# OUR GROWING CITY

2015 Annual Growth Monitoring Report

Edmonton

# OUR SHARED VISION

# We are building the City together, following a shared vision that guides our policies and investment choices to accommodate growth while preserving our unique quality of life.

Edmonton is growing at a fast pace. As the city changes to accommodate the thousands of new residents drawn here annually, there is a need to maintain its vibrancy and quality of life. Edmonton is a city that continues to attract, house and employ people.

The City of Edmonton and our partners strive to strike a balance between preserving ecologically sensitive land, supporting the revitalization of downtown, densifying mature areas, and accommodating new development by ensuring land is available when needed.

Each year the City endeavours to deliver infrastructure and services that are most important to Edmontonians, while managing the opportunities and challenges of an ever-changing city. Our annual Growth Monitoring Report tracks how we are doing.

The City's vision is outlined in *The Way Ahead*, which contains key directional plans to shape the way we grow our city, green our environment, live in our community, move people and goods efficiently, prosper locally and globally, and finance our needs responsibly and strategically. Edmonton's vision provides the platform for building the kind of communities that deliver choice, diversity, resiliency, sustainability, and innovation.

Several key initiatives demonstrate how this vision guides Edmonton's growth. The Quarters Downtown, West Rossdale, Blatchford, downtown redevelopment, and Transit Oriented Development are helping our central neighbourhoods and areas along Edmonton's expanding LRT routes grow "upward." Ongoing efforts to enable infill opportunities in our mature and established neighbourhoods help the city grow "inward," and the construction of new neighbourhoods in developing areas enables our city to grow "outward."

In addition we are more efficiently using our existing infrastructure by growing a little "closer." Enhancing planned densities, while also finding opportunities to increase densities in our existing neighbourhoods.

Strategically growing "up, in, out," and "closer" enables an attractive and affordable range of housing types, and supports non-residential growth in well-designed and well-connected places.

## HOW DOES THIS REPORT WORK?

This report is a summary snapshot of city growth, supported by detailed reports, open data sets, and complementary links. Using a layered approach, this report is structured as a "portal" into the diverse and detailed information that the City of Edmonton collects, maintains, analyses, and shares about its physical development and population growth trends. Through this report, readers are linked to increasing levels of information to match their own analytical needs.

For more information, visit **www.edmonton.ca/growthanalysis**

## KEY FINDINGS FROM THE EDMONTON GROWTH MONITORING REPORT

- The City of Edmonton continues to grow "up," "in" and "out." The current findings confirm the complexity of maintaining growth balance between core, mature and established neighbourhoods and developing or "new" neighbourhoods.
- A demographic shift is occurring in mature and established areas of the city. The population is ageing and households are decreasing in size. There will be a significant increase in lone person and two person households.
- The 2014 Edmonton Municipal census counted 877, 926 people, 60,428 more residents from 2012.
- The Edmonton CMA is comparatively much younger than major Canadian city regions with a median age of 36 years.

- Over the past four decades, the in the core neighbourhoods have been slowly growing to include more young adults. People in our mature neighbourhoods are aging and neighbourhhods have been losing population. The children in our established neighbourhoods are growing up and leaving home while their parents are staying put, younger families with small children are rapidly populating our developing neighbourhoods.
- In Edmonton the current proportion of zoned land uses is roughly 32% residential, 3 % commercial, 12 % industrial, 7 % institutional and 9 % parks and open space, special "direct control" zones account for 4% of land uses, Transportation Utility Corridor (TUC) 6 % and 27 % agriculture.
- In 2014, the City issued 14,175 residential permits and 2,007 non-residential permits.
- There were 9,789 housing starts in 2014 and 12,013 net new units approved.
- Within Edmonton, the developing neighbourhoods account for the majority of residential development and in 2014, as in 2013, developing neighbourhoods accounted for 83% of all residential growth.
- There were 5,889 low-density residential lots serviced in Edmonton's developing neighbourhoods in 2014. In 2014, the west and southwest increased their shares of servicing. The southeast remained constant, and the south (both southeast and southwest) accounted for 52% of all serviced lots.
- In 2014, 2,298 units were gained in mature and established neighbourhoods.
- Core neighbourhoods have the highest average density, more apartment buildings, and less single detached and row housing.
- Mature neighbourhoods tend to have lower densities and more single-detached homes than other neighbourhoods.
- Established neighbourhoods tend to have a lower average density than mature neighbourhoods, with less apartment housing and more row housing than other neighbourhoods.
- Recent Neighbourhood Structure Plans have a trend towards higher planned densities that are greater than 30 du/nrha and contain a more balanced range of dwelling types.

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# INTRODUCTION

# 1.0

# MONITORING GROWTH & CHANGE

Edmonton is a great city that continues to attract new residents. In order to accommodate growth in a fiscally, socially and environmentally responsible manner, The Way We Grow, Edmonton's municipal development plan, directs the management of future public obligations and growth opportunities through a long-term growth coordination strategy.

In November 2012, Council approved the Growth Coordination Strategy. The strategy provides a framework to identify and manage future public obligations and to accommodate expected growth through monitoring, reporting, coordination, and communication. One of the key outcomes of the strategy was the preparation of an annual Growth Monitoring Report.

This report contains information on Edmonton's neighbourhoods, which are divided into four geographic areas based on *The Way We Grow* (see map on page 13).

**Core areas**
Downtown and adjacent neighbourhoods

**Mature areas**
Neighbourhoods outside the core, generally completed prior to 1970

**Established areas**
Completed neighbourhoods, generally within the Anthony Henday Transportation Corridor

**Developing areas**
Currently developing and planned neighbourhoods where lot registration is not yet complete

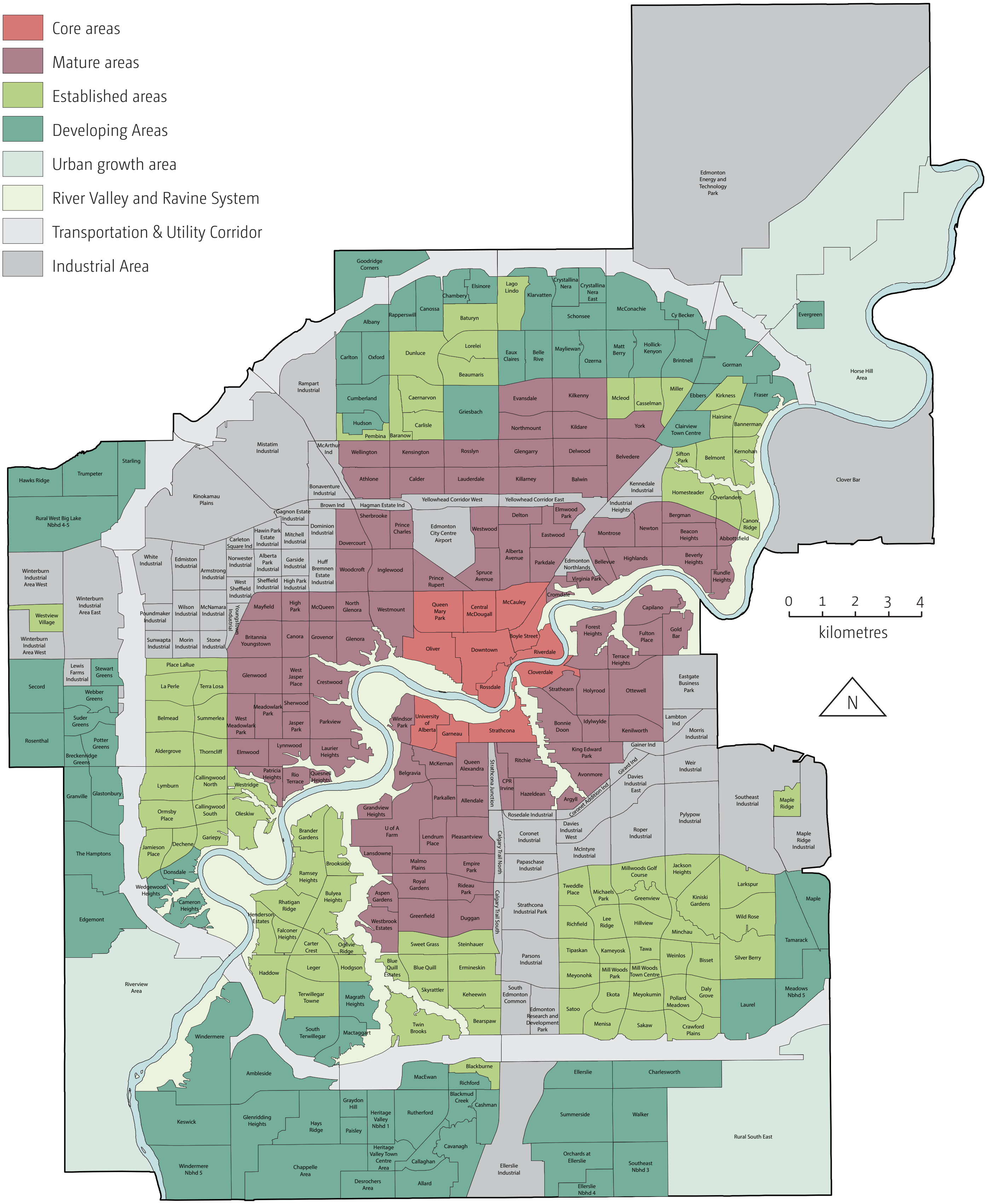
This second annual Growth Monitoring Report covers the year 2014. It contains information on key demographic, residential and non-residential growth trends across the city. It builds on growth related measures we track year long. The report provides the reader with snapshots in time on certain attributes of urban growth.

Information is sourced from Statistics Canada, the Canadian Mortgage and Housing Corporation (CMHC), and City of Edmonton sources and is current as of May 21, 2015.[1]

[1] See References in the Appendix for more information

# NEIGHBOURHOOD CLASSIFICATION

- Core areas
- Mature areas
- Established areas
- Developing Areas
- Urban growth area
- River Valley and Ravine System
- Transportation & Utility Corridor
- Industrial Area



# EDMONTON'S PLACE IN THE REGION

# 2.0

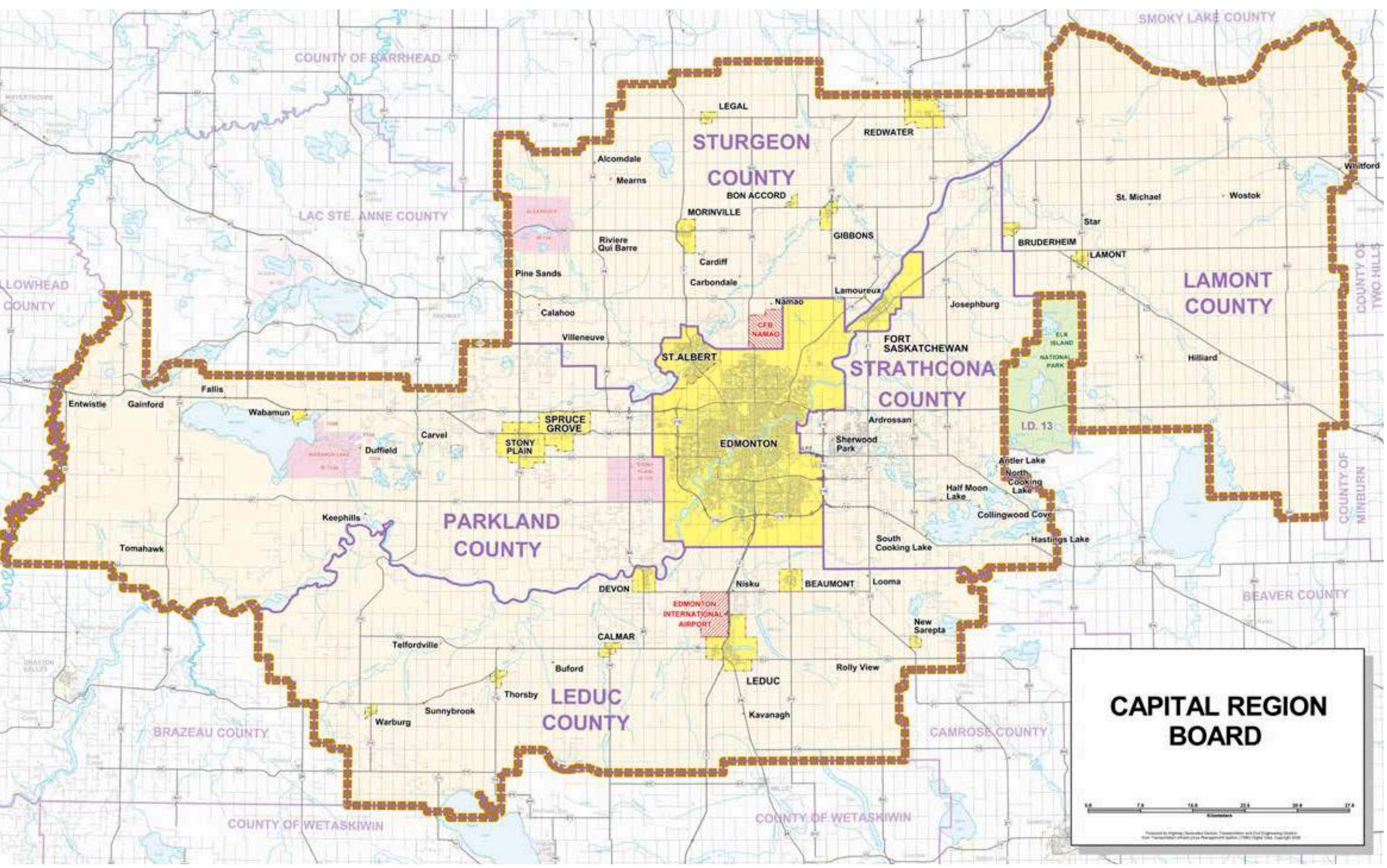
# REGIONAL CONTEXT

"When we're united, our voice is that much stronger and our story that much more compelling. At 1.3 million strong, Edmonton Metro will be a force to be reckoned with."

Mayor Don Iveson, *2015 Edmonton State of the City*

Edmonton is growing, and keeping pace with this growth is a challenge. Edmonton is the urban centre of a resource-rich economic region and a gateway to global trade, where goods for a global market are produced and distributed.

The city is the heart of the Capital Region, which includes Edmonton, St. Albert, Spruce Grove, Stony Plain, Leduc City, and the surrounding Counties of Leduc, Parkland, Strathcona, Sturgeon and Lamont. Edmonton provides a wide range of services, employment, and housing choices for the entire region.



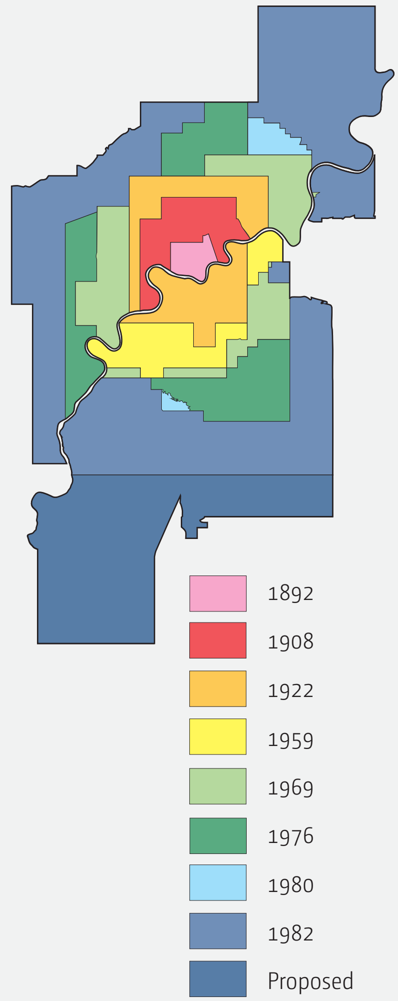
Edmonton's history is characterized by periods of rapid growth. The city expanded its boundaries several times since its incorporation to accommodate waves of newcomers lured by the oil industry. After World War II and the 1947 discovery of oil in Leduc, Edmonton experienced a growth spurt that lasted 20 years when Edmonton's compound growth rate hovered around 5% to 6%, and the city's boundaries doubled to accommodate the demand for residential land (see the Boundary History map). The most recent municipal boundary change was in 1982, and this change was followed by the low growth years of the 1990s when the compound population growth was a less than 1%. Since 2009, Edmonton has experienced rapid expansion at a compound growth rate of 2.3%.

The Capital Region is expected to grow to just under 2.2 million people by 2044, with Edmonton reaching 1.4 million during this time.[2] Based on this anticipated increase, Edmonton will require approximately 270,000 new housings units by 2044. Edmonton is a centre for employment accounting for 79% or approximately 500,000 jobs in the Capital Region. Projections to 2044 are that the city will, maintain and grow its share of jobs within the region based on current and future efforts to expand its employment base across all sectors.

Edmonton has consistently maintained a majority of housing starts within the Capital Region. In 2014, 71% of the region's total housing starts occurred within the City, slightly above the 10 year 66% average. Over this same period the city's regional share of single-detached and multi-family (semi-detached, row housing and apartments) has averaged 59% and 74% respectively. With several smaller communities surrounding Edmonton, the city must provide complementary housing options to those available within the region. Ensuring that growth is both coordinated and efficient is integral to providing cost effective housing.

Over the last decade, Edmonton's population has increased by 165,535 people, to 877,926 in 2014, with 70% of the region's population now living in Edmonton. These growth pressures have been reflected in an active housing market, with 78,305 housing starts between 2005 and 2014.

**EDMONTON'S BOUNDARY HISTORY**




[2] Sourced from the Nichols Applied Management Growth Projection Report "The Case for Annexation"

# CITY OF EDMONTON CHIEF ECONOMIST[3]

## Edmonton's Economic Outlook: Diversity Brings Resilience

In spite of the sharp decline in oil prices during the second half of 2014, the economies of the Capital Region and Edmonton continued to perform well. Growth will continue in 2015 albeit at a slower pace than recent years. Strong momentum in the construction sector combined with a solid base of employment in health care and education will offset energy related weakness in the logistics, professional services and manufacturing sectors. Edmonton's more diverse economic structure means the city will outperform Alberta as the provincial economy adjusts to reduced activity in the energy sector.

As oil prices gradually recover, economic prospects for Edmonton will improve quickly with population and employment growth rising above levels expected for both Alberta and Canada. In spite of very strong in-migration over the past several years, Edmonton's outstanding record of job growth kept the unemployment rate well below the national average. As of March 2015 Edmonton's unemployment rate was 5.3%.

In the longer term, economic growth should moderate due to an ageing population. However, Edmonton's relatively young overall demographic will mean the easing in growth will be much more modest than that forecast for other many other metropolitan areas. From 2014 to 2024 growth is expected to average 2.9% per year.

Edmonton's very robust labour market conditions stimulated in-migration and boosted population growth as well as new household formation. The arrival of record levels of migrants over the past several years pushed Edmonton's rental vacancy rate down to 1.7% in the second half of 2014 and drove multi-family housing starts to historically high levels in the first quarter of 2015.

Aggressive residential construction levels balanced the housing market in spite of strong demand from a growing population. Consequently, increases in housing costs have been very modest compared to other markets such as Calgary, Toronto and Vancouver. Edmonton's housing affordability remains one of the best among Canada's leading metropolitan areas.

Inflation as measured by the Consumer Price Index (CPI) declined markedly over 2014 and into 2015 as gasoline and home heating prices plummeted. As of March 2015 Edmonton's year over year rate of inflation was a mere 0.1% compared to 1.0% for Canada. Edmonton's CPI will ramp up to just under 2% during 2015 as housing costs and energy related costs rise. Both operating and capital costs inflation for the city should be very moderate as a slowing energy sector reduces demand for labour, materials and equipment.

[3] The Economic Outlook Report and related documents are available at www.edmonton.ca/business_economy/economic_data/economic-outlook.aspx

# A MARKET PERSPECTIVE: THE URBAN DEVELOPMENT INSTITUTE EDMONTON REGION[4]

After very strong population growth from 2012 to 2014, Edmonton's population is expected to grow at 2.2% to 2019 and then at 1.9% over the longer term. While this population growth will help to address labour shortages it will place a continuing demand on the city for the increased services and infrastructure investments a growing population requires, such as public transit, police services and affordable housing.

