



2022-23 Official Plan Review

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Town of O'Leary

Background Study and Community Profile

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1. CONTEXT

1.1. Introduction

This Background Study and Community Profile outlines the social, economic and environmental realities of the Town of O’Leary and identifies key areas of consideration as part of the 2022-2023 official plan review process, laying the groundwork for the Town’s updated Official Plan and Bylaw.

1.2. Location

O’Leary is located in the south-central portion of West Prince at the intersection of the O’Leary Road and the Confederation Trail (former CNR rail lines) approximately 5 kilometers west of the Western Road (Rte 2). The Town is 60 kilometers north-west of Summerside and 130 kilometers west of the provincial capital, Charlottetown.

In terms of its physical size, O’Leary is relatively small, with a total area of 1.83 sq. km. This limited size has caused a considerable amount of development to spill over the municipal boundaries into adjacent unincorporated lands. Even the municipal sewage lagoon had to be located originally outside of the very constrained municipal boundaries. On September 24, 2016, the Town’s boundary was expanded by 60 acres. An earlier boundary change in 2009 also added a small area of land. At the time of the 2022-2023 Plan Review, the Town had also initiated a process to annex approximately 37 acres to the east along Route 142, the majority of which being a large parcel owned by the Town, located adjacent to the Utility’s lagoon.

As one of the three service centres in the West Prince region, the Town has a relatively high population density compared to its rural neighbours, at 479 people/sq. km.

Table 1: Background Data, Town of O’Leary

	Area	2021 Population	Population Density
O’Leary	1.83 sq km	876	479
West Prince region	1147 sq km	14807	12.6
O’Leary as % of region	0.16%	5.9%	

The topography is relatively flat, with one small stream bisecting the Town in the eastern end.

Figure 1: Regional Context



1.3. Mi'kmaq History

Prince Edward Island is known as *Epekwitk* and is part of Mi'kma'ki, the traditional, unceded territory of the Mi'kmaq people for more than 12,000 years. The entire province, along with Nova Scotia, eastern New Brunswick, the Gaspé peninsula and southern Newfoundland, comprise Mi'kma'ki where oral tradition and historic record point to seasonal use and habitation of the region.

All of Mi'kma'ki is covered under Peace and Friendship Treaties which serve as a foundation for the relationship of the Mi'kmaq and all citizens of the region.

1.4. Settler History

The Village of O'Leary was born well over 100 years ago when the western Prince County rail system was laid. The O'Leary Station was built at the location where the rail crossed the O'Leary Road. That location has not changed to this very day, although the use has since changed to residential.

By the time the Island's 1880 Meacham's Atlas was being produced, the railway lands had been developed to include a siding and two spur lines opposite the main station. In addition to the station building, the railroad company constructed a coal shed and a water tank. All of these facilities were shown in the Atlas.

The Village quickly developed into a service centre for the area. The spur lines were used to serve James Barclay's stream-driven sawmill and warehouse north of the O'Leary Road. They also served the Post

Office, then managed by John Frost.

On the south side of O’Leary Road, Robert Ellis and a Ramsay-Barclay enterprises both built stores, and John MacDonald set up a cooperage. Thus began the first manufacturing, trade and commerce in O’Leary.

The earliest residents of the Village came from a variety of places. Hugh and Charles Murray moved in from Bedeque, and David and Lorenzo Ramsay from Port Hill. O’Leary’s first tailor was William Jelley. Robert Ellis moved in from Springfield West to open his store. Thomas Robinson came from Unionvale with his family, and the Dickens family came from the eastern part of the Province to open O’Leary’s first blacksmith shop.

Two names which are significant in the history of O’Leary Station are Peter N. Pate and James Barclay. Barclay came to O’Leary from Ellerslie and brought his bride from Bedeque. He owned a store in partnership with D.C. Ramsay and a railroad siding warehouse. He also built the Willow Hotel. Peter Pate moved in 1888 from West River. At various times he owned a store, cannery, machine shop and cooperage. He also served for a time as Justice of the Peace and Magistrate for Prince County. He opened the first bank in O’Leary – the Bank of New Brunswick. Entrepreneurs such as Barclay and Pate helped O’Leary to quickly establish itself as a robust new community.

In addition to its entrepreneurs, O’Leary also had the good fortune to attract vigorous medical men. In 1886, Dr. Daniel McLaughlin came to O’Leary and built the Dr. George Dewar house. Later, Dr. H. E. MacEwen joined the practice, with A. J. Matheson dispensing drugs from a dispensary in Dr. McLaughlin’s house. An impressive number of doctors have served in the community over the years since 1886.

A wide business community continued to develop in O’Leary. In 1889, Swabey and John Jelley opened the Jelley Carriage Shop and Funeral Home. The funeral home operated until 1974, when its name changed to Ferguson Funeral Home. By the last year of the 19th Century, Thomas Turner was running a tannery, John Reilly was making boots and Phillip Evans was manufacturing harness. W.H. Dennis was competing with the Jelleys by making sleighs and carriages in his shop, while D.P. Campbell ran a store and George Bernard had a barber shop in his home. Later, Martin Griffin opened a photographic studio near the west end of Main Street.

Every early community had its tinkers and O’Leary was no exception. In January 1938, Fred Champion threw the switch in his electrical power plant to light O’Leary’s streets and the homes of his first customers. He wired buildings and expanded his electric power service for several miles around. In January 1949, his generating plant was lost in a fire.

O’Leary was incorporated as a Village under the PEI *Village Services Act* in 1951. The first commissioners appointed were Alton Rayner, Ralph Adams and Bernard Shea. During the life of the *Village Services Act*, commissioners were elected at annual meetings. Under the Municipalities Act, the Community had a 6-member Council, a full-time Administrator and a Recreation Director. Applied for change in status in X, became a town.

Potato farming is obviously a large factor in O’Leary’s commercial activity today. O’Leary is a recognized marketing place, and retails supplies, machinery and services to the industry. At one point three large companies packed and shipped potatoes in the Community –C.F. Willis & Son Ltd., O’Leary Co-op and

H.B. Willis Co. Ltd. These companies had large labour forces and channeled thousands of dollars in wages into the community annually. The CIL Fertilizer plant and the Massey-Ferguson machinery dealership were two other major farm- related businesses in the Village. The CIL plant has since been taken over by Cavendish Farms.

An important key to O’Leary’s community growth is the spirit of co-operation by which people work together for the betterment of the community. One example is the O’Leary Farmers Co-op which at its peak operated a general store, a hardware and building supply store, a service station, a feed mill, and a potato warehouse. All of this was achieved on a “one member – one vote” basis. Another notable co-operative is the Central Credit Union, formed by a merger of the former Saint Mark’s, Saint Anthony’s and O’Leary Credit Unions.

The co-operative spirit already demonstrated will need to continue if O’Leary is to grow and prosper. It is expected that such co-operation will continue, not only among O’Leary residents, but also between the Community and its surrounding service area. The Official Plan for O’Leary will seek to build on the positive aspects of co-operation among people and communities.

1.5. Governance

The Town of O’Leary is governed by an elected Mayor and six Councillors for a four-year term in an open ward system. O’Leary was incorporated as a Village under the PEI *Village Services Act* in 1951. The *Municipalities Act* in 1983 resulted in a name change to the Community of O’Leary. The O’Leary Council formerly applied to the provincial government to change the status of the Community to a Town and the change took effect on March 11, 2014, a status that was retained through the transition to the *Municipal Government Act* in 2017.

The Town has a 6- member Council, and a full-time chief administrative officer, recreation director, and maintenance supervisor, with additional seasonal staff during the summer months for maintenance and recreation programs.

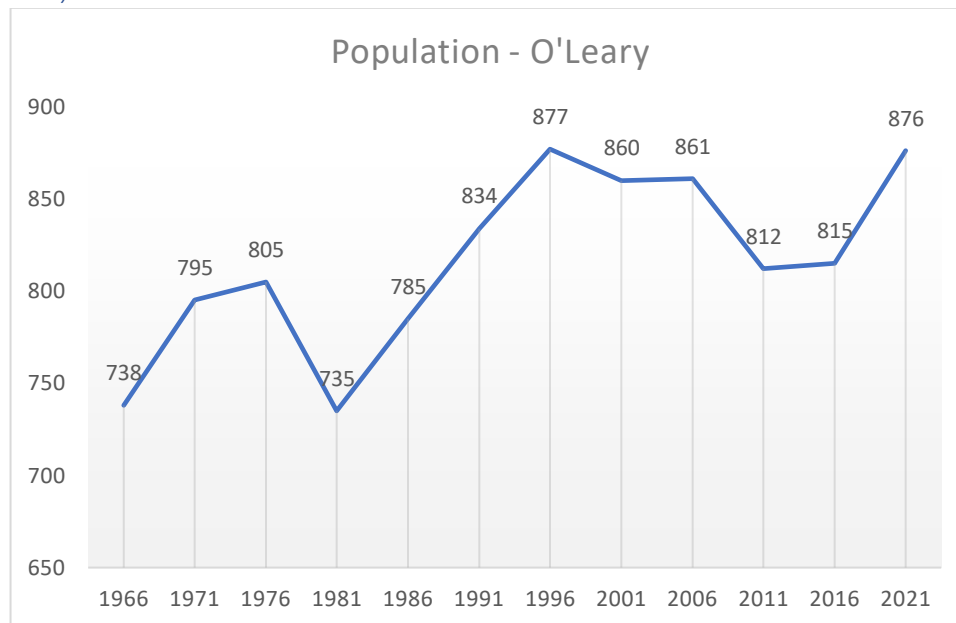
2. SOCIAL

2.1. Population¹

The Town of O'Leary is home to 876 residents as of 2021, an increase in population of 7.5% from 2016 and a large increase in the growth rate after a 0.4% growth from 2011 to 2016.

Figure 2 depicts population changes in the Town from 1966 to 2021, based on Census Canada figures. The trend from 1966 to 1996 was generally positive, with the exception of a significant downturn in the 1981 Census period. Very slight declines occurred between 1996 and 2006 with a larger decline between 2006 and 2011. Population numbers had rebounded by the time of the 2021 Census, reflecting growth in the West Prince Region and, to a larger degree, across the province.

Figure 2 - O'Leary population growth over time (Statistics Canada Census data and 2014 O'Leary Official Plan)

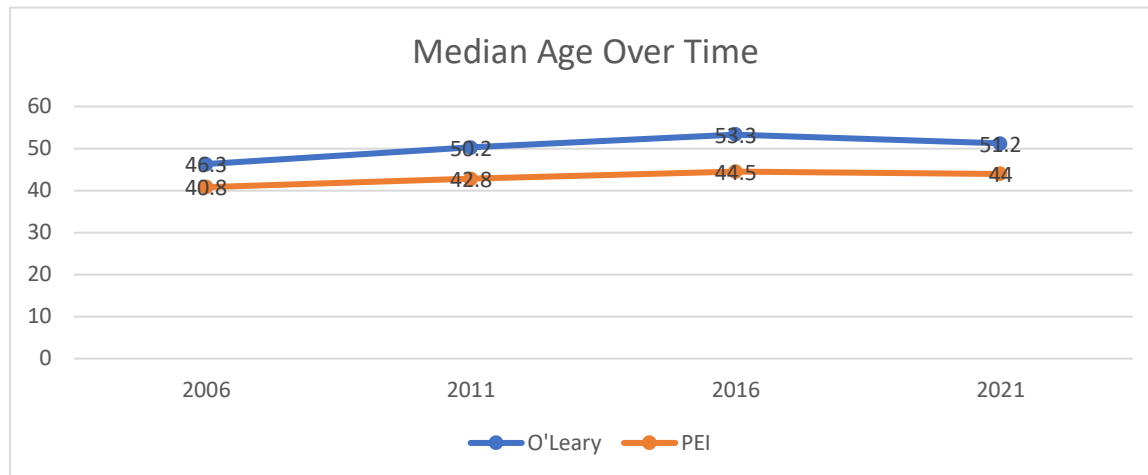


2.1.1. Age Breakdowns

As illustrated in Figure 3-4 and Table 2, the population is slowly aging; in the last fifteen years, the median age increased from 46.3 to 51.2 years, while the Province's overall median age increased from 40.8 to 44 years.

¹ Census Profile. 2021 Census. <https://www12.statcan.gc.ca/census-recensement/2021/dp-pd/prof/index.cfm?Lang=E>

Figure 3: Median Age over Time – Statistics Canada



In 2021, approximately 52% of O'Leary's population was over the age of 50 and 31.4% were over 65 years of age as compared to the provincial figures, where 43% were over the age of 50 and 21.2% were 65 years or older. Clearly O'Leary's population is aging and the number of younger families with children is declining. Shifts in age breakdowns notwithstanding, the percentage of households with 1-2 persons remained steady at 71% between 2016 and 2021.

