in Core Housing Need, Greater Sudbury		
Year	Owners	Renters
2006	3%	24%
2011	3%	23%
2016	4%	28%
2021	3%	18%
<i>Source: CMHC. Statistics Canada.</i>		

Table 11

Households in Core Housing Need, Greater Sudbury (2021)			
	Share of Total Households	Owner Households in CHN	Renter Households in CHN
# of Households in Core Housing Need	100.0%	1,270	4,445
% of Households in Core Housing Need	-	2.8%	17.9%
Household Type			
Couples With Children	27.2%	0.8%	7.0%
Couples Without Children	23.3%	0.6%	6.1%
One-Parent Households	9.9%	7.6%	22.9%
Multifamily Households	5.1%	0.8%	7.5%
One-Person Households	30.2%	8.2%	24.4%
Other Non-Family	4.3%	3.6%	10.3%
Age of Primary Household Maintainer			
15-24	3.7%	0.0%	14.6%
25-34	13.8%	1.7%	12.5%
35-44	15.9%	1.6%	13.4%
45-54	16.6%	1.9%	18.0%
55-64	20.5%	3.7%	22.9%
65+	29.5%	3.7%	22.5%
<i>Source: CMHC, Statistics Canada.</i>			

Figure 10



Community Housing

As of December 2024, there were 1,595 active applications on the City's centralized housing wait list. This identified 1,292 applications of households in true need, which is similar to the Ontario Ministry of Municipal Affairs and Housing's definition of households in high need. As of December 2024, high need households are identified as households earning:

- Less than \$23,100, for studio/bachelor units,
- Below \$30,000, for 1-bedroom units,
- Below \$36,600, for 2-bedroom units,
- Below \$40,800, for 3-bedroom units,
- Below \$50,100, for 4-bedroom units or larger.

4. Priority Groups

There are 12 groups that CMHC defines as priority populations for affordable homes: groups who face a proportionally far greater housing need than the general population. There is also a 13th group, women-led households and specifically single mothers, implied in the National Housing Strategy which targets 33% (with a minimum of 25%) of funding going to housing for women-led households. Priority population groups are:

- Women and children fleeing domestic violence
- Women-led households, especially single mothers
- Seniors 65+
- Young adults aged 18-29
- Indigenous Peoples
- Racialized people
- Recent immigrants, especially refugees
- LGBTQ2S+
- People with physical health or mobility challenges
- People with developmental disabilities
- People dealing with mental health and addictions issues
- Veterans
- People experiencing homelessness

Census data does not disaggregate core housing need data by all priority populations, including veterans, individuals who identify as LGBTQ2S+, survivors of domestic violence, and individuals experiencing homelessness. Many households may have members in multiple priority categories which may also not be represented in the data. With these limitations in mind, information on housing need by priority population would be helpful for developing inclusive housing policies.

4.1 What information is available that reflects the housing need or challenges of priority populations in your community? If data is available, please report on the incidence of core housing need by CMHC priority population groups in your community. If no quantitative data is available, please use qualitative information to describe the need for these priority populations.

Some key observations that can be made when comparing household sub-groups (**Table 12**) include:

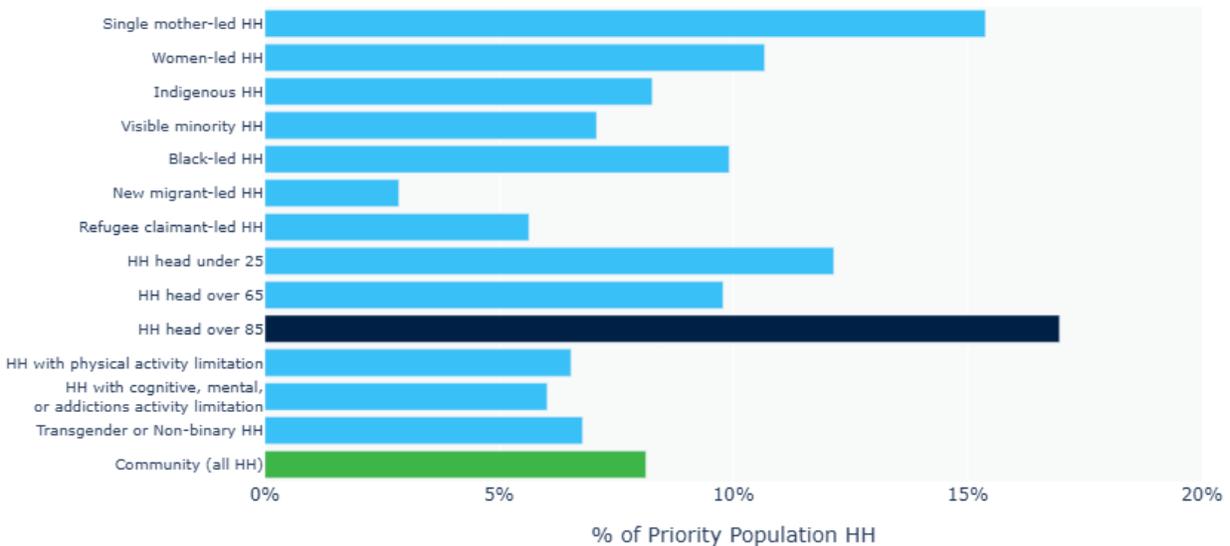
- All immigrant households are slightly more likely to be in CHN than non-immigrant households. This group is a small share of the total households (roughly 1.5%).
- Visible-minority-led owner households are slightly more likely to be in CHN than other households. This group is also relatively small, at 5% of total households.
- Indigenous-led households are slightly more likely to be in CHN than non-Indigenous-led households. This group consists of 10% of total households.
- Women-led households are more likely to be in CHN than male-led households.

Table 12

Households in Core Housing Need, Greater Sudbury (2021)			
	Share of Total Households	Owner Households in CHN	Renter Households in CHN
# of Households in Core Housing Need	100.0%	1,270	4,445
% of Households in Core Housing Need	-	2.8%	17.9%
Primary Household Retainer - Immigrant Status			
Households led by recent immigrants arriving in the past 5 years (2017 – 2021)	0.6%	0.0%	0.0%
Households led by persons with recent immigrants arriving between 5 and 10 years ago (2011-2016)	0.7%	0.0%	0.0%
Other households	98.7%	2.8%	18.4%
Primary Household Retainer - Visible Minority Identity			
Households led by Visible Minorities	4.7%	3.2%	10.2%
Other households	95.3%	2.8%	18.6%
Primary Household Retainer - Indigenous Identity			
Households led by persons with Indigenous Identity	9.9%	3.0%	19.7%
Other households	90.1%	2.8%	17.7%
Primary Household Retainer - Gender			
Female-led Households	45.1%	3.6%	20.0%
Male-led Households	54.9%	2.2%	15.4%
<i>Source: CMHC, Statistics Canada.</i>			

Figure 11

Percentage of Households in Core Housing Need by Priority Population, 2021
Greater Sudbury / Grand Sudbury (CD, ON)



When considering the HART data available on CHN among key demographic groups in Greater Sudbury (**Figure 11**):

- Households led by individuals over 85 years old have the highest propensity for CHN at 17%.
- Single-mother-led households and households led by individuals under 25 years old have the next highest propensities, at 15% and 12% each.

Moreover, self-declaration data from the City's centralized housing wait list show that of the 1,595 active applications, 194 (12%) were refugee households, and 209 (13%) were senior households). 15 (1%) of applications were for special priority applicants, or those where a member of the household whose personal safety or that of their family is at risk because of abuse by another individual or because of human trafficking. A further 248 (16%) of applications were deemed urgent, which include applicants that do not have a permanent address, lost their home to a natural disaster, live in a hostel/shelter, or are currently homeless.

As of January 31, 2025, there are currently 302 individuals identified through the City's By-Name List who are unhoused and seeking tenancy.

4.2 Please describe the incidence and severity of homelessness in your community, including an estimated number of individuals and/or families experiencing homelessness (hidden, visible, chronic, living in encampments, and episodic). If available, please include recent Point-in-Time counts.

As of May 2024, when the Roadmap to End Homelessness was approved, the number of individuals experiencing homelessness on the By-Name List (a real-time list noting individuals experiencing homelessness) was 242. As of January 31, 2025, this population has increased to 302, representing a 25% increase.

Of the individuals included on the By-Name List, 83% are experiencing chronic homelessness and 77% identify as high acuity, indicating the need for a permanent supportive housing or housing first intervention to remain housed. In addition, 50% of the population identifies with tri-morbidity, the complex co-morbidity of physical health, mental health, and substance use issue.

On October 8th, 2024, the City of Greater Sudbury conducted a Point in Time Homelessness Count. There were 505 individuals counted as homeless over a 24-hour period.

As of January 31, 2025, community partners are aware of 197 individuals living in encampments across 37 known locations within the City. Approximately 48% of these individuals have consented to have their name added to the by-name list.

4.3 Please describe local factors that are believed to contribute to homelessness in your community (e.g., the closing of a mental health facility, high numbers of refugee claimants, etc.).

In Greater Sudbury, there is a growing need for affordable housing supply, as the average market rent continues to increase, and vacancy rates remain well below the current demand. In 2023, a greater percentage of the population in Greater Sudbury was receiving social assistance (6.4%) compared to the province (4.3%). Of the households receiving social assistance in Greater Sudbury, 73% are in receipt of ODSP (Ontario Disability Support Program) and 27% are in receipt of Ontario Works. For households in receipt of ODSP and Ontario Works, shelter rates are well below the average market rent, with \$556/month provided for recipients of ODSP and \$390 provide for Ontario Works recipients. In 2023, the average market rent in Greater Sudbury was \$1,043 for a one-bedroom unit, significantly above shelter rates provided to social assistance recipients.

As of December 2024, Greater Sudbury has a community housing stock of approximately 4,792 units. As of September 2022, over 70% of the waitlist for community housing was seeking a one-bedroom unit. As of December 2024, there were approximately 1,500 households on the waitlist for community housing. Due to the length of the waitlist, it can take over four years to be housed in a unit.

In alignment with the Housing Supply and Demand Analysis completed in 2023, the Roadmap to End Homelessness outlines the need for approximately 800 deep-core/affordable units, in order to meet current demand.

In addition to affordable housing challenges, Greater Sudbury is negatively impacted by the opioid crisis, which has contributed to homelessness and the need for substance use treatment and additional supportive housing. Between January 2024 to December 2024, 124 people died from suspected drug poisoning in the Sudbury and Manitoulin Districts, representing an annualized mortality rate of 61.8 deaths per 100,000 population per year, significantly higher than the Ontario rate of 22.3 deaths per 100,000 population per year.

Indigenous people are disproportionately affected by homelessness, representing 38% of the survey respondents from the October 2024 Point in Time Count and 49% of the homeless individuals on the By Name List as of December 31st, 2024.

4.4 Please identify temporary and emergency relief resources available for individuals experiencing homelessness in your community (e.g., number of shelter beds, resource centres, number of transitional beds available). If possible, please indicate whether capacity levels are commensurate with need. There will be an opportunity to provide information on local permanent solutions and resources further down.