Edmonton's growth continued at a torrid pace in 2014. Residential and commercial investment was at an historic high. A robust economy drove population growth in all areas of the city: downtown, mature areas and in the suburbs. People from all over the world came to Edmonton in 2014, attracted by the prospect of finding a job and a great place to call home.

Development throughout the city continued on a path aimed at enhancing the quality of life, taking care of the environment and providing Edmontonians with the opportunity to live, work and play in this outstanding city.

## How do we do this?

Growth was concentrated in hubs and growth nodes slating land for a variety of uses and diversity dwellings. Homes, streets, office buildings, commercial buildings, parks and recreational facilities were designed and built on a human scale. Development continued to occur close to where people live, supported by active transportation whether by bus, car or LRT, walking or biking.

Developers, city planners, builders and political leaders worked tirelessly to build great communities. The results have been staggering. Intelligent urbanization has led to a better quality lifestyle, stronger economy and social fabric.

Looking ahead, ensuring Edmonton is a wonderful place to live, work and play is a top priority for the Urban Development Industry. We must continue our efforts, together with city leaders, aimed at making Edmonton both welcoming and affordable. Edmonton's development industry supports our economic good fortune by imagining and building communities where infrastructure means more than roads and water. It's a network of relationships, an opportunity for collaboration, association and innovation.

By working together we can achieve anything.

[4] For more information, please contact the Urban Development Institute, www.udiedmonton.ca

# A YOUNG, DIVERSE POPULATION

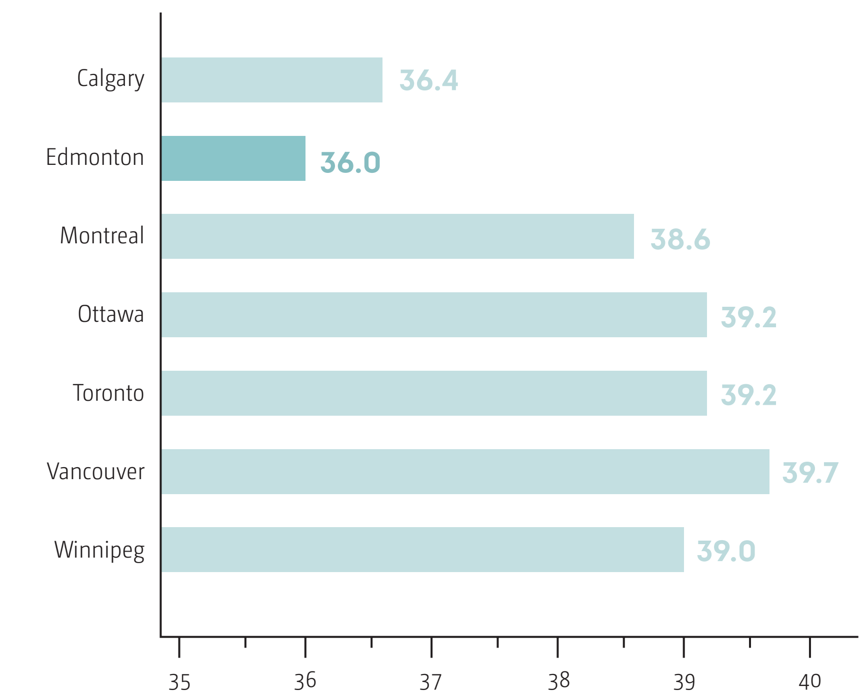
# 3.0

# DEMOGRAPHICS

Edmonton is situated within a larger region that makes up the Edmonton Census Metropolitan Area (CMA). The latest population data from Statistics Canada show that the Edmonton CMA had 1,328,290 residents as of June 30, 2014, up 3.3% over the previous 12 months.

It is the fifth largest CMA in the country, and the second fastest growing CMA in Canada after Calgary. The growth rate between 2013 and 2014 was three times faster than the national growth rate of 1.1%.

### Median Age of Census Metropolitan Areas (2011 Census of Canada)




The Edmonton CMA is comparatively much younger than other major Canadian city-regions with a median age of 36 years. Other major Canadian city-regions have a median age of 39-40 years.

**WHAT IS A CMA?**

A CMA is formed by one or more adjacent municipalities centred around a large urban area (known as the urban core). A CMA must have a total population of at least 100,000, of which 50,000 or more must live in the urban core.

To be included in the CMA, other adjacent municipalities must have a high degree of integration with the central urban area as measured by commuting flows derived from census place-of-work data.

Source: Statistics Canada

**WHAT IS THE EDMONTON CENSUS METROPOLITAN AREA (CMA)?**

The Edmonton CMA encompasses 35 other municipalities, including St. Albert, Sherwood Park, Spruce Grove, Leduc and Fort Saskatchewan, as well as the Counties of Sturgeon, Parkland, Strathcona and Leduc.

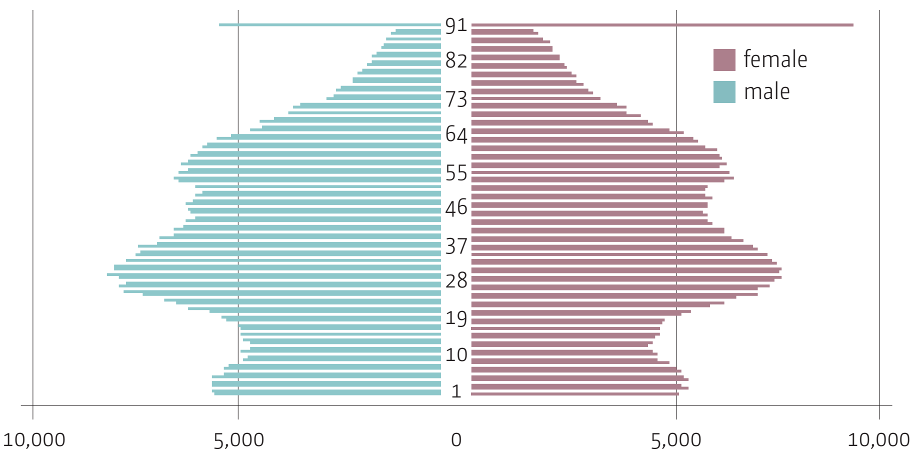
Source: Statistics Canada

# AGE AND DIVERSITY

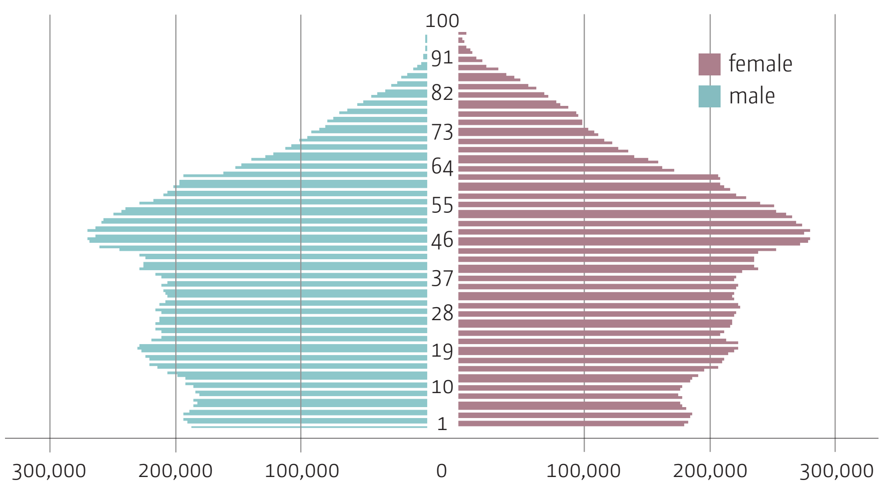
Edmonton is growing, ageing and diversifying. According to the 2014 Edmonton Municipal Census, the population of Edmonton proper is 877, 926. This is up 60,428 residents from 2012 and represents a 7.4% increase from 2012.

Compared to other cities in Canada, Edmonton is experiencing what is termed as a "youth bulge." Edmonton's largest population cohort is 25-39 years of age (Echo Boomers). This is the fastest growing age group in Edmonton. The second largest group is the 49-65 age group commonly referred to as the "Baby Boomer" generation.

### 2014 City of Edmonton Population by Age and Gender*




### 2011 Canada Population by Age and Gender**




**MATURE NEIGHBOURHOOD SNAPSHOT: OTTEWELL**

Ottewell began development in the 1950s and was substantially complete by the late 1960s and was part of Edmonton's high growth period of Alberta's energy boom of the time. The large majority (82%) of housing is single detached (City average is 51%). The median 2010 household income was $73,178 compared with $72,248 for the City. The 2014 population was 5,985 which is a 38% decline from it's 1971 population of 9,685. Ottewell has aged with 28% of the population aged 60 and over compared with 16% for Edmonton.

* Source: City of Edmonton Census

** Source: Statistics Canada

# POLICY IMPLICATIONS OF POPULATION AND DIVERSITY

With more Baby Boomers moving towards 65+ years of age, it is anticipated that we as a city will be dealing with additional needs in terms of housing, transportation and leisure. We will also have to meet the needs of the growing Echo Boomer cohort and their children in the 0-4 age cohort, who will begin schooling in the next five to ten years.

The Baby Boomers in other Canadian cities are becoming more and more suburbanized. They are looking for housing choices that are close to services and are smaller and affordable. Suburbs in many cities are offering these choices.

The Echo Boomers tend to prefer using active or public transit and living close to where they work. In many Canadian cities this cohort is concentrated in the urban core. Edmonton has begun to see this trend as younger adults are concentrated in the urban core.

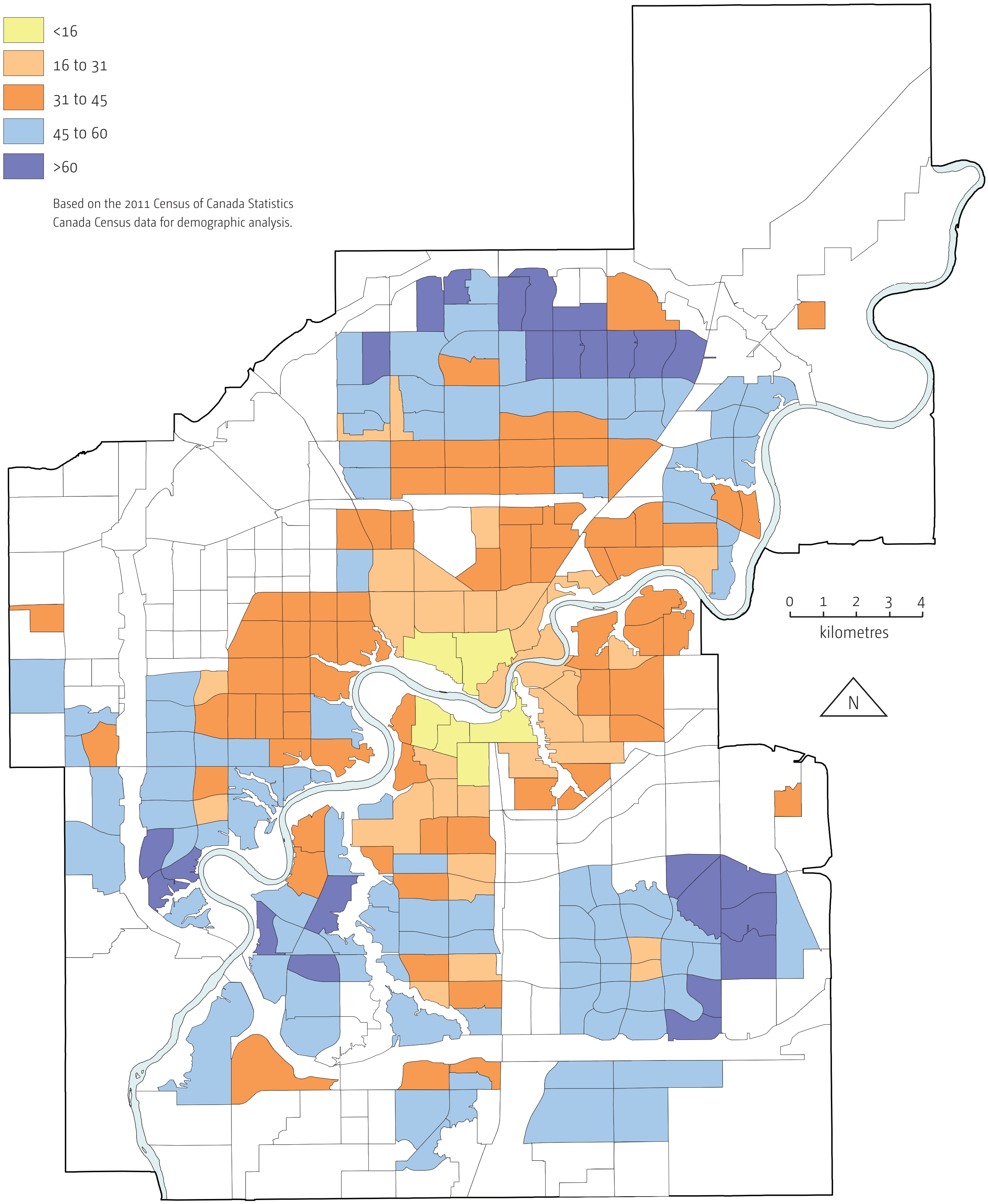
In Edmonton young families with small children are concentrated in the developing areas. This group, concentrated in developing areas, requires services such as schools, playgrounds, and daycares.

### ECHO BOOMERS

Millennials, Generation Y, or Echo Boomers are a generation born in the 1980s to mid–1990s who have a strong desire to live and play close to the places they work. This highly skilled and educated cohort is now the largest generation in Canada and their desire to live in vibrant and attractive urban cores has begun to change the way in which we plan. Millennials' choice of active or public transportation has resulted in a reduced need for parking as they drive less than their parents' generation. Furthermore, their movement into urban centres has helped shift investment from the suburbs, and developers and businesses have begun to follow, by building condominiums and locating businesses in these urban areas in an attempt to capitalize on this generation's desired lifestyle.[5]

[5] Please refer to the Appendix for more information on these cohorts

## PERCENTAGE OF FAMILIES WITH CHILDREN BY NEIGHBOURHOOD




Based on the 2011 Census of Canada Statistics Canada Census data for demographic analysis.

## NEIGHBOURHOOD POPULATION TRENDS

Edmonton has changed significantly over the past few decades, and is expected to continue to change as it grows. However, not all areas of the city have experienced uniform population growth over the same periods, and there are important differences between neighbourhoods depending on their era of development and current development opportunities.

Over the past four decades, the population in core neighbourhoods has slowly grown to include more young adults. In contrast people in mature neighbourhoods are ageing and these neighbourhoods have been losing population. Following a similar trend, population loss in established neighbourhoods has been a result of children growing-up and leaving home while their parents are staying put. Meanwhile, younger families with small children are rapidly populating our developing neighbourhoods.

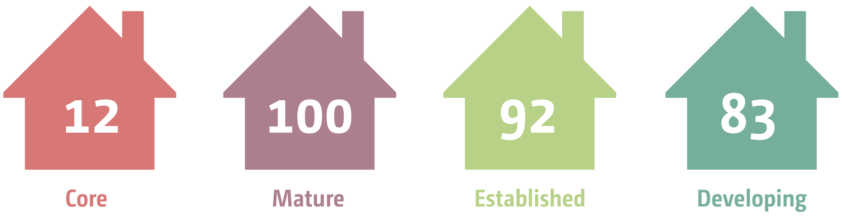
Looking at a shorter time frame, between 2009 and 2014, mature neighbourhoods increased by 6,662 people and 4,295 households. Core neighbourhoods had a population increase of 5,909 and added 4,609 more households. 12 core neighbourhoods[6] had an almost equal population and household growth as the 100 mature neighbourhoods.

**CORE NEIGHBOURHOOD SNAPSHOT: STRATHCONA**

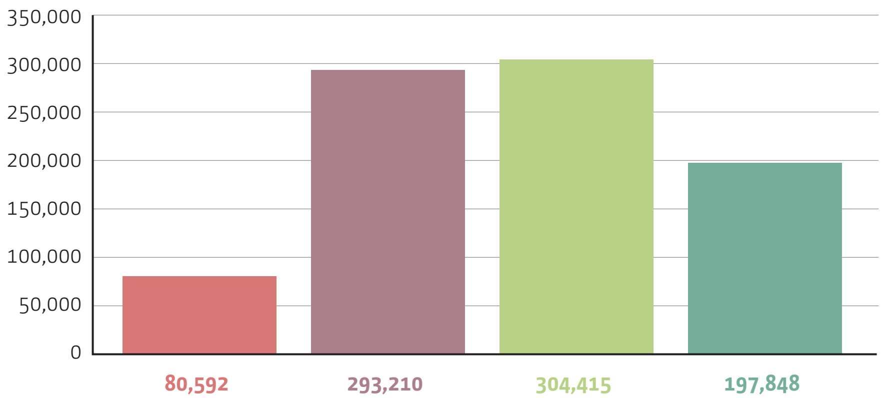
Development of Strathcona began in the 1890s with the arrival of the Calgary and Edmonton Railway line in 1891. Much of Strathcona's housing stock was redeveloped in the 1960s and 1970s (46% of total) with 30% built before 1961. A large majority (74%), of housing is apartment (high rise and walkup) with single and semi-detached housing making up 25%. The 2014 population was 9,618 which is an increase of 13% from 1971. The median 2010 household income was $55,178 compared with $72,248 for Edmonton. Strathcona has a young age profile with 51% aged between 20 and 39 compared with 33% for Edmonton. One-person households make up 50% of households compared with 29% for Edmonton.

[6] 12 core neighbourhoods have been identified by the MDP (Queen Mary Park, Central McDougall, McCauley, Oliver, Boyle Street, Riverdale, Rossdale, Cloverdale, The University of Alberta, Garneau, Strathcona and the Downtown). However, the City of Edmonton does not have jurisdiction over the University of Alberta neighbourhood, therefore other publications may report 11 core neighbourhoods.

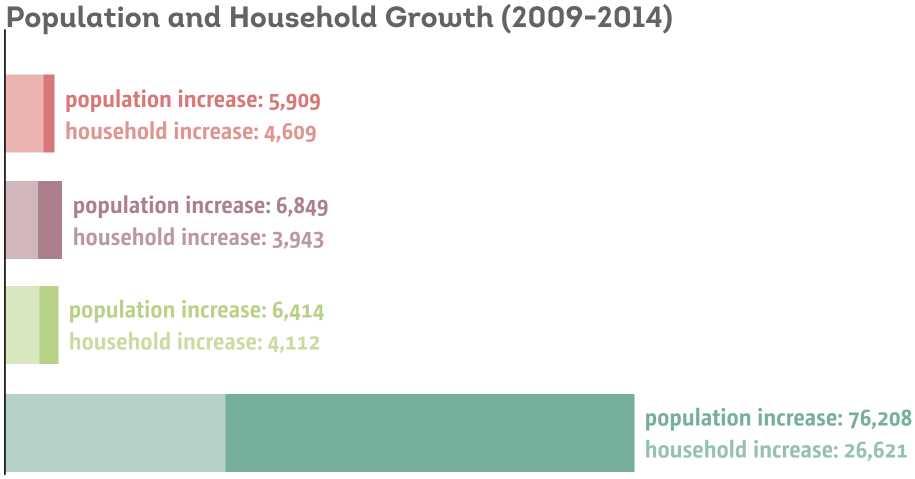
## Number of Neighbourhoods



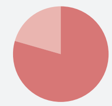

## 2014 Neighbourhood Populations

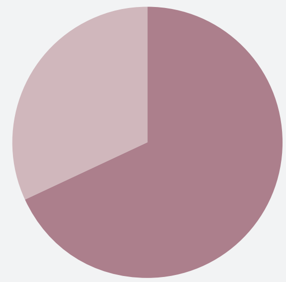


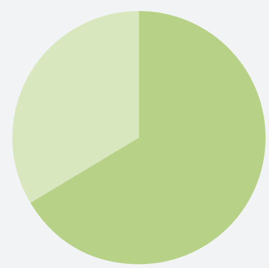

## Population and Household Growth (2009-2014)




### AREA IN HECTARES*




* No data available for developing neighbourhoods

In spite of population gains in old neighbourhoods, some neighbourhoods experienced population decreases in the last five years. Dunluce and Spruce Avenue experienced the largest population losses, followed by Twin Brooks and Ormsby Place.

Nine of the top ten fastest growing neighbourhoods over the last five years are in the south. Top five-year increases by neighbourhood are shown in the following table.