Figure 4: Comparison of Age distribution in O'Leary from 2011 and 2021

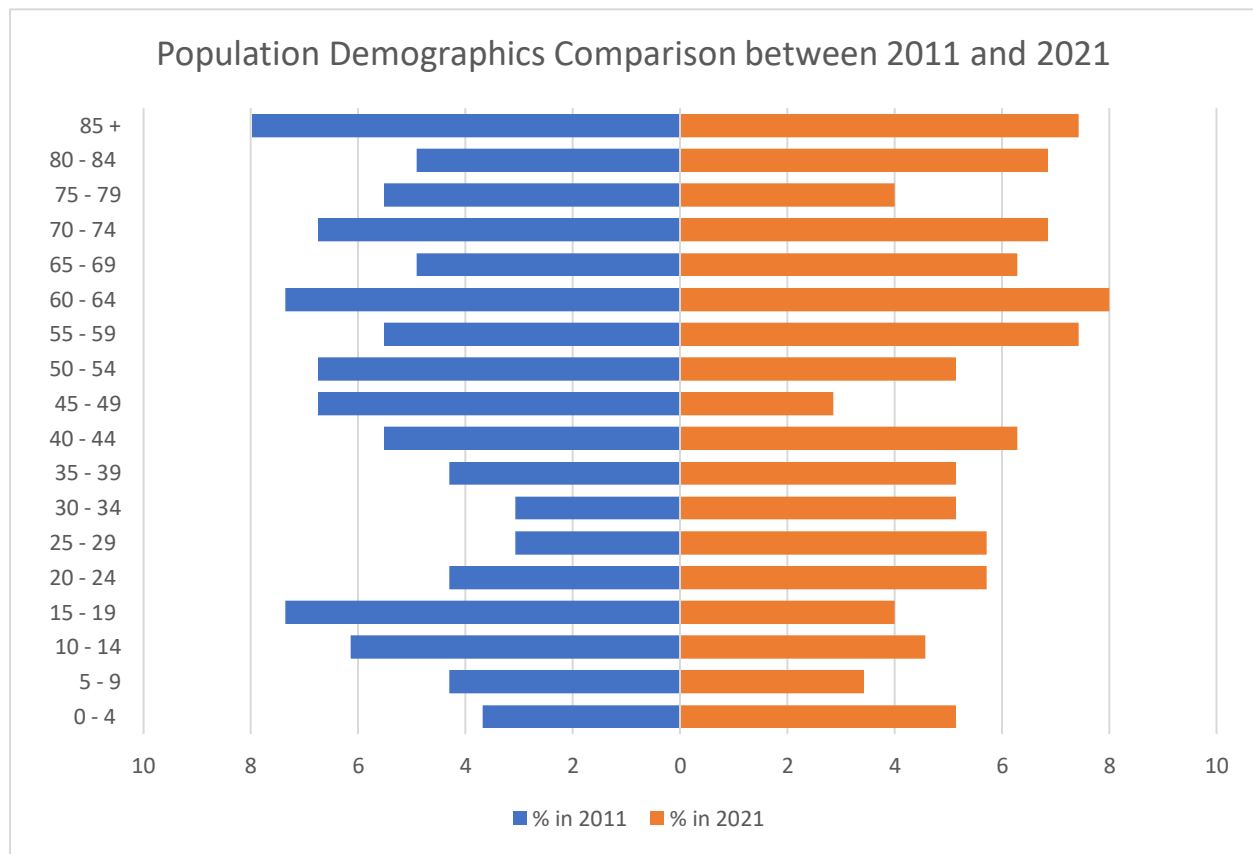


Table 2: Age characteristics, Town of O'Leary, PEI – Statistics Canada

Age Characteristics	O'Leary 2021	O'Leary 2016	O'Leary 2011	PEI 2021
0-14	13.7%	14.1%	20.4%	15.3%
15-64	55.4%	52.8%	50.9%	63.5%
65+	31.4%	33.1%	28.7%	21.2%
Average age	48.5	49.1		43.1
Median age	41.2	53.3	50.2	44
50+	52%	54.6%	49.7%	43%

As with other communities facing an aging population, the community is likely to face an ongoing need to supply specialized health and social/recreational programming. Seniors' housing, long term care facilities, meals on wheels and mobility assistance will all likely face increasing pressures and pose challenges for Town Council, community groups and the community at large, although community efforts have made progress towards meeting some of these needs.

2.1.2. Household Make-up

The average household size in 2021 was 2.2, compared with 2.3 in Prince County and provincially, and up slightly from an average household size of 2.1 over the previous two census periods. This is reflective perhaps of the increasing number of newcomers moving to the region, many of whom share accommodations for a variety of reasons, as the development of new dwellings occupied by usual residents and dwellings overall did not keep pace with the population growth.

49% of households featured a single family, while 41% were made of single-person households. A further 5% involved one-census-family household with an additional person, 4% were non-census-family households with more than one person, and only 1% featured multi-generational households.

Table 3: Household Size Over Time

Household size	O'Leary 2021	O'Leary 2016	PEI 2021
1 person	40%	39%	29%
2 persons	31%	32%	38%
3 persons	13%	18%	15%
4 persons	8%	6%	12%
5 or more persons	8%	6%	7%
Average household size	2.2	2.1	2.3
Households	375	355	64,570

43% of households have a primary household maintainer aged 65 or older. 41% of primary household maintainers are 35-64 years of age, and 16% of householder have a primary household maintainer between 15-34 years.

Almost 55% of those living in private households were married or living common-law, while 10% were parents in one-parent families, and 35.4% were children. 71% of persons living in private households

were in family households, while 29.4% were in private households other than a census family, with the majority of those living alone. 41% of couple families included children. The average census family was 2.7 people, while the average household size was 2.2.

O'Leary has lower rates of household formation in relation to the rest of Prince Edward Island, particularly among the 14-24 year cohort, meaning that the impact of housing shortages is most acute among younger residents. Should housing supply continue to fall behind population growth, the resulting suppression of household formation could result in a declining population of children, young families, and skilled workers.²

Table 4: 2021 Household Characteristics

Household Characteristics	O'Leary 2021	PEI 2012
One Census Family Households without additional persons	48.6%	61.8%
Couple Families	75%	86.3%
% couples with children	40.7%	45.1%
% couples without children	63%	54.9%
One-parent Families	25%	15.9%
Multigenerational Household	1.4%	1.6%
Multiple-Census Family Households	0%	0.4%
One-Census Family Households with additional persons	5.4%	2.4%
Two+ person non-census family households	4.1%	5.0%
One-person Households	40.5%	28.9%
Total Private Households	370	64,570
% of population in private households	91.3%	97.5%

Table 5: Size of Census Families

Size of Census Families in Private Households	O'Leary 2021	PEI 2021
2 persons	58.1%	56.1%
3 persons	23.3%	20.1%
4 persons	9.3%	15.9%
5 or more persons	7.0%	7.9%
Average size of census families	2.7	2.8
Total Census Families in Private Households	215	43,530

² Pelletier, Matthew. Understanding Housing Needs in the Town of O'Leary. July 2023. See Appendix A.

2.1.3. Future Population and Housing Needs

Recent growth trends would depend on the continuation of recent trends prompted at least in part by the COVID-19 pandemic, where virtually all areas of Prince Edward Island, and indeed the Canadian Maritimes, experienced unexpected population bumps with the immigration of young families and professionals who had the flexibility to leave their urban homes in western and central Canada and settle in seemingly safe and relatively affordable places away from large urban centres. PEI experienced the highest year-over-year increase on current record in 2021 where the growth rate was 3.0 per cent, the highest growth rate among provinces and territories. This compares to a rate of 1.2 per cent for Canada as a whole.³ The longer-term demographic impacts of the pandemic on migration patterns and economic activities, with all of the associated implications, will not be known for several more years; however, all indications are that the availability of affordable housing will be a significant factor in terms of retaining recent newcomers to the region and continuing that growth by being able to accommodate additional households.

Future population trends will be closely tied to the Town's ability to meet the housing needs and ensure the sustainability of services. Between the 2021 and 2041 census periods, O'Leary's population could grow by as many as 570 persons, with a net increase of over 260 households.⁴ In order to keep up with the projected population growth, however, O'Leary will need to increase housing stock by at least 266 net units by 2041, meaning an increase of 13 units a year to keep pace or 15 units per year to improve overall affordability. The annual rate of unit increase between 2016 and 2021 was 3 new units.

Failing to meet those dwelling unit targets would increase the likelihood that future growth may happen just beyond the town in the unincorporated O'Leary Fire District, which has a 2021 population of 2566 and saw a comparable rate of growth over the last census period of 7.2%. Growth beyond the town would serve to help sustain the commercial and institutional services but could put an additional burden on the Town's services being accessed by those beyond the Town's boundaries.

2.2. Cultural Diversity

The vast majority of residents (79%) currently living in the town are Canadian citizens, but this is much lower than the provincial figure of 92%, again reflective of the region's reliance on newcomer and temporary foreign workers in the labour force. Notably, Census data suggests that 85% of all immigrants arrived between 2016 and 2021. Given this relatively larger newcomer segment of the community, 23% of the population identified as visible minorities, 76% of which were Filipino (18% of the population in 2021). Only 5% of the population reported having ancestry of either Indigenous or Indigenous and non-Indigenous ancestry. More than 74% of the population characterizes themselves as third generation or more, while 22% characterize themselves as being first generation. Similarly, the vast majority of the population has ethnic origins from the British Isles or western Europe.

³ <https://www.princeedwardisland.ca/en/information/finance/pei-population-report-quarterly>

⁴ Pelletier, Matthew. Understanding Housing Needs in the Town of O'Leary. July 2023. See Appendix A.

Tables 6 & 7 – Immigrant and Mobility Status – Statistics Canada

Immigrant Status	2021	2016
Non-immigrant	78%	98.7%
Immigrant	13%	1.3%
Non-permanent resident	9%	1.3%

The shift in immigrant status may have an impact on the types of housing needed, depending on cultural and economic preferences for multi-generational or shared accommodations.

Mobility Status (2021 Census)	1 year ago	5 years ago
Non-mover	83%	44%
Moved within Town	7%	5%
Internal Migrants within PEI	6%	31%
Internal Migrants within Canada	3%	7%
External Migrants	1%	14%

2.3. Education

Higher education is often associated with higher household incomes which has an impact on development and housing composition, employment flexibility, transportation preferences and desired services. The Town has a lower-than-average education level as compared to the province as a whole.

The town is home to the O’Leary Consolidated Elementary School, while students attend Hernewood Intermediate for grades 7-9 and Westisle Composite High School for grades 10-12

Table 8: Comparison of the Highest Level of Schooling (2021)

Highest level of schooling	15 years +	Town	Province
Less than high school		25%	16%
high school or equivalent		38%	25%
Post-secondary diploma, degree or certificate		38%	56%

2.4. Income

Overall, total average individual incomes were 16.1% percent lower in the town compared to the provincial average. Disparities in income among males and females were less pronounced between the town and province, with income of females being 2.9% lower than that of males in the town compared to 2.2% lower provincially, while the disparity in income in Prince County was 9.2%. When it comes to household income, the town's median was 35.8% lower than the provincial median. Not only are the income levels in the Town lower than provincial numbers, they are also 32.1% lower than in the surrounding fire district and in the county as a whole and even in relation to the towns of Alberton and Tignish.