The City of Greater Sudbury partners with community agencies to provide the following temporary and emergency relief services for individuals experiencing homelessness in the community:

- 89 emergency shelter beds (3 programs), which include:
 - Canadian Mental Health Association – Off the Street Shelter (35 beds), low-barrier shelter for adults aged 18 and older.
 - Salvation Army Cedar Place (28 beds) – Women and Families Shelter
 - Elizabeth Fry Safe Harbour House (26 beds) – low-barrier shelter for women, and gender-diverse individuals.
- 75 overnight warming centre spaces (2 programs)- operational winter months only
- One drop-in centre/soup kitchen/laundry/drop in services
- 13 transitional housing beds- high acuity chronic homeless individuals

In 2024, the emergency shelter system in Greater Sudbury observed a 95% occupancy rate, which was an increase from 91% in 2023. In spring 2024, the Sudbury Action Centre for Youth (SACY) emergency shelter closed leaving significant gaps in the homelessness system for youth. In winter 2024, two warming centre spaces opened to provide a warm space for individuals experiencing homelessness to shelter temporarily from the elements. As the emergency shelter system has experienced extremely limited occupancy, this leaves a significant number of individuals without shelter during the coldest months. As of January 2025, there were 261 individuals living in encampments or unsheltered, far exceeding the available emergency shelter space.

In 2021, the City of Greater Sudbury partnered with Health Sciences North to operate 13 transitional housing beds at a local motel as a pilot program for individuals experiencing homelessness with complex needs including chronic physical health, mental health, and/or substance use disorders. This program is anticipated to move to a 40-unit location following construction of the building in Q1 2025.

4.5 Some groups, including students, those in congregate housing, and temporary foreign workers, may be excluded from publicly available core housing need data sources. Communities are encouraged to use this section to describe the housing needs of these respective populations to ensure that all groups are represented in their HNA.

This data is not tracked in Housing Services as the portfolio does not include congregate housing. A household applicant would provide whatever form of documentation they have related to being in Canada as a temporary foreign worker and if all documents were provided then the household would be eligible.

5. Housing Profile

5.1 Key Trends in Housing Stock:

This section should tell a story of housing changes over time in a community through trends in net change of affordable or below-market housing. This should be expressed through illustrations of net losses or net gains in affordable and non-market housing over the previous three census periods.

5.2 Please provide a brief history of how housing in the community has been shaped by forces such as employment growth and economic development, infrastructure, transportation, climate impacts, and migration. Please include any long-term housing challenges the community has faced:

See detailed discussion found throughout Section 2 and 3 of this HNA on trends and changes as they relate to employment growth, economic development, and migration.

Climate Impacts

Being in Northern Ontario, Greater Sudbury is more prone to the impacts of climate change, particularly in the forest fires (due to drier, hotter summers) and flooding (due to more irregular snow melts and precipitation). This may impact the quality and security of existing housing along areas more prone to these extreme events.

Affordable Housing Gaps

Greater Sudbury's population growth in the last few years has resulted in considerable increases in rental and ownership prices. As illustrated in **Table 13**, most new and resale ownership homes are unaffordable to the majority of households across Greater Sudbury. Households in the three top income deciles (high-income households) can afford a greater range of housing, but even in this group, the 7th and 8th deciles still have some affordability constraints depending on location and housing type. These groups will require higher downpayments, either through cash gifts from family, earned equity through existing homeownership, or other similar situation to afford a home in the market.

Rental housing is almost entirely unaffordable to households below the 6th income decile (**Table 14**). Between the 6th and 8th deciles, affordability is limited to smaller units or units in older buildings that typically rent slightly below the average rate. Based on starting rental rates for new purpose-built rentals, only the top decile can afford a two-bedroom unit, while new three-bedroom apartments are beyond the affordability thresholds of all households. Similarly, privately rented homes are largely unaffordable to people below the top income decile.

New affordable housing units, housing supported by rent supplements, and lower-end market housing provided by Greater Sudbury Housing Corporation and other local non-profits are affordable to low-income households down to the 1st decile in some cases (**Table 15**). Rent-Geared-to-Income (RGI) housing is by definition – 30% of household income before tax – affordable to all income deciles. These housing options are however very limited, with the City's current wait list standing at 1,595 active applications.

Observing historical housing start data, the following trends can be identified:

- Annual housing starts in the City peaked in the late 2000s, reaching nearly 600 units per year in 2007 and 2012. This has declined significantly since then to around 200 starts in the late 2010s. Another construction flurry occurred in 2021 when 400 units were started, but this again has since dropped to just over 250 under in the last few years (**Figure 12**).
- This trend has been largely similar for both ownership and rental housing, both of which have seen starts below the peaks of more than a decade ago. In 2023, only 142 ownership and 116 rental housing units had been started. (**Figure 13**).
- Most housing ownership starts have been in single-family homes (i.e., single-detached, semi-detached). Over the last decade, 88% of starts were for single- and semi-detached homes, 11% for row/townhomes, and almost 0% for apartment units (**Figure 14**).
- Most new rental housing stock has been in apartments. Over the last decade, 78% rental housing starts have been in apartments, with only 19% in row/townhomes, and 2% in semi-detached homes (**Figure 15**).

Greater Sudbury has been receiving provincial funding through the Build Faster Fund (BFF) to support housing development (including for long-term care beds). In 2023, the BFF target was 279 units, and 436 units were achieved. The 2024 target was 317, and once data from the 4th quarter of 2024 has been updated, the City expects it will exceed the provincial target.

The more limited number of starts in recent years (despite the sudden growth in residents) reflect the following trends:

- The initial disruptions of COVID-19 on work safety regulations and general housing demand likely limited housing construction activity in 2020 and 2021,
- Growing construction costs, development costs, and borrowing rates hampered construction activity and overall ownership housing demand in 2022, 2023 and 2024.

Moreover, unit type distribution for rental housing has largely been tilted towards 2-bedroom units (**Figure 16**), which as of 2023 consists 55% of the total rental housing stock, up from 46% in 1990. There was some decline in 1-bedroom units across the observed period, from 34% in 1990 to 30% in 2023. Studio and 3-bedroom units have always consisted smaller portions of the rental stock.

This is reflective of a likely general demographic for rental housing in Greater Sudbury – roommates, young couples, and retirees. Roommates are likely to be working individuals or students, due to the large number of international students and non-permanent workers. Retirees, who at times downsize from a larger home, are also likely to end up renting if there are no affordable alternatives in the ownership market. This has become increasingly common as higher home prices have made even smaller homes difficult to purchase. Young couples are also a likely demographic due to the elevated home prices

likely pricing out younger households with less capital, but may be a declining share of the rental stock due to recent demographic shifts (see **Table 1**).

Both ownership and rental affordability are therefore strained across Greater Sudbury.

Table 13

Ownership Housing Affordability Gap Analysis, Greater Sudbury										
Income Decile		1	2	3	4	5	6	7	8	9
Affordability Threshold		\$97,546	\$150,293	\$199,428	\$247,478	\$303,477	\$368,508	\$451,603	\$555,178	\$732,755
Location/Housing Type	Average Sale Price									
Resale Housing*										
Capreol	\$286,800									
Onaping Falls	\$303,200									
Nickel Centre	\$439,600									
Rayside-Balfour	\$465,500									
City of Sudbury	\$488,500									
Valley East	\$476,700									
Walden	\$451,500									
Greater Sudbury	\$452,500									
New Housing										
Single-Detached	Two-Bedroom	\$435,900								
	Three-Bedroom	\$476,811								
	Four-Bedroom	\$663,233								
	Five-Bedroom	\$1,199,950								
Semi-Detached	Two-Bedroom	\$334,275								
	Three-Bedroom	\$354,515								

*Resale pricing by housing/bedroom type was unavailable.

Source: Greater Sudbury Real Estate Board, NBLC.

Affordable	
Unaffordable	

Table 14

Rental Housing Affordability Gap Analysis, Greater Sudbury										
Income Decile		1	2	3	4	5	6	7	8	9
Affordability Threshold		\$536	\$718	\$939	\$1,149	\$1,392	\$1,668	\$1,974	\$2,430	\$3,092
Unit Type	Average Rental Rate*									
Purpose-Built Rental Apartments										
Bachelor	\$1,280									
One-Bedroom	\$1,473									
Two-Bedroom	\$1,724									
Three-Bedroom	\$2,029									
New Purpose-Built Apartments										
Two-Bedroom	\$2,000									
Three-Bedroom	\$3,200									
Purpose-Built Townhomes										
Two-Bedroom	\$2,099									
Three-Bedroom	\$2,042									
Four-Bedroom	\$1,895									
Privately Leased Homes										
Two-Bedroom	\$2,500									
Three-Bedroom	\$2,093									
Privately Leased Apartments**										
One-Bedroom	\$1,495									
Two-Bedroom	\$1,700									
Three-Bedroom	\$2,200									
Privately Leased Secondary Units (Basement Apartments)										
One-Bedroom	\$1,483									
Two-Bedroom	\$1,500									
Three-Bedroom	\$2,200									
Privately Leased Rooms										
Single Room	\$589									

*Due to limited availability, an average starting marker rent was used for rental townhomes and new purpose-built apartments.
 **Single-floor apartments (plex buildings). There were no condominium units listed for lease at the time of the survey.
 Source: CoStar Group, Realtor.ca, Kijiji, NBLC

Affordable	
Unaffordable	

Table 15

Community/Affordable Housing Affordability Gap Analysis, Greater Sudbury				1	2	3	4	5	6	7	8	9	
Income Decile													
Income				\$21,426	\$28,716	\$37,551	\$45,945	\$55,665	\$66,709	\$78,969	\$97,192	\$123,699	
Affordability Threshold				\$536	\$718	\$939	\$1,149	\$1,392	\$1,668	\$1,974	\$2,430	\$3,092	
%AMR	Program	Unit Type	Average Rental Rate*										
100% AMR	New Affordable Housing/Housing Benefits/Rent Supplements	Bachelor	\$749										
		One-Bedroom	\$1,030										
		Two-Bedroom	\$1,134										
		Three-Bedroom	\$1,286										
80% AMR		Bachelor	\$599										
		One-Bedroom	\$824										
		Two-Bedroom	\$907										
		Three-Bedroom	\$1,028										
60% AMR		LEM	Bachelor	\$449									
			One-Bedroom	\$618									
			Two-Bedroom	\$776									
			Three-Bedroom	\$841									
RGI	Community Housing		~\$350										

Source: City of Greater Sudbury

Affordable	
Unaffordable	

Table 16

Household Income Limits for Community Housing (RGI), Greater Sudbury					
Location	Bachelor	One-Bedroom	Two-Bedroom	Three-Bedroom	Four-Bedroom +
Greater Sudbury Service Area	\$19,200	\$24,900	\$29,400	\$34,800	\$44,700
Max Income Decile Served	1st	1st	2nd	2nd	3rd