## Neighbourhood Population Growth/Decline (2010-2014)

| Neighbourhood | Population Change |
|---|---|
| Summerside | 6,507 |
| The Hamptons | 5,157 |
| Windermere | 5,017 |
| Walker | 4,424 |
| Laurel | 4,098 |
| Rutherford | 3,916 |
| South Terwillegar | 3,882 |
| Ambleside | 3,224 |
| Tamarack | 2,795 |
| Charlesworth | 2,775 |
| Dunluce | -287 |
| Spruce Avenue | -281 |
| Twin Brooks | -264 |
| Ormsby Place | -196 |
| Westview Village | -195 |
| Hillview | -192 |
| Greenfield | -189 |

**DEVELOPING NEIGHBOURHOOD SNAPSHOT: SUMMERSIDE**

The Summerside neighbourhood is located within the Ellerslie Area Structure Plan (ASP) and is found at the centre of the ASP. Summerside was named after a city on Prince Edward Island. Construction of the Summerside neighbourhood began in the early 2000s and the neighbourhood has a planned nautical "resort community" character. A significant feature is Summerside Lake, a 13 hectare and 28 feet deep lake. Summerside was one of the larger neighbourhoods with a population of 11,314 in 2014. Median household income in 2010 (Statistics Canada) was about $100,000.

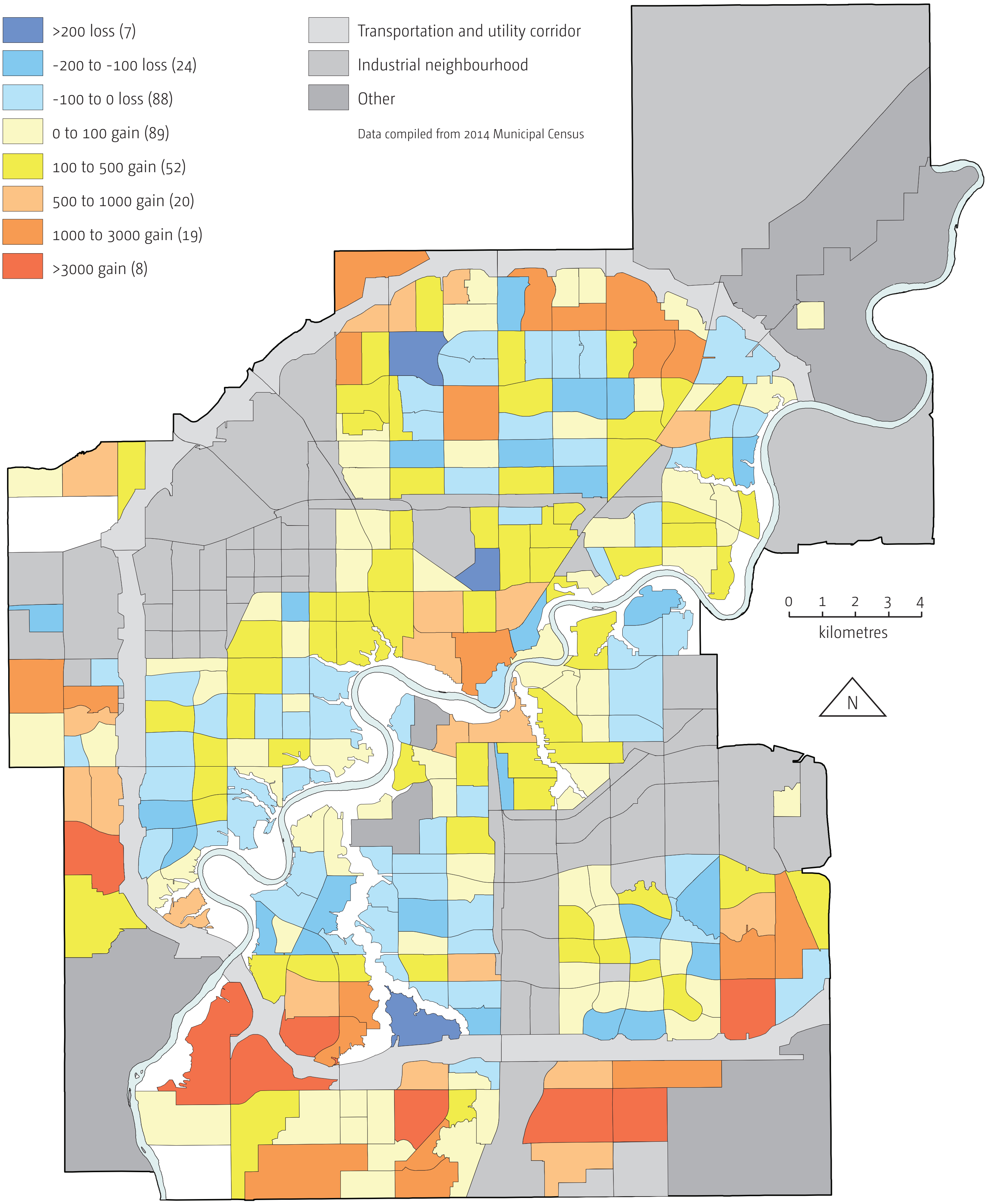
*Please note that although Boyle Street demonstrated population loss, it has one of the largest gains in terms of permits. Permit data illustrates construction activity.

# POPULATION GROWTH BY RESIDENTIAL NEIGHBOURHOOD (2009 TO 2014)

>200 loss (7)
-200 to -100 loss (24)
-100 to 0 loss (88)
0 to 100 gain (89)
100 to 500 gain (52)
500 to 1000 gain (20)
1000 to 3000 gain (19)
>3000 gain (8)

Transportation and utility corridor
Industrial neighbourhood
Other

Data compiled from 2014 Municipal Census



# LAND USE AND DEVELOPMENT

# 4.0

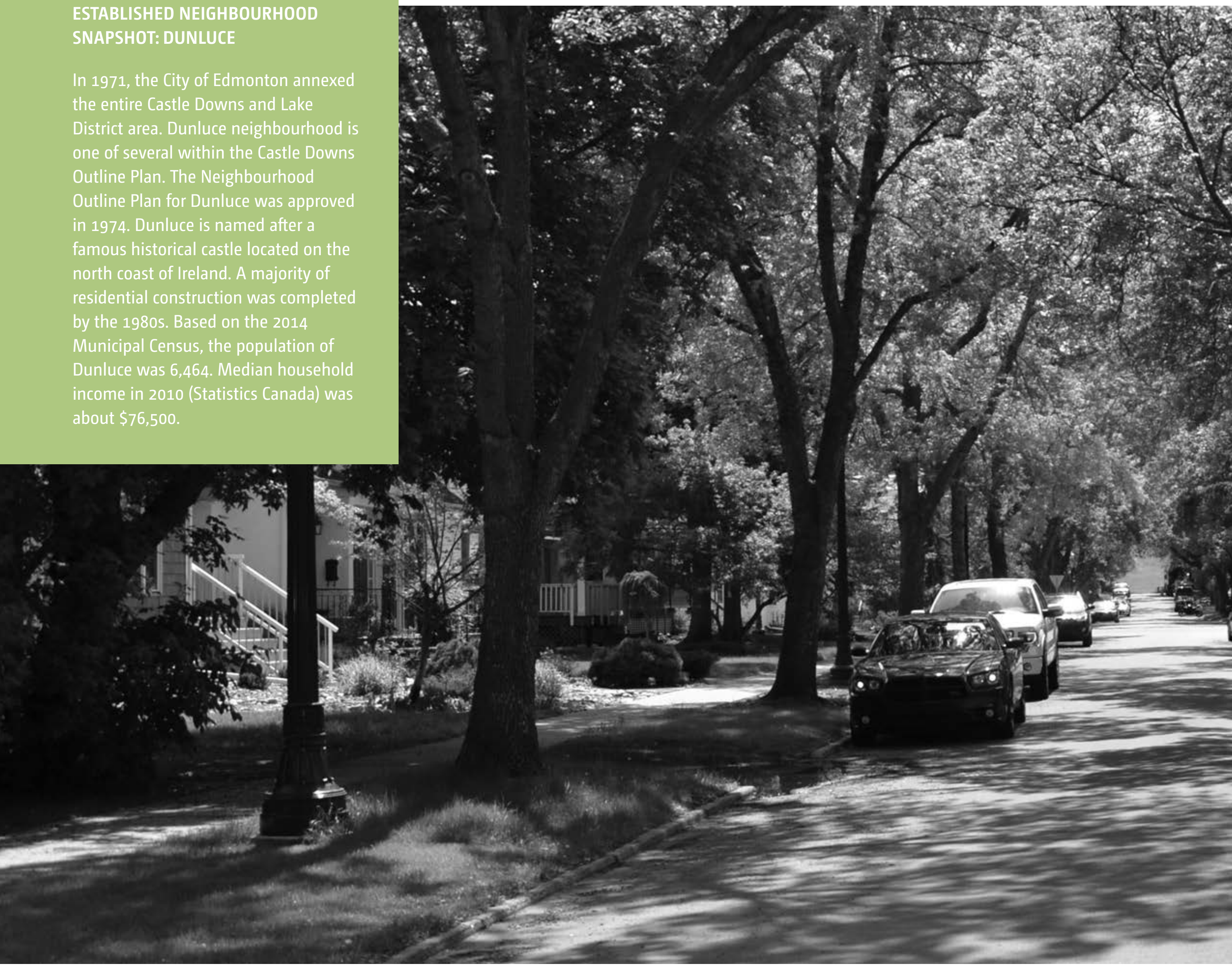
# DIVERSE DEVELOPMENT TO MEET DIVERSE POPULATION

Edmonton's development is diverse, with residential, commercial, industrial, institutional, and recreational land uses throughout the city. Combined, Edmonton's different land uses and development patterns support a diversity of buildings, landscapes and amenities that create a vibrant city and provide a range of opportunities for people to live, work, and play.

Development patterns shift and change as the city grows, and this section provides an overview of Edmonton's growth with respect to its non-residential and residential land use patterns and land use supply.

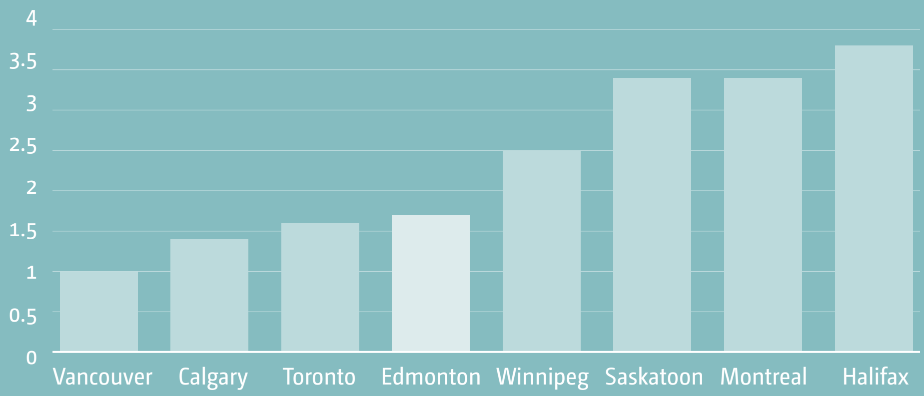
**ESTABLISHED NEIGHBOURHOOD SNAPSHOT: DUNLUCE**

In 1971, the City of Edmonton annexed the entire Castle Downs and Lake District area. Dunluce neighbourhood is one of several within the Castle Downs Outline Plan. The Neighbourhood Outline Plan for Dunluce was approved in 1974. Dunluce is named after a famous historical castle located on the north coast of Ireland. A majority of residential construction was completed by the 1980s. Based on the 2014 Municipal Census, the population of Dunluce was 6,464. Median household income in 2010 (Statistics Canada) was about $76,500.



Edmonton's 2014 apartment vacancy rate was 1.7% - close to that of Calgary and Toronto.

### 2014 Apartment Vacancy Rate: Canadian Cities*




Apartment vacancy rates in Edmonton increased in 2009 at the time of the financial crash in the developed economies. Since then, strong employment growth and record levels of net migration over several years, increased demand for apartment housing and reduced rates in the last few years.

### Edmonton Apartment Vacancy Rate*


* Source: CMHC

Edmonton supports a diversity of land uses: residential, commercial, industrial, institutional and recreational. Through the zoning process the city shapes the different types of uses and built form for any given land parcel, as well as the amount of area committed to those uses. The process ensures that Edmonton is a vibrant city with opportunities for employment, housing and recreation (see the General Zoning Category map for an illustration of citywide zoning).[8]

Development patterns change as the city evolves and different land uses are established in different areas. In order to ensure sustainable development patterns, the city strives to maintain a balance between different zones.

Zoned land is currently 32% residential, 3% commercial, 12% industrial, 7% institutional, and 9% parks and open space. Special "direct control" zones account for 4% of land uses, transportation/utility corridor (TUC) 6%, and agricultural 27%.[9]

Direct control zones are used to define unique regulations or accommodate mixed uses, so Edmonton's actual land use breakdown may underrepresent areas where specialty zoning is more common, such as the downtown.

Since 2014 the proportion of agriculture and reserve land has dropped from 37% (26,160 ha) to 27% (18,790 ha). For the past decade Edmonton has been converting an average of 1,000 hectares of agriculture and reserve zoned land into urban zones. The decade long pattern of a 2:1 ratio of residential to business employment (industrial/commercial) land area continues.

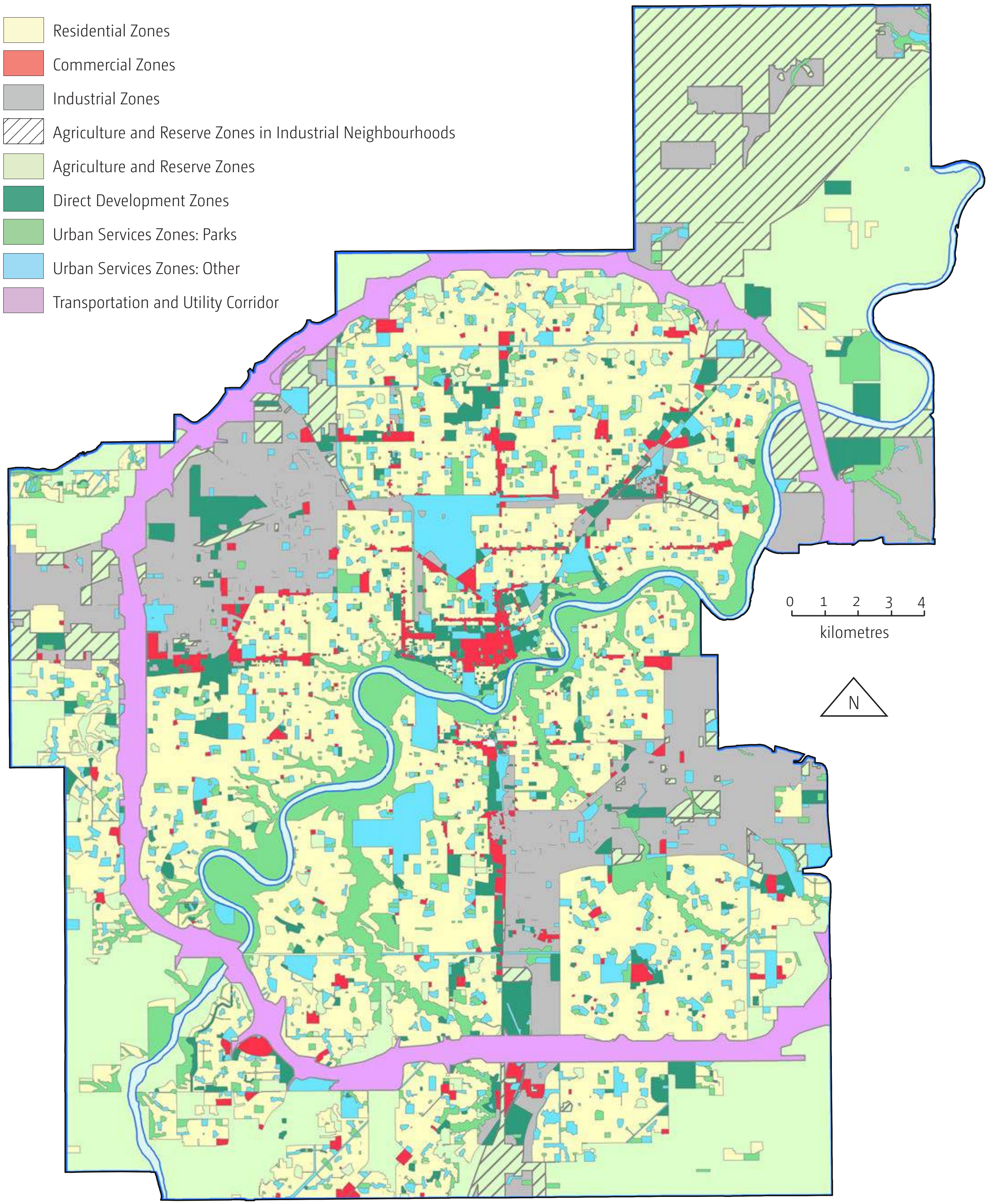
**MATURE NEIGHBOURHOOD SNAPSHOT: ALBERTA AVENUE**

Located within Edmonton's inner city, Alberta Avenue is one of the city's older residential neighbourhoods. It dates back to 1894, a time when Edmonton had about 1,000 residents. According to the 2014 Municipal Census, Alberta Avenue had 6,565 residents and a median household income of $52,911. The neighbourhood density is 35 du/nrha. Alberta Avenue is an example of a neighbourhood that is undergoing community-led, City-supported revitalization efforts that have transformed this historic area, improving both its social and physical aspects. The Avenue Initiative is Edmonton's pioneer neighbourhood, which started in 2006.

[8] Refer to the Appendix or see Edmonton's Zoning Bylaw 12800: www.edmonton.ca/zoningbylaw

[9] See Edmonton Zoning trends 2004-2014 in the Appendix and in Open Data: data.edmonton.ca

## GENERAL ZONING CATEGORY



## VACANT RESIDENTIAL LAND

Edmonton's core, mature and established neighbourhoods share a total of 180 ha of vacant land, with the distribution of this land varying widely amongst them. Established neighbourhoods contain the most vacant land, with 88 ha or 49% of all vacant land being found in these communities. This is largely due to the established neighbourhood of Homesteader, which has the most vacant land of any neighbourhood with 41ha. Mature neighbourhoods follow next with 61 ha or 34% of the vacant land, while the central core holds the smallest share of vacant land with 31 ha (17%) of land found within these neighbourhoods.

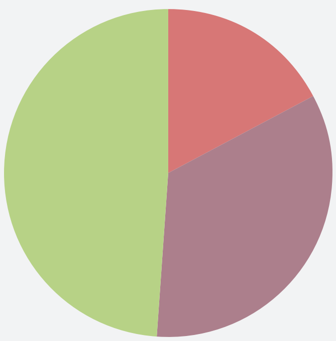
In total, 1,343 vacant lots have been identified within the central core, mature and established neighbourhoods. From this perspective, mature neighbourhoods contain over half of the total vacant lots with 703 lots (52%), with the next largest share, 492 lots or 37%, belonging to the central core. The McCauley neighbourhood in the central core contains the most vacant lots of any neighbourhood with 141 vacant lots within its boundary. Although established neighbourhoods contain the most vacant land, between the three neighbourhood types they contain the fewest number of lots with 11% or 148; indicating that a few lots contain most of their vacant land.

Between these areas the average size of a vacant lot is $424^{m2}$. The majority of vacant lots are zoned RF1, with 241 lots falling under this zoning. The DC1 was the next most commonly used zone with 216 lots.

### Potential

Of the 180 ha of vacant land within the central core, mature and established neighbourhoods, 75 ha is currently zoned for residential development. Multiplying the area of each vacant lot by the maximum units permitted under each zone provides an estimate of potential development opportunity. Using this method, the vacant land in these neighbourhoods could allow for an additional 3,287 dwelling units and potentially 7,725 people. This is an estimate based only on existing zoning and does not include DC1 or DC2 zoned land. This method also does not account for opportunities available through rezoning or lot consolidations and therefore the development opportunity may potentially be higher.

**VACANT LAND DISTRIBUTION**



- Established: 88 ha (49%)
- Core: 31 ha (17%)
- Mature: 61 ha (34%)

**HOW BIG IS A HECTARE?***

A hectare is about 2.47 acres.
The grass surface within the running track of Commonwealth Stadium is approximately one hectare.