Table 9: Comparison of Total Average Income and Median Household Income (2020)

	Town			Prince County			Province		
	Total	M	F	Total	M	F	Total	M	F
Average total income in 2020	\$33,600	\$34,000	\$33,000	38,040	40,000	36,320	\$40,040	\$40,480	\$39,600
Median household income	\$47,200			\$69,500			\$73,500		

Figure 5: Comparative After-Tax Household Income (2020) – 2021 Census

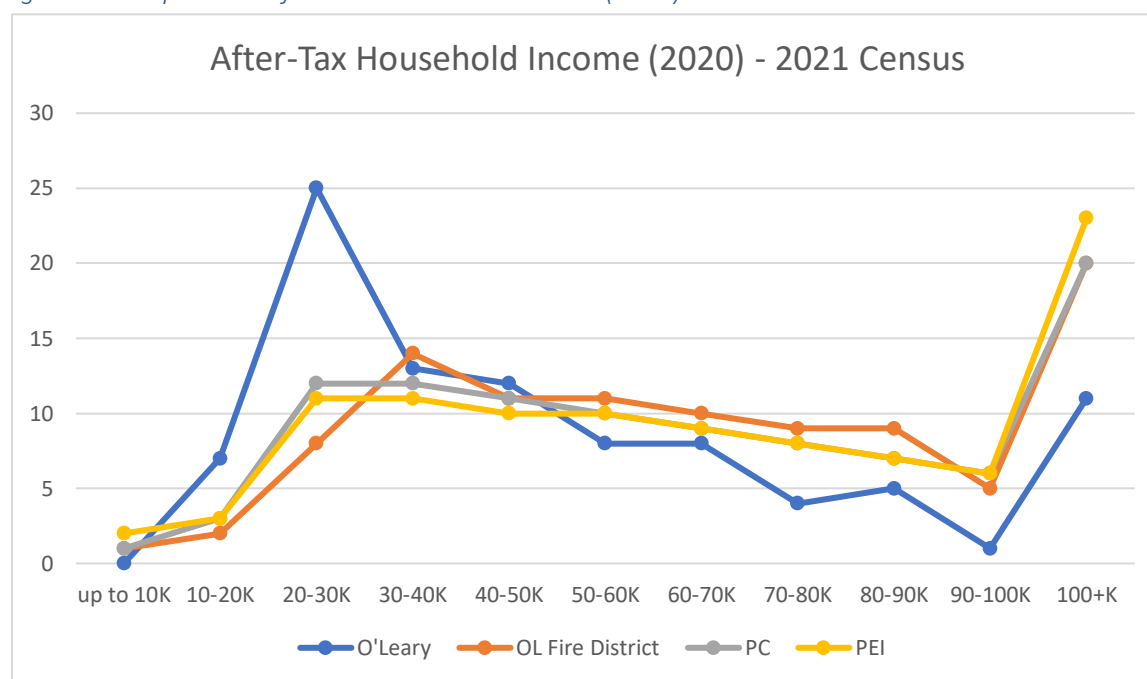


Table 10: Prevalence of Low Income (based on the Low-Income Measure after tax) (2021 Census, %)

O'Leary – 2021 Census			Prince County			Province		
Total	Male	Female	Total	Male	Female	Total	Male	Female
30	25.6	33.5	14.2	12.8	15.6	13.8	12.8	14.7

The prevalence of low-income individuals as a proportion of total population is markedly higher for all age groups and both sexes within the town, compared to provincial rates. This coincides with lower education levels and lower incomes for both individuals and households in the town.

2.5. Institutions and Recreation

2.5.1. Heritage and Culture

As noted in the early historical context above, the land on which the Town was established was an area frequently used by the Mi'kmaq people. Local historical place names, which have generally gone unused in recent centuries, are being reintroduced across the Island to confirm the role the region played in human society prior to and at the time of colonial settlement.

There is one provincially-designated historic site within the town, being the O'Leary Railway Station. Three other properties are registered, including the Heritage Chapel, the Little Red School House, and the O'Leary Telephone Office, all on Dewar Lane adjacent to the Potato Museum.

2.5.2. Recreation and Parks

Communities are understanding more and more the critical nature of recreational facilities and programs in the life of a community. For communities like O'Leary, which provide a central service role for a large rural service area, recreation and recreational infrastructure play a particularly significant role. Given the capital and operating costs of many recreational facilities, they can often only be supplied on a regional basis. Recreational programs not only contribute to the social, physical and mental health of the community, they can also significantly compliment economic activities and can in fact represent a productive element of the local economy (as well demonstrated by the City of Summerside and other municipalities).

Facilities in the Town include:

- **O'Leary Community Sports Centre** with rink
- **Ellsworth Field** (leased and maintained by the Town): softball and baseball fields
- **Maple Leaf Curling Club** – scheduled to be demolished shortly, to be replaced by a regional facility outside of the Town and owned by a community curling club
- **Ellis Field Ball Diamond** – softball and baseball, with bleachers, owned by the Town
- **Soccer fields** – part of the school property, although the Town offers programming.
- **Centennial Park** – located next to the Canadian Potato Museum. The park has been expanded in the last year, now containing a walking track with lights, splashpads, and a new play structure to be installed this spring. The park also features an outdoor rink facility (currently only used during winter months), washrooms and change rooms
- **Other smaller parks** are located along Main Street (including tennis courts and basketball nets)

- **Friendship Park** – a parklet with landscaping, now privately owned
- **The Confederation Trail** runs through the core area of O’Leary and provides both a tremendous pedestrian facility and also a significant green corridor.
- The former Multi-Generational Centre on Main Street is now privately owned and features a gym

2.5.3. Institutions and Community Services

The larger institutional facilities tend to be clustered primarily in the western portion of the Town. The two most prominent are the O’Leary Community Hospital and the O’Leary Consolidated Elementary School.

As one of the primary service centres for the West Prince region, O’Leary is home to the Community Hospital O’Leary (Health Centre), which has approximately 13 extended care beds for restorative, respite, convalescent and palliative care and provides laboratory, diagnostic imaging, pharmacy, physiotherapy and nutrition counselling, as well as clinics by visiting consultants in geriatrics and psychiatry. Emergency services are available in Summerside at the Prince County Hospital and at the Queen Elizabeth Hospital in Charlottetown, or with more restrictive hours, at the Western Hospital in Alberton. Island EMS has a depot in the town.

The housing needs of seniors are served through the long term care beds in the Community Hospital and soon in the Willows, the new community care home currently under construction. O’Leary also has one pharmacy, dentist and a physiotherapy clinic in the Oulton Business Centre.

Community Inclusions provides support to adults in West Prince with intellectual disabilities, including employment programming, residential services and day services at the Maple House Centre, which houses a bakery and café in O’Leary. The O’Leary operations include residential supports for up to eight individuals.

Places of worship: O’Leary Baptist Church; O’Leary United Church; O’Leary Church of Christ; O’Leary Church of the Nazarene.

Provincial government:

- Access PEI (Provincial Regional Services Centre)
- PEI Cannabis
- PEI Liquor

Federal government:

- Post Office
- Service Canada Centre

Shared Provincial/Municipal

- Library

Other community and institutional facilities include: the Community Complex and Fire Hall; Chances child care centre; Royal Canadian Legion; and the Canadian Potato Museum and O’Leary Community Museum.

Government facilities felt to be at risk in 2023 include the Skills PEI and Career Development Services, set to move out of the Town to nearby Mill River.

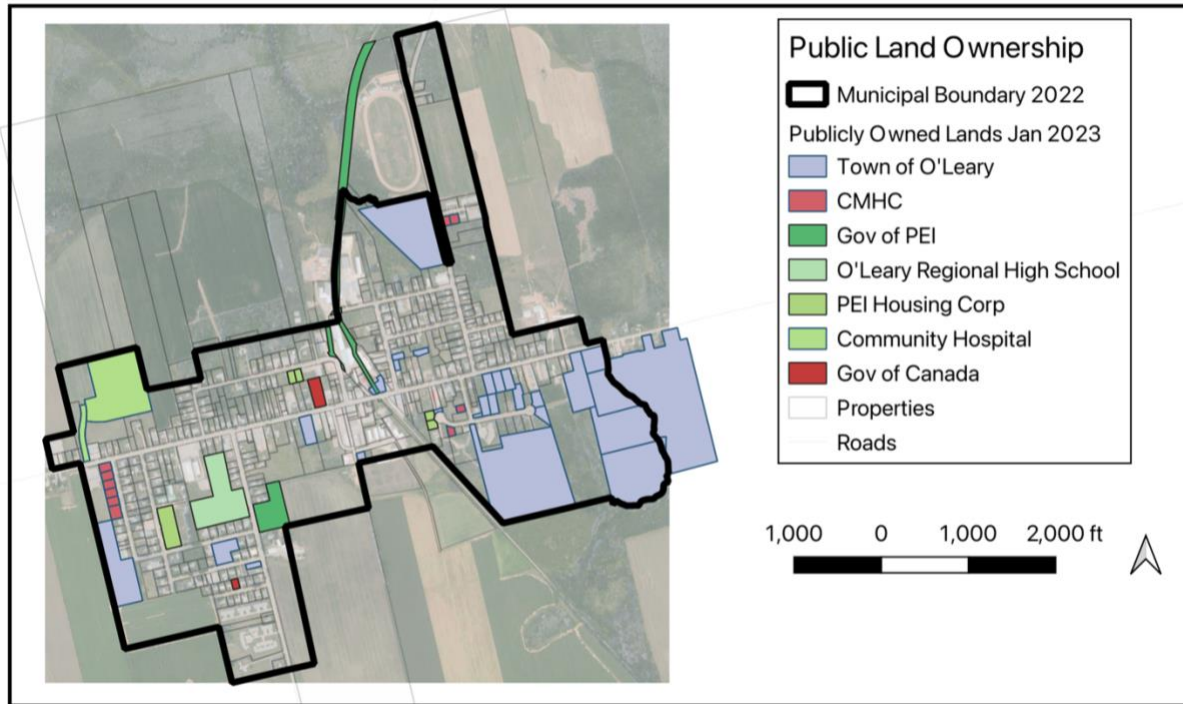


Figure 6: Public Land Ownership

3. PHYSICAL DEVELOPMENT

3.1. Current Land Uses

3.1.1. Corporate Land Use Inventory (2010)

Development in the O’Leary area tends to be largely strung along main roads in a pattern typically described as ribbon development. The primary exception to this is the town itself, which has a much more compact, ‘village’-like nature.

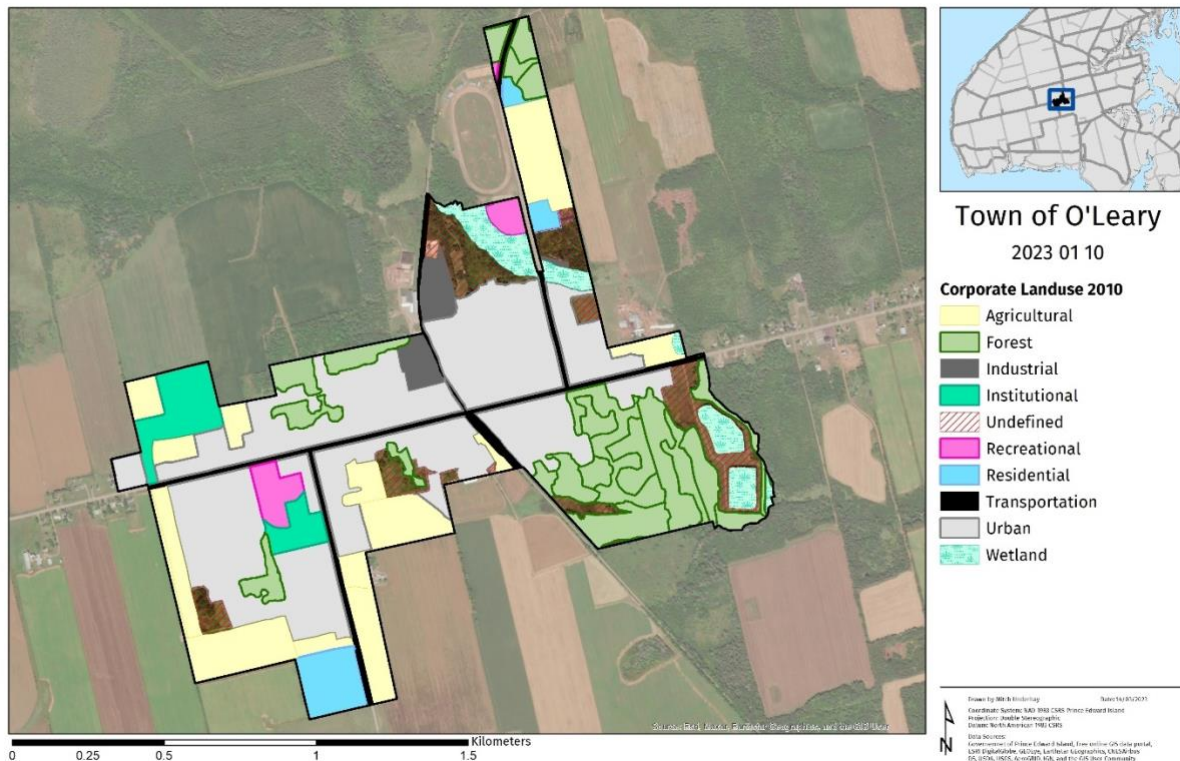


Figure 7: 2010 Land Use Inventory (Province) – land use boundaries are approximate. While the Province has undertaken a more recent land use inventory process, the results were not yet available at the time of this assessment.