Figure 12

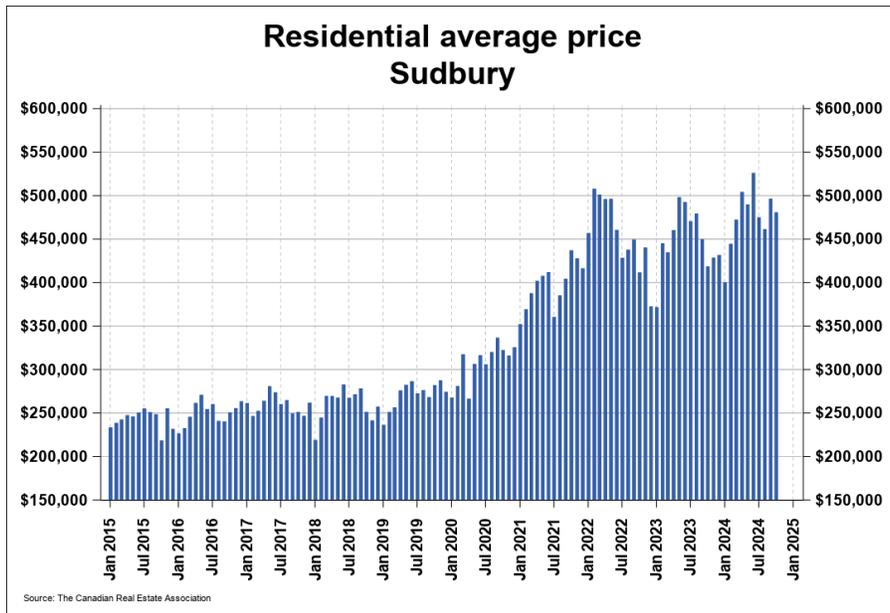
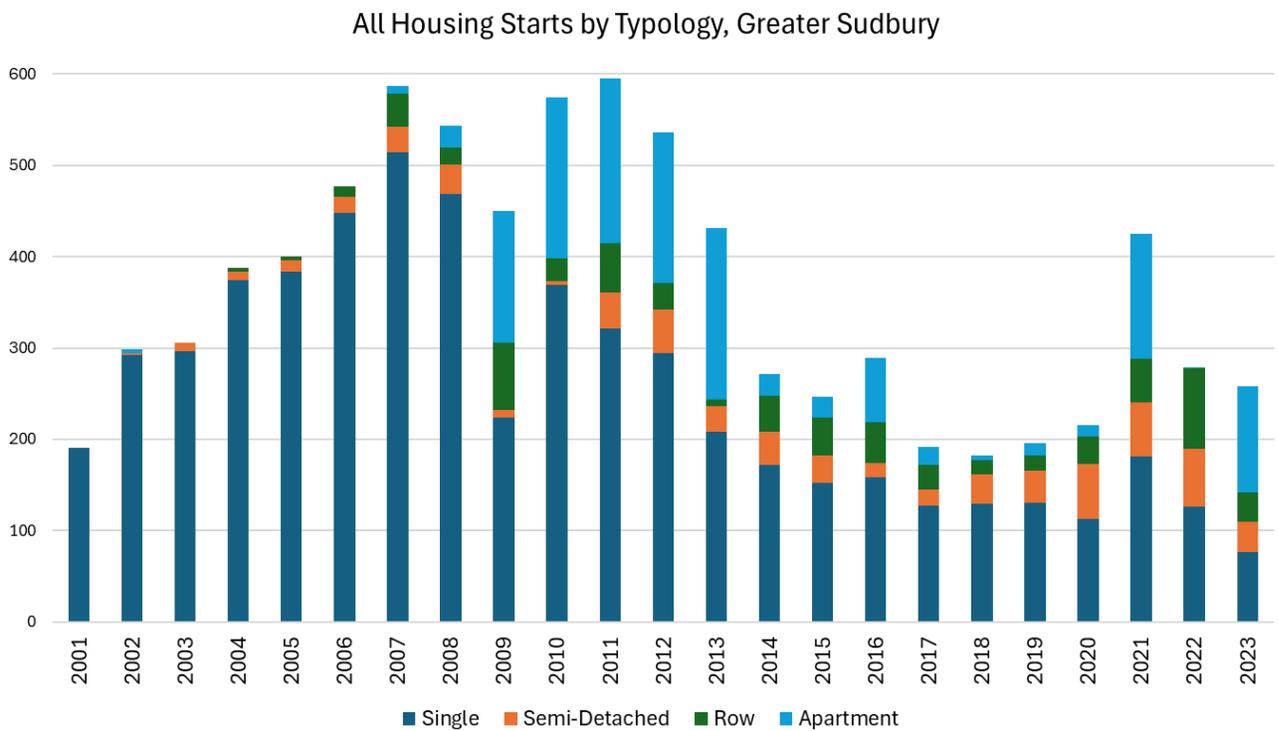


Figure 13



Source: CMHC Housing Portal.

Figure 14

All Housing Starts by Tenure, Greater Sudbury

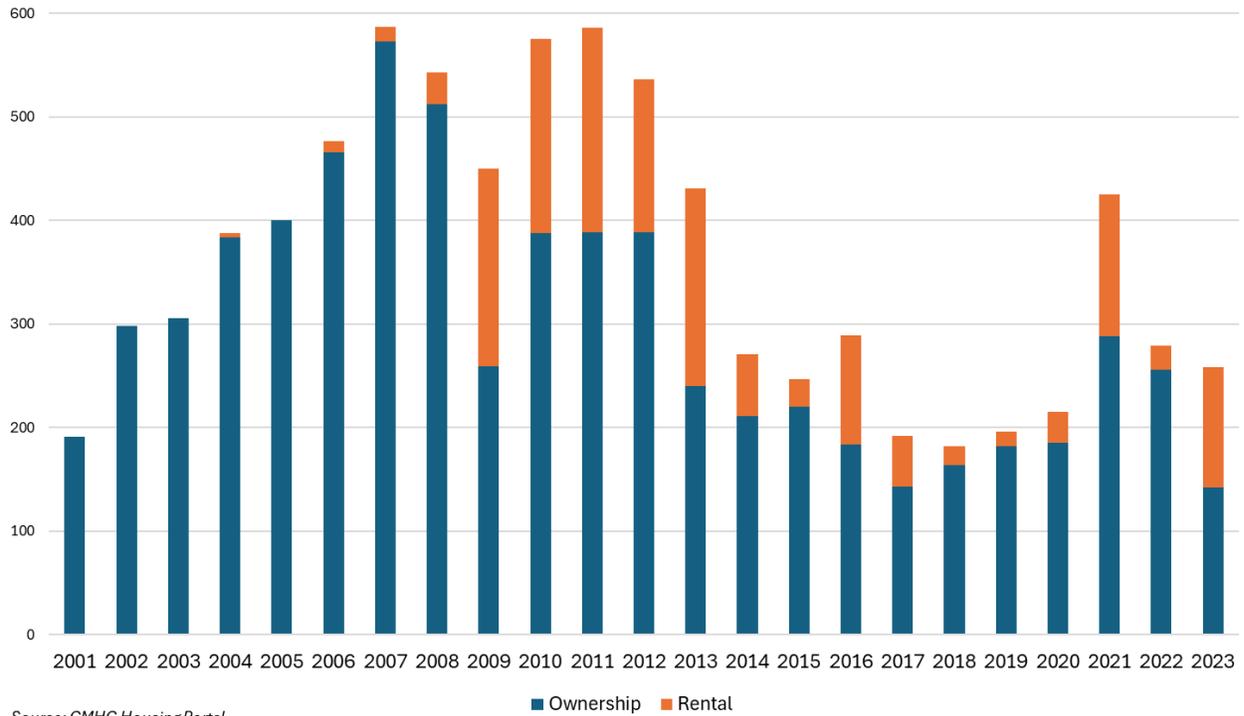


Figure 15

Ownership Housing Starts by Typology, Greater Sudbury

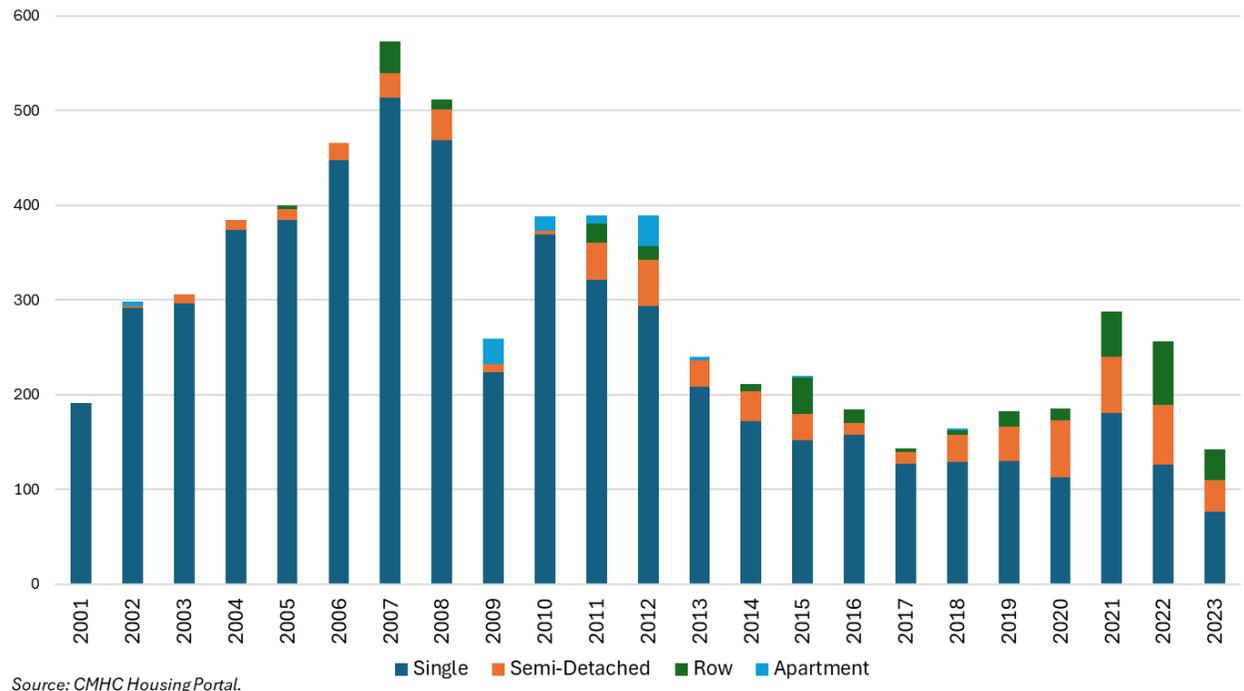
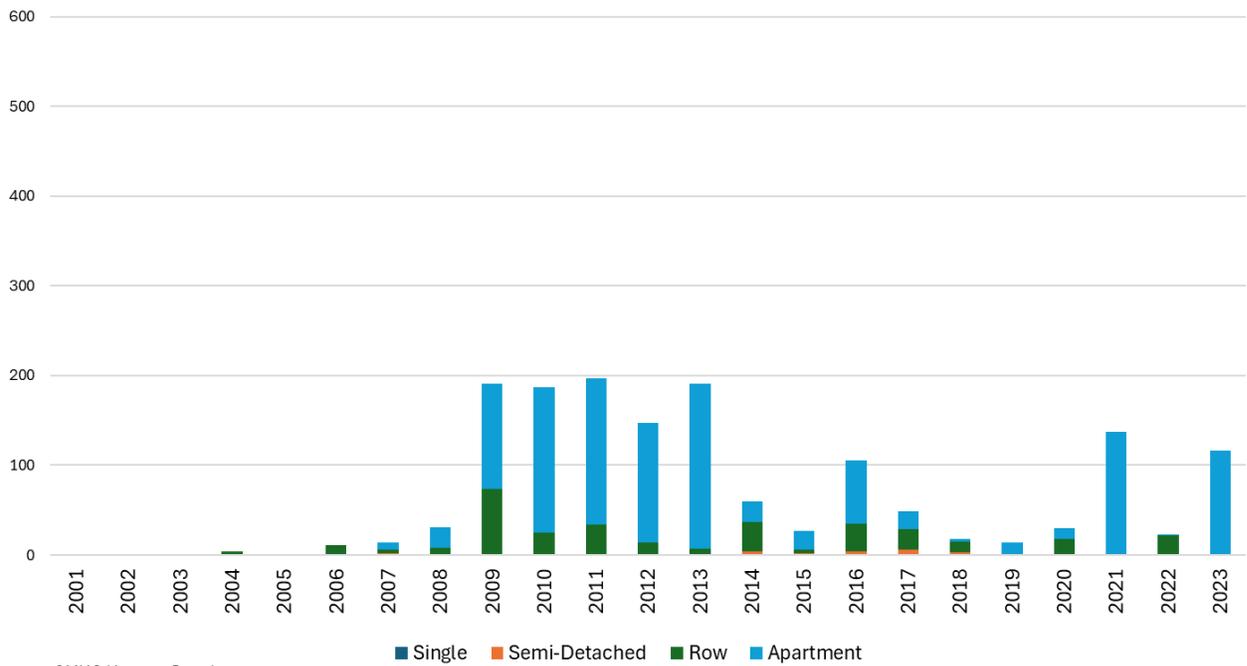