Edmonton has approximately 180 hectares of zoned vacant land, the size of nearly four West Edmonton Malls.

* For a complete list of zoning definitions, please refer to the Appendix of this report.

# THE SEQUENCE OF NEIGHBOURHOOD PLANNING AND DEVELOPMENT

The Way We Grow, Edmonton's Municipal Development Plan, provides strategic direction to shape the land use and built form of the city. The Municipal Development Plan applies to the whole city, is updated on a 10-year cycle, and is based on a 30-year planning horizon.

The Municipal Development Plan states City Council's position and expectations on various land use matters and is the source for many of the City's major policy, guideline and program initiatives (e.g. the Growth Coordination Strategy, Area Redevelopment Planning Program).

Area Structure Plans apply to generally 600 (or more) hectares of land. Area Structure Plans provide a high-level development concept identifying the general location and configuration of residential, commercial, institutional, public open space and utilities, and the alignment of major transportation infrastructure including LRT, highways, and arterial and collector roadways. Area Structure Plans also outline a scheme to service and stage the development of the Plan area. In preparing an Area Structure Plan the City collaborates with the development industry and others (e.g, schools, utilities) to ensure the development concept and servicing scheme comply with the City's applicable policies and standards and appropriately addresses the constraints and opportunities present in the Plan area. It is at this stage that the City evaluates, understands, and begins to identify the infrastructure and service needs attributable.

### DEVELOPING NEIGHBOURHOOD SNAPSHOT: MCCONACHIE

The McConachie neighbourhood is located in the Pilot Sound area in northeast Edmonton. It was established in 2006 through the adoption of the McConachie Neighbourhood Structure Plan (NSP). Development of the neighbourhood began soon after the plan was approved, and is still underway. In 2014 McConachie had 2,743 residents and a median income of $123,593. Its density in 2014 was 27du/nrha with a projected density of is 32.2 du/nrha upon completion.


Zoning is applied to land in compliance with the Area and Neighbourhood Structure development concepts and assigns the development opportunities and regulations for built form on the affected lands. Land use zones identify permitted and discretionary uses; site coverage, building heights, forms and density; landscaping, site layout and parking requirements.

Subdivision divides land into smaller parcels in accordance with the land use zone in place for the "parent" parcel, and establishes the configuration and orientation of lots and the pattern and alignment of the abutting road network. It is at the subdivision stage that the City identifies the specific requirements (including infrastructure) necessary to support the future development of the lots created by the subdivision.

Servicing Agreements are a condition of subdivision approval and are concluded between a land developer and the City. Agreements specify the location and standard of the municipal improvements (sewer, water, roads, etc.) required to support a subdivision. Once a servicing agreement is in place the lots created by a subdivision can be registered, serviced and sold to builders to construct housing and commercial buildings, etc.

Development Permits allow for the operation of a particular land use as specified under the land use zone in place for the affected land.

Building Permits are the end product of a review by the City to ensure a particular development meets the requirements of the Edmonton Zoning Bylaw, the Alberta Building Code and other City regulations.

**CORE NEIGHBOURHOOD SNAPSHOT: OLIVER**

Once known as Edmonton's "West End," the Oliver neighbourhood was renamed in the 1950s after pioneer citizen Frank Oliver. Development which began in the 1880s was predominantly institutional, however, by the start of the 1900s residential development was firmly in place. Although this early residential development was initially single-detached dwellings, growth pressures in the 1950s and Oliver's proximity to downtown resulted in apartment redevelopment, a built form that dominates the neighbourhood today. Today, Oliver has become a densely populated neighbourhood (219 du/nrh) with a strong commercial element. The neighbourhood has one of the City's larger populations with 19,135 residents, while median household income in 2010 (Statistics Canada) was just over $50,000.

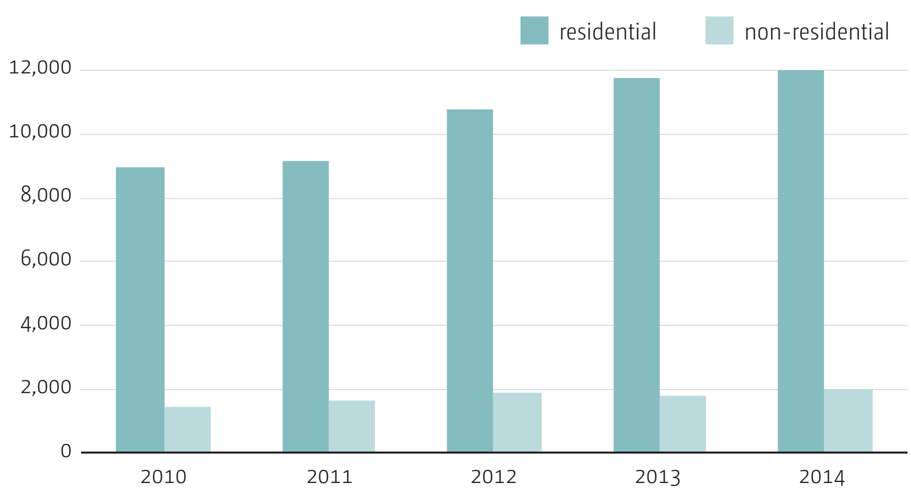
## NON-RESIDENTIAL DEVELOPMENT PATTERNS

Building permits are divided into residential and non-residential according to the development activities they allow. Over the past five years the number of permits and combined total construction values have generally grown steadily, although non-residential construction values tend to be more variable as individual projects can have significant financial impact.

### Estimated Construction Values (2010-2014)


In 2014, the City issued 14,175 residential permits and 2,007 non-residential permits. The value of residential construction in the city was almost $3 billion dollars in 2014. This represents a 17% increase from residential construction values in 2013. The value for non-residential construction in 2014 was approximately $1.6 billion, accounting for a 16% increase from 2013 non-residential activity. Of the non-residential permits, 63% of the total construction value was for commercial uses, 8% for industrial, 27% for institutional, and 2% for miscellaneous. In 2014, both residential and non-residential construction values were above the five-year averages indicating continued growth city-wide.

### Total Number of Building Permits (2010-2014)



## INDUSTRIAL LANDS

Industrial land is located in 73 neighbourhoods across the city, and three main sectors: the northeast, northwest, and south/southeast. As of year-end 2014, there were 6,468 gross vacant hectares of industrial land (1,166 net and 5,302 gross) including 4,810 ha in the Edmonton Energy and Technology Park. Of the vacant land, 18% is zoned as net industrial. Industrial land absorption rates dropped in 2014 to 154 ha from 291 ha the year before. This is a 53% decrease in land absorption. However, the 2014 absorption rate is still above the last 10-year average of 143 ha per year. In 2014, 117 industrial permits were issued in the city with a construction value of $236 million.[10]

### Ellerslie Industrial Park

Ellerslie Industrial Park consists of 429 hectares of industrial land. The area has a mix of industrial business and agricultural uses. The industrial business designation accommodates a range of light industrial business and high-technology uses.

**ELLERSLIE INDUSTRIAL PARK AT-A-GLANCE**

**Location:** South Edmonton

**Size:** Vacant zoned industrial land is 233 ha

**Existing uses:** Plastics firms, machinery and equipment, transportation and warehousing

### Edmonton Research Park

The park offers a variety of facilities and spaces to suit a range of research requirements. The Advanced Technology Centre is an incubator that can accommodate up to 33 start-ups with flexible space up to 2,000 square feet. Currently more than 1,500 people work for more than 50 companies at the Park, engaged in advanced research in medicine, biotechnology, software, petroleum research, cold climate engineering, nanotechnology and clean energy.

**EDMONTON RESEARCH PARK AT-A-GLANCE**

**Location:** South Edmonton

**Size:** Vacant zoned industrial land is 6 ha

**Existing uses:** Medicine, biotechnology, software, and petroleum research, cold climate engineering, nanotechnology and clean energy

### Edmonton Energy and Technology Park

This park embodies a vision for a new eco-industrial area for the City of Edmonton. The opportunity for value-added industries and significant economic spin-off activity based on the development of Alberta's oil sands was the catalyst for the development of this industrial plan. The park will be of interest to chemical and energy value-added processors who want to capitalize on upgrading, processing and refining natural gas, natural gas liquids, oil and bitumen by-products. The large-scale development opportunity offers outstanding development potential for manufacturers and fabricators and the excellent road and rail connections that support a strong transportation and logistics base.

**EDMONTON ENERGY AND TECHNOLOGY PARK AT-A-GLANCE**

**Location:** Northeast Edmonton– a part of Alberta's Industrial Heartland

**Size:** 4,810 ha

**Existing uses:** Integrated cluster of industries connected with hydrocarbon processing, manufacturing, logistics and associated research and technology sectors

[10] For more information, see the Current Planning Monthly Building Permit Summary (www.edmonton.ca/bylaws_licences/licences_permits/monthly-building-permit-summar.aspx)

# RESIDENTIAL DEVELOPMENT PATTERNS

Over the last 40 years, Edmonton has maintained the majority of residential growth within the region as measured by housing starts. The proportion has varied, from a high of 94% of the regional share in 1982 to a low of 53% in 1996, and an average share of 70%. Within the Region, Edmonton tends to account for the most multi-family growth, with an average 84% share. In 2014, Edmonton's housing starts accounted for 72% of all housing starts within the region.[11] Within Edmonton, the developing neighbourhoods account for the majority of residential development and in 2014, as in 2013, developing neighbourhoods accounted for 83% of all residential growth.

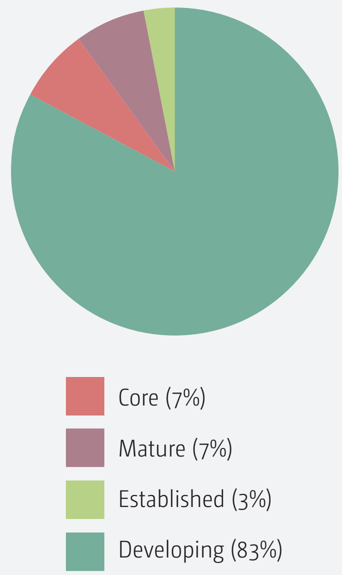
At the end of 2014, Edmonton had 83 developing and planned neighbourhoods as defined by the MDP. 59 of which have started development and have potential lot registrations available. Before significant housing development can occur in developing neighbourhoods, they must receive statutory approval through an Area Structure Plan (ASP) and a Neighbourhood Structure Plan (NSP). These plans provide a framework for land use decisions, as well as an estimate of neighbourhood density and the total number of housing units. Ten official neighbourhoods are classed as 'planned' within Area Structure Plans because they do not have an approved Neighbourhood Structure Plan. Forty neighbourhoods have been approved for development through Neighbourhood Structure Plans and are at different stages of development.

The Horse Hills and Riverview ASPs are two neighbourhoods that have the potential to create ten new planned neighbourhoods upon NSP approvals and creation as official neighbourhoods. With the approval of the Decoteau ASP expected in 2015, an additional five neighbourhoods will be considered as planned when an NSP is approved. In 2014, the Goodridge Corners neighbourhood transitioned to a developing status with the approval of an NSP. Developing neighbourhoods have been collapsed into North, West and South sectors for analysis (see table below).

### Neighbourhood Completion Status (December 2014)

| | North | West | South | City-wide |
|---|---|---|---|---|
| Planned | 2 | 3 | 6 | 11 |
| 0-24% Complete | 2 | 5 | 6 | 13 |
| 25-74% Complete | 7 | 3 | 12 | 22 |
| 75-95% Complete | 3 | 1 | 1 | 5 |
| >95% Complete | 15 | 8 | 10 | 33 |
| **Total** | 29 | 20 | 34 | 83 |

### NET NEW HOUSING UNITS (2014)




### HOUSING STARTS

A "start," is defined by the CMHC as the beginning of construction work on a building, usually when the concrete has been poured for the whole of the footing around the structure, or an equivalent stage where a basement will not be part of the structure.

Information is provided by the Canadian Mortgage and Housing Corporation (CMHC), please see the CMHC for more information, online at **www.cmhc.ca/housingmarketinformation**

[11] Regional housing starts are tracked by the Canadian Mortgage and Housing Corporation, a full table showing Edmonton's share "Edmonton Region Housing Starts: 1970-2014" is available online at www.edmonton.ca/growthanalysis

Plans provide an estimate of the total lot supply available in developing neighbourhoods, and as lots are registered the remaining supply is calculated. As of December 2014, the potential lot supply available in developing neighbourhoods for single and semi-detached housing was 91,516 lots. Once 95% of these low-density lots available in a neighbourhood have been developed, a neighbourhood is considered "complete." Neighbourhoods may not reach full completion due to obstacles with servicing or land ownership, so 95% is used as a proxy.

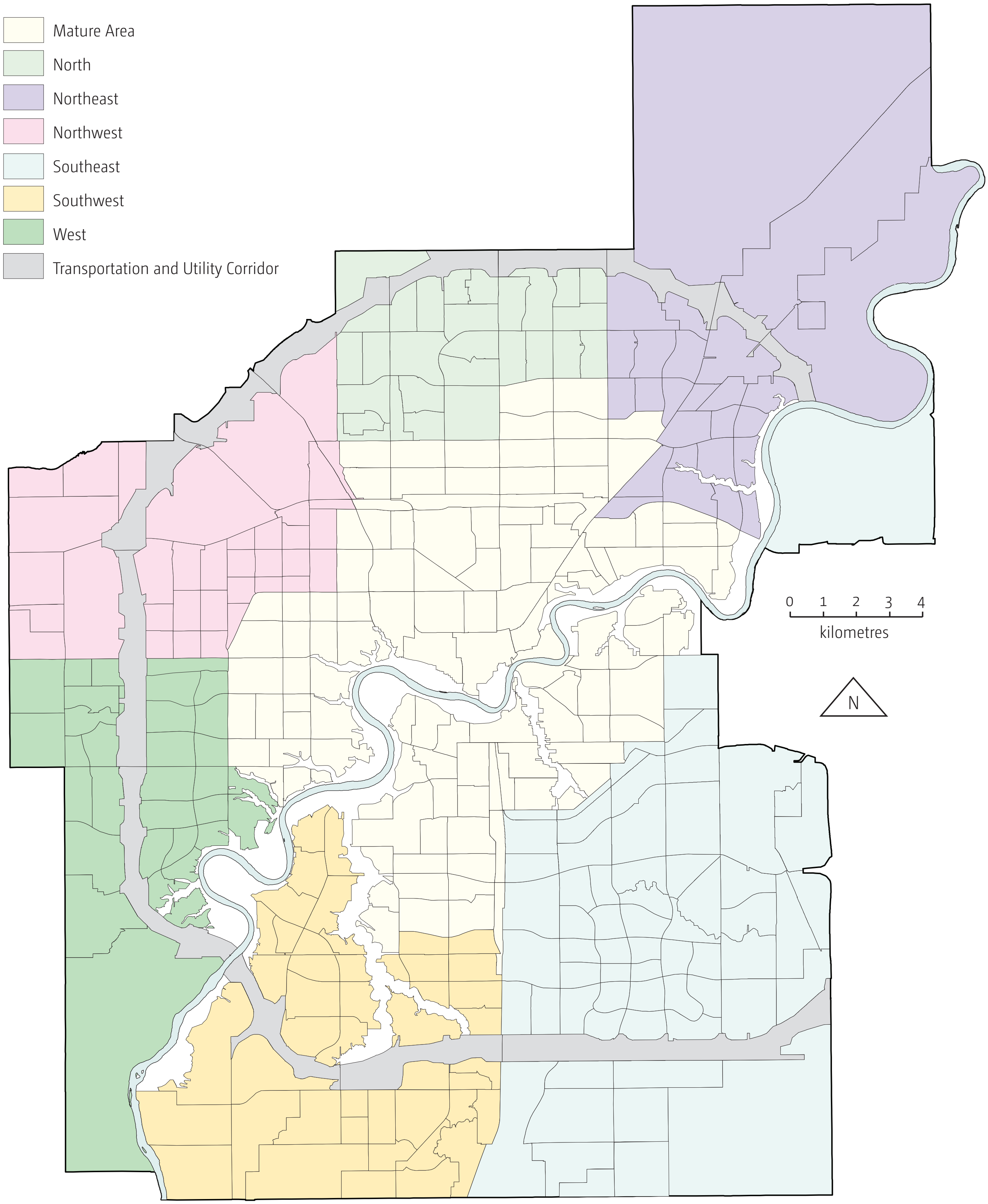
## 2014 Total Low Density Residential Lot Supply by Subsector

| Subsector | Developing | Planned | 95% Complete | Potential Lot Supply |
|---|---|---|---|---|
| North | 5,170 | 0 | 125 | 5,295 |
| Northeast | 2,886 | 19,906 | 0 | 22,792 |
| Northwest | 2,765 | 3,439 | 0 | 6,235 |
| Southeast | 9,253 | 7,269 | 0 | 16,522 |
| Southwest | 14,878 | 3,660 | 0 | 18,538 |
| West | 8,535 | 13,555 | 44 | 22,134 |
| City-wide | 43,518 | 47,829 | 169 | 91,516 |

### ESTABLISHED NEIGHBOURHOOD SNAPSHOT: ORMSBY PLACE

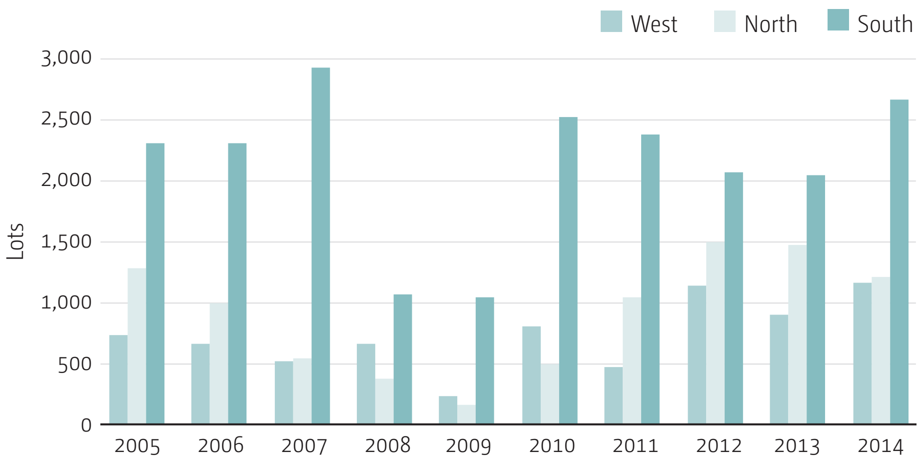
Located in West Edmonton, Ormsby Place is bound on the west by the Transportation Utility Corridor (TUC), on the south by Callingwood Road, on the north by 69 Avenue and on the east by 178th Street. Ormsby Place is surrounded by other residential neighbourhoods. Development in Ormsby Place started in the 1970s and 1980s and continued on into the early 2000s. According to the 2014 Municipal Census, Ormsby Place had 5,450 residents with a median household income of $82,308. The neighbourhood density is a 23 du/nrha.

## CITY SECTOR


Mature Area
North
Northeast
Northwest
Southeast
Southwest
West
Transportation and Utility Corridor
0 1 2 3 4
kilometres
N

Tracking lot registrations provides a record of past development and indicates how economic activity, demand and affordability affect the rate at which lots were absorbed from supply. Typically, low-density lots are absorbed faster than higher density lots. However, in recent years, medium-density lots have been developed at the same rate as low-density units, so that low-density lot completion has begun to approximate full residential completion of a neighbourhood.[12]

## Annual Low Density Absorption (Lot Registration) 2005-2014




Past development trends and future projections are calculated through servicing records for low-density residential lots. Once a water main is charged and ready to be connected to a new home the lot is considered "serviced." Functioning water service is required for fire protection prior to the construction of the first showhome in a new neighbourhood, so servicing projections can be used to represent the start of new construction areas. The number of low-density residential lots serviced in Edmonton's developing neighbourhoods in 2014 was 5,889. In 2014, the West and the Southwest increased their shares of servicing. The Southeast remained relatively constant, and the South (both Southeast and Southwest) accounted for 52% of all serviced lots. These breakdowns are projected to generally continue, with the South sector continuing to receive the majority of servicing and development activity.[13]

| City Sector | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|---|---|---|---|---|---|---|---|---|
| North | 31% | 25% | 17% | 10% | 17% | 15% | 21% | 17% | 34% | 19% |
| West | 12% | 21% | 25% | 7% | 43% | 20% | 13% | 22% | 20% | 25% |
| South | 58% | 53% | 59% | 82% | 39% | 65% | 65% | 61% | 46% | 56% |
| Total Lots | 5,922 | 2,700 | 4,945 | 3,128 | 595 | 4,576 | 3,568 | 4,539 | 4,430 | 5,889 |

### MATURE NEIGHBOURHOOD SNAPSHOT: GREENFIELD

Greenfield had its beginnings as a neighbourhood in the 1960s when Edmonton was having very high population growth in response to the rapid development of Alberta brought on by high growth in the energy sector. Greenfield's residential development form is nearly completely (92%) single detached houses (the City share is 51%). The 2014 population was 3,610 which is a decline of 38% from its 1971 population of 5,790. The neighbourhood's population has aged with 26% of the 2014 population in the age group 60 and over (the citywide share is 16%). Median 2010 household income was $96,261 compared with $72,248 for the City.