Table 11: Land Use in O'Leary (2010)

Use	Sq. M.	Acres	% of Land Base
Agricultural	293,068	72.4	16.2%
Forest	302,593	74.8	16.8%
Industrial	40,871	10.1	2.3%
Institutional	75,396	18.6	4.2%
Non - Evident	154,118	38.1	8.5%
Recreational	36,150	8.9	2.0%

Residential	55,087	13.6	3.1%
Transportation	83,185	20.6	4.6%
Urban	691,063	170.8	38.3%
Wetland	72,671	18.0	4.0%
Total	1,804,202	445.8	100%

3.1.2. Farmland

As noted in Table 11, about 16% of the Town’s land base is currently agriculture. Of the properties within the Town, there are 64.5 acres with a farm assessment, 45.6 of which are indicated as being bona fide farmland.

3.1.3. Food Security

The United Nations Food and Agriculture Organization suggests that “Food security exists when all people, at all times, have physical and economic access to sufficient, safe and nutritious food to meet their dietary needs and food preferences for an active and healthy life.” One of the common requirements of a community that has food security is a stable local food production base. With local access to a supermarket and food security has not been flagged as a concern, outside of challenges related to income. In 2015, a farmers market was also established in the O’Leary Legion Hall, opening during the Potato Blossom Festival and continuing through the fall depending on the availability of products but does not appear to remain in operation.

3.2. Housing

Approximately one third of the Town’s land base is currently developed for residential use. Over the various versions of the Town’s official plan, different approaches were used to direct residential development, beginning with a two-zone approach (General Residential and a Mobile Home zone), shifting to a tiered exclusionary approach to zoning in keeping with more standard framework in 2014 with a stated objective of protecting housing values. The earlier approach led to a mix of housing forms in most neighbourhoods with many streets featuring a mix of single detached homes, duplex units and apartments. There were concerns during the 2014 review that there were few if any exclusively single detached residential neighbourhoods in O’Leary and potential impact on housing values and disincentivizing homeowners.

More recently, housing availability and affordability pressures are being experienced across Prince Edward Island and there is a shifting focus to complete communities, integration, and sustainability.

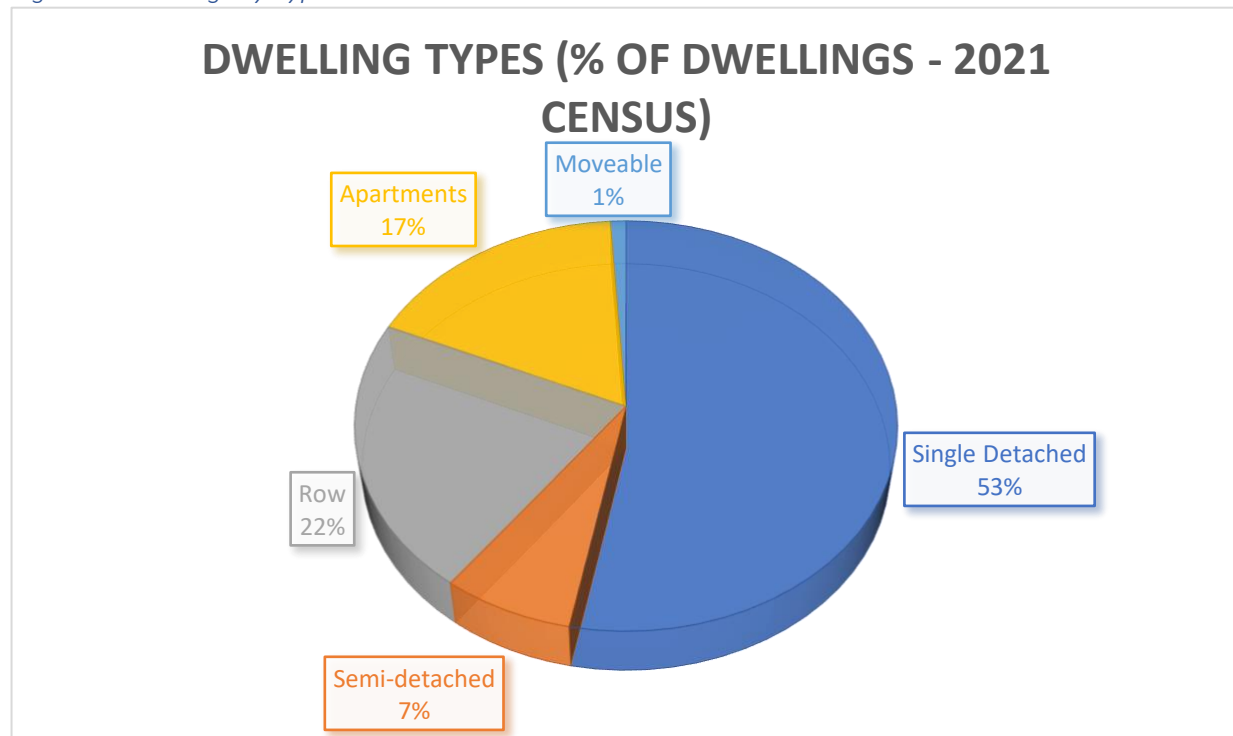
There are a range of seniors housing options in the Town but, as indicated in section 2.1, demand for affordable seniors housing continues to rise. Recent efforts in the community have led to the development of a new community care facility, under construction at the time of the 2022-2023 review.

There is also some lower income family housing in the western portion of the Town, but newer more innovative housing options and a range of options are required in order to entice additional young families into the Town. The one developed “mobile home” subdivision (most units are actually mini homes) on Maple Street is very attractive and might be a model for some future residential

development. At the same time, interest in emerging housing forms such as tiny homes provides other options for consideration.

According to Statistics Canada, there were 402 private dwellings in the Town of O'Leary in 2021, 93% (373) of which are occupied by full-time residents (compared to 86% provincially). There is a mix of housing types in the Town, with 52% being single detached, 7% semi-detached, 21% row houses, 17% apartment units, and 1% movable dwellings (2021) as indicated in the chart below. This is a slight decrease in the proportion of single-detached dwellings in relation to rowhouse dwellings from 2016.⁵

Figure 8: Dwellings by Type – 2021 Census

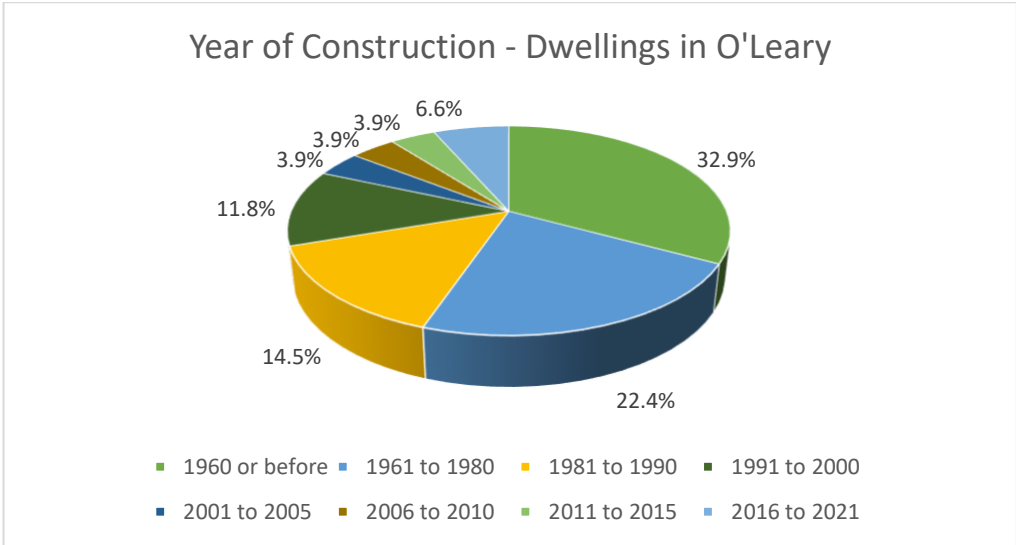


Most residential development is clustered behind either side of Main St. The housing stock in the Town of O'Leary is in generally good condition and 89% of rated their housing as suitable and only in need of regular maintenance and minor repairs in the 2021 Census, although that is a decrease from 97% rating their housing as suitable in 2016. Only 18% of housing has been built in the last 20 years, with over 55% of housing in the town being constructed prior to 1980. The remaining housing stock (26%) was built between 1981 and 2000.

The majority of units built since 2013 have been multi-family (28), with only three single detached and 3 duplex units being created over that time period. A number of new townhouse units are now available at the southern-most part of the town off the Barclay Road, developed as a form of clustered or grouped dwellings.

⁵ 2021 Census

Figure 9: Year of Construction of Housing in Town (2021)



Based on 2021 Census data, almost 20% of private dwellings are 1 bedroom, 38% have 2 bedrooms, 22% have 3 bedrooms, and a further 17% have 4 bedrooms or more. Recent work on housing needs in the West Prince region has flagged both 1-bedroom apartments and 3-4+ bedroom units as being priorities, although O’Leary appears to have more of a balance in this regards. The ability to meet the housing needs of seniors, newcomers arriving without family and families accessing nearby schools are the priority areas for future work.

In 2021, 39% of households owned their homes while 61% were renting (compared with 46% and 54% respectively in 2016). Not surprising, more tenants (23.4%) were assessed as being in core housing need compared to owner households (13.8%), but the tenant group spending more than 30% of income on shelter decreased from 42.1% in 2016 to 23.4% in 2021 and was lower than both the county and provincial 2021 figures. This is possibly a reflection of the efforts of the provincial government to providing housing supports as well as a shift in demographics related to the recent population growth. Where 37.8% of tenant households were in subsidized housing in 2016, 44.7% of tenant households were in subsidized housing in 2021.

With Prince Edward Island leading the country in inflation rates in 2022 and even prior, and with the significant housing availability constraints, it is not surprising that monthly rental shelter costs have increased. What is difficult to assess is the cost of rentals for those looking to move to a new rental location, as rental rates and the cost of new construction tend to affect those seeking to move more than those staying in their existing dwelling.

Table 12: Comparative Shelter Costs – Statistics Canada

Shelter costs (2021 and 2016 Census)	2021	2016
Median monthly shelter costs Owned	\$650	\$717
Average monthly shelter costs Owned	\$740	\$752
Median monthly shelter costs rental	\$660	\$646
Average monthly shelter costs rental	\$735	\$657
Median value of dwellings	\$150,000	\$100,059
Average value of dwellings	\$176,000	\$128,129

While the median value of dwellings in O'Leary in 2021 was 50% of that of the provincial value, it still represents a 50% increase in median value locally, while the average value of dwellings increased by 37%.

Table 13: Comparative Costs in Region

	2021 O'Leary	2021 Prince County	2021 PEI
Owners >30% on shelter		6.7%	8.8%
Tenants >30% on shelter	23.4%	27.5%	30.3%
Tenants in subsidized housing	44.7%	20.9%	18%
Median monthly shelter costs Owned (\$)	650	735	860
Average monthly shelter costs Owned (\$)	740	897	1031
Median monthly shelter costs rental (\$)	660	840	940
Average monthly shelter costs rental (\$)	735	875	996
Median value of dwellings (\$)	150,000	230,000	300,000
Average value of dwellings (\$)	176,000	253,400	313,200
Owners core housing need	13.8%	3.7%	3.8%
Tenants core housing need	23.4%	15.3%	14.1%

An estimate of parcels under 1 acre suggests there could be upwards of 80 parcels that could be developed, although the availability of many of those parcels for housing development could be restricted by a range of factors, such as availability for purchase, zoning, other uses on the site, site suitability, and mapping errors.⁶

While the Town undertook its own subdivision in 2018, the Pate Garden Subdivision, only 9 of 17 lots have sold and no construction has begun – 6 lots were purchased by a single owner. The covenants and

⁶ Estimate is based on parcels of less than 1 acre with a non-commercial assessment of less than \$25,000 but no residential assessment and may include parcel identified through mapping errors such as split parcels.

other requirements associated with the sale of lots may have played a role in this lack of movement and the covenants were reviewed and removed in 2023, given the current costs associated with construction and labour that have pushed home ownership out of reach for many young adults and young families. Residential properties were assessed at 19.3M in 2022.