Figure 16

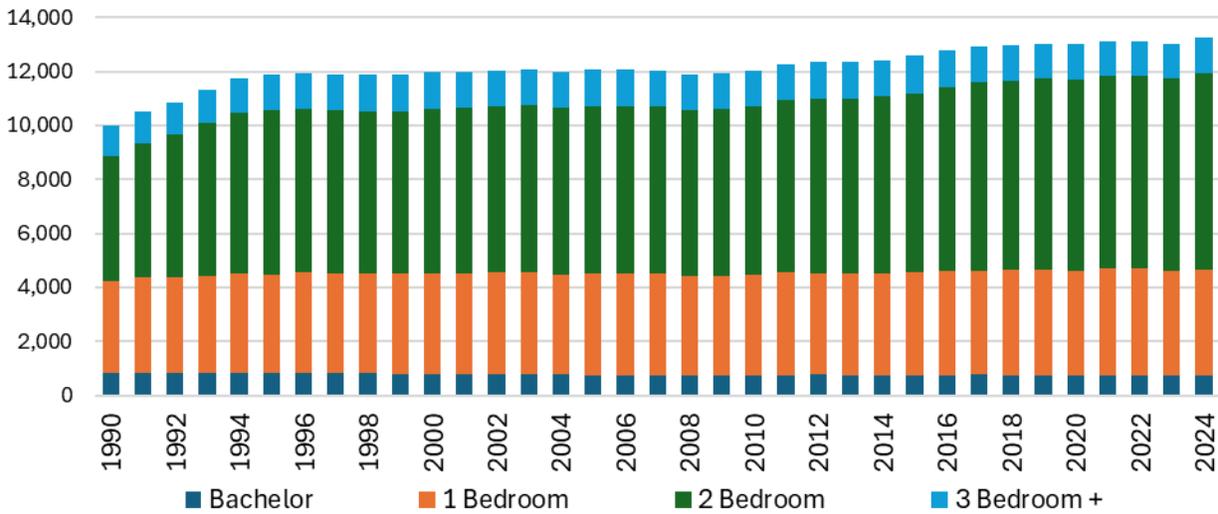
Rental Housing Starts by Typology, Greater Sudbury



Source: CMHC Housing Portal.

Figure 17

Rental Universe by Unit Type, Greater Sudbury



Source: CMHC Housing Portal.

5.2.1 Housing Units: Currently Occupied/Available		
Characteristic	Data	Value
Total private dwellings	Total	71475
Breakdown by structural types of units (number of units)	Single-detached	43325
	Semi-detached	3280
	Row house	2915
	Apartment/flat in a duplex	4475
	Apartment in a building that has fewer than 5 storeys	12045
	Apartment in a building that has 5 or more storeys	4785
	Other single attached	130
	Movable dwelling	530
Breakdown by size (number of units)	Total	71475
	No bedrooms	360
	1 bedroom	9050
	2 bedrooms	17270
	3 bedrooms	26755
	4 or more bedrooms	18040
Breakdown by date built (number of units)	Total	71475
	1960 or before	21385
	1961 to 1980	26485
	1981 to 1990	8115
	1991 to 2000	6800
	2001 to 2005	1915
	2006 to 2010	2760

5.2.1 Housing Units: Currently Occupied/Available		
Characteristic	Data	Value
	2011 to 2015	2390
	2016 to 2021	1635
Rental vacancy rate (Percent)	Total	1.6
	Bachelor	*
	1 bedroom	2.3
	2 bedrooms	1
	3 bedrooms+	*
Number of primary and secondary rental units	Primary	13107
	Secondary	132
Number of short-term rental units	Total	580*

* Taken from AirDNA.

5.3 In the last five years, how many affordable units for low and very low-income households have been built, and how many have been lost? If data is not available, please describe how the loss of affordable housing units may have impacted your community.

Built – Lorraine Street – 40 units, Sparks Street – 14 units

Under Construction - Pearl Street – 38 Units

Lost - Units have been lost through the federal government service agreements that have expired over the past 5-10 years. Approximately 200 units have been lost which has impacted the length of time that Household applicants are active on the centralized wait list waiting for subsidized housing. The highest demand is for one-bedroom units within the community.

5.4 How have average rents changed over time in your community? What factors (economic, social, national, local, etc.) have influenced these changes?

Prior to the COVID-19 pandemic, rents increased by 3% on average every year, with no single year seeing a rent decrease. Since then, this has increased to 6% per year (**Figure 17**).

Meanwhile, the low vacancy rates of 2007 and 2008 turned into the high vacancy rates of the mid-2010s, which reached a peak of 5.3% in 2016 and persisted until 2018 (**Figure**

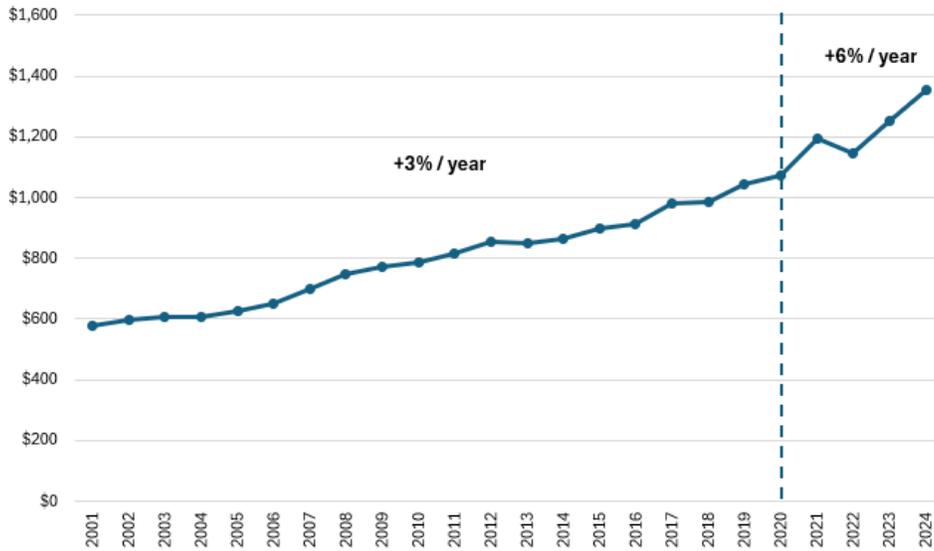
18). This has gradually declined, reaching 1.4% as of 2024. Periods of higher vacancy give tenants more power to negotiate for initial rents and encourage landlords to settle for lower rents than preferred for fear of lost income from unoccupied units, while periods of lower vacancy give landlords more leverage to raise listing rents and in determining final rents due to a tighter supply. Typically, average rents during a period of stabilized vacancy experience increases that track with inflation, however this is not the case for Greater Sudbury given the 9% and 8% average rent increases in 2023 and 2024 during periods of tight vacancy.

This rent growth and vacancy decline can be explained by some other factors:

- Surge in non-permanent residency and immigration – These groups started to become more significant source of new population in the mid-2010s. The first group is more substantial in volume and are most likely to rent due to the temporary nature of their stay. This is represented by both international students responding to the programs aimed at attracting them to local post-secondary institutions, and temporary skilled workers, who arrived in Greater Sudbury with the help of the RNIP program. This is also reflective, to a lesser degree, the increase in immigration over this period.
- International students in particular have increased in Greater Sudbury over the past two years as illustrated in **Figure 5**.
- Accelerated income growth – Household incomes for both tenant households grew significantly faster between 2016 and 2021 than previous intervening census periods, allowing landlords to charge more (**Figure 8**).
- Rental supply stagnation – The dearth of rental housing starts over the last decade has contributed to a tightening housing market, and in turn, higher rents (**Figure 13**).
- Eroding Ownership Affordability – Home prices have increased dramatically since 2019 (**Figure 11**), increasing demand for rental housing as “would-be” purchasers either stay in rental housing longer or rent a home instead of purchasing. This is more pronounced in Greater Sudbury, as unlike in many other municipalities, interest rate increases in 2022 and 2023 did not have long-standing impacts in dampening housing prices. As of 2024, prices are now starting to exceed the height of 2022 home prices. This likely pushes more aspiring homeowners to the sidelines.