[12] "Land Supply in Developing and Planned Neighbourhoods" report at www.edmonton.ca/growthanalysis

[13] "Low-Density Residential Lot Servicing 2013-2019" report at www.edmonton.ca/growthanalysis

Registrations, servicing, permits and housing starts are related, but different, snapshots of the development timeline. Registration documents the creation of legal lots and generally comes first. Servicing is required to complete infrastructure, and may be required with lot registration. Permits are issued to allow for construction activity, while housing starts[14] measure the actual start of construction. Averaged over many years, all measures should indicate approximately the same amount of activity, while monthly or yearly figures illustrate the balance of land at different stages of the development process. In 2014, registrations, servicing, and permits increased. Permitting experienced the largest increase, indicating future construction activity.

### Residential (Single and Semi) Land Development Trends


[14] Housing starts are tracked by the Canadian Mortgage and Housing Corporation and reported city-wide, while other measures are monitored by the City by neighbourhood. As a result, the "housing starts" statistics are not shown on this graph. A CMHC-based housing starts summary chart is available in the Appendix and in Open Data (data.edmonton.ca)

# GROWING UP, IN, OUT AND CLOSER

# 5.0

# DEVELOPMENT PATTERNS & TRENDS

Edmonton is growing and changing in many ways. Our neighbourhoods range from one to 100+ years old and have different population characteristics, different housing characteristics and different patterns of development. Section 3 described differences with respect to population size and age. This section builds on Section 3 by reviewing physical development patterns in terms of housing form and density, and by summarizing trends in recent development.

**CORE NEIGHBOURHOOD SNAPSHOT: BOYLE STREET**

One of Edmonton's oldest neighbourhoods, Boyle Street's was recorded on a map of the newly created town of Edmonton in 1892 and is believed to be named after lawyer John R. Boyle. An early resident of Edmonton who served on the city's first Municipal Council. Many changes have occurred over the past 100+ years and today redevelopment continues to occur with the Quarters Area Redevelopment Plan (ARP) proposing further redevelopment in the area. Today the neighbourhood is predominately composed of apartment buildings, with a majority of residents renting. As of 2014, the neighbourhood had a population of 6,913. The Boyle Street median household income in 2010 (Statistics Canada) was well below the city's $72,248 at $37,378.

## DEVELOPMENT PATTERNS

Different types of residential neighbourhoods have different residential patterns, as indicated by unit density and housing type. Density is calculated by dividing the number of residential dwelling units in an area by the size of the area identified for residential uses (dwelling units per net residential hectare – du/nrha). Focusing on units within a residential area emphasizes density in building type and also allows for neighbourhood comparisons, as potential differences in non-residential uses, such as parks, roads, and commercial areas are removed. The Dwelling Unit Density map illustrates neighbourhood density differences.[15]

### City-wide (2009 - 2014)

The Dwelling Unit Density maps illustrate neighbourhood density differences across the city. In 2009 the Municipal Census had insufficient dwelling unit data on many of the developing neighbourhoods on the edges of the city. The planned densities for the neighbourhoods were used for the 2009 map. Based on NASP and NSP statistics, developing neighbourhoods in recent years tend to have a planned density of over 30 du/nrha. Five years later, the 2014 Census indicated that sufficient development had occurred so that actual densities for 11 new neighbourhoods could be calculate. However, 24 developing Neighbourhood Structure Plans (indicated in green on the Dwelling Unit Density Map) had insufficient information to calculate a residential density.

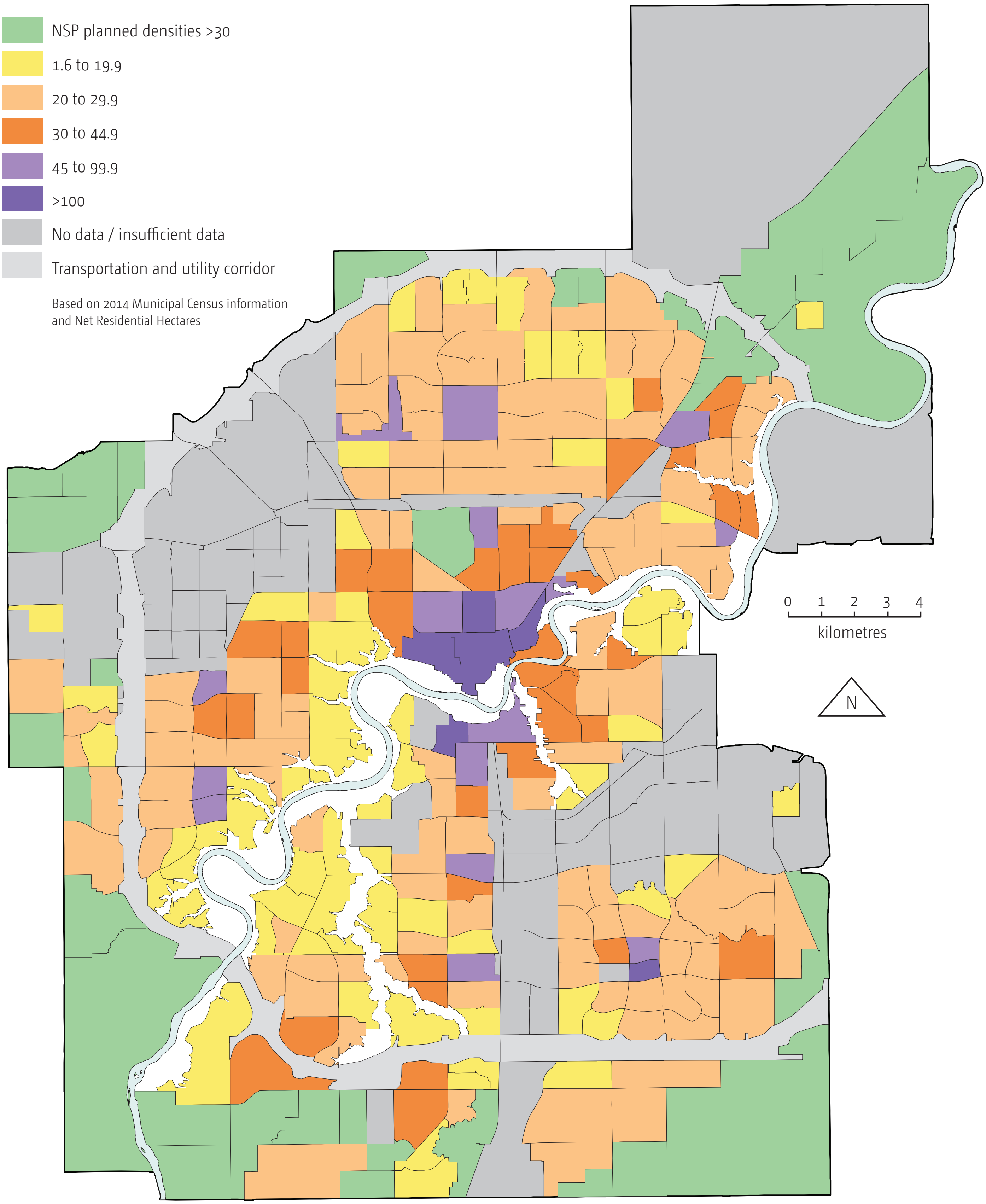
Dwelling unit density was calculated for 237 neighbourhoods in 2009 and 248 neighbourhoods in 2014. Of the established and mature neighbourhoods, a majority (132 neighbourhoods) had no change in density. Virginia Park had a decrease of 47 to 42 du/nrha. Canon Ridge (density 39), West Meadowlark Park (40), and Cromdale (81) increased in density by 5, 6, and 8 du/nrha respectively.

[15]For more information on density or built form see the 2014 Census Density by Neighbourhood and 2014 Built Form by Neighbourhood spreadsheets (www.edmonton.ca/growthanalysis)

# DWELLING UNIT DENSITY

- NSP planned densities >30
- 1.6 to 19.9
- 20 to 29.9
- 30 to 44.9
- 45 to 99.9
- >100
- No data / insufficient data
- Transportation and utility corridor

Based on 2014 Municipal Census information and Net Residential Hectares



## Core Neighbourhoods

Core neighbourhoods have the highest average density, more apartment buildings, and less single detached and row housing. Five of the top ten neighbourhoods with the highest dwelling unit density are located in the core. Downtown, Oliver, Boyle Street, Garneau, and Central McDougall all have dwelling unit densities over 100 du/nrha. The average density in the core is 125, with a range of 339 in Downtown to 32 in Riverdale.

## Mature Neighbourhoods

Mature neighbourhoods tend to have lower densities and more single-detached homes than other neighbourhoods. The average density of mature neighbourhoods is 25 du/nrha, which ranges from 8 in Quesnell Heights to 81 in Cromdale. Five mature neighbourhoods (Abbottsfield, Cromdale, Empire Park, Queen Alexandra and Westwood) have a dwelling unit density over 50.

## Established Neighbourhoods

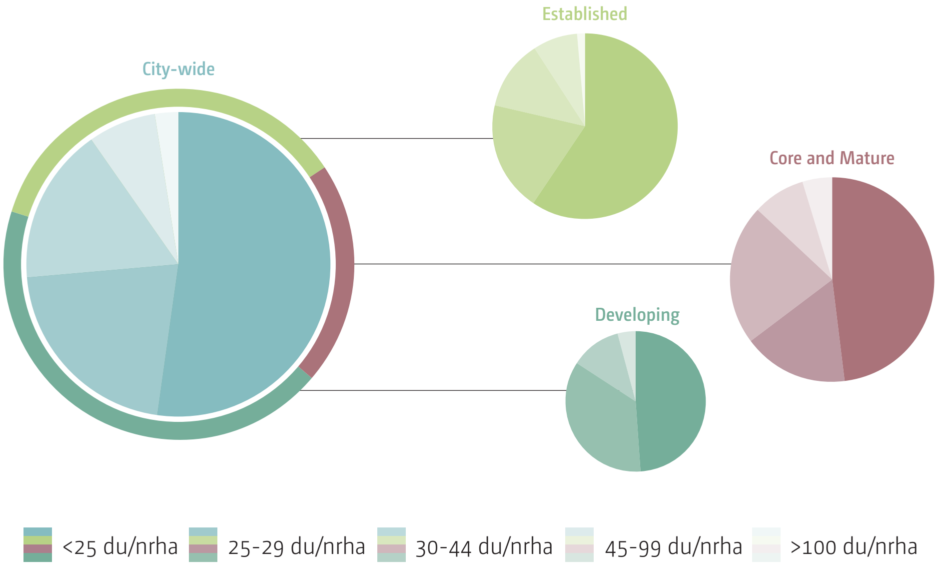
Established neighbourhoods tend to have a lower average density than mature neighbourhoods, with less apartment housing and more row housing than other neighbourhoods. The average density is 24 du/nrha, which ranges from 11 in Wedgewood Heights to 123 in Mill Woods Town Centre. There are six neighbourhoods (Tawa, Ermineskin, Baranow, Terra Losa, Callingwood South, and Pembina) with a dwelling unit density between 50 and 100.

## Developing Neighbourhoods

Many of the neighbourhoods classified as 'developing,' according to the Municipal Development Plan are almost fully developed. For example, in Eaux Claire has 95% of the neighbourhood is covered by registered subdivisions. New neighbourhood structure plans on the perimeter of the city initially may have low dwelling unit density because development is in its early stages and single-detached homes tend to be the first areas developed. Recent Neighbourhood Structure Plans have a trend towards higher planned densities that are greater than 30 du/nrha and contain a more balanced range of dwelling types. Clareview Town Centre had the highest dwelling unit density of 67 while Richford had the lowest dwelling unit density at 9.[16]

[16] As developing neighbourhoods are not yet complete census information can be misleading so this information is based on a 2015 summary of NASP and NSP statistics, available at www.edmonton.ca/growthanalysis

## Neighbourhoods by Residential Dwelling Unit Density Range




### ESTABLISHED NEIGHBOURHOOD SNAPSHOT: HILLVIEW

Hillview is one of the 27 neighbourhoods known collectively as Mill Woods. Most development in Hillview occurred during the 1970s although some building activity spilled over into the 1980s.

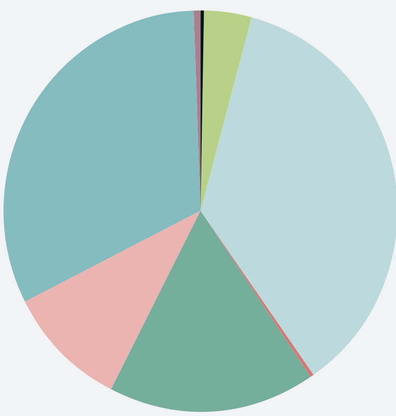
The existing residential development is a mix of single-detached homes, row housing and walk-up apartments. The Hillview neighbourhood is situated on the only hill in Mill Woods and because of the significance of this topographical feature the neighbourhood was named after it. In 2014, there were 3,574 residents in the neighbourhood. Median household income in 2010 (Statistics Canada) was about $72,000.

## DEVELOPMENT TRENDS

Residential development is monitored through building permits. Through building permits the annual number of new units, permit activity, and estimated construction value is tracked and assessed. During the last five years, all of these measures have shown consistent growth, with 2014 having the highest construction value, permit activity and unit increase of all years. In 2014, Edmonton gained 12,018 net housing units, up 15% over 10,203 in 2013.[17]

In 2014, approximately 36% of the net unit gains were single-family homes, 32% were apartment units, and 32% were other housing types such as secondary suites, semi-detached homes, and row housing. Net units are total units within a building type, so a duplex would have two dwelling units.

**2014 NET HOUSING UNITS (CITY-WIDE)***



- Garage Suites (21)
- Secondary Suites (514)
- Single-detatched (4,287)
- Duplex (18)
- Semi-detatched (2,010)
- Row House (1,257)
- Apartment (3,900)
- Mobile Homes (11)

*Total Units 12,018

### Core Neighbourhoods

Core neighbourhoods grew by 904 units and accounted for 8% of total city-wide growth in 2014. In the core neighbourhoods, 84% of the gains were apartment housing, with an average new apartment size of 75 units. Of all core neighbourhoods, Boyle Street experienced the biggest gains with 418 net units, followed by Oliver with 223 units, and Downtown with 181 net units.

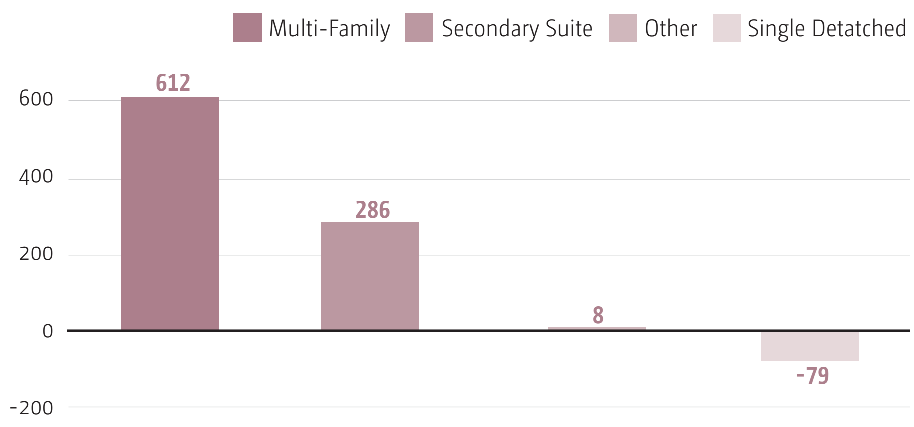
### Mature Neighbourhoods

Mature neighbourhoods grew by 827 units and accounted for 6% of all new units in 2014. This is an increase of 18% from 2013 unit growth (704 units). It is, however, a relatively low proportion of city-wide growth due to strong increases in newer neighbourhoods. Mature neighbourhoods typically lose single-detached homes, and net gains are through multi-unit development. In 2014, mature neighbourhoods had a total loss of 484 single-detached homes and a net loss of 94 single-detached homes. Unit increases were driven by secondary suite creation (26%), multi-family units including semi-detached and row housing (45%), and apartment housing (29%).

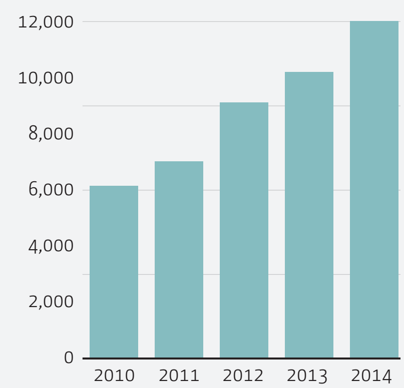
Although mature neighbourhoods tend to experience a net loss of single-detached housing, the new single-detached homes that are built tend to be denser because they are built with secondary suites. In mature neighbourhoods, 353 new single detached homes were built, and 57 of these were built with secondary suites (approximately 16%). Comparatively, in developing neighbourhoods, only 4% of new single-detached homes were built with secondary suites.

[17] 2009 – 2014 Mature Neighbourhood Reinvestment summary, 2014 Mature Neighbourhood Reinvestment Report, and 2014 Building Permits by Neighbourhood spreadsheet (www.edmonton.ca/growthanalysis) as well all 2009-2014 Residential Building Permits are available through Open Data (https://data.edmonton.ca).

### Net Dwelling Units Added in Mature Neighbourhoods (2014)*




### NET NEW HOUSING UNITS (2010-2014)

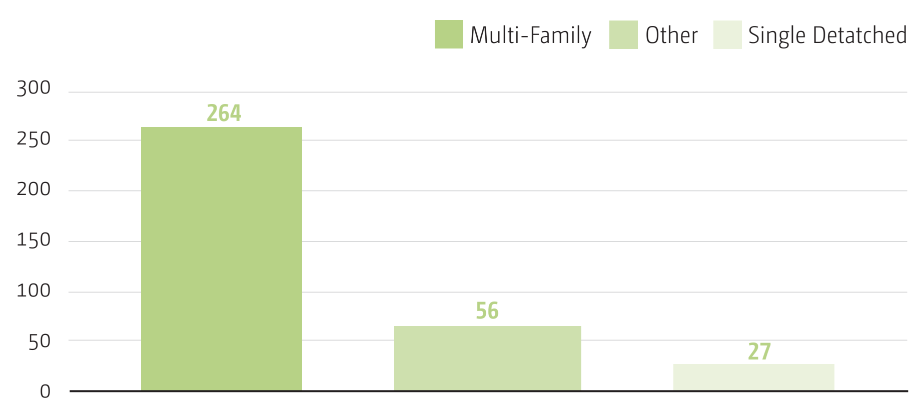



Among mature neighbourhoods, Griesbach had the largest net gain of 146 units, followed by Queen Alexandra which gained 128 units, Parkdale with 48 units and Windsor Park with 36 units. Gains in Griesbach were almost entirely the result of semi-detached homes (102 units) while gains in Queen Alexandra were predominantly large apartment complexes (111 units).

## Established Neighbourhoods

Established neighbourhoods grew by 360 units and accounted for 3% of all new units in 2014. As housing stock in established neighbourhoods is relatively newer, there tends to be fewer units demolished and most gains are through completion of remaining vacant parcels. Unit increases were driven through secondary suites (15%), row housing (34%), and apartment housing (35%). The remaining 16% of the units consist of semi-detached and single-detached homes.