3.3. Development Activity

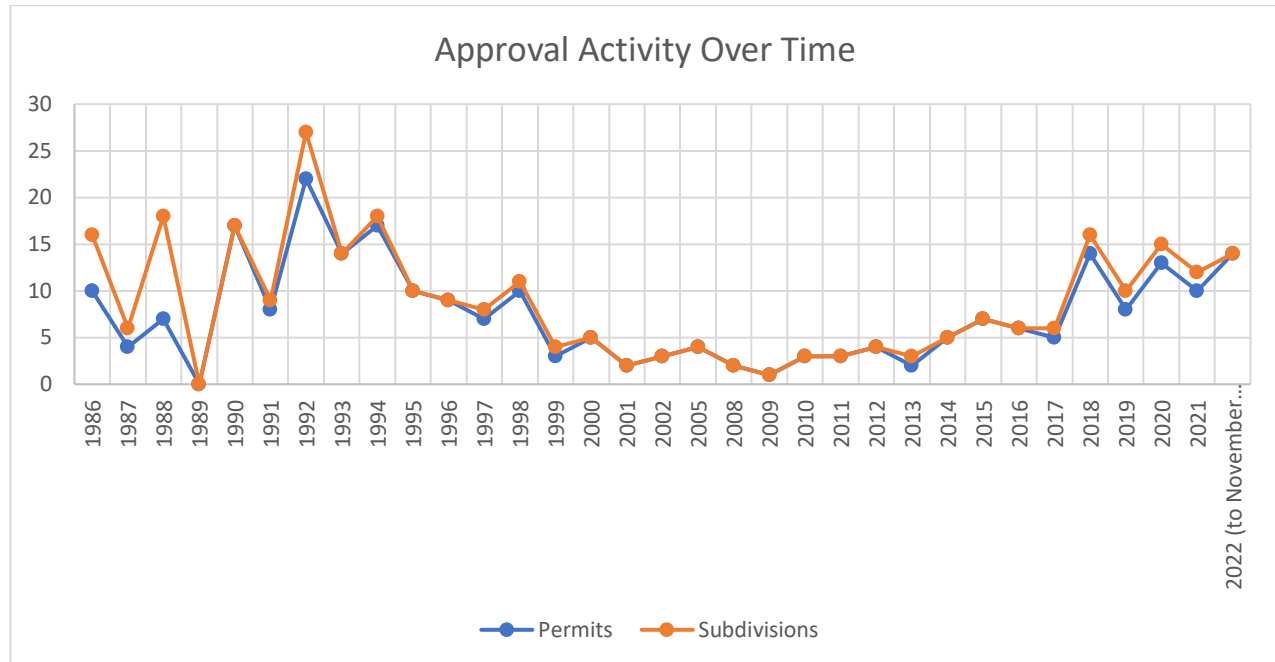
Subdivision and development activity within the town since 2013 is shown in the Table below:

Table 14: Permits issued 2013 – 2021. Source: Town of O’Leary

Building Permits	Number of permits	Subdivisions	Number of approvals
New dwellings (mini home, replacement, new single detached, tiny home)	3	Consolidations & Land Exchanges	7
Two-unit residential	3 permits 3 units	New lot creation (residential)	3 23 lots
Multi-unit residential	6 permits 28 units		
Commercial & industrial (new)	2		
Institutional & Recreation (new and renovations)	8		
Addition or renovation	13 residential 7 Non-residential		
Agricultural	3		
Accessory structures (including fences & pools)	33		
Other (including demolitions)	6		
Total permits	84		

The majority of permits and subdivision approvals took place before 1993, with a slight uptake in the last 5 years. Perhaps the most encouraging element of the development activity since 2000 has been the number of commercial and multi-family residential units, a trend which has continued since the 2014 review. The cost of providing roads and central services has no doubt been a major factor in the very low number of new lots being created in recent years; however other factors are at play given the lack of movement on the Pate Subdivision, including, among other things, the cost of materials and the challenge in finding labour in the trades, and in some cases, additional requirements such as covenants on minimum dwelling size.

Figure 10: Development Activity Over Time



3.4. Energy

Electricity is provided by Maritime Electric, with one property featuring a larger ground-mounted solar array. While the 2014 Bylaw includes provisions for wind, there are no such similar regulations related to solar energy systems currently, although interest in both roof-mounted and ground-mounted solar arrays has increased quite a bit in the last few years across the province and municipalities are looking to update their regulations to address these.

3.5. Transportation & Infrastructure

3.5.1. Vehicular Transportation

The primary transportation route through the Town of O’Leary is Route 142 (Main Street) which bisects the Town from east to west. Also known as the O’Leary Rd beyond the Town’s boundaries, this route connects to Route 2 to the east and to West Cape in the west. Traffic counts on Route 142 (between Route 2 and Route 148) have been relatively stable, with an average annual daily traffic count of 4,145 in 2016 and 4,240 in 2020. The other significant route is Route 148, which connects north to Howlan Road as the Gaspé Road, and which south to Buchanan Road as Barclay Road. Average annual daily traffic on Route 148 (between Route 142 and Route 140) were 1,326 in 2016, and 1,357 in 2020.

Outside of the Town’s eastern boundaries, Route 142 is classed as arterial, but is classed as a local 1 within the Town. Gaspé and Buchanan roads are also classed as local 1, while all other streets are classed as residential. Local residential streets include Park Avenue, Ellis Avenue, Water Street, North Street, Kent Street, Willow Avenue, Lloyd Street, Stewart Lane, Dewar Lane, Centennial Drive, Parkview Avenue, Heritage Lane, Community Street, Beechwood Avenue, Maple Street, East Drive, Royal Avenue, Pate Gordon Drive, and Jubilee Avenue. One portion of Royal Ave at its very end, essentially the access road

behind the O’Leary Building Centre, is indicated as being private.

Figure 11a: Road Network (source: PEI Government arcgis mapping – December 2022)



All roads in the Town are owned and maintained by the Province and are generally in good condition but, as with many Island municipalities, storm water management systems on some local streets are not well developed.

Table 15: Number of metres and ownership of roads in O’Leary

Road Jurisdiction	Length (m)
Province	12,992
Private	210
Federal	0

Figure 11b: Road Network (source: PEI Government arcgis mapping – December 2022)



The Town is generally comfortable with the state of street within the community with the exception of Parkview Drive, where there has been a request to widen the street to accommodate extra traffic related to the adjacent park and museum.

3.5.2. Public Transportation

The Province's new rural transit system provides a new, albeit limited, option to provide alternate forms of transportation, with a route running between Tignish, Summerside, and Charlottetown, and another running between O'Leary, Alberton and Tignish. The routes are restricted in their frequency, however, and the lack of transportation options have been highlighted as a challenge in the region when it comes to finding accommodations and getting to needed education, health and other services, while work schedules and bus schedules do not always align.

In addition, Transportation West, a non-profit community organization provides accessible transportation within the region, with approximately 7 vehicles with the capacity to accommodate 5-15 passengers, with rides being booked in advance.⁷

3.5.3. Pedestrian and Active Transportation

Pedestrian facilities (sidewalks) in the core of the town are quite well developed, with almost 5 kilometers of paved sidewalks. The sidewalks will be expanded over time as the municipal budget allows – public engagement during the official plan review revealed interest on the part of some residents to see the sidewalks extended into the more residential areas of the community. In order to maintain the current high level of service, routine upgrading will be required on an ongoing basis. Expansion of the system should be undertaken as budgets permit but should be based on a long-term active transportation plan.

The Confederation Trail also bisects the town, running directly through the core area. It provides an

⁷ Information provided on transportationwest.com

exceptional pedestrian facility for local residents to enjoy and also provides a pedestrian and bikeway connection to many other points in West Prince and across the Island. Running through the centre of town, the Trail offers an excellent resource for walkers, joggers, cyclists. In 2021, the Province began allowing horses use the Confederation Trail from O’Leary north to Piusville in the summer months. While the use of the Trail over the winter months is dedicated to snowmobilers, some damage related to ATV usage has been recorded by the Province.

3.6. Municipal Services

3.6.1. Overview

Municipal services largely feature the sanitary sewer system, sidewalks, recreation, and land use planning, with the recent addition of bylaw enforcement.

3.6.2. Sanitary Sewer

The sanitary sewer system in O’Leary was started in the early 1950’s. The Town of O’Leary Sewage Collection and Treatment Corporation was incorporated on March 8, 1988. Currently O’Leary is serviced by a two-cell sewage lagoon, upgraded recently with UV treatment, as well as one pumping station and approximately 10,800 metres of gravity sanitary sewer mains and 475 metres of forced main. All streets in the Town are serviced. The two cells were de-sludged in 2020, extending the life of the system. The Town is comfortable that the system has the capacity to absorb more connections.

3.6.3. Central Water

All properties in O’Leary are serviced by individual on-site wells. There has been some history of localized water contamination, primarily due to former petroleum facilities, but no wide-spread water supply problems have been noted and no plans are currently in place to provide a central water supply system.

3.6.4. Storm Water Management

Stormwater run-off in the Town is managed by the Province as part of the road network. Overland flooding has not been a significant concern in the Town.

3.6.5. First Responders

Ambulance – The Town is served by an Island EMS ambulance base, located on Willow St, although discussions are underway for a new base for Island EMS paramedics and potential opportunities within the community.

Policing – The Town of O’Leary receives police protection from the RCMP detachment located between Alberton and O’Leary on Route 2. Services are provided through a standard municipal policing contract.

Fire – The Town of O’Leary has its own Volunteer Fire Company, located on Community Street in the community complex. This fire company also provides fire protection on a fee for service basis to a large fire district surrounding the Town.

4. ECONOMY

4.1. O’Leary and its Service Area

The Town of O’Leary has been known for many years as primarily an agricultural service centre. The surrounding rural areas have a very strong history in term of potato production and O’Leary, as the local rail head, has had a long tradition of servicing this local industry. The numerous large produce warehouses which remain in the Town provide clear evidence of this historic relationship. Other key agricultural services the ADL Dairy , the feed mill, and the Cavendish Farms Fertilizer plant, which sustained some fire damage in May 2023. The large surrounding agricultural region also depends on O’Leary for financial services, government offices, professional services, automotive supplies, gasoline and related services, and a wide array of daily needs such as food, pharmacy, convenience items, hardware, building supplies, etc. O’Leary is also the home of the elementary school and health clinic at the Community Hospital.

While this agricultural service role is widely understood and acknowledged, it is important to realize that O’Leary is also the centre of a significant tourism region and also provides key services to the local fishery. There is also a significant and growing manufacturing and processing sector in close proximity to O’Leary.

An important key to O’Leary’s community growth is the spirit of co-operation by which people work together for the betterment of the community. One example is the O’Leary Farmers Co-op which at its peak operated a general store, a hardware and building supply store, a service station, a feed mill, and a potato warehouse. All of this was achieved on a “one member – one vote” basis. Another notable co-operative is the Provincial Credit Union which absorbed the Central Credit Union which had itself been formed by a merger of the former Saint Mark’s, Saint Anthony’s and O’Leary Credit Unions.

The co-operative spirit already demonstrated will need to continue if O’Leary is to grow and prosper. This co-operative spirit has extended to the new community care facility. It is expected that such co-operation will continue, not only among O’Leary residents, but also between the Town and its surrounding service area.

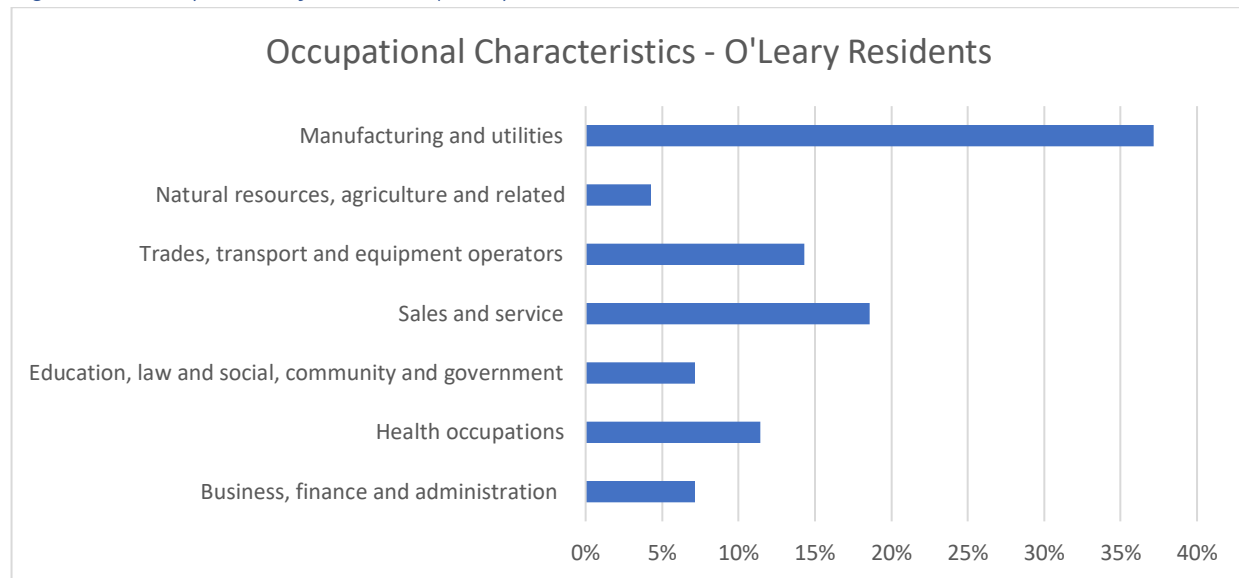
4.2. Labour force and industry characteristics

4.2.1. Occupational Characteristics

Manufacture and utilities at 37%, Sales and services at 19% and Trades, transport and equipment at 14% are the top three occupations of municipal residents, making up more than 70% of the occupations overall. According to the 2021 Census, 87% of municipal residents in the labour force are employed by someone else while 13% are self-employed, consistent with the provincial rates.