Figure 18

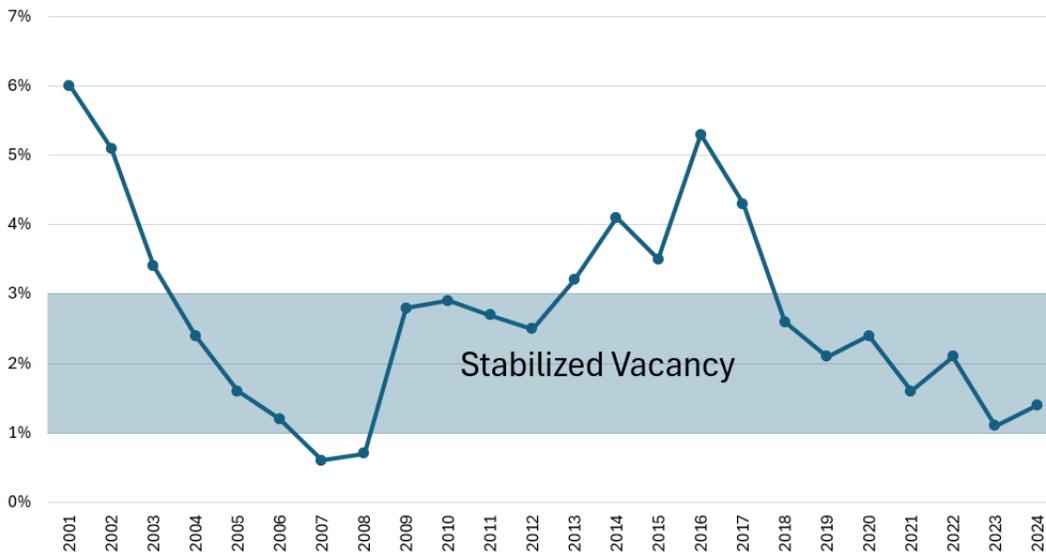
Historical Average Rents, Greater Sudbury



Source: CMHC Housing Portal.

Figure 19

Historical Vacancy Rate, Greater Sudbury



Source: CMHC Housing Portal.

5.5 How have vacancy rates changed over time? What factors have influenced this change?

See 5.4.

5.6 How have trends in core housing need changed over time between both tenant and owner-occupied households?

See 3.7.

5.7 Non-Market Housing

5.7.1 Current Non-Market Housing Units		
Characteristic	Data	Value
Number of housing units that are subsidized	Total	1,848
Number of housing units that are below market rent in the private market (can either be rent or income-based definition)	Total	70 (Raising the roof homes supported by the City's CIP – 15 units, Coniston Seniors Housing Apartment Project – 55 units)
Number of co-operative housing units	Total	496
Number of other non-market housing units (permanent supportive, transitional, etc.)	Total	324

5.8 Please describe any other affordable and community housing options and needs/gaps currently in your community that are not captured in the table above.

The City's total portfolio of 4,792 units that is comprised of homes owned by the City's Local Housing Corporation, non-profit and cooperative community housing (CH) providers, rent supplements, COHB, and other portable housing benefits that are being provided. Included in this total, there are 107 accessible/modified units and 14 CH providers with 538 units that are for seniors only. Housing Services does not provide long term care or assisted living units.

The City's Housing Corporation has wrap around supports at Lorraine Street to ensure that the tenants moving in with physical and mental health issues are given the assistance required to have successful tenancies.

5.9 Housing Trends

5.9.1 Housing Values		
Characteristic	Data	Value
Median monthly shelter costs for rented dwellings (Canadian dollars)	Median	1000
Purpose-built rental prices by unit size (Average, Canadian dollars)	Total	1195
	Bachelor	749
	1 bedroom	1030
	2 bedrooms	1293
	3 bedrooms+	1401
Purpose-built rental prices by unit size (Median, Canadian dollars per month)	Total	1200
	Bachelor	753
	1 bedroom	985
	2 bedrooms	1300
	3 bedrooms+	1352
Sale prices (Canadian dollars)	Average	494582
	Median	494582
Sale prices by unit size (Average, Canadian dollars)	Average	494582
	Bachelor	-*
	1 bedroom	-*
	2 bedrooms	399541
	3 bedrooms+	526263
Sale prices by unit size (Median, Canadian dollars)	Median	494582
	Bachelor	-*
	1 bedrooms	-*
	2 bedrooms	399541

5.9.1 Housing Values		
Characteristic	Data	Value
	3 bedrooms+	526263

5.9.2 Housing Units: Change in Housing Stock		
Characteristic	Data	Value
Demolished – breakdown by tenure	Tenant	27
	Owner	131
Completed – Overall and breakdown by structural type (annual, number of structures)	Total	1048
	Single	492
	Semi-detached	200
	Row	196
	Apartment	160
Completed – Breakdown by tenure (annual, number of structures)	Tenant	314
	Owner	734
	Condo	0
	Coop	0
Housing starts by structural type and tenure	Total	962
	Single	383
	Semi-detached	155
	Row	169
	Apartment	254
Housing starts by structural type and tenure	Tenant	276
	Owner	686
	Condo	0

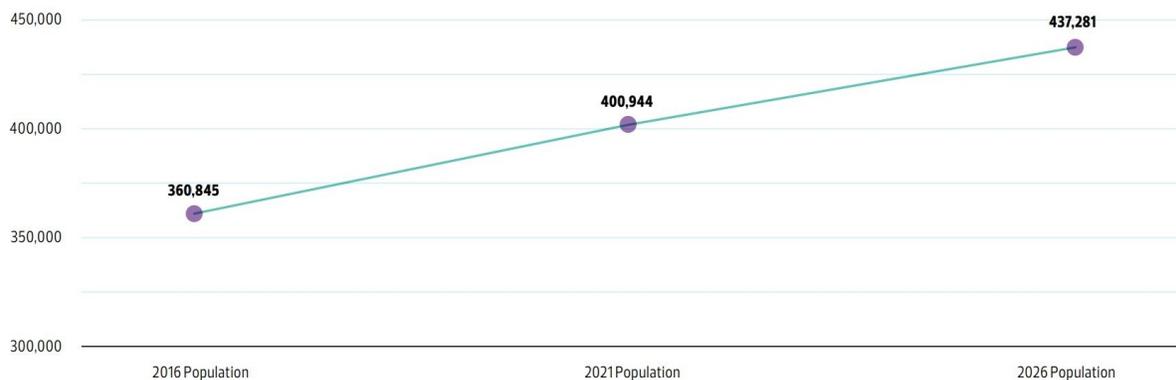
5.9.2 Housing Units: Change in Housing Stock		
Characteristic	Data	Value
	Coop	0

* - There were no available condominium apartment buildings at time of survey.

6. Projected Housing Needs and Next Steps

This section aims to answer the question, how much and what type of housing is needed to meet the needs of the population over the next 10 years? How will this Housing Needs Assessment (HNA) be meaningfully used in planning and investment decisions?

This section projects population trends from the previous 10 years, dividing by income category and target housing costs while considering migration trends. An example of a benchmarked projection from [Edmonton's Affordable Housing Needs Assessment](#) is provided below.



Household Growth Projection 2016- 2026. [Source: Edmonton Affordable Housing Needs Assessment – August 2022](#)

HNAs should be able to convey through their data-driven narrative how many housing units are needed by income category, household size and dwelling type over the next 10 years. In completing this section, communities must carefully consider their past growth trends and future demographic projections, including recent immigration patterns, aging population dynamics, and economic trends. Furthermore, it is also crucial for communities to consider any pre-existing housing shortages, as evidenced by indicators such as recent trends in rental vacancy rates, growth in prices/rents, the number of households in core housing need, and the aging of their current housing stock.

6.1 Projection Methodology Guidelines

There are several projection methodologies that can be used to project housing demand, [including the HART housing needs projection here](#). The federal government recommends using the HART methodology as a reference point, with additional considerations and data points to improve the validity of the methodology. These considerations, including economic data integration and supply capacity and gaps as well as steps for calculating the methodology are noted below. Provinces and territories, in consultation with their municipalities/communities, are invited to use a methodology that fits their regional circumstances, ensuring the assumptions that inform their preferred methodology are also clearly explained. The federal government will review the HNAs as a requirement for its various funding programs and assess the methodology and assumptions that inform it for their validity and robustness. If needed, further engagements can take place to better align the preferred methodology with the federal government's expectations.

In employing a projection methodology, jurisdictions may find the following list of key considerations and steps useful. The following approach involves first projecting the population into the future, then projecting household formation from headship rates, and then **demand for housing by tenure, dwelling type and size, family type and income groups**. Following the Population Projection, Household Projection and Housing Demand Projection steps, a table is presented of the key considerations for each step in the process.

Step 1: Population Projection

- Conceptually the projected population is calculated as the survived population + births + projected net migrants. An example of an accepted method to calculate population projection is the Cohort-Component population projection method.

Step 2: Household Projection

- Project family and non-family households separately by multiplying the projected population by age group in a given year with projected headship rates (household formation) by age group in a given year.
 - A headship rate represents the probability that a member of a given age group will head (maintain) a household of a given type (family or non-family). Historical headship rates are calculated as the ratio of household heads in an age group to the population of that age group.
 - Total headship rates can be determined by adding family and non-family headship rates together for a given age group and year. An increase in the total headship of any particular age group means that overall a higher proportion of that group heads households than previously. The converse holds true for a decrease in the total headship rate. Thus, the total rate is

an overall indication of the propensity to form households in a particular age group.

- Project both family and non-family households by household type (composition), including couples without children, couples with children, lone parents, multiple-family households, one-person households, and other non-family households. This can be achieved by multiplying the projected number of households in a particular age group by the projected household type proportions for that age group.
 - Historical proportions for family households are the ratio of the number of family households of a given type in an age group to the total number of family households headed by that age group.
 - Historical proportions for non-family households are the ratio of the number of non-family households of a given type in an age group to the total number of non-family households headed by that age group.
- Project net household formation according to family and non-family household types by calculating the difference between projected households in successive years.

Step 3: Housing Demand (Need) Projection

- Project the number of owner households within a particular age range and household type by multiplying projected household by type (family and non-family) by projected ownership rates.
- Project the number renter households by calculating the difference between projected households and the number of projected owner households.
 - Historical ownership or renter rates are the ratio of the number of owning/ or renter households of a given type and age of head to the total number of households (owners and renters combined) of that type and age of head.
- Project dwelling type (single, semi, row, apartment) by multiplying projected age-specific renter and owner dwelling choice propensities by household type (family and non-family) with the projected number of renter and owner households of the given household type and age group.
 - Historical dwelling choice (occupancy) propensities describe the proportion of a given household type, tenure, and age of head group occupying each of the four dwelling types.
- Finally, communities should integrate assessments of pre-existing housing shortages into their final calculations. This integration should be informed by a thorough review of the preceding quantitative and qualitative analyses within the HNA. Additionally, communities should utilize the data and more advanced methodologies detailed in the Annex to ensure a comprehensive estimation of these shortages.

HART Household Projections – Projected Households by Household Size and Income Category

- The HART methodology estimates the total number of units by type (number of bedrooms) and with reference to income categories that will be needed to house a community’s projected population.