### Net Dwelling Units Added in Established Neighbourhoods (2014)*




* Source: City of Edmonton

Among established neighbourhoods, Larkspur had the largest net gains (66 units), which was driven by the construction of a large apartment development. Leger had the second largest (60 units), followed by Casselman (49 units). Growth in Casselman was due to row housing developments. Combined, these three neighbourhoods accounted for 49% of all gains in established neighbourhoods.

## Developing Neighbourhoods

Developing neighbourhoods grew by 9,927 units and accounted for 83% of all net new units in 2014. Within developing neighbourhoods, single and semi-detached homes accounted for 64% percent of all new dwelling units, row housing for 11%, and apartment housing for 25%.

Among developing neighbourhoods, Windermere had the largest gains (785 units), followed by McConachie (618 units), and Summerside (568 units). Together, these three neighbourhoods gained more units than all the core and established neighbourhoods combined.

**DEVELOPING NEIGHBOURHOOD SNAPSHOT: THE HAMPTONS**

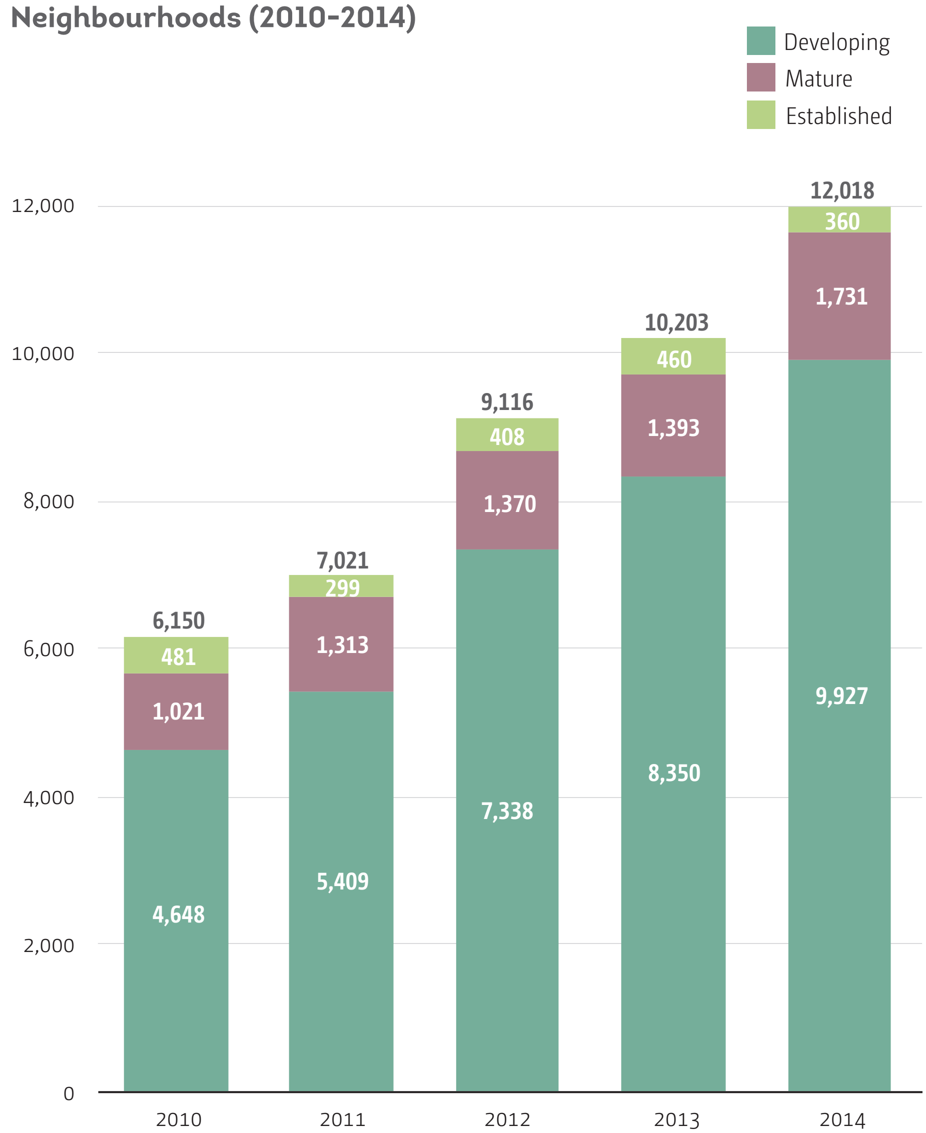
The Hamptons neighbourhood is located on the West side of Edmonton in The Grange Area Structure Plan. Neighbourhoods within The Grange ASP refer to a period in England's past when estates were known as "granges". The Hamptons refers to London's Hampton court, which was the favoured residence of King Henry VIII. Development began in the early 2000s. According to the 2014 Municipal Census, the housing split within the neighbourhood was approximately two-thirds low density and one-third median density residential units. There were 10,799 residents in 2014. Median household income in 2010 (Statistics Canada) was over $104,000.

# INFILL STATISTICS BY NEIGHBOURHOOD TYPE, A FIVE-YEAR ANALYSIS

Infill statistics by neighbourhood type over a five-year period are presented in this analysis. Calculations are by dwelling unit created, and illustrate development trends, providing an understanding of the type of infill activity that is occurring and where it is taking place.

The Mature Neighbourhood Reinvestment graph illustrates the number of infill units gained city-wide. It is separated into mature, established and developing neighbourhoods over the past five years (2010-2014). The total number of units are shown at the top of each bar with specifics embedded.

### Net Housing Units Gained in Mature Reinvestment Neighbourhoods (2010-2014)

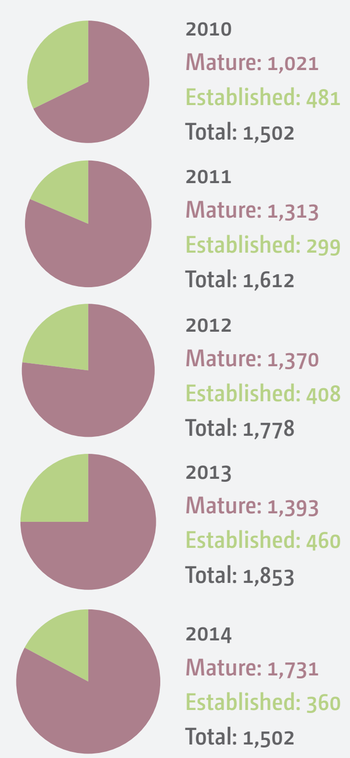



### INFILL

Infill is the development of new housing in core, mature and established neighbourhoods.[18] Neighbourhoods impacted by infill development are primarily residential, mostly planned or developed before 1995, and generally located within the Anthony Henday ring road. This development may include new secondary suites, garage suites, duplexes, semi-detached and detached houses, row houses, apartments, or other residential mixed-use buildings.

[18]More information on Evolving Infill is available online at www.edmonton.ca/evolvinginfill

### DEVELOPMENT IN MATURE* AND ESTABLISHED NEIGHBOURHOOD BY NET UNIT GROWTH AND PERCENTAGE**




* Includes the central core

** Figures are approximate and current as of April 2015.

In 2014, 2,298 units were gained in mature and established neighbourhoods. Infill can include garage and garden suites, secondary suites, row houses, semi-detached and duplexes, skinny homes and apartments. The following chart shows the amount of infill separated by neighbourhood typology. Note that skinny homes tracking began in 2013.

The majority of infill units are created by apartments, followed by secondary suites and semi-detached units.

## Net Unit Gains by Dwelling Type (2010-2014)

| Infill Type | 2010 | 2011 | 2012 | 2013 | 2014 | Total |
|---|---|---|---|---|---|---|
| Garage/Garden Suites | 10 | 9 | 4 | 7 | 16 | **46** |
| Secondary Suites | 252 | 292 | 303 | 276 | 360 | **1,483** |
| Row Houses | 121 | 106 | 76 | 143 | 187 | **633** |
| Semi-Detatched | 170 | 214 | 230 | 272 | 304 | **1,190** |
| Skinny Homes | - | - | - | 22 | 52 | **74** |
| Apartment Units | 825 | 746 | 1039 | 1379 | 1379 | **5,049** |
| Total Units | **1,378** | **1,367** | **1,652** | **1,780** | **2,298** | **8,475** |

### SKINNY HOMES

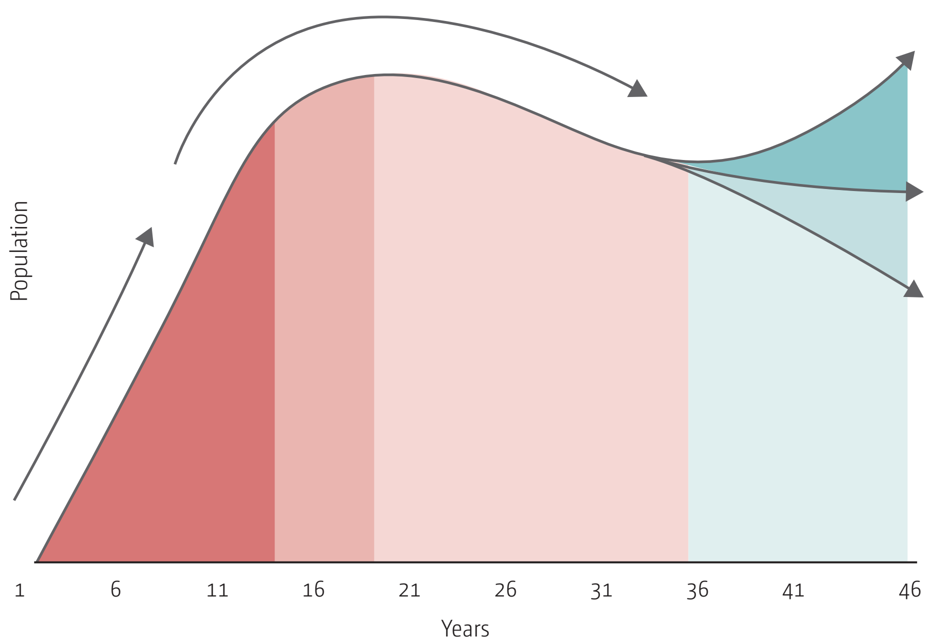
"Skinny homes" are Single Detached dwellings that are typically built on lots that are 25 to 33 feet wide (7.6 m to 10.4 m).

Skinny homes are usually created in existing neighbourhoods by either subdividing one large lot into two, or by consolidating two smaller lots and then subdividing it into three parcels with smaller frontages.

## WHAT IS A NEIGHBOURHOOD LIFE CYCLE?

All neighbourhoods change as they go through a typical lifecycle process. When they are first building out, new neighbourhoods experience rapid population expansion as the community develops, new households are formed and household size grows. They then tend to stabilize for a period of time, which is followed by population decline as children grow up and leave home. Neighbourhoods can then experience a variety of transitions and different outcomes over time. Neighbourhood populations may continue to shrink as household size declines for a period, or they may grow again as new generations of Edmontonians move in and expand their household size.

### The Typical Lifecycle of a Neighbourhood




- Development of vacant lands results in population increase, typically young families with young children.
- Neighbourhoods are completed and in-migration slows. The population continues to grow as families have children.
- The population declines as children grow up and leave home.
- Neighbourhoods may be revitalized, or become seen as a desirable place to live. Redevelopment and intensification increase available dwellings and attract new residents.
- New in-migration from young families occurs as older couples begin to leave the neighbourhood. A stable neighbourhood population is achieved.
- Undesirable economic and social conditions may make neighbourhoods unattractive, resulting in population losses.

# DEVELOPMENT HOTSPOTS

# 6.0

# TRANSFORMATIONAL PROJECTS

Edmonton is investing in the downtown and has also embarked on a series of transformational projects in or near the core area. A series of planned downtown projects will complement existing development, while major transformational projects in adjacent areas are expected to add additional housing units and people to this area. Major projects include the Blatchford development to the north of downtown, the Quarters redevelopment in the Boyle Street neighbourhood, and the West Rossdale redevelopment in the Rossdale neighbourhood. Combined, these projects are expected to add over 50,000 people to the core area population over the next 35 years. Vibrant and attractive urban cores have begun to change the way in which we plan. Millennials' choice of active or public transportation has resulted in a reduced need for parking as they drive less than their parents' generation. Furthermore, their movement into urban centres has helped shift investment from the suburbs, and developers and businesses have begun to follow, by building condominiums and locating businesses in these urban areas in an attempt to capitalize on this generation's desired lifestyle.

## TRANSIT ORIENTED DEVELOPMENT [19]

Transit Oriented Development (TOD) is an exciting approach to city-building that can help achieve Edmonton's vision of a more compact, transit-oriented, and sustainable community, where people walk, cycle, and use transit more than they do today. The TOD Policy and Guidelines approved by City Council in February 2012 help realize this vision.

TOD integrates transportation, land-use and development by concentrating residential, commercial, and employment along a network of walkable and bikeable streets within a five-minute walk (approximately 400m) of a transit station. This proximity provides residents with the benefit of increased transportation choices with reduced dependence on personal automobile trips, reduced personal transportation costs, increased accessibility to daily needs, as well as improved health through physical activity.

TOD looks to capitalize on public investment in transportation to unlock development potential, achieve densification targets and bring more residents within reach of the transit system. TOD has the potential to transform neighbourhoods around LRT and transit centres into vibrant hubs of mixed-use activity that bring people together. It helps revitalize neighbourhoods, make a more efficient use of infrastructure and reduce energy consumption and pollution. Initiatives such as TOD developments such as the Mill Woods Station Area Redevelopment Plan, McKernan-Belgravia Station Area Redevelopment Plan and Stadium Station Transit Oriented Development Project will help shape Edmonton's lifestyles over the next 25+ years.

[19] www.edmonton.ca/TOD

## Stadium LRT Station[20]

TOD at Stadium Station will make better use of existing infrastructure, achieve a variety of City goals and, best of all, be very attractive to future residents. This is a great opportunity for the city to become more sustainable.

## Blatchford[21]

Blatchford is a TOD that will add approximately 11,000 homes over the next 20 to 35 years. With the opportunity to develop 217 hectares of raw land just minutes away from Edmonton's downtown core, the City reimagined how an urban community could be designed. With construction work underway, the City is quickly moving forward with an ambitious redevelopment plan that will see this central piece of land transformed into one of the largest sustainable redevelopment projects in North America.

Blatchford will provide residents with a great quality of life and will utilize 100% renewable energy while providing a community that allows individuals to age in place. It offers a town centre with office space, retail and residential dwellings. Residents will be empowered to pursue a wide range of sustainable lifestyle choices. These include the ability to utilize transit with streets designed for walking and transit, ample park and open space, in addition to urban agriculture including community garden plots.

In 2015, significant work began to prepare the west side of the site for the first stage of development including building the infrastructure, setting architectural guidelines, creating the builders' performance standards and selecting prequalified developers who can deliver on Blatchford's vision. As Blatchford is building 'in' townhomes, low- and mid-rise apartments will be the only dwellings constructed, making it Edmonton's first neighbourhood with no single-detached dwellings.

### STADIUM LRT STATION AT-A-GLANCE

**Location:** 111 Avenue and 84 Street

**Size:** 7.3 ha

### BLATCHFORD AT-A-GLANCE

**Location:** Bordered by Yellowhead Trail to the North, Kingsway Avenue to the south, 121 Street to the west, and the Northern Alberta Institute of Technology (NAIT) and Jefferson Armories to the east

**Size:** 217 ha

**Timeline:** 20 to 35 years

**Population:** 30,000


[20] www.edmonton.ca/city_government/projects_redevelopment/stadium-station-transit-oriented-development.aspx

[21] www.edmonton.ca/blatchford

## Edmonton Arena District (EAD)[22]

The district is located between 101 Street to 104 Street and along 103 Avenue to 106 Avenue. Once completed the 10.1 hectare district will be a master-planned community connecting Edmonton's central core to the north, east, west and south through its connections to five LRT stations, pedestrian-friendly streets, promenades and pathways, in addition to ample parking.

While the focal point will be the 18,647-seat Rogers Place arena and public plaza, the district alone is expected to add another 1000+ residential units in the form of luxury condominiums and premium quality rental. The district will also provide the opportunity for individuals to live where they work and play with 1.3 million square feet of rentable office space and over 270,000 square feet of retail being included in phase one alone. When completed the district will offer an integrated mix of retail, office, hotel, residential, and entertainment venue space.

Through this development the City of Edmonton in partnership with the Edmonton Arena District joint venture is working towards developing a well-designed, sustainable, vibrant and accessible downtown area that realizes the goals outlined in the *Capital City Downtown Plan*.

## Proposed Annexation[23]

The City of Edmonton is quickly running out of room to accommodate anticipated growth. This is especially true for industrial lands but is also true for residential developments. Accounting for this the City of Edmonton is collaborating with its regional partners to adjust boundaries to meet growth demands and to support future land development.

The city's population is expected to continue its growth pattern. Recent development and growth trends show the city has accounted for 70% of the region's population growth and slightly more than 71% of the housing units. Without annexation, Edmonton will exhaust its industrial supply of land in 10 years and its residential in 12 to 17 years. The proposed annexation ensures that both industrial and residential land inventories meet the policy target of maintaining a minimum 30-year supply. Planning for the long-term population and employment is necessary to ensure the vibrancy and fiscal sustainability of both the city and the region.

### EDMONTON ARENA DISTRICT AT A GLANCE

The $2 billion Edmonton Arena District consists of the Rogers Place arena, a community ice rink, Stantec Tower, City of Edmonton Tower, the Delta hotel and a Cineplex VIP theatre. Following its completion the district will be Canada's largest mixed-use sports and entertainment development– a dynamic, urban destination that will help transform and revitalize downtown Edmonton.

**Location:** 101 St to 104 St and 103 Ave to 106 Ave

**Size:** 10.1 ha

**Timeline:** Expected completion Fall 2016

### PROPOSED ANNEXATION AT A GLANCE

Edmonton is projected to grow to 2.1 million people by 2064. In order to continue to provide the foundation for the region to prosper, we must extend our boundaries to responsibly manage future growth, facilitate sustainable development, and extend infrastructure in a cost-efficient way.

**Location:** south of the City, east and west of the Queen Elizabeth II Highway

**Size:** approximately 16,000 ha

**Timeline:** 2 to 5 years on average to complete the annexation process

**Population:** approximately 231,440

[22] www.edmonton.ca/city_government/projects_redevelopment/downtown-arena.aspx

[23] www.edmonton.ca/annexation

## The Quarters Downtown[24]

The Quarters Downtown is on the eastern edge of downtown Edmonton with easy access to the natural amenities of the City's river valley, arts, entertainment and financial districts. The area extends from 97 Street to 92 Street, and from 103A Avenue to the top of the river valley (approximately 43 hectares).

Over the next 20 years, the area will be transformed into a vibrant, diverse and inclusive community well connected to the central business and cultural district and the river valley. The City of Edmonton is financing $56 million in infrastructure investments with revenues from The Quarters Downtown Community Revitalization Levy (CRL). These capital investments include upgrading drainage services and commercial development zoning. City-led projects include the transformation of 96 Street from Jasper Avenue to 103A Avenue, and the Boyle Renaissance. Boyle Renaissance is a made-in-community solution that will provide a range of market and affordable housing opportunities and a variety of services such as childcare, family services, cultural opportunities, park space and a community garden.

## West Rossdale[25]

The West Rossdale Urban Design Plan was initiated by the City to provide a long-term vision for the western portion of the Rossdale neighbourhood. West Rossdale is approximately 22.5 ha in the North Saskatchewan River Valley, directly south of the downtown and east of the Legislature grounds. The redevelopment concept envisions an urban village, with a main street developed along 96 Avenue and development that transitions from higher-rise buildings adjacent to the downtown to low-rise housing adjacent to South Rossdale and the River.

West Rossdale is planned to be a vibrant, diverse, walkable, sustainable, and inclusive community that will evolve over a 20-year period to eventually contain a population of approximately 3,000 people.

### THE QUARTERS AT A GLANCE

**Location:** 97 Street to 92 Street, and from 103A Avenue to the top of the river valley

**Size:** 43 ha

**Timeline:** 5 to 20 years

**Population:** 18,000

### WEST ROSSDALE AT A GLANCE

The West Rossdale Urban Design Plan establishes a shared, long-term vision for this significant river valley neighbourhood. An important aspect of the plan is acknowledging Rossdale's location within the river valley, a major entrance way to downtown and its historical and archaeological significance. A high quality of design excellence and attention to the public environment of parks, streets, squares, trails, public buildings, signage and exterior architecture will contribute to the area's success and ensure that each project fully contributes to community building and positive renewal.