Figure 12 below outlines the occupational characteristics of Town residents based on the 2021 census.

Figure 12: Occupations of Residents (2021)

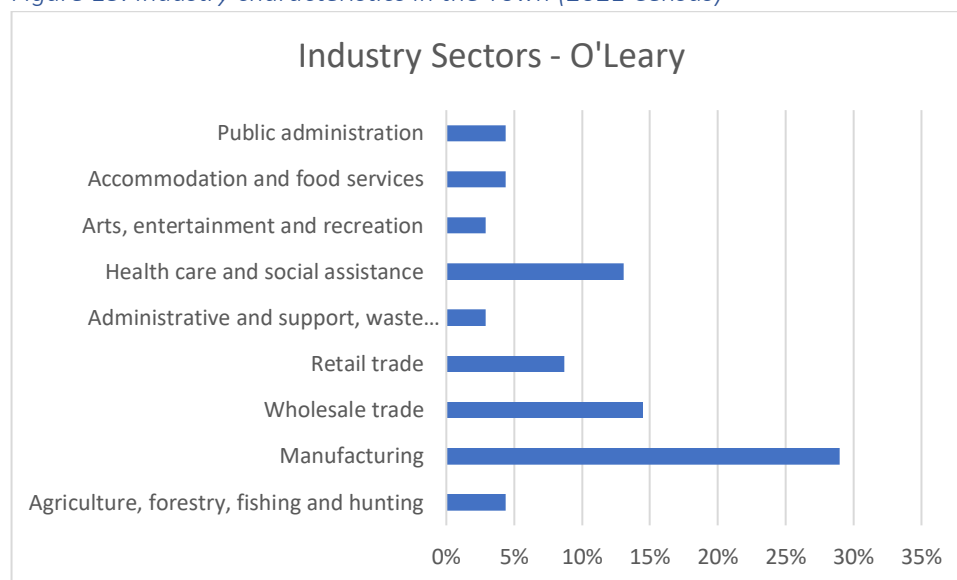


Of the total working age population, 56% worked and of those 33% worked full-time and 67% worked part year/part-time. Provincially, 67% of the population worked and the split of those who worked full-time and those who worked part year and/or part-time was 50/50.

4.2.2. Industry Composition

Figure 13 outlines the range of industries that are represented by residents in the town. Manufacturing & utilities, Wholesale trade, and Health care and social assistance make up the bulk of industrial employment for the town.

Figure 13: Industry characteristics in the Town (2021 Census)



4.2.3. Commuting to Work

As illustrated in Table 16, 67% of the workforce commute to a different census subdivision within the

census division but most have fairly short commutes. 95% of workers commute by vehicle, with 78% of those as a driver in a car, truck or van, and the other 22% as a passenger.

Table 16: Comparison of time spent commuting to work by percentage of employed labour force – 2021 Census

Commute duration	Town	Province
Less than 15 minutes	48 %	64 %
15-29 minutes	43 %	34 %
30-44 minutes	5 %	12 %
45+ minutes	6 %	8 %

4.2.4. Labour Force Participation

The participation rate in the workforce in town is approximately 53.4% in 2021. The employment for male workers is 49.2% compared to 48% for female workers. These numbers are lower than provincial participation and employment rates, which are 65.8% for participation%, and 62.2 and 56% respectively for male and female employment.

4.3. Commercial Activity

4.3.1. General Commercial

The Town of O’Leary has a reasonably well-defined commercial core area. Most commercial businesses are clustered along Main Street and Willow Street. Quite expectedly, the commercial core of the Town and its industrial facilities – focused primarily on the agricultural sector – tend to be clustered along or in close proximity to the former rail line. The intersection of the former rail line (now the Confederation Trail) and the O’Leary Road (Main Street) remains the focus or hub of economic activity in the Town.

Retail and other commercial services are well supplied in O’Leary and currently include: a food store; convenience store; bank; credit union; pharmacies; hospital with medical centre; hardware and building supplies; service station; restaurant; auto parts; liquor store and cannabis store; funeral home; computer services; quilt and fabric store; bakery; hair dressers and aesthetician; fitness club; flower shop; pet care services; small engine repair; and a range of professional and technical support services located in two separate office complexes. There are also a number of commercial operations located just outside the municipal boundaries including a flower shop, restaurant, automobile sales and a tire shop.

Several large potato and produce warehouses dominate the northern core area of the Town. Other potato warehouses related to the Town’s largest farm are located along the former rail line in the southern core area of the Town. Other prominent industrial facilities include the ADL Dairy, the feed mill, the Cavendish Farms Fertilizer plant, which sustained some fire damage in May 2023, and a cabinet shop. More recent developments have included dog grooming and pet care businesses.

An expanded development of seasonal dwellings at the nearby Mill River Resort may provide an added customer base for town businesses but has also prompted the development of new commercial space just about 8 km away along the Veteran’s Memorial Highway, presenting the potential for loss of businesses directly within the Town. The largest economic concern raised as part of the 2022-2023

official plan review has been the need for additional commercial space within the Town, with most commercial properties being seen as being at capacity.

Commercially assessed properties were valued at \$46.6M in 2022.

4.3.2. Tourism

Tourism development, while still highly seasonal in terms of economic activity and employment, has shown dramatic growth both provincially and in Prince County over the last 20 years. According to Tourism PEI⁸, tourism on the island increased significantly in the years leading up to the pandemic.

Table 17: Tourism Data over Time

Traffic Source	2009 – 2019 (Oct-April)	2009-2019 (May to Sept)
Air	+12% to +50%	+41% to +57%
Bridge	+19% to +27%	+17% to +25%
Ferry	Off season	-7% to +14%

The accommodation sector also reported year over year increases in overnight stays for both fixed room and campground accommodations leading up to 2020. As well, the number of visitors to PEI from 2005 to 2019 was increasing at 3.3% with over 1.6 million visitors coming to the island in 2019. As a result, provincial tourism revenues went from \$342.3 million in 2005 to \$486.5 million in 2019. Tourism groups have been organizing over recent years to invigorate the North Cape Coastal Drive as a tourism region. Increased tourism activity has been an objective in recent plan reviews and continues to be a focus, with the associated benefit of bringing people to the Town; the Town sees its role as largely being one of supporting tourism operations.

Information from the Province's Department of Tourism for 2022 indicates that there were only two licensed tourism operations within the Town, being a cottage and a vacation home. Tourism attractions within the Town are primarily focused around the Potato Museum, although sports facilities and other recreation infrastructure can serve as a draw the greater area.

⁸ <https://www.tourismpei.com/industry/research/tourism-indicator-dashboards>

abandoned petroleum sites create concern for adjacent properties. Long term monitoring of these sites will be necessary. Other localized well contamination events have been addressed and do not appear to present long term risks.

There is one parcel listed as a registered contaminated site, PID 41830, located at 41 Willow Ave, related to the property's operation as a bulk plan (Imperial Oil Limited). The site was granted conditional closure in 2013 but a building exclusion zone limiting future building construction to slab on grade on a small portion of the property is in effect due to some remaining un-remediated contamination on-site.

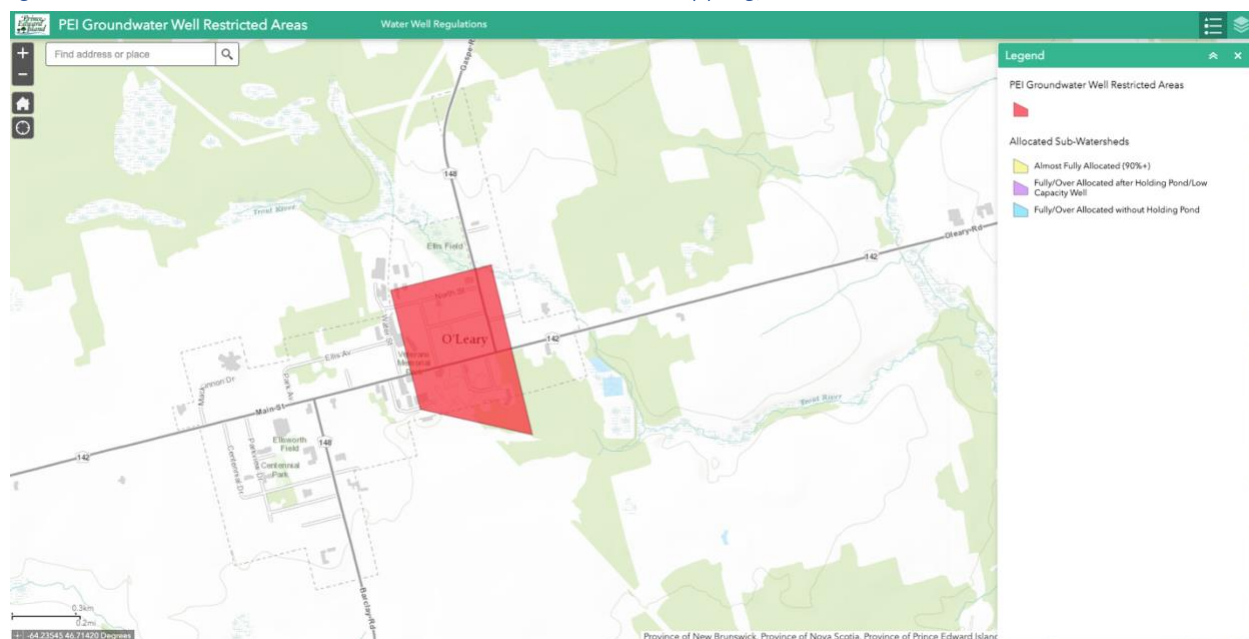
Whenever municipalities have central sewer systems and on-site wells there is always concern about potential sewer main leakage and long term monitoring and maintenance programs related to the Sewer Utility must remain a high priority. Excellent progress has been made in recent years and this program should continue on a routine basis.

Other possible point sources of ground water contamination should also be closely monitored with the assistance of the Department of Environment.

5.2.2. Well Water Restrictions

There is one well-water restricted area covering much of the town, with implications for developments requiring large amounts of water. Those restrictions are managed by the Province's Department of Environment.

Figure 15: Province's Groundwater Well Restricted Area Mapping, November 2022



5.3. Climate resiliency

5.3.1. Climate Projections

Being inland, the Town is protected from many of the climate change pressures being experienced by coastal municipalities. That being said, climate change will impact the town in a variety of ways.

Climate change may also impact the Town's groundwater supply and private wells as a result of potential

increases in drought conditions. As well, property-level storm water management will be needed to deal with increased precipitation and extreme weather events resulting from climate change.

Key climate change indicators and projections help us understand what changes can be expected in the future. The following projections are from the Climate Atlas of Canada for the Town of O’Leary and region.

