

EMPLOYMENT AREAS STUDY



March 2016

Employment Areas Executive Summary

Employment areas contribute significantly to the fabric of Saskatoon. They are vital to the city's economy, providing opportunities for the production, distribution and trade of goods and services. They are also places that residents travel to and from daily for work, often spending a large portion of their time there. The Saskatoon Speaks Community Vision for Sustainable Growth and Moving Around provide the basis for the goals for employment areas.

Goals for Employment Areas

- To retain the City Centre as the primary destination for corporate head offices, store-front retail and cultural amenities for the city and region.
- To achieve a balanced distribution of employment areas throughout Saskatoon, supporting the efficient use of existing and planned transportation infrastructure and providing employment options closer to where people live.
- To ensure that existing and planned employment areas are well-designed, can facilitate travel by all transportation modes (walking, cycling, automobiles, public transit) and support convenient and higher frequency transit service.
- To ensure an adequate supply of employment land is available to support new businesses and a growing workforce.

The Employment Areas Study forms an integral component of the City's overall Growth Plan to Half a Million (Growth Plan). Focused on the areas where Saskatoon's residents work, the Employment Areas Study has two main purposes:

- 1) To determine if our existing and planned employment areas can support employment growth to a population of 500,000, and
- 2) To evaluate whether our current plans and policies for facilitating employment growth will achieve the goals for employment areas.

Employment Today

- 65 percent of employment is concentrated in the Core Neighbourhood, North West Industrial, and University of Saskatchewan areas.
- 35 percent of employment is dispersed throughout the city in smaller concentrations focused in industrial areas, large-scale institutional lands, along major arterial roadways and at larger commercial nodes such as suburban centres.
- There are few jobs within residential neighbourhoods, except home based businesses and where there are nodes of commercial and/or institutional activities such as schools or hospitals.

- Small businesses constitute a significant portion of overall employment in Saskatoon with over 70 percent of businesses employing less than 10 people.
- 20 percent of people who live within Circle Drive walk, cycle or take transit to work, compared to 7.5 percent of people who live outside of Circle Drive.

Employment Tomorrow (at 500,000 population)

To ensure that enough employment lands are available to support employment at a population of 500,000 an employment projection was conducted. The projection calculated the expected number of jobs at the 300,000, 400,000 and 500,000 population horizons. These jobs were then allocated to various areas of Saskatoon

based on approved and in-progress growth plans and assumptions about job growth in existing built up areas of the city. The findings of the employment projection are summarized below and illustrated in Figure 1:

- There is sufficient land available within current boundaries to support employment growth to 500,000 people.
- 56.6 percent of employment will be concentrated in the Core Neighbourhood, North West Industrial, and University of Saskatchewan areas.
- 10,800 jobs will be added to the Central Business District, a 50 percent increase from today.
- 44.4 percent of employment will be dispersed in smaller concentrations throughout Saskatoon.
- Current policies require significant employment opportunities to be identified in new suburban development areas resulting in a more dispersed employment pattern.

- 62 percent of people will live east of the South Saskatchewan River, while 65 percent of jobs will be located west of the river.

Planning for Employment Areas Today

- There are a number of plans and policies that shape employment growth in Saskatoon today. These include:
 - Official Community Plan Bylaw No. 8769 (OCP)
 - Sector Plans and Concept Plans
 - Zoning Bylaw No. 8770
 - City Centre Plan and North Downtown Master Plan
- These and other documents were reviewed to identify any gaps in our current planning practices that may limit us from achieving our goals for future employment areas.

Growth Plan

The Growth Plan will support transportation choice in new and existing employment areas.

- The proposed Bus Rapid Transit system will enhance opportunities for transit use to new and existing employment areas and will support employment growth along the rapid transit corridors.
- The Active Transportation Plan supports the enhancement of non-motorized transportation modes, such as walking and cycling, in all employment areas.

Future Policy Directions

A number of recommended policy directions were identified to enable full achievement of the goals of this study:

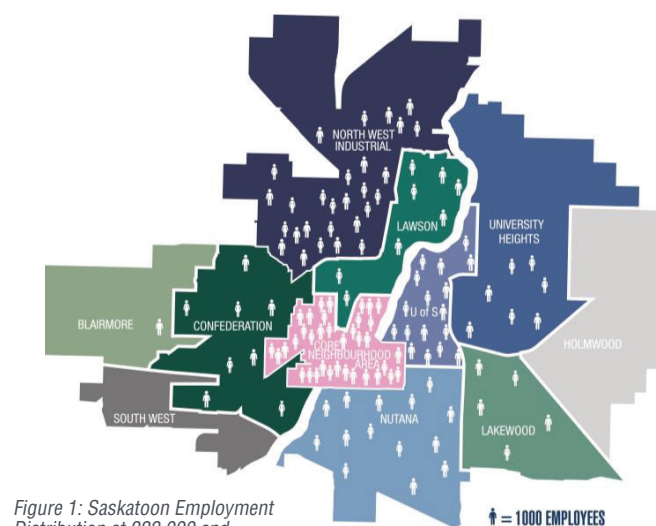
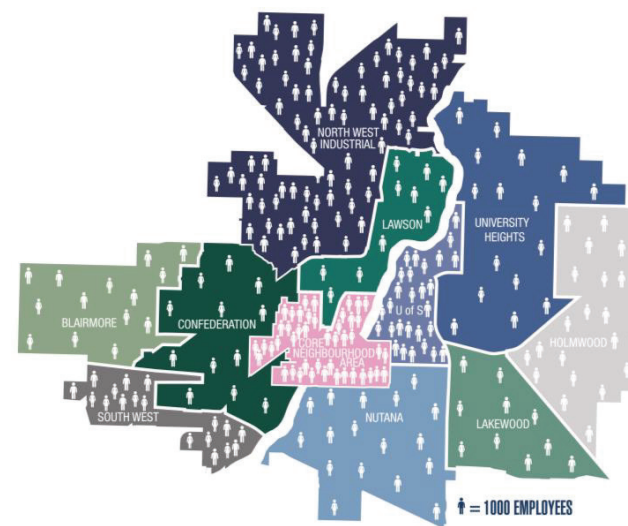
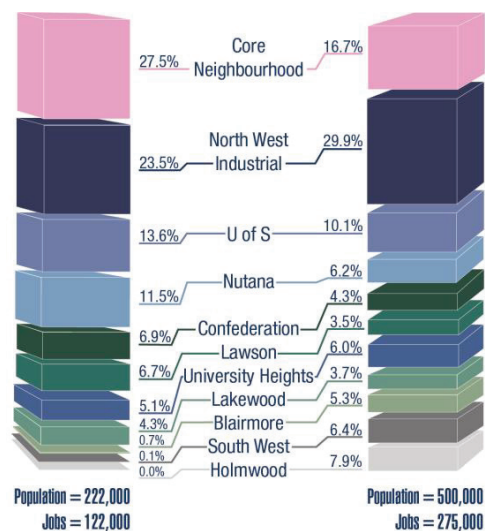


Figure 1: Saskatoon Employment Distribution at 222,000 and 500,000 Population Horizons



1) Employment Areas as Comprehensively Planned Units:

Establish policy that considers employment areas as comprehensively planned units rather than areas of blanket zoning within which subdivision is effectively permitted on an ad hoc basis:

- OCP Amendments:
 - Create a new Employment Areas Design and Development section containing an objective statement and policies that would guide the development of detailed area concept plans for employment areas.
 - Clearly define when non-residential area concept plans are required to ensure a coordinated development