**Location:** Bound by 97 Avenue and Rossdale Road to the North, 106 Street to the West and the river valley to the South and East

**Size:** 5.31 ha

**Timeline:** 8 to 15 years

**Population:** 3,000

[24] www.edmonton.ca/city_government/projects_redevelopment/the-quarters-downtown.aspx

[25] www.edmonton.ca/city_government/projects_redevelopment/west-rossdale-urban-design-plan.aspx

# INFORMATION PORTAL

# 7.0

# PUBLICATIONS

The City of Edmonton's goal is to provide vital and meaningful information to a variety of stakeholders, to support informed decision-making. As our city continues to evolve and adapt, so do we, the information stewards, as we are constantly looking at new and innovative ways of providing the information and analysis that our stakeholders have come to rely upon.

This section provides an in-depth look at the variety of reports published since the 2014 Growth Monitoring Report, while also providing a "sneak-peak" at future publications. These reports and more can be found by clicking the linked report covers or online by visiting **www.edmonton.ca/growthanalysis**.

**GROWTH ANALYSIS PUBLICATIONS**

**Data Sets**
Audience: Technical

**Technical Series**
Audience: Specialized

**Growth Snapshots**
Audience: General

# DATA SETS

The publication of data sets is intended to target the technical user of information. These residents or stakeholders require raw information presented without analysis. The information is presented as either a spreadsheet on our website, through the Open Data website, or a combination of both. Although very elemental and raw, these publications offer the deepest level of information and are often used by those who require information be tailored to their unique needs.

## Residential Building Permits Data Set[26]

The Residential Building Permits data set provides insight into where residential building activity is occurring throughout the city. This is accomplished by tracking the number of building permits issued in a calendar year. The spreadsheet contains information such as the geographic location (neighbourhood, address etc.) of the permit, the type of permit issued, the current zoning at the time of application, construction value, property investment, as well as unit gains or losses. Additionally, the data set provides a brief summary of development activity by neighbourhood and zoning.

**Residential Development Permits**

Summary of annual neighbourhood permits for new building construction and alterations. This data-set is from 2009 to present year. Data is updated semi-annually.

| | Neighbourhood | Typology | Total Construction Value ($ | Number of Permits | Number of Additions | Interior/Exterior Alterations | Accessory Buildings |
|---|---|---|---|---|---|---|---|
| 1 | ALBERTA AVENUE | Mature Area | $5,413,857 | 84 | 2 | 24 | |
| 2 | ALDERGROVE | Established | $28,750 | 6 | 0 | 4 | |
| 3 | ALLENDALE | Mature Area | $1,061,897 | 25 | 2 | 8 | |
| 4 | AMBLESIDE | Developing | $78,924,048 | 218 | 0 | 12 | |
| 5 | ANTHONY HENDAY | TUC | $9,000 | 2 | 0 | 0 | |
| 6 | ARGYLL | Mature Area | $636,586 | 19 | 1 | 3 | |
| 7 | ASPEN GARDENS | Mature Area | $522,766 | 15 | 6 | 8 | |
| 8 | ATHLONE | Mature Area | $96,751 | 14 | 1 | 6 | |
| 9 | AVONMORE | Mature Area | $418,832 | 16 | 0 | 2 | |
| 10 | BALWIN | Mature Area | $400,676 | 16 | 2 | 4 | |
| 11 | BANNERMAN | Established | $94,801 | 6 | 0 | 2 | |
| 12 | BARANOW | Established | $6,550,000 | 1 | 0 | 0 | |
| 13 | BATURYN | Established | $2,765,947 | 15 | 1 | 4 | |
| 14 | BEACON HEIGHTS | Mature Area | $1,038,918 | 25 | 3 | 7 | |
| 15 | BEARSPAW | Established | $24,500 | 5 | 2 | 3 | |
| 16 | BEAUMARIS | Established | $159,168 | 9 | 2 | 5 | |
| 17 | BELGRAVIA | Mature Area | $3,810,037 | 47 | 5 | 9 | |
| 18 | BELLE RIVE | Developing | $523,330 | 14 | 1 | 7 | |
| 19 | BELLEVUE | Mature Area | $86,476 | 10 | 0 | 1 | |

[26]https://data.edmonton.ca/Indicators/Residential-Development-Permits/25sf-z8zd

## Vacant Land Inventory Data Set[27]

The Vacant Land Inventory data set builds off the popular series of technical reports and snapshot on vacant land (please refer to our Technical Series and Snapshot Series of reports for more information on Vacant Land). The data set which is published on the City of Edmonton's Open Data Portal provides insight to developers and other stakeholders as to where vacant land is located, the size of vacant lots, potential for consolidation, current zoning and whether or not the vacant property is publicly or privately owned.

**Vacant Land Inventory**

This is a dataset using centroid points to geolocate vacant land in the city. This inventory is a snapshot in time using data collected from May 2014. The data is based on the land

| ADDRESS | NEIGHBOURHOOD_NAME | ZONING | SIZE (m2) | TYPOLOGY | OWNERSHIP_TY | KNOWN PLANNING APPLICATI | PLANN |
|---|---|---|---|---|---|---|---|
| 9413 118 AVENUE NW | Alberta Avenue | CB2 | 146.702 | Mature | PRIVATE | 1) Major Development Permit: Job No | levelopm |
| 9413 118 AVENUE NW | Alberta Avenue | CB2 | 184.705 | Mature | PRIVATE | 1) Major Development Permit: Job No | levelopm |
| 9131 118 AVENUE NW | Alberta Avenue | CB2 | 287.863 | Mature | PRIVATE | NA | |
| 9203 118 AVENUE NW | Alberta Avenue | CB2 | 288.16 | Mature | PRIVATE | 1) Major Development Permit: Job No | levelopm |
| 9131 118 AVENUE NW | Alberta Avenue | CB2 | 306.374 | Mature | PRIVATE | NA | |
| 9131 118 AVENUE NW | Alberta Avenue | CB2 | 306.389 | Mature | PRIVATE | NA | |
| 9131 118 AVENUE NW | Alberta Avenue | CB2 | 306.416 | Mature | PRIVATE | NA | |
| 9131 118 AVENUE NW | Alberta Avenue | CB2 | 306.42 | Mature | PRIVATE | NA | |
| 9131 118 AVENUE NW | Alberta Avenue | CB2 | 306.445 | Mature | PRIVATE | NA | |
| 9203 118 AVENUE NW | Alberta Avenue | CB2 | 306.744 | Mature | PRIVATE | 1) Major Development Permit: Job No | levelopm |
| 11742 96 STREET NW | Alberta Avenue | CB2 | 367.845 | Mature | PRIVATE | NA | |
| 9623 118 AVENUE NW | Alberta Avenue | CB2 | 430.706 | Mature | PRIVATE | NA | |
| 9617 118 AVENUE NW | Alberta Avenue | CB2 | 430.79 | Mature | PRIVATE | NA | |
| 9502 118 AVENUE NW | Alberta Avenue | CB2 | 574.26 | Mature | PRIVATE | NA | |
| 9220 111 AVENUE NW | Alberta Avenue | CNC | 155.739 | Mature | PRIVATE | NA | |
| 9220 111 AVENUE NW | Alberta Avenue | CNC | 158.353 | Mature | PRIVATE | NA | |
| 9222 111 AVENUE NW | Alberta Avenue | CNC | 167.673 | Mature | PRIVATE | NA | |
| 12133 97 STREET NW | Alberta Avenue | CNC | 357.254 | Mature | PRIVATE | 1) Major Development Permit: Job No | levelopm |
| 12133 97 STREET NW | Alberta Avenue | CNC | 357.33 | Mature | PRIVATE | 1) Major Development Permit: Job No | levelopm |
| 11317 95 STREET NW | Alberta Avenue | CNC | 367.883 | Mature | PRIVATE | NA | |

[27] https://data.edmonton.ca/Sustainable-Development/Vacant-Land-Inventory/svsw-2ub7

## TECHNICAL SERIES

The primary audience of the technical series includes specialized users looking for detailed analysis into where, when and how our city is growing. This analysis, usually presented as a report with a detailed methodology and references, identifies trends while also including charts, graphs and maps when appropriate. These publications offer a detailed analysis of a subject based on the data sets. These reports are intended for residents or stakeholders with knowledge and understanding of a specific topic.

**ZONING**

For information on zones, please refer to the Zoning Summary in the Appendix. To view the City of Edmonton's full Zoning Bylaw 12800, go to **www.edmonton.ca/Zoningbylaw**

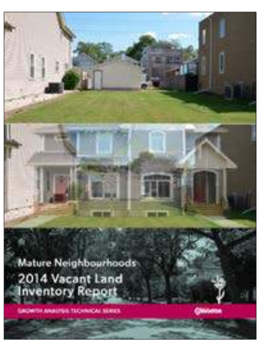
### Vacant Land Reports

Unlike the raw data set, the Vacant Land Reports provide an in-depth analysis examining lot sizes, where vacant lands are located, and trends in addition to maps and a detailed methodology. This report analysis does not include Developing Neighbourhoods, as land that appears to be vacant, is in reality pending construction. The series of reports examine the distribution of land within the central core, mature and established neighbourhoods; a summary of findings which in each can be found below:

#### Central Core[28]


Within the 11 neighbourhoods of the central core, 31 ha of vacant land located on 492 lots have been identified as vacant. Over one-third (40%) of these lots are zoned as Direct Development Control Provision (DC1) and these zones alone account for 13 ha. Vacant lots in the central core range in size from 42 m2 to 25,531 m2, with a median size of 374 m2. Of the 31 ha of vacant land, 8 ha is currently zoned for residential development. This land has the potential to allow for an additional 668 dwelling units and approximately 1,307 people.

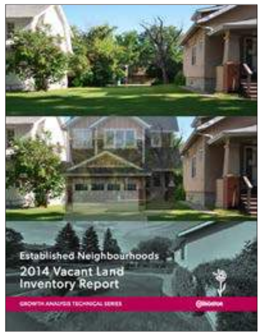
#### Mature Neighbourhoods[29]




Edmonton's 98 mature neighbourhoods contain 61 ha of vacant land on 703 vacant lots. Within these neighbourhoods RF1 and RF3 lots account for 46% of all vacant lots (23% respectively), these lots range in size from 119 m2 to 24,796 m2, with a median size of 458 m2. Of the 61 ha, 29 ha is currently zoned for residential development. This land has the potential to allow for an additional 1,150 dwelling units and approximately 2,730 people.

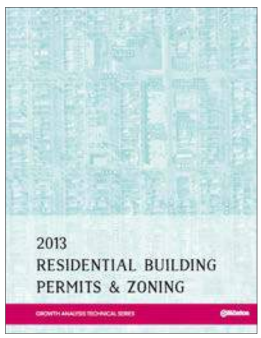
[28] www.edmonton.ca/city_government/documents/Vacant_Land_Inventory_-_Central_Core.pdf

[29] www.edmonton.ca/city_government/documents/2014_Mature_Neighbourhood_Vacant_Land_Inventory_Report.pdf




## Established Neighbourhoods[30]

Edmonton's 92 established neighbourhoods contain 88 ha of vacant land on 148 vacant lots. Within these neighbourhoods RF1 lots account for over half (51%) of the zoning and 10 ha. The lots in these neighbourhoods range in size from 247 m2 to 278,297 m2. It is worth noting that one lot in Homesteader contains nearly half of all the vacant land in established neighbourhoods. Of the 88 ha of vacant land, 37 is currently zoned for residential development. This land has the potential to allow for 1,469 dwelling units and an additional 3,688 people.




## Residential Building Permits and Zoning Report[31]

The Residential Building Permits and Zoning report provides an overview of how zoning relates to residential construction activity, as assessed through the review of distribution and number of Building Permits, estimated construction costs and dwelling unit gains. Understanding how zoning shapes the built form is an important part of monitoring growth patterns and trends.
The report notes that:

- One-third of all permits issued in Edmonton were for the RSL zone, while the RF1 zone at 20%. These two zones together with the RPL, RF3 and RF4 accounted for 90% of all residential permits in 2013.
- The RSL zone had the highest total construction value of 1.2 billion dollars in 2013, while the RMH zone was the least with 0.5 million.
- While the RSL zone seen the most unit gains (2,823) out of any zone the RA9 zone seen the most units built per permit with 81 units/permit built.

[30] www.edmonton.ca/city_government/documents/2014_Established_Neighbourhoods_Vacant_Land_Inventory_Report.pdf

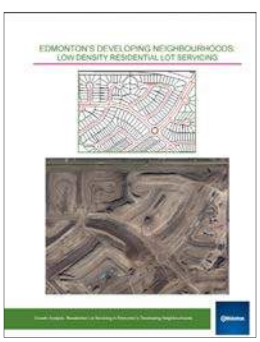
[31] www.edmonton.ca/city_government/urban_planning_and_design/growth-analysis-development-activity.aspx

## Neighbourhood Profiles[32]

The 2014 Neighbourhood Profiles provide and update to the popular 2006 profiles utilizing data from the 2011 Federal Census to provide an in-depth look into the demographics and built form each neighbourhood. Following a brief description of the neighbourhood the profiles outline relevant demographic information such as age and gender, income and ethnic composition, in addition to the built form (structure type and period of construction), methods of travel and existing land uses.


## Mature Neighbourhood Reinvestment Report[33]

The annual Mature Neighbourhood Reinvestment (MNR) report provides a picture of private investment into residential units in mature neighbourhoods. This report, using Residential Building Permits, focuses on development activity within mature neighbourhoods and tracks the value of residential construction, unit growth, permits issued as well as the number of secondary suites. Together this information provides insight into where and how much reinvestment is occurring within Edmonton's mature neighbourhoods.



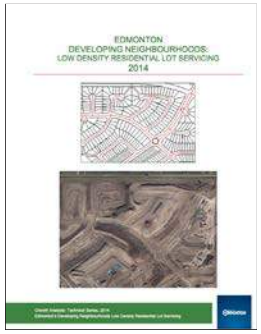
## Dwelling Unit Density by Neighbourhood[34]

This report provides a definition for low, medium and high-density developments. Through the use of graphic and pictorial examples, the various forms of development and different levels of density are shown and assist in the visualization of Edmonton's built form. The report utilizes data from the 2014 Municipal Census and the Spatial Land Information Management (SLIM) system. This report is current at the time of analysis and provides effective insight into how our neighbourhoods develop, in addition to allowing for comparisons to be made between different points in time.

[32] www.edmonton.ca/residential_neighbourhoods/your-neighbourhood.aspx

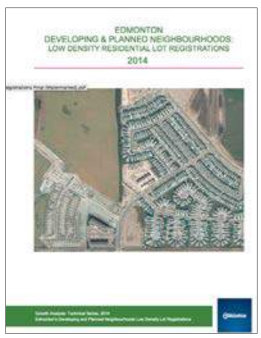
[33] www.edmonton.ca/city_government/documents/2014_Mature_Neighbourhood_Reinvestment_Report.pdf

[34] www.edmonton.ca/city_government/urban_planning_and_design/growth-analysis-land-use.aspx




## Servicing – Low Density Residential Lots in Developing Neighbourhoods

The Low Density Residential Lot Servicing report analyses servicing trends over the last ten-years, while also providing a summary of servicing undertaken in 2014 at the subsector and Area Structure Plan (ASP) level. This report further provides a six-year servicing forecast within developing neighbourhoods that currently have approved ASPs. This understanding provides insight into where new development will occur in the future and allows for the timely delivery of services to these new homes.




## Registrations - Low Density Residential Lot Registrations

The Low Density Residential Lot Registrations report measures the absorption and supply of residential land in developing and planned neighbourhoods based on lot registrations. The numbers provided show the level of neighbourhood completion as directed in Section 3.1.1.4 of the Municipal Development Plan (MDP), The Way We Grow. Land supply is measured by comparing current absorption and potential capacity within approved Area Structure Plans (ASPs). The objective is to show where current growth is taking place. This understanding is particularly relevant in terms of the Growth Coordination Strategy’s policy to focus land development activity and infrastructure provision on approved and developing neighbourhoods to ensure their timely completion and the provision of the full range of services to their residents.

# LOOKING AHEAD; TECHNICAL SERIES TO COME

## Census Atlas

Using the 2011 Federal Census of Canada, the Census Atlas will use a combination of maps, graphs, and text to visually represent patterns and trends within and amongst Edmonton's neighbourhoods.

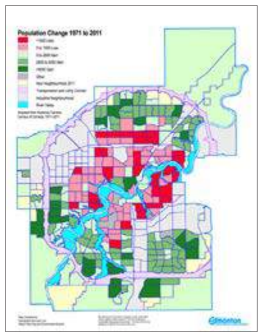
## Five-Years of Growth

The Five-Years of Growth Report will analyze population trends between 2009 and 2014. The report will address the main factors driving growth in Edmonton while further outlining what this growth looks like and where it is occurring in the city.

# GROWTH SNAPSHOTS

Growth Snapshots are short, reader-friendly publications that highlight key growth trends for the general user. These one to two page summaries use images such as maps, infographics, pictures and FAQs and are intended for those without a technical knowledge of the subject matter. These plain language snapshots are easy to read and are still of use to those with a technical background. They are short and to the point, providing a higher-level summary with only key highlights.

## Density and Population Change Maps[35]




These maps visually highlight how our population and built form has changed over a period of time using census data. The Dwelling Unit Density Map analyzes the density of dwelling units in a neighbourhood by dividing the number of dwelling units by the total land dedicated to residential purposes. These densities have been mapped out and help to visually compare the densities of Edmonton's neighbourhoods. The Population Change map compares census data from 1971-2011 and uses a map to visually represent which neighbourhoods have gained or lost population over this 40-year period. This map illustrates that inner city neighbourhoods for the most part have been losing residents, while developing neighbourhoods have experienced strong growth.

## Vacant Land Highlights[36]


LAND USE SNAPSHOT
VACANT LAND

The Vacant Land growth snapshot highlights information in the Vacant Land Reports in our "Technical Series" and provides concise information into the distribution of vacant properties in Edmonton's central core, mature and established neighbourhoods. Combining the results of the individual technical reports the growth snapshot indicates 1,342 lots within the three areas contain 180 ha of vacant land. Using industry standard densities found in NSPs, the 75 ha of vacant land currently zoned for residential use could accommodate approximately 3,287 dwelling units and an additional 7,725 people.

35 www.edmonton.ca/city_government/urban_planning_and_design/growth-analysis-population.aspx

36 www.edmonton.ca/city_government/documents/Citywide_Vacant_Land_Snapshot.pdf


## Infill Series[37]

The Building Permits growth snapshots provide insight into the type of development activity that is occurring. Focusing on Infill in 2014 and supporting the Infill Roadmaps Actions 7 and 8, the snapshots analyzed trends in row housing, secondary suites, duplexes and semi-detached houses, as well as garage and garden suite activity. The snapshots reveal increases in each of the categories from 2013 to 2014 indicating an increase in infill development. Each of the snapshots is described in further detail below:

- Row housing: The neighbourhoods with the most Row House infill were Casselman (47 new units), Caernarvon (25 units), and Kirkness (24 units). There was a 31% increase in Row Housing units from 2013 to 2014.
- Secondary Suites: The neighbourhoods with the most Secondary Suite infill were Alberta Avenue (14), Queen Alexandra (9), and Highlands (9). There was a 30% increase in Secondary Suite units from 2013 to 2014.
- Duplexes and Semi-detached: In 2014, the neighbourhoods with the most Duplex and Semidetached infill were Inglewood (26 new units), Eastwood (18 new units), and Allendale, Forest Heights, and King Edward Park were tied (14 new units). There was a 12% increase in Duplexes and Semi-Detached units from 2013 to 2014.
- Garage and Garden Suites: In 2014, the neighbourhoods with the most Garage Suite infill were Glenora (2 new units), Strathcona (2 new units), and Terwillegar Towne (2 new units). The number of Garage and Garden Suites constructed more than doubled (7 units to 16 units) from 2013 to 2014.

[37] www.edmonton.ca/city_government/urban_planning_and_design/growth-analysis-development-activity.aspx

# APPENDICES

# 8.0

# REFERENCES

## Canadian Mortgage and Housing Corporation - Housing Starts

Adapted from Canadian Mortgage and Housing Corporation, Edmonton Housing Starts Summary, 1980 through 2014.