Table 18: Comparison of recorded climate averages and future climate projections for O’Leary Region⁹

Change in Climate	1976-2005 recorded average	2051-2080 projections*	Change
Mean Annual Temperature (°C)	6.1	10.7	+ 4.6 °C
Mean temperature (spring)	3.4	7.4	+ 4 °C
Mean temperature (summer)	18.2	22.9	+ 4.7 °C
Mean temperature (fall)	9.1	13.1	+ 4 °C
Mean temperature (winter)	-6.2	-0.5	+ 5.7 °C
Number of very hot days (+30C)	3	35	+ 32 days
Hottest Day (median)	32	36	+ 4 °C
Number of tropical nights (night temp>18°C)	8	57	+ 49 days
Number of winter days (-15C)	22	0	- 22 days
Last day of spring frost	May 7	April 7	-30 days
Number of frost days (coldest temp is below 0 °C)	156	134	- 22 days
Total precipitation (annual)	1,111 mm	1,187 mm	+ 76 mm
Wet days >= 20 mm	10	13	+ 3 day

*projections are based on a high emissions scenario, also known as RCP8.5

Table 18 illustrates that the temperatures will be getting warmer, with an expected increase of the annual temperature of more than 4.6 degrees Celsius by 2080 (the world is aiming for maintaining a 1.5C increase from baseline levels in the 2015 Paris Accord). The biggest increases are seen in the number of tropical nights, jumping from 8 days to 57 by 2080, and very hot days (days above 30C) in the area jumping from 3 per year in the recorded average pre-2005 to almost 35 days per year by 2080. The last day of spring frost also moves from around May 7 to April 7, which may have implications for agriculture (longer growing season), but also for invasive pests and allergens affecting both crops and people. Other impacts that might present as a result of shifting weather patterns is an increased risk of fire, particularly in scenarios such as is being experienced in 2022-2023 with accumulated post-storm debris and decreased rainfall.

⁹ Data taken from the Climate Atlas of Canada. https://climateatlas.ca/map/canada/plus30_2030_85#lat=46.76&lng=-62.31&z=6&grid50k=011L08 or <https://climatedata.ca/>

5.3.2. Flood and Erosion Risk

As noted above, O’Leary is sheltered from coastal flooding and erosion risks, but remains vulnerable to increasing overland flooding with more intense precipitation events, which can have disastrous effects for people’s properties.

5.3.3. Health Impacts of Climate Change

While more intense precipitation events will impact infrastructure and agriculture (and by extension, food supplies or affordability), heat stress and droughts will impact people and agricultural activities; extreme weather events (post-tropical storms and hurricanes) have and will require focused emergency management planning and the designation of community shelters; and climate impacts on biodiversity will influence tree stands and habitat. Given the age of buildings and the vulnerability of older populations to extreme heat events, cooling infrastructure may become as critical as warming shelters.

Long term considerations for climate change adaptation for municipal infrastructure may include cooling shelters and other shade features in any expansion or development of community facilities and any municipal infrastructure, the promotion of more dense development, and adaptation in the design and placement of municipal infrastructure. Likewise, proper stormwater management will assist in slowing or retaining runoff during extreme events, which in turn will protect waterways and infrastructure.

Climate Change Mitigation

Energy

The province-wide adoption of the National Building Code in 2020 promises to improve the standards for new construction. Although the town has the option to adopt enhanced or more stringent energy efficiency requirements, this would place an added administrative, inspection, and enforcement responsibility on the town and the town has opted to enter into an agreement with the Government of Prince Edward Island for provincial administration of the building code. As building energy-efficiency advances, however, the Town may wish to consider mechanisms to encourage additional energy efficiency features in new buildings or renovations, which could be tracked through development permit applications or incentivized or promoted through programs and partnerships with other levels of government. Several EV charging facilities are available in or near O’Leary, with more expected in the near future.

In particular, there has been a growth in demand for renewable energy generation over the last 5 years across the province, a trend that will likely continue. Meeting the demand for new renewable energy may occur at different scales, from single-detached dwellings, multi-unit dwellings, or larger commercial applications. These systems may also include energy storage systems of varying scales. It is becoming increasingly important to balance the need for, and facilitation of, renewable energy options and climate change mitigation against the potential concerns regarding and resistance to changing technology and their impacts on the landscape in the community.

Transportation

Given the nature of the town and the fact that most residents drive outside the town for work and other activities, the community remains heavily dependent on fossil-fuel powered vehicles for transportation. Given the Town’s more urban nature, existing subdivisions and the built form generally are already fairly compact and there is limited space for new growth. That being said, a continued focus on compact,

walkable neighbourhoods connected to existing transportation networks will be important to continue to minimize the need to drive, at least locally, thereby reducing greenhouse gas (GHG) emissions somewhat, although to have a more significant impact, local employment opportunities would be needed to shift dramatically from the existing travel patterns. As the COVID-19 experience has demonstrated, however, working from home is an option for many types of work, provided that the regulatory structure is set up to support this. Promoting more flexibility in working from home allows for the reduction in vehicular travel, a significant factor in GHG emissions in Prince Edward Island.

As noted above, the Province's new rural transit system provides a new, albeit limited, option to provide alternate forms of transportation, and Transportation West provides some options for regional movement, but neither are robust or frequent enough to substitute entirely for passenger vehicles.

Carbon Sequestration

The amount of agricultural and forested land in the town, offer carbon sequestration opportunities as another mitigation opportunity for consideration. The promotion of reforestation and afforestation efforts through the local watershed groups and in other appropriate areas, both to act as carbon sinks as well as to promote ecological health within the watershed, are positive mitigation strategies.

Appendix A: Understanding Housing Needs in the Town of O'Leary

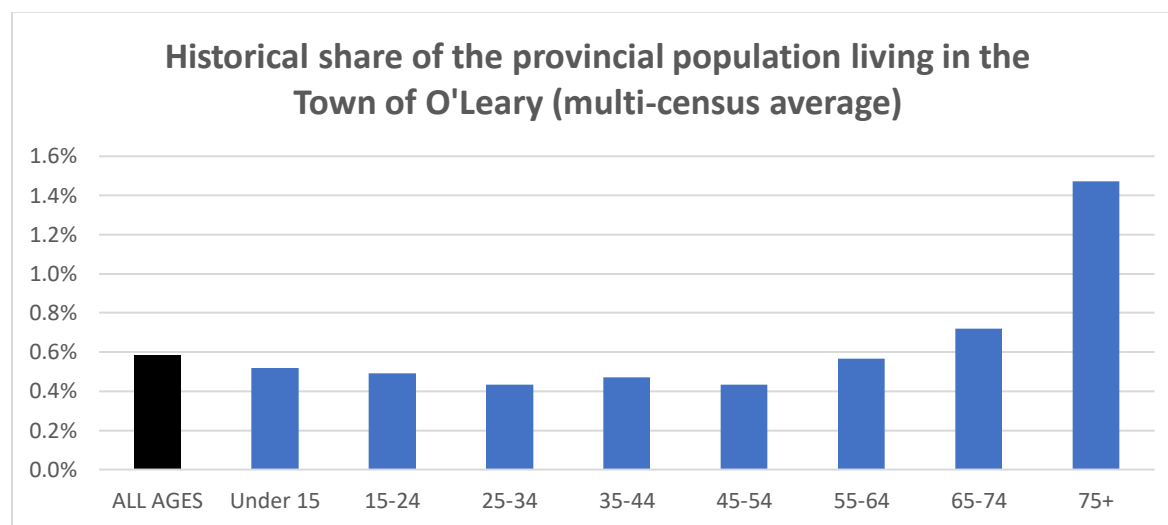
Matthew Pelletier, July 18, 2023

Summary

- Between the 2021 Census and 2041, O'Leary's population is expected to grow by around **570 persons**. This will result in a net increase of over 260 new households.
- O'Leary generally has lower rates of household formation than the rest of PEI, meaning that **it is comparatively difficult for individuals to form their own households**. The household formation rate among 15 to 24 year-olds is 0%, suggesting that the impact of housing shortages is most acute among younger residents.
- This means that the town's housing stock will have to grow by **13 net new units each year** to ensure that household formation rates do not fall further among the rest of the population. For the town to obtain a formation rate equal to the rest of PEI, the housing stock will have to grow by at least **15 net new units annually**.
- According to the 2021 Census, O'Leary's housing stock only grew by 3 net new units a year since 2016. **The current rate of housing stock growth is below what is required to keep up with the town's growing population.**
- If housing supply continues to fall behind population growth, household formation will become even more suppressed. This could result in a declining population of children, young families, and skilled workers on whom the town depends.

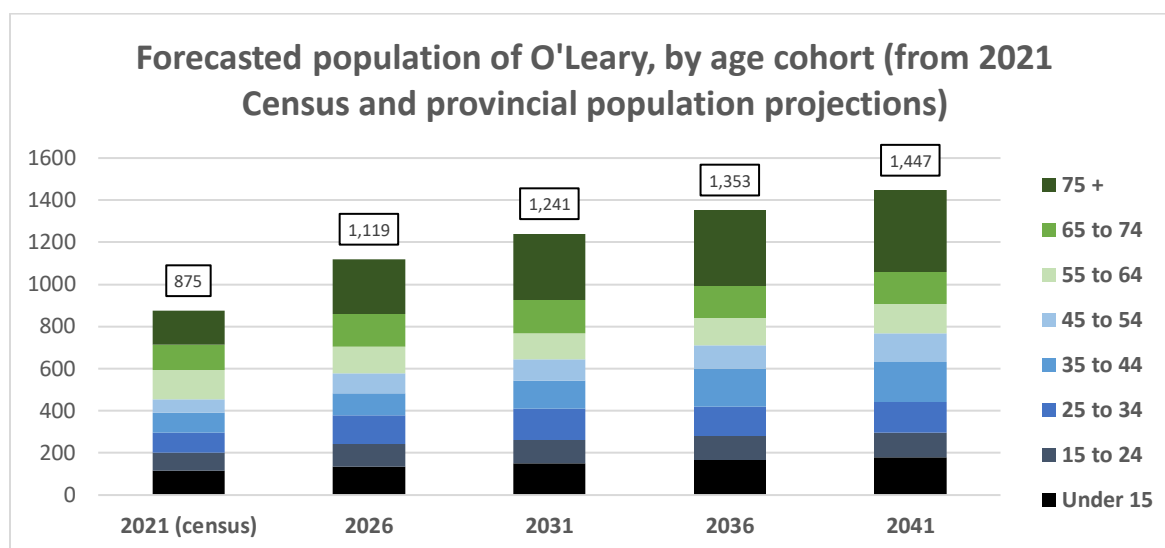
Population assumptions

PEI's population is expected to grow by 43% between 2021 and 2041. Across each age cohort, around 0.6% of the province's population has been situated in the Town of O'Leary for the past four censuses. However, the share of the provincial population is generally higher among older cohorts.



From: Appendix I

If these proportions of the provincial population are assumed to remain constant relative to the PEI Government's 2041 forecasted population growth, then **O'Leary's population will reach around 1,450 people in the next 20 years.**



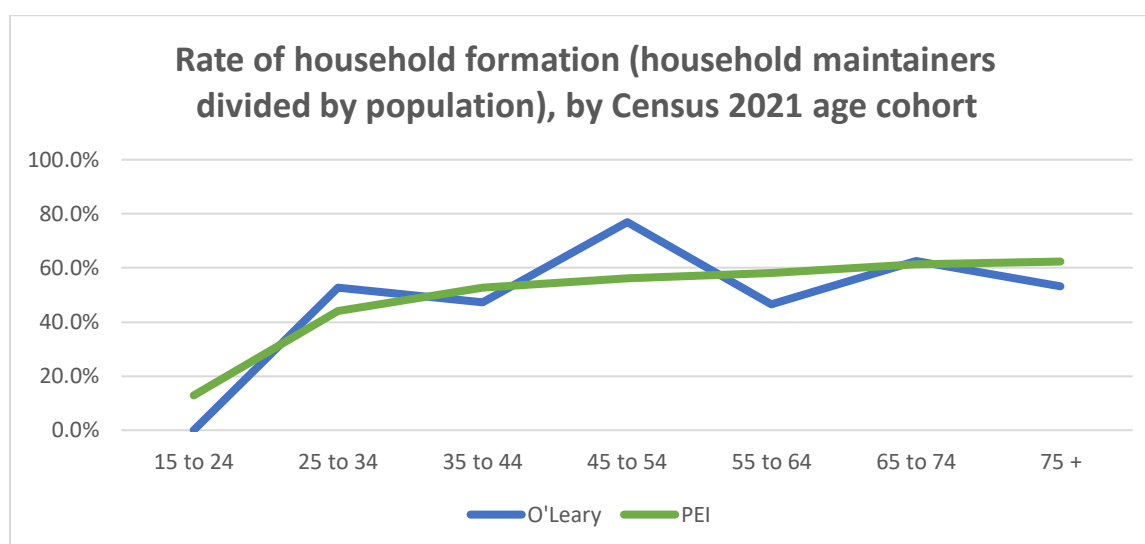
From: Appendix I

A recent CBC PEI piece notes that the provincial government's new population forecast has already [significantly undercounted](#) the Island's population for 2023. As a result, the figures presented in this report should be interpreted as a **conservative estimate** of O'Leary's growth.