Please use the Housing Assessment Resource Tools Households Projections tab to fill out the table below for your jurisdiction – [Housing Needs Assessment Tool | HART](#)

6.1.1 Projected Households by Household Size and Income Category						
HH Income Category	1 person	2 person	3 person	4 person	5+ person	Total
Very Low Income	3,006	0	0	0	0	3,006
Low Income	9,861	2,737	364	34	79	13,075
Moderate Income	6,385	6,377	1,101	409	159	14,431
Median Income	3,710	7,836	2,109	986	506	15,147
High Income	1,829	11,210	6,931	6,734	3,209	29,913
Total	24,791	28,160	10,505	8,163	3,953	75,572

Key Considerations

Population

- It is strongly advised to use the updated post-census population estimates for 2022 as your base population provided by Statistics Canada’s demographic estimates division. These estimates account for any discrepancies in population counts, whether they are undercounts or overcounts. These estimates also smooth out the sharp downturn in immigration due to the pandemic in 2020/21. Please refer to annex for links to Statistics Canada CSD and CMA estimates.
- If historical fertility, survival and mortality rates by age category are stable and not trending, apply average historical rates to current population by age to project forward. If rates do trend by age over time, estimate the average change in rates in percentage points and add to current rates when projecting forward for the baseline scenario.

- For larger communities and centres where the data exists, disaggregate and project baseline net migration flows for respective components (i.e., net interprovincial, net intra migration and net international). Disaggregate net international migration and project its components further (emigration, returning Canadians, non permanent residents, etc.) and use recent growth trends per flow to project total net international migration. In projecting international migration, it will be important for communities to use the more updated federal immigration targets as an anchor.
- Because of the economic uncertainty triggered by the COVID-19 pandemic and potential future shocks, larger communities are expected to create one additional population scenario (high) to supplement the baseline. Utilize StatsCan projection methodology for fertility, survival, and migration to establish the high scenario. Consult Statistics Canada's population projection report cited in the appendix. Communities should avoid using low population or migration scenarios to prevent housing need undercounting.
- **Smaller Communities:**
 - In smaller centers where population projection scenarios are unavailable from StatsCan, but there is the capacity to generate them, cities can resort to using historically high population growth rates or migration scenarios as alternative methods for projecting future population.
 - One industry communities should also develop multiple population scenarios to manage economic volatility

Household Projections

- Headship rate is commonly defined as the ratio of the number of households by age to the population of adults by age in each community and can be used to project future households.
- If historical headship rates data is not trending or stable by age, apply the average historical census family/non-family headship rates by age group to the corresponding population within each age group.
- If historical headship rates by age is showing a trend over time, include the average historical census family/non-family headship rates percentage point change to the current headship rate. Subsequently, apply these adjusted headship rates by age to the corresponding population within each age group. By incorporating average historical headship rates into household projections, communities can mitigate the impact of potential decreases in recent headship rates that may be due to housing unaffordability, therefore avoiding artificially low household projections.
- **Optional for Smaller Communities:**
 - For the younger population aged 18-34, predict family/non-family headship rates using economic modeling. See UK study in annex for further guidance.

- Project household composition by family/non-family households using latest census proportions by family type.
- Project household size by age for family/nonfamily type by dividing population by households.

Housing Demand

To project housing demand by tenure:

- If ownership rates for family/non-family households within specific age groups are not showing a trend over time, apply the average historical ownership rates to projected households by age. The remaining households are considered renter households by age.
- If ownership rates for family/non-family households within specific age groups are trending over time, include the average historical percentage point change to the current ownership rates. Apply these adjusted ownership rates to household counts by age to project tenure by age. The remaining households are considered renter households by age.

To project housing demand by dwelling type:

- If historical dwelling propensities by family type, age, and tenure are not exhibiting a trend, apply the average historical demand propensity by type, age, and tenure to project households by type, age, and tenure.
- If historical demand type propensities are trending, incorporate the average percentage point change in demand type propensities to the current propensities. Apply these adjusted propensities to household types to estimate future dwelling propensities.

Economic Data Integration

- Relying solely on traditional demographic approaches to forecast housing needs can underestimate housing demand.
- Headship rates by age and family type can be projected by considering economic factors as explanatory drivers. These factors could include income, unemployment rates, prices, rents, and vacancy rates.
- CMHC is developing models to project headship rates for household maintainers aged 18-34 in provinces and larger metropolitan areas. Larger communities can benefit from leveraging these projections.
- Using an economic approach to project headship rates and incomes facilitates the estimation of household counts by age, size, tenure, and income. When integrated with dwelling type, price, and rent data, this approach assists in identifying potential households in core housing need.

Supply Capacity & Supply Gaps

- Housing need projections should be adjusted upwards or downwards to account for the **net effects** of conversions, demolitions, and vacant units in each community.
- Where data is available, communities should assess future capacity by compiling data on draft approved serviced lots, categorized by dwelling type and tenure, that will be available for residential development. When combined with household projections by dwelling type and tenure, help estimate supply gaps
- In addition, larger communities can leverage supply gap estimates from CMHC to help inform where need is greatest and to identify housing shortages.
- **Optional for Smaller Communities:**
 - Comparing housing need projections with supply capacity will enable communities to identify potential gaps in supply by dwelling type and tenure.

6.2 Projection Methodology

Please outline the methodology and calculations used to complete the projections here, including any assumptions made.

6.2.1 Projections, 2031		
Characteristic	Data/Formula	Value
Women by age distribution (# and %)	0-14	13,732
	15-19	4,891
	20-24	5,659
	25-64	51,207
	65-84	19,087
	85+	3,520
Male Births	Births x Estimated Proportion of Male Births	320 per year
Female Births	Total births – Male Births	330 per year
Survival Rate	Survival rate for those not yet born at the beginning of the census year	98.5%
Net Migrations	Net migration (in and out) of those not yet born at the beginning of the census year	4,395
Projected Family Households	Age-group population x projected age-specific family headship rate	53,925
Projected Non-family Households	Age-group population x projected age-specific non-family headship rate	29,182

6.2.1 Projections, 2031		
Characteristic	Data/Formula	Value
Total Projected Headship Rate	Family headship rates + non-family headship rates	43.1%
Projected Net Household Formation	Projected households by type (family and non-family) (Year 2) – Projected households by type (family and non-family) (Year 1)	752 (annual Family) 407 (annual Non-family)
Projected Owner Households	Projected households by type, year and age group x Projected ownership rate by type, year and age group	53,571
Projected Renter Households	Projected households by type, year and age group – projected owner households by type, year and age group	29,536
Projected Dwelling Choice	Projected households by type, tenure and age group x projected dwelling choice propensities by type, tenure and age group	Single Detached House

6.3 Population and Households Projections

6.3.1 Anticipated Population by 2031		
Characteristic	Data	Value
Anticipated population	Total	193,037
Anticipated population growth	Total	26,902
	Percentage	16.2% or 1.6% annually
Anticipated age	Average	45
	Median	45.3
Anticipated age distribution (# and %)	0-14	28,319
	15-19	10,055
	20-24	11,928
	25-64	101,499
	65-84	35,844
	85+	5,393

6.3.2 Anticipated Households by 2031		
Characteristic	Data	Value
Current number of households	Total	71,525
Anticipated number of households	Total	83,107
Anticipated Household Age	Average	54 (1976-1981)
	Median	42 (1986-1991)
Anticipated Households by Tenure	Renter	29,536
	Owner	53,571
Anticipated Units by Type	Total	83,107
	Single	48,933
	Semi-detached	3,951
	Row	3,841
	Apartment	26,383
Anticipated Units by Number of Bedrooms ¹	1 bedroom	10,538
	2 bedroom	20,122
	3 bedroom	31,161
	4 bedroom	16,596
	5 bedroom	3,875
Anticipated Households by Income	Average	15,272
	Median	14,221
	Very Low	2,552
	Low	13,011
	Moderate	15,431

6.3.2 Anticipated Households by 2031		
Characteristic	Data	Value
	High	30,092
Anticipated average household size	Total	2.26
Draft approved lots by planned housing type ²	Total	294
Draft approved lots by tenure	Tenant	2
	Owner	292

NOTE: The City of Greater Sudbury has 117 active draft approved plans of subdivision, comprising a potential 4,326 units on 795 ha of land, the majority of which are zoned R1 and R2 (low density residential).

¹*Distribution by number of bedrooms does not add to the total units as those that contain 0 or 6 plus bedrooms are not shown.*

²*This projected total is based on the average annual number of draft approved lots over the past 10 years projected over the next 10 years, accounting for a 1.6% growth of this period. The number of projected draft approved lots for single-detached, semi-detached, row, and apartment typologies are 235, 48, 8, 2 lots respectively.*

7. Use of Housing Needs Assessments in Long-Term Planning

7.1 This final section aims to determine how your community anticipates using the results and findings captured in the Housing Needs Assessment to inform long-term planning as well as concrete actions that can address identified needs. Please use the following questions to describe how those linkages will be made.

- **How will this HNA inform your official community or development plan, housing policies and/or actions going forward?** For example, if the HNA identifies specific needs in your community across the housing spectrum – such as housing needed for priority populations, units for large households in denser form factors, more diverse structural types such as missing middle housing, or more affordable and higher-density housing near transit - how could actions and changes in policy and planning help address those needs?

This HNA will have role in informing future housing and housing-related policies and programs developed by the City, as well as adjustments made to existing policies and programs. These include Official Plans, Housing and Homelessness Strategies, Community Improvement Plans, and Zoning By-Laws. It is assumed that future HNA

iterations will have the same purpose. Key information relating to current and future housing need (particularly for vulnerable population groups), land needs, housing prices and rents, population projections, and socio-economic, environmental, and transportation conditions as they relate to the development of adequate, suitable, and affordable housing in Greater Sudbury will be utilized in these policies and programs.

How will data collected through the HNA help direct those plans and policies as they aim to improve housing locally and regionally, and how will this intersect with major development patterns, growth management strategies, as well as master plans and capital plans that guide infrastructure investments?

Greater Sudbury is 3,627 square kilometers in area and consists of a large, central urban area surrounded by more than 20 smaller urban and non-urban settlements that are all tied together through an extensive network of hard and soft infrastructure. While our urban and non-urban settlements constitute approximately 6 percent of our total area, the dispersed pattern of growth poses challenges for the efficient provision of infrastructure and public service facilities. The city's road system includes approximately 3,600 lane kilometers of roadway; CGS owns and operates six (6) municipal drinking water supply systems, each with multiple wells, treatments systems and linear infrastructure; and thirteen (13) independent wastewater collection systems, including a total of ten (10) wastewater treatment plants, four (4) lagoons and sixty-eight (68) wastewater lift stations.

The City of Greater Sudbury has completed a series of local infrastructure plans including a Transportation Master Plan, Water/Wastewater Master Plan, Watershed Study and Master Plan, and Transit Action Plan. Additionally, Greater Sudbury has completed an Employment Land Strategy and associated implementation Plan which aligns infrastructure improvements in a series of strategic employment areas which have been identified as key locations for both expansion of existing industrial businesses and attraction of new industrial opportunities. The planned Residential Land Strategy proposes a similar exercise be completed for our residential lands to maximize the potential number of units enabled through strategic infrastructure investments.