## Census of Canada - Demographic Information

Adapted from Statistics Canada, Census of Canada, 1940-2011. This does not constitute an endorsement by Statistics Canada of this product.

## City of Edmonton –Land Use, Density, Registrations, Servicing, Permits

The City of Edmonton provides this information in good faith. While every effort has been made to ensure the accuracy of information contained in this report, the City of Edmonton provides no warranty, express or implied, regarding the accuracy, completeness or correctness of information contained herein. The City of Edmonton disclaims any liability for the use of this information. No part of this material may be reproduced, in whole or in part, without acknowledgement.

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## Other References

Information on neighbourhoods, zoning, and land and development applications:
http://maps.edmonton.ca/

*For more information on 'Echo Boomers' and the sources used in this report please refer to:*

Carrillo, A. (2013, January 22). Downtown Toronto population growing and getting younger. Retrieved May 9, 2015, from http://www.condo.ca/downtown-toronto-population-growing-and-getting-younger/

Williams, V. L., & Enriquez, A. B. (2010). Factors for attracting Baby Boomers and Millennials to downtown living: implications for revitalizing Guam's downtown Hagatna. Journal Of International Business Research, (Sl. 2), 61.

*For more information on 'Baby Boomers' and the sources used in this report please refer to:*

O'Toole, M. (2013, January 22). Downtown Toronto's pace of population growth triples, outpacing suburbs' as Echo Boomers flock towards urban centre: Report. Retrieved from http://www.nationalpost.com/m/wp/blog.html?b=news.nationalpost.com//toronto/downtown-torontos-pace-of-population-growth-triples-outpacing-suburbs-as-echo-boomers-flock-towards-urban-centre-report

Patterson, Z., & Saddier, S. (2012). Are Baby Boomers Likely to Retire to the City in Canada. 1-28. Retrieved from https://www.cirrelt.ca/DocumentsTravail/CIRRELT-2012-62.pdf

## DEFINITIONS

### Area Structure Plan (ASP)

A statutory plan that identifies future neighbourhoods and where residential, commercial, institutional and recreational sites will be located in a previously undeveloped area and how essential municipal services such as water and sewer systems, roads and fire protection will be provided. These plans also describe the number of people that are expected to live in the new area and how development will be staged over time.

### Core Neighbourhoods

Consists of downtown and neighbourhoods that have a strong inter-relationship with the Downtown, as defined by "Central Core" in the Way We Grow.

### Density

Density is the spatial concentration of a measure within a geographic area, and is commonly measured by population or dwelling units. Density per net residential hectare refers to the spatial concentration within an area designated for residential purposes. This standardizes neighbourhood comparisons as it accounts for other land uses such as parks, roads, and commercial spaces.

### Developing Neighbourhoods

Consists of neighbourhoods with facilities and services that are still under developed, as defined by the Way We Grow. For reporting purposes, this category also includes planned neighbourhoods that experience limited development activity, and is further broken into north, west, and south sectors.

### Established Neighbourhoods

Consists of mature neighbourhoods as defined by the Mature Neighbourhood Overlay and established neighbourhoods developed prior to 1995, as defined by the Way We Grow. For reporting purposes, newer neighbourhoods with over 95 % completion of all residential lots are also classed with established as they no longer experience significant servicing activity.

### Infill (Residential)

Residential infill is the development of new housing in established neighbourhoods. This new housing may include secondary suites, garage suites, duplexes, semi-detached and detached houses, row houses, apartments, and other residential and mixed-use buildings.

### Low-Density Residential

A single-detached house or semi-detached/duplex housing, which may include a secondary suite.

### Medium-Density Residential
Attached units, except semi-detached dwellings and duplexes, but including row-housing and low and mid-rise apartments/condominiums.

### Neighbourhood Area Structure Plan (NASP)
A statutory plan that identifies where future residential, commercial, institutional and recreational will be located in a previously undeveloped area and how essential municipal services such as water and sewer systems, roads and fire protection will be provided. These plans also describe the number of people that are expected to live in the new area and how development will be staged over time. NASPs are a smaller scale than an Area Structure Plan, but larger in area than a normal Neighbourhood Structure Plan. NASPs tend to be used in large, but uniform areas.

### Neighbourhood Structure Plan (NSP)
A statutory plan that aligns with a larger Area Structure Plan, but provides greater detail at the neighbourhood-level. An NSP will provide information on where residential, commercial, institutional and recreational sites will be located in a previously undeveloped area and how essential municipal services such as water and sewer systems, roads and fire protection will be provided. These plans also describe the number of people that are expected to live in the new area and how development will be staged over time.

### Semi-Detached House
A semi-detached house has another unit attached on one of its sides. It is included in single-family housing in this document for consistency.

### Single-Detached House
A single-detached house has open space on all sides and is not attached to any other structure (except its own garage or shed). This structure may have a basement suite that does not have a separate private entrance.

### Suite Addition
The addition of residential units to existing buildings (with or without the expansion of the building), such as introducing secondary suites into a detached house.

### Traffic District
Edmonton is divided into 31 traffic districts.

### Urban Growth Area
Areas identified in the Way We Grow for future urban growth.

# ZONING SUMMARY*

## Residential Zones

### RF1 - Single Detached Residential Zone

This zone provides the opportunity for single-family housing.

### RF2 - Low Density Infill Zone

This zone provides the opportunity for retaining single-family housing, while allowing some duplex development.

### RF3 - Small Scale Infill Development Zone

This zone provides the opportunity for single family and duplex housing while allowing some apartment or row housing with up to four units.

### RSL - Residential Small Lot Zone

This zone provides the opportunity for single family housing with attached garages on smaller lots.

### RSL - Residential Small Lot Zone

This zone provides the opportunity for single family housing with attached garages on smaller lots.

### RPL - Planned Lot Residential Zone

This zone provides the opportunity for single family housing on smaller lots and accessed by a rear lane.

### RMH - Mobile Home Zone

This zone provides the opportunity for mobile homes developed within a mobile home park or subdivision.

### RR - Rural Residential Zone

This zone provides the opportunity for permanent single-family residential development in a rural setting.

### RF4 - Semi-Detached Zone

This zone provides the opportunity for primarily semi-detached and duplex housing.

*Please note that this is a summary. Full regulations are available through the Zoning Bylaw 12800 at www.edmonton.ca/zoningbylaw.

### RF5 - Row Housing Zone

This zone provides the opportunity for relatively low to medium density housing, such as row houses or town houses.

### RF6 - Medium Density Multiple Family Zone

This zone provides the opportunity for medium density housing, such as row houses or town houses that may have separate second storey units.

### RA7 - Low Rise Apartment Zone

This zone provides the opportunity for low-rise apartment buildings up to four storeys.

### RA8 - Medium Rise Apartment Zone

This zone provides the opportunity for medium rise apartment buildings up to six storeys in height.

### RA9 - High Rise Apartment Zone

This zone provides the opportunity for high-rise apartment buildings.

## Direct Control Zones

### DC1 - Direct Development Control Provision

This zone provides the opportunity for detailed, sensitive control of the use, development, siting and design of buildings and disturbance of land. This zone is used to establish, preserve or enhance areas of unique character or environmental concern, or areas of special interest as designated under the Historical Resources Act.

### DC2 - Site Specific Development Control Provision

This zone provides the opportunity for direct control over a specific proposed development where the proposed mix of uses or the development regulations cannot be accommodated in a standard zone.

### Special Area - Downtown

This is a collection of special areas zones that apply only to the Downtown, and are listed in Section 910 of the Zoning Bylaw. These zones include the CCA, CMU, HA, HDR, JAMSC, RMU, UW, and AED zones.

### HDR - High Density Residential

This zone provides the opportunity for high density housing with minor local commercial Uses in a predominantly residential environment where the concept of a livable urban village with a strong sense of identity and place, community activities and amenities are focused on a neighbourhood main street.

### JAMSC - Jasper Avenue Main Street Commercial Zone

This zone provides the opportunity for at-grade, predominantly retail commercial, office and service uses suitable for the Downtown's Main Street, Jasper Avenue, and to ensure that infill developments and the retrofitting and preservation of historical and older buildings incorporate human scale design characteristics to enhance a revitalized, Main Street atmosphere.

### CCA - Core Commercial Arts Zone

This zone provides the opportunity for high density and quality development that accommodates office, retail, service, institutional, residential, arts and entertainment Uses and meet the land use objectives for the Commercial Cultural Core.

### CMU - Commercial Mixed Use Zone

This zone provides the opportunity for medium intensity development that accommodates a mix of predominantly commercial, office, institutional and business Uses as a secondary office commercial area while emphasizing retail activities, entertainment and service Uses at grade.

## Industrial Zones

### IB - Industrial Business Zone

This zone provides the opportunity for industrial businesses that carry out their operations such that no nuisance is created or apparent outside an enclosed building, and the use is compatible with any adjacent non-industrial zones.

### IM - Medium Industrial Zone

This zone provides the opportunity for manufacturing, processing, assembly, distribution, service and repair uses that carry out part of their operation outdoors or require outdoor storage areas. Any nuisance associated with these uses should not extend beyond the site.

## Commercial Zones

### CNC - Neighbourhood Convenience Commercial Zone

This zone provides the opportunity for convenience commercial and personal service uses, intended to serve the day-to-day needs of residents within the neighbourhood.

### CSC - Shopping Centre Zone

This zone provides the opportunity for larger shopping centres intended to serve a community or regional area. Residential, office, entertainment and cultural uses may be included in this zone.

### CB1 - Low Intensity Business Zone

This zone provides the opportunity for low intensity commercial, office and service uses located along arterial roadways that border residential areas.

### CB2 - General Business Zone

This zone provides the opportunity for businesses that require large sites and a location with good visibility and accessibility along, or adjacent to major public roadways.

### Non-residential Zones

This is a collection of all non-residential zones, and includes commercial, industrial, urban service (AJ, US and PU), and agricultural and reserve zones. Residential development tends to be limited in these zones as it is not their primary purpose.

### AJ - Alternate Jurisdiction Zone

This zones purpose is to provide for lands that do not require a Development Permit when operating under the jurisdiction of federal legislation, provincial legislation or the Constitution Act.

## MA - Municipal Airport Zone

This zone provides the opportunity for the operations of the Edmonton City Centre Airport. In addition to the MA Zone, there are three additional zones, MA1, MA2 and MA3, which allow for the operation of the airport facility, the airport business industrial zone, and the airport general business zone respectively.

## UI - Urban Institutional Zone

This zones purpose is to provide for facilities of an educational or institutional nature, within mature areas of the city that could include additional uses that would complement the institutional development.

## US - Urban Services Zone

This zones purpose is to provide for publicly and privately owned facilities of an institutional or community service nature.

## PU - Public Utility Zone

This zones purpose is provide for a system or works that is used to provide for public consumption, benefit, convenience or use such as water or steam, sewage disposal, public transportation, irrigation, drainage, fuel, electric power, heat, waste management and telecommunications.

## AGU - Urban Reserve Zone

This zone provides the opportunity for agricultural and rural land use activities and a limited range of other uses that will not impact future development of the land.

## AP - Public Parks Zone

This zone provides the opportunity for an area of public land for recreational uses.

## CS1, CS2, and CS3 - Community Services Zones

The four Community Services Zones (CS1, CS2, CS3 and CS4) provide for relatively low to medium density housing generally referred to as row housing on lands that have become surplus to public education needs. In addition, each Community Services Zone has a distinct range of development opportunities.

# METHODOLOGY NOTES

## Census Information

Differences in population statistics may occur due to rounding at the neighbourhood and age group level, and the exclusion of unconventional populations such as hotels and group counts.

## Permit Information

Information is based on City of Edmonton building permit data, and may be subject to error. Development that occurs without permits is not included.

Demolished units do not always account for secondary suites, and secondary suites can be removed without permits, so may be undercounted.

Permits referring to "stacked semi's" are recorded as duplexes. Stacked and side-by-side row housing is recorded as row housing.

## Registration and Servicing Information

Low density lot supply includes single-detached, duplex, and semi-detached building forms. Remaining low density lot supply is the calculated difference between registered lots and total projected lots, based on the most recent neighbourhood plan (or amended plan), up to December 31, 2013

Neighbourhoods are considered complete when low density residential lots reach 95 % completion. Neighbourhoods may not reach 100 % completion due to servicing constraints or small variations between actual and projected unit numbers.

## Maps

All maps are compiled by Geospatial Services Unit, Urban Planning and Environment Branch. The City of Edmonton disclaims any liability for the use of this map. No reproduction of this map, in whole or in part, is permitted without express written consent of The City of Edmonton, Sustainable Development Department.

## Edmonton Zoning Trends 2004-2014*

| | 2004 | 2006 | 2008 | 2010 | 2012 | 2014 |
|---|---|---|---|---|---|---|
| City Size | 69,980 | 69,980 | 69,980 | 69,980 | 69,980 | 69,980 |
| Reserve or Agriculture Zoning | 31,900 | 30,399 | 27,860 | 26,760 | 26,160 | 23,810 |
| **Developed Zoning** | | | | | | |
| Residential | 18,042 | 19,052 | 20,290 | 20,750 | 21,090 | 22,180 |
| Direct Control | 2,064 | 2,249 | 2,550 | 2,790 | 2,880 | 2,960 |
| Commercial | 1,473 | 1,485 | 1,570 | 1,610 | 1,640 | 1,740 |
| Industrial | 7,200 | 7,294 | 7,550 | 7,630 | 7,630 | 8,190 |
| Institutional | 3,584 | 3,658 | 4,170 | 4,360 | 4,430 | 4,620 |
| Parks and Open Spaces | 5,717 | 5,843 | 5,990 | 6,080 | 6,160 | 6,510 |
| **Total Developed Zoning** | **38,080** | **39,581** | **42,120** | **43,220** | **43,830** | **46,200** |

### DEVELOPED ZONING

"Developed Zoning" refers to zones with uses that require higher levels of servicing, as well as dedicated park zones. Roadways do not have zoning so roads take on the zoning of surrounding parcels. Note that although land may be zoned with "developable zoning," actual development may not occur.

The following Zones are included in each broad zoning category:

- Reserve/Agriculture: AG, AGI, AGU, EETR
- Residential: RF1-RF6, RA7-RA9, RSL, RPL, RMD, RMH, RR, RMU, TSDR,TSLR, RPLt, RF4t, RF5t, RA7g, RF5g, RA7w, HDR, GLD, GLG, CCSF, CCLD, CCMD, CCHD, HVLD, UCRH, GHLD
- Direct Development Control: DC1, DC2, DC(RDA)
- Commercial: CB1, CB2, CB3, CHY, CNC, CSC, CO, CCA, EZ, HA, MSC, TMU, CCNC, GVC, UVCa, CSCa, CSCw, UW, JAMSC, AED, TC-C
- Industrial: IB, IL, IM, IH, EIB, EIM, IC, EETB, EETC, EETL, EETM
- Institutional: US, PU, AJ, MA, MA1-MA3, CS1-CS4, UI
- Parks and Open Space: A, AP, AN, NA

* All figures are in hectares unless otherwise noted.
For more information on each zone, please see Edmonton's Zoning Bylaw (Bylaw 12800)
http://webdocs.edmonton.ca/InfraPlan/zoningbylaw/bylaw_12800.htm

## CMHC Edmonton Housing Starts Summary 1980-2014**

| | Edmonton: City | | | Edmonton: CMA | | | City as % of CMA | | |
|---|---|---|---|---|---|---|---|---|---|
| Year | Single | Multiple | Total | Single | Multiple | Total | Single | Multiple | Total |
| 1980 | 2,655 | 5,791 | 8,446 | 3,674 | 6,293 | 9,967 | 72% | 92% | 85% |
| 1981 | 3,594 | 6,923 | 10,517 | 4,491 | 7,508 | 11,999 | 80% | 92% | 88% |
| 1982 | 1,683 | 7,428 | 9,111 | 2,204 | 7,534 | 9,738 | 76% | 99% | 94% |
| 1983 | 2,877 | 2,244 | 5,121 | 3,761 | 2,692 | 6,453 | 76% | 83% | 79% |
| 1984 | 1,722 | 155 | 1,877 | 2,197 | 187 | 2,384 | 78% | 83% | 79% |
| 1985 | 1,868 | 102 | 1,970 | 2,424 | 104 | 2,528 | 77% | 98% | 78% |
| 1986 | 1,710 | 200 | 1,910 | 2,355 | 206 | 2,561 | 73% | 97% | 75% |
| 1987 | 2,057 | 309 | 2,366 | 3,265 | 343 | 3,608 | 63% | 90% | 66% |
| 1988 | 2,105 | 597 | 2,702 | 3,469 | 664 | 4,133 | 61% | 90% | 65% |
| 1989 | 2,173 | 731 | 2,904 | 3,931 | 886 | 4,817 | 55% | 83% | 60% |
| 1990 | 2,495 | 937 | 3,432 | 4,759 | 1,162 | 5,921 | 52% | 81% | 58% |
| 1991 | 1,564 | 988 | 2,552 | 3,016 | 1,269 | 4,285 | 52% | 78% | 60% |
| 1992 | 2,346 | 1,541 | 3,887 | 4,683 | 2,081 | 6,764 | 50% | 74% | 57% |
| 1993 | 2,148 | 2,017 | 4,165 | 4,202 | 2,518 | 6,720 | 51% | 80% | 62% |
| 1994 | 1,690 | 1,461 | 3,151 | 3,225 | 1,781 | 5,006 | 52% | 82% | 63% |
| 1995 | 1,130 | 763 | 1,893 | 2,159 | 923 | 3,082 | 52% | 83% | 61% |
| 1996 | 1,421 | 514 | 1,935 | 2,944 | 690 | 3,634 | 48% | 74% | 53% |
| 1997 | 1,945 | 1,070 | 3,015 | 3,685 | 1,277 | 4,962 | 53% | 84% | 61% |
| 1998 | 2,032 | 1,559 | 3,591 | 4,080 | 1,867 | 5,947 | 50% | 84% | 60% |
| 1999 | 2,141 | 1,791 | 3,932 | 4,075 | 2,580 | 6,655 | 53% | 69% | 59% |
| 2000 | 2,137 | 1,628 | 3,765 | 4,072 | 2,156 | 6,228 | 53% | 76% | 60% |
| 2001 | 2,815 | 1,996 | 4,811 | 4,959 | 2,896 | 7,855 | 57% | 69% | 61% |
| 2002 | 4,158 | 4,664 | 8,822 | 6,860 | 5,721 | 12,581 | 61% | 82% | 70% |
| 2003 | 3,857 | 5,099 | 8,956 | 6,391 | 5,989 | 12,380 | 60% | 85% | 72% |
| 2004 | 4,030 | 4,129 | 8,159 | 6,614 | 4,874 | 11,488 | 61% | 85% | 71% |
| 2005 | 5,023 | 4,411 | 9,434 | 7,623 | 5,671 | 13,294 | 66% | 78% | 71% |
| 2006 | 5,363 | 4,453 | 9,816 | 9,064 | 5,906 | 14,970 | 59% | 75% | 66% |
| 2007 | 3,763 | 5,131 | 8,894 | 7,682 | 7,206 | 14,888 | 49% | 71% | 60% |
| 2008 | 1,220 | 2,759 | 3,979 | 2,606 | 4,009 | 6,615 | 47% | 69% | 60% |
| 2009 | 2,206 | 1,705 | 3,911 | 3,897 | 2,420 | 6,317 | 57% | 70% | 62% |
| 2010 | 3,417 | 2,963 | 6,110 | 6,062 | 3,897 | 9,959 | 56% | 76% | 61% |
| 2011 | 3,080 | 3,055 | 6,135 | 5,017 | 4,315 | 9,332 | 61% | 71% | 66% |
| 2012 | 3,517 | 5,971 | 9,488 | 5,658 | 7,179 | 12,837 | 62% | 83% | 74% |
| 2013 | 3,981 | 6,653 | 10,634 | 5,970 | 8,719 | 14,689 | 67% | 76% | 72% |
| 2014 | 4,750 | 5,048 | 9,798 | 6,832 | 7,040 | 13,872 | 70% | 72% | 71% |

**Adapted from CMHC, Edmonton Housing Starts Summary, 1980 through 2014.

Urban Planning and Environment Branch,
Sustainable Development, City of Edmonton