Household formation assumptions

To predict how this population growth will translate into housing demand, we must first determine how household formation changes between age cohorts. The **rate of household formation** is calculated by dividing the number of primary household maintainers (formerly referred to as heads of households) by the number of residents aged 15 and up. Data for both of these variables can be found through the 2021 Census of Population.

O'Leary has a lower rate of household formation (48.7%) than the rest of PEI (49.4%), suggesting it is comparatively difficult for the town's residents to form their own independent households. However, the rate varies significantly across different age cohorts.



From: Appendix II

To calculate the number of households expected to be situated in O’Leary in 2041, the forecasted amount of residents must be multiplied by the corresponding rates of household formation from the 2021 Census of Population. The delta between the 2041 and 2021 amounts represents the net change in housing stock required in the town over a 20-year period. For the most accurate estimates, it is recommended that these calculations be conducted across age cohorts rather than in a single lump sum count.

Table 1: *Forecasted number of new households in O’Leary, based on current rates of household formation (from Appendix II)*

Age cohort	2021 Census population	2021 households by age of maintainer	2021 household formation rate (Maintainers divided by Population)	Forecasted 2041 population (derived from PEI Government)	2041 households (forecast x 2021 formation rate)	Delta (2041 households minus 2021 households)
15-24	85	0	0.0%	120	0	0
25-34	95	50	52.6%	144	76	26
35-44	95	45	47.4%	191	90	45
45-54	65	50	76.9%	136	105	55
55-64	140	65	46.4%	138	64	-1
65-74	120	75	62.5%	151	95	20
75+	160	85	53.1%	389	206	121
					20-year total:	266

It is estimated that O’Leary will need to increase its housing stock by 266 net new units over 20 years just to keep up with population growth. However, the town has low rates of household formation, include a rate of 0% among 15 to 24 year-olds. The town should consider adopting the higher provincial rates of household formation as a benchmark within growth planning to ensure that access to housing isn’t suppressed among residents, especially younger members of the working age population. To meet the higher target, O’Leary’s housing stock will need to increase by 301 units over 20 years.

Table 2: *Forecasted number of new households in O’Leary, based on province-wide rates of household formation (from Appendix II)*

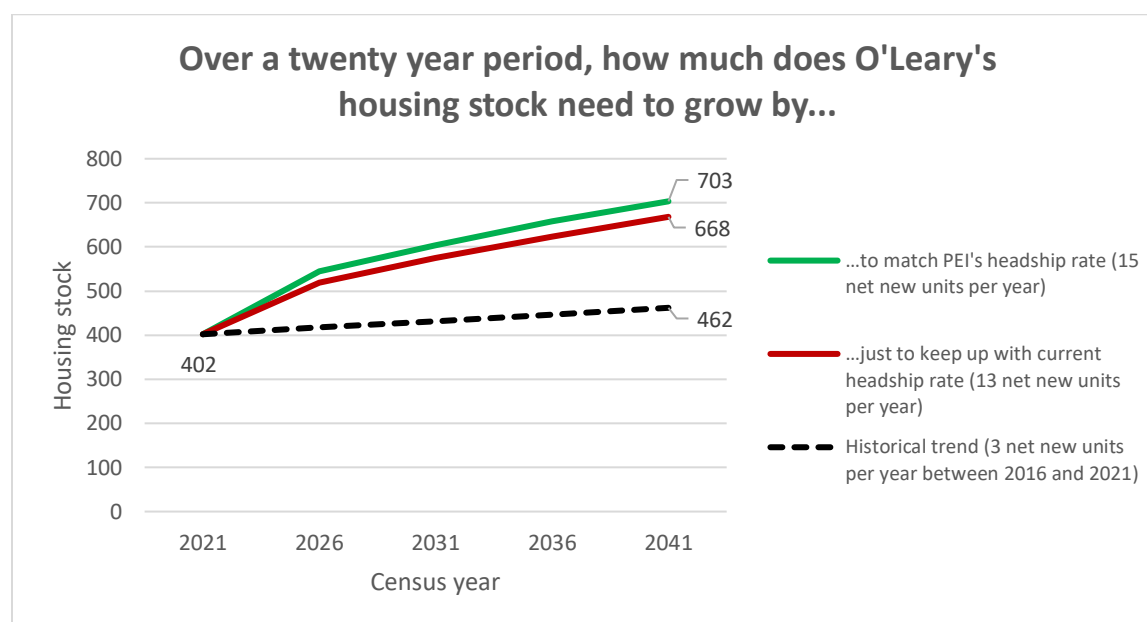
Age cohort	2021 households by age of maintainer	2021 province-wide household formation rate	Forecasted 2041 population (derived from PEI Government)	2041 households (forecast x 201 province-wide formation rate)	Delta (2041 households minus 2021 households)
15-24	0	12.9%	120	15	15
25-34	50	44.2%	144	64	14
35-44	45	52.7%	191	100	55
45-54	50	56.2%	136	77	27
55-64	65	58.1%	138	80	15

65-74	75	61.3%	151	93	18
75+	85	62.4%	389	242	157
				20-year total:	301

Considering the range of these two totals as annual construction objectives, O’Leary should be increasing its housing stock by 13 net new units per year to keep up with growth, and 15 or more per year to improve overall affordability. Between the 2016 and 2021 censuses, the total number of private dwellings in O’Leary grew from 387 units to 402 (an annual rate of 3 net new units). If this rate of housing stock growth is to hold over the coming years, O’Leary will likely build 10 to 12 fewer units than needed on an annual basis.

Policy implications

O’Leary’s housing shortage is not as proportionally severe as the ones being observed in major Atlantic urban centres such as Halifax or Moncton. However, O’Leary has fewer dwellings per capita than the rest of PEI. The town has also one of the highest shares of renter households on the Island (including one of the [highest shares](#) of renters living in subsidized housing), and as such would be impacted by the province’s low rental vacancy rate of 0.9%. The gap between O’Leary’s housing needs and projected housing stock growth is expected to widen unless homebuilding keeps up with demand.



From: Appendix III

The exacerbation of this crisis will lead to **suppressed household formation** - a phenomenon whereby individuals (especially young adults) continue to delay starting an independent household due to a lack of attainable housing options. Suppressed household formation could have significant economic, demographic, and political ramifications for O’Leary. For example:

- Aspiring homeowners forego buying homes due to a shortage of affordable options for purchase. They instead reside with roommates or continue to live with their parents. Young adult couples may end up delaying the formation of their own families, which could pose long-term demographic issues for both O’Leary and the rest of PEI.

- Tenants and low-income families are crowded out from renter markets as higher income households compete with incumbents for scarce rental options. O’Leary’s median household income is among the lowest in the province – a lack of new supply could make competition over rentals a highly visible issue.
- O’Leary loses its appeal to newcomers due to chronic housing shortages and skilled workers become more likely to move to more affordable jurisdictions, resulting in net outmigration.

To mitigate the suppression of households, adequate housing supply is needed. However, unlocking new supply requires consideration of issues pertaining to sustainability, labour constraints, local governance, and land use policy.

To *maintain* affordability, O’Leary should aim to increase its housing stock by 13 net new units each year so that the household formation rate observed in 2021 continues over the coming decade. But to *improve* affordability, the town should set an annual target of 15 net new units per year or more so that household formation increases among historically suppressed cohorts (e.g., young adults). This will make the town far more affordable and attractive to younger residents, especially those looking to start a family in a community that is receptive to their shelter needs.

Appendix I: PEI and O'Leary population estimates

Prince Edward Island 2026-2041 population estimate

Age Cohort	2026	2031	2036	2041
Under 15	26,223	28,932	32,239	34,269
15-24	21,856	22,685	22,935	24,415
25-34	31,345	34,191	32,359	33,101
35-44	22,068	27,863	37,682	40,358
45-54	21,770	23,336	25,737	31,489
55-64	22,561	21,957	22,875	24,464
65-74	21,332	22,247	21,523	21,039
75+	17,689	21,315	24,380	26,418
Total	184,844	202,526	219,730	235,553

From: [Government of Prince Edward Island](#)

O'Leary 2021-2041 population estimate

Age Cohort	Historical share of PEI's population (last four censuses)	2021	2026	2031	2036	2041
Under 15	0.5%	85	136	150	167	178
15-24	0.5%	95	107	111	113	120
25-34	0.4%	95	136	149	141	144
35-44	0.5%	65	104	132	178	191
45-54	0.4%	140	94	101	111	136
55-64	0.6%	120	127	124	129	138
65-74	0.7%	160	153	160	155	151
75+	1.5%	85	260	314	359	389
Total	0.6%	875	1,119	1,241	1,353	1,447

Note: 2021 population is derived from the 2021 Census, while 2026-2041 figures are derived by multiplying PEI's forecasted population by each age cohort's corresponding historical share of the provincial population situated in O'Leary (from the town's [2006](#), [2011](#), [2016](#), and [2021](#) census profiles)

Appendix II: Forecasted number of new households in O’Leary, based on the *current* and *province-wide* rates of household formation.

O’Leary’s current household formation rate

Age cohort	2021 Census population	2021 households by age of maintainer	2021 household formation rate (Maintainers divided by Population)	Forecasted 2041 population (derived from PEI Government)	2041 households (forecast x 2021 formation rate)	Delta (2041 households minus 2021 households)
15-24	85	0	0.0%	120	0	0
25-34	95	50	52.6%	144	76	26
35-44	95	45	47.4%	191	90	45
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75+	160	85	53.1%	389	206	121
					20-year total:	266

Province wide formation rate

Age cohort	2021 households by age of maintainer	2021 province-wide household formation rate	Forecasted 2041 population (derived from PEI Government)	2041 households (forecast x 201 province-wide formation rate)	Delta (2041 households minus 2021 households)
15-24	0	12.9%	120	15	15
25-34	50	44.2%	144	64	14
35-44	45	52.7%	191	100	55
45-54	50	56.2%	136	77	27
55-64	65	58.1%	138	80	15
65-74	75	61.3%	151	93	18
75+	85	62.4%	389	242	157
				20-year total:	301

Note: Maintainer and household formation data were derived from the 2021 Census of Population, while population projections were derived from Appendix I.

Appendix III: Forecasted growth of housing stock, by household formation scenario and actual projections

Year	Based on the 2021 provincial rate of household formation	Based on 2021 municipal rate of household formation	Historical trend (3 net new units per year between 2016 and 2021)
2021	402	402	402
2026	544	519	417
2031	604	575	432
2036	659	623	447
2041	703	668	462
Delta (2041 households minus 2021 households)	301	268	60
Net new units per year	15.1	13.4	3

Note: 2021 private dwelling total and historical trend both derived from O’Leary’s 2016 and 2021 census profiles. All other figures based on calculations from Appendix II.

Appendix B: Additional Data

Table 19: O'Leary Household Make-up over Time – Statistics Canada

Household Size	2021	2016	2011
1 person	40%	39%	38%
2 persons	31%	32%	35%
3 persons	13%	18%	14%
4 persons	8%	6%	7%
5+	8%	6%	7%

Table 20: Household Indicators Across Region – Statistics Canada

	2021 O'Leary	2021 Prince County	2021 PEI
Owners >30% on shelter		6.7%	8.8%
Tenants >30% on shelter	23.4%	27.5%	30.3%
Tenants in subsidized housing	44.7%	20.9%	18%
Median monthly shelter costs Owned	650	735	860
Ave monthly shelter costs Owned	740	897	1031
Med monthly shelter cos	660	840	940
Av monthly shelter costs rental	735	875	996
Ave value of dwellings	176,000	253,400	313,200
Median value of dwellings	150,000	230,000	300,000
Owners core housing need	13.8%	3.7%	3.8%
Tenants core housing need	23.4%	15.3%	14.1%

Table 21: O'Leary Age Characteristics over Time – Statistics Canada

Age Characteristics	2011	2016	2021
0-4 years	30	40	45
5-9 years	35	35	30
10-14 years	50	40	40
15-19 years	60	45	35
20-24 years	35	30	50
25-29 years	25	35	50
30-34 years	25	35	45
35-39 years	35	30	45
40-44 years	45	30	55
45-49 years	55	40	25
50-54 years	55	55	45
55-59 years	45	70	65
60-64 years	60	50	70
65-69 years	40	65	55
70-74 years	55	40	60
75-79 years	45	55	35
80-84 years	40	45	60
85+ years	65	60	65
Total	815	805	875