These infrastructure plans identify areas in the City where long term replacements and/or expansions to water and wastewater servicing networks. All infrastructure master plans are informed by a review of background studies and guidelines, examination of historical data, as well as a gap analysis to identify existing and future capacity requirements. Additionally, water and wastewater alternative servicing solutions have been developed and evaluated in order to determine preferred servicing approaches. The Transportation Master Plan supports a comprehensive transportation vision through improvement of the existing road network, enhancement and expansion of active transportation (biking, walking) facilities and the incorporation and development of additional transportation policies.

All infrastructure plans are developed in alignment with the City's Corporate Strategic Plan, Population, Household and Employment Projections and Official Plan policies and designations to strategically plan where to locate new housing and living areas,

businesses, parks and open spaces and schools, and what infrastructure will be needed to service those areas while protecting the City's water resources, natural environment and cultural heritage.

In 2018, Council approved a Water and Wastewater Asset Management Plan to provide a strategic document that will guide decisions related to how the City's water and wastewater infrastructure will be managed to most efficiently and effectively allocate resources to meet desired levels of service for the lowest overall lifecycle cost. An update of the Water and Wastewater Asset Management Plan is underway. The asset management plan does not stand alone in assisting the City with sustainable planning of infrastructure investment. The Plan draws upon work completed under other planning documents, include the City of Greater Sudbury Water and Wastewater Master Plan, WSP (2018); Sudbury Transportation Master Plan, (WSP (formerly MMM Group)(2018); Condition Assessment of Lift Stations by various consultants (2021-2022); and Enterprise Asset Management Plan, KPMG (2021).

Community Improvement Plan incentive programs, and Development Charges exemptions and reductions for housing development are targeted to the City's major Nodes and Corridors where it has been identified that no additional infrastructure upgrades are required and development would be well serviced by existing community services.

The City of Greater Sudbury is a single-tier municipality, without an upper-tier municipality, that is responsible for the provision of all hard and soft services within the City boundary. Greater Sudbury is the unofficial capital of Northeastern Ontario and a regional hub for healthcare, retail, and a variety of government services. Its close proximity to Southern Ontario, roughly four hours to Toronto by car, will be shorter with the future completion of the four laning of highway 400. At 86,925 workers, Sudbury's employment rate sits just below the pre-pandemic peak and is expected to push above pre-pandemic levels in 2025, then continue to rise annually from 2026-2028. Rise in employment is driven largely by the industrial and healthcare sectors and while this increase in employment is positive, labour shortages have been flagged as the single most significant obstacle to business growth in our region, followed by housing for the attraction and retention of the required workforce to support economic growth.

The Official Plan for the City of Greater Sudbury provides the policy framework that ensures that new housing supply will be supported by the provision of infrastructure, such as public transit, drinking water and wastewater connections, as well as parks and greenspaces and other community amenities through both long-range planning as well as assessment and review that occurs at the development approvals stage closer to the issuance of a building permit. 80% of CGS residential development is infill within existing designated settlement areas, meaning that the majority of development will be connected to existing water and wastewater infrastructure.

With respect to long-range planning and coordination, hard services are guided by a series of Asset Management and Master Plans. Soft Services are guided by a similar suite of policy documents, as well as coordination with local services providers, associations and institutions. As development occurs, planning applications are

circulated to a number of partner agencies to ensure that they are aware of planned development and ensure that their long-term planning documents align with both projected and actual growth occurring within the City.

The following sections provide a high-level overview of key strategies and alignments that support new housing supply including: asset management, infrastructure, public transit and active transportation, parks and greenspaces, safety and security, health care services, schools and educational opportunities, cultural and community amenities, dining and entertainment and downtown as well as economic strategic plans.

Infrastructure

In 2018, City Council achieved the first requirement of O. Reg 588/17, with the approval of the Enterprise Asset Management Policy aimed at ensuring municipal infrastructure systems are supported by plans and financing decisions that demonstrate effective service support and appropriate regard for managing lifecycle costs.

On August 1, 2021, Council approved an asset management plan for core assets (roads, bridges and large culverts, water, wastewater, and stormwater management systems) that identifies the current levels of service and the cost of maintaining those levels of service.

On December 12, 2023, achieved the third milestone of the O.Reg. 588/17 Phase-in Schedule and approved an asset management plan for all municipal infrastructure assets that identifies current levels of service and the costs of maintaining those levels of service.

In 2018, Council approved a Water and Wastewater Asset Management Plan to guide decisions related to how the City's water and wastewater infrastructure most efficiently and effectively allocate resources to meet desired levels of service for the lowest overall lifecycle cost.

An update of the Water and Wastewater Asset Management Plan is underway. This asset management plan does not stand alone in assisting the City in the sustainable planning of infrastructure investment. The Plan draws upon work completed under other planning documents, including the City of Greater Sudbury Water and Wastewater Master Plan, WSP (2018) (update currently underway); City of Greater Sudbury Transportation Master Plan, WSP (formerly MMM) (2018); Condition Assessment of Lift Stations by various consultants (2021-2022); Enterprise Asset Management Plan, KPMG (2021); water condition assessment, etc.

The update to the Water and Wastewater Asset Management Plan is 95% complete and planned to be presented to Council in early 2025. With respect to the final milestone of the Phase-in Schedule for the Enterprise Asset Management Plan, the work is in the preliminary stages. It is anticipated to be considered by City Council in late Q4, 2024 or early Q1 2025 ahead of the legislated deadline.

Water/Wastewater 10 Year Financial Plan dated April 2019, provides details of the projected financial position of the drinking water system taking into account expected

expenses and capital outlays, expected revenue and financial measures to provide a sustainable long-term financial future.

Watershed Study and Master Plan

Greater Sudbury has 330 lakes within 25 watersheds that drain into Lake Huron. Protection of our watersheds is identified as a priority in the City of Greater Sudbury's Official Plan. Greater Sudbury is undertaking a series of sub-watershed studies to implement stormwater targets for new development areas as well as implementation measure for existing urbanized areas.

In August 2022, Council approved an **Employment Land Strategy** (ELS) to foster economic growth and support a diversified economy now and into the future. The strategy will ensure that the City is well positioned to respond to Employment Land needs by considering future trends, projected demand, land supply, municipal services, incentives and other tools to support future growth and economic changes. The ELS links planning, infrastructure and economic development to ensure that the city has an adequate supply of serviced employment land, and policy and incentive frameworks in place to stimulate investment, development and job creation. The study identified that four of eight strategic employment areas identified by the study require water and wastewater upgrades, the implementation plan set a path forward to complete all required upgrades. The first project identified as the most "shovel ready" is underway with the first phase anticipated to be completed in 2025.

In 2016, Greater Sudbury adopted a **Transportation Master Plan** which recommends a sustainable approach to planning and managing the local transportation network by making the most effective use of infrastructure for motorists, public transit, cyclists and pedestrians. The Transportation Master Plan recommended the City develop a Transportation Demand Management (TDM) Plan to complement infrastructure delivery for transit, walking and cycling. This complementary report was approved by Council in June 2018.

Public Transit and Active Transportation

In 2017 Greater Sudbury undertook a comprehensive review of the Greater Sudbury Transit System that culminated in the adoption of a Transit Action Plan that provided a review of all aspects and transit service types within the City of Greater Sudbury. This transformational plan was adopted in 2019 and produced increased ridership to new, unprecedented levels.

The City will be increasing transit service over the next two years, adding approximately 11,000 hours of service. 6,000 of those hours will be implemented in 2024 with the remainder to be added in 2025. These changes include updated arrival and departure times for existing routes and the introduction of new routes to meet ridership demands. The increases are due to the growth in ridership by over 50 per cent in 2023. To date, in 2024 ridership numbers are 35% above those recorded in 2023.

Greater Sudbury will continue to monitor transit ridership trends and adapt service provision as needed on an annual basis.

Transportation demand management is a wide range of policies, programs, services and products that influence how, why, when and where people travel to create a more sustainable transportation network. The objectives are to encourage individuals to change modes of transportation (walk, cycle, take transit or carpool instead of drive alone); travel less (telework, link several purposes on one trip) or change trip times or routes (choose off-peak hours or less congested roads).

In June 2018, Greater Sudbury became only the 6th municipality in Ontario to officially adopt a **Complete Streets Policy**. Benefits of Complete Streets include: encouraging people to walk, bicycle or take transit; provide better physical and mental health outcomes for people of all ages; reduce the chance of death or injury; support better balance between motorized travel and other uses; provide space for landscaping, which contributes to healthier air, more shade, better stormwater management and makes our city more resilient to the effects of climate change and results in desirable cities with a high quality of life.

Greater Sudbury has also adopted two climate change adaptation guiding documents. The **Community Energy and Emissions Plan** (CEEP) is the long-term plan to reduce carbon emissions and pollution in Greater Sudbury. The CEEP uses energy, emissions, land-use, and financial modelling to determine community-wide efforts required to meet a 2050 net-zero emissions target. The **Community Climate Change Adaptation Plan** (CCCAP) is a long-term plan to improve resilience in our community to climate change and extreme weather events, reduce our risk and vulnerability, and recover quickly from events such as flooding, extreme heat and power outages.

Parks and Greenspaces

Parks, open space, and leisure facilities are essential contributors to Greater Sudbury's quality of life. Each provides meaningful opportunities for social engagement and physical activity to residents and tourists, individuals and groups, young and old, and people of all abilities. The primary objective of the **Parks, Open Space & Leisure Master Plan** is to develop a strategy for the management and delivery of services at municipal parks and facilities which include arenas, indoor pools, fitness centres, gymnasiums, community centres & halls, dedicated space for youth & seniors, indoor turf facilities, arts & culture facilities, playgrounds, soccer fields, ball diamonds, sport fields and courts, splash pads & beaches, off-leash dog parks, outdoor ice rinks, running, tracks, skate & BMX parks and ski hills.

The Parks, Open Space & Leisure Master Plan also provides a strategy for parkland, trails and connectivity. The Master Plan is also informed by the Green Space Advisory Panel report and update that made recommendations for parks and open space policy and created an evaluation system to assist in identifying priority park parcel acquisitions, and identify surplus park properties.

Safety and Security

Emergency Services Strategic Plan

In June 2011, City Council amalgamated Fire, Paramedic and Emergency Management into one Community Safety Department. The strategic direction of the Community Safety Department reflects an understanding of complementary and integrated dynamic elements in the delivery of Fire, Paramedic and Emergency Management Services to our community.

The **Greater Sudbury Police Service (GSPS)** is the 12th largest Municipal Police Service in Ontario, composed of 264 uniformed staff and 105 civilian staff, covering the largest municipality in Ontario, based on total area (3,627 Square Kilometers, including water bodies).

Health Care Services

Health Sciences North (HSN) is an academic health sciences centre that serves Northeastern Ontario, and is Greater Sudbury's largest employer with 4,000 employees, 600 highly skilled medical staff and scientists, 2,100 learners and 700 volunteers. HSN is the largest hospital in Northern Ontario. Housed within HSN is the Health Sciences North Research Institute (HSNRI), a state-of-the-art research facility that also conducts research about Northern Ontario populations. HSNRI focuses on vaccine development, cancer research and healthy aging. Municipal efforts to address labour shortages, such as the Rural and Northern Immigration Pilot (RNIP) continue to contribute to local population growth and workforce efforts, targeting sectors such as engineering, skilled trades, healthcare, and construction. Since program inception in 2020, 1,399 candidates were approved to live and stay in Sudbury. This represents nearly 2,700 total new residents when including spouses and children.

The Federal Government has recently announced the program will become a permanent immigration pathway. The new system in September 2024 will include two streams, the Rural Community Immigration Pilot (RCIP) and will include a Francophone Community Immigration Pilot (FCIP) program which is expected to attract an additional 1,000 residents per year. A mix of housing options will be necessary to meet projected requirements of current and future residents.

Schools and Educational Opportunities

The City of Greater Sudbury functions as the regional centre of learning and applied research for northeastern Ontario. Laurentian University, the Northern Ontario School of Medicine, School of Architecture, Cambrian College, and College Boreal provide excellent educational services through a variety of full and part-time programs. These programs are complemented by numerous research activities and joint ventures. Community partnering and the formation of innovative partnerships with the public and private sectors have become a major focus for all institutions. Greater Sudbury have over 29,500 students enrolled in post-secondary education.

Other vital community Amenities

Cultural and Community Amenities

Greater Sudbury's [Cultural Plan and Cultural Action Plan](#) articulate the City's strategic direction to further enhance our cultural sector in four interconnected strategic directions: Creative Identity, Creative People, Creative Places and Creative Economy. Our community is multicultural and has a unique historical relation with its geographical landscape and the plan celebrates that diversity.

Tourism

Sudbury is a leading tourism destination in Ontario, with over 1.2 million visitors each year and approximately \$200 million in tourist spending, tourism is a growing sector of the City's economy and provides a range of cultural activities to current residents and tourists alike.

Top tourism destinations in Sudbury include Science North, who's unique offerings include hands-on science fun, an IMAX theatre, world-class exhibits and Dynamic Earth, an innovative mining and geology centre that invites visitors to explore the planet below earth's surface.

Sudbury is also a premier destination for festivals and events in Northern Ontario celebrating a combination of art, music, food and more year-round. Festivals include Up Here (We Live Up Here), Northern Lights Festival Boreal and Jazz Sudbury. The Sudbury Theatre Centre, Yes Theatre Refetterio, and Place des Art provide some of the key venues for the arts.

With guidance from the Culinary Tourism Alliance and a partnership with Destination Northern Ontario, a team including representatives from the City of Greater Sudbury and Tourism Northern Ontario developed [Growing Food Tourism in Greater Sudbury](#). Project objectives include developing high quality tourism products and experiences that are unique to the region and positioning Greater Sudbury as a hub for regional tourism.

Dining, Entertainment and Downtown

Greater Sudbury has 2 Business Improvement Areas (BIAs) where local businesses collaborate to improve their economic environment. The [Downtown Sudbury BIA](#) includes over 90 property owners and 400 businesses that raise funds to finance initiatives aimed at enhancing the business environment, increasing foot traffic, and promoting the district as a premier destination for shopping, dining and services. Current BIA programs include a business recruitment initiative, a downtown clean-up program, a campus core program catering to students and other programs to incentivize activities in the public realm.

[From the Ground Up: GSDC Strategic Plan 2015-2025](#), guides strategic decisions that contribute to economic growth in our community. The plan sets and strengthens the community's direction and focus, while working towards an ambitious vision of growth and economic diversification. The objectives are built from the community's desire to develop a holistic strategy that would align with partners' goals and lead the Greater Sudbury Development Corporation and the City towards future economic development and prosperity.

Downtown Master Plan presents strategies for improving the downtown's level of economic, cultural and retail activity, its sense of place and its role as the urban centre for the region. Most of the 25-year action items and many of the 10-year action strategy project have been completed and Council has proved funding for the update of the Master Plan. Collectively these actions have contributed to a more vital downtown and Greater Sudbury continues to collaborate and engage the community as the update occurs through public event such as the Cultural Forum, Business Improvement Area Annual General Meeting, and events hosted by the McEwan School of Architecture and Greater Sudbury Chamber of Commerce.

The **Economic Development Strategic Plan 2015-2025**: From the Ground Up, sets and strengthens Greater Sudbury's direction and focus, while working towards an ambitious vision of growth and economic diversification. Goals include becoming the global leader in the mining supply and services industry, a nationally recognized centre for artistic excellence, vibrancy and creativity, one of Ontario's top destinations, a leader in health and life sciences, one of the most integrated education and innovation ecosystems in Ontario, a robust entrepreneurship ecosystem, a welcoming and open community, a highly skilled workforce, and a quality of place and lifestyle that is second to none.

- **Based on the findings of this HNA, and particularly the projected housing needs, please describe any anticipated growth pressures caused by infrastructure gaps that will need to be prioritized and addressed in order to effectively plan and prepare for forecasted growth. This can relate to any type of enabling infrastructure needed for housing, including fixed and non-fixed assets, as well as social, community or natural infrastructure that your local government has identified as a priority for fostering more complete and resilient communities.**

Greater Sudbury will be undertaking a Residential Land Strategy that will align the supply of designated residential land with areas with servicing capacity. Servicing Capacity (both water and wastewater infrastructure) is the greatest priority when effectively preparing and planning for forecasted growth in Greater Sudbury. As described in the section above, planning for other vital community services and amenities is undertaken in alignment with projected growth and as development occurs, water and wastewater infrastructure is the key to enabling development to accommodate forecasted growth.

Greater Sudbury has over 665 ha of residentially designated developable lands within the settlement area boundary, representing a potential 27,876 units; 4,326 potential units within draft approved subdivisions and 1,035 vacant residential legal lots of record representing 10,624 potential units. These residential lands with varying levels of planning approvals are spread across 7 former municipalities, across 8 water systems and 14 wastewater systems. A number of planned developments, including subdivisions with draft plan approval are preventing from proceeding to construction because of limited servicing capacity.

Greater Sudbury has identified a number of the key wastewater system upgrades required to unlock more housing supply, however, more analysis is required to complete a Residential Land Supply Strategy. A wastewater system specific analysis of housing units that would be enabled and shovel ready units that would be enabled by upgrades to the Lively-Walden wastewater system supported the City's successful application to the Province's Housing-Enabling Water Systems Fund. The project is anticipated to enable 585 shovel-ready units with by 2031 and 3,300 potential housing units. The shovel-ready units have existing planning approvals but cannot proceed to building permit issuance because of a lack of wastewater capacity. A fulsome review of all water and wastewater systems and alignment with existing approvals as contemplated through the Residential Land Supply Initiative will allow the City to strategically invest in infrastructure upgrades where the most housing units will be enabled and support future funding opportunities. It is anticipated that the Residential Land Supply Strategy will be completed by the end of Q3, 2025.

Annex A: Relevant Links for Developing Housing Needs Projections

Data and Analysis

[Housing Statistics - Statistics Canada](#)

[Population estimates, July 1, by census subdivision, 2016 boundaries \(statcan.gc.ca\)](#)

[Population estimates, July 1, by census metropolitan \(statcan.gc.ca\)](#)

[Population and demography statistics \(statcan.gc.ca\)](#)

[Population Projections for Canada \(2021 to 2068\), Provinces and Territories \(2021 to 2043\) \(statcan.gc.ca\)](#)

[Housing Market Information Portal](#)

[UrbanSim – Scenario Modeling](#)

Reports & Publications

[Housing Markets Insight - CMHC's household projections for 8 of Canada's major urban centres until 2042](#)

[CMHC - Housing Shortages in Canada Report](#)

[University of British Columbia - Housing Assessment Resource Tools \(HART\)](#)

[University of London - Affordability targets: Implications for Housing Supply](#)

[Nova Scotia Housing Needs Assessment Report Methodology](#)

[Ontario Land Needs Assessment Methodology](#)

[British Columbia Affordable Housing Need Assessment Methodology](#)

Annex B: Glossary

Affordable Housing: A dwelling unit where the cost of shelter, including rent and utilities, is a maximum of 30% of before-tax household income.

Area Median Household Income: The median income of all households in a given area.

Cooperative Housing: A type of residential housing option whereby the owners do not own their units outright. This would include non-profit housing cooperatives, as stand-alone co-operatives or in partnership with another non-profit, including student housing co-ops, as well as Indigenous co-ops, including those in partnership with Indigenous governments and organizations. This does not, however, include homeownership co-ops or equity co-ops that require an investment, which along with any profit earned, is returned to co-op investors.

Core Housing Need: Refers to whether a private household's housing falls below at least one of the indicator thresholds for housing adequacy, affordability or suitability, and would have to spend 30% or more of its total before-tax income to pay the median rent of alternative local housing that is acceptable (attains all three housing indicator thresholds).

- *Adequate* – Does not require any major repairs, according to residents. Major repairs include those to defective plumbing or electrical wiring, or structural repairs to walls, floors or ceilings.
- *Suitable* – Has enough bedrooms for the size and make-up of resident households, according to guidelines outlined in National Occupancy Standard (NOS).
- *Affordable* – All shelter costs total less than 30% of a household's before-tax income.

Household: A person or a group of persons (other than foreign residents) who occupy a private dwelling and do not have a usual place of residence elsewhere in Canada.

Household Formation: The net change in the number of households.

Supportive Housing: Prioritizes people experiencing chronic homelessness and other vulnerable people who have the highest support needs. It provides long-term affordable housing and a diversity of customized support services.

Permanent Supportive Housing: Prioritizes people experiencing chronic homelessness and other vulnerable people who have the highest support needs. It provides long-term affordable housing and a diversity of customized support services.

Purpose-Built Rental: Also known as the primary rental market or secure rentals; multi-unit buildings (three or more units) which are built specifically for the purpose of providing long-term rental accommodations.

Short-Term Rentals: All or part of a dwelling unit rented out for less than 28 consecutive days in exchange for payment. This includes bed and breakfasts (B&Bs) but excludes hotels and motels. It also excludes other accommodations where there is no payment.

Suppressed Household Formation: New households that would have been formed but are not due to a lack of attainable options. The persons who would have formed these households include, but are not limited to, many adults living with family members or roommates and individuals wishing to leave unsafe or unstable environments but cannot due to a lack of places to go.

Missing Middle Housing: Housing that fits the gap between low-rise, primarily single-family homes and mid-rise apartment buildings, typically including secondary and garden suites, duplexes, triplexes, fourplexes, rowhouses and townhouses, courtyard housing, and low-rise apartment buildings of 4 storeys or less. These housing types provide a variety of housing options that add housing stock and meet the growing demand for walkability. The missing middle also refers to the lack of available and affordable housing for middle-income households to rent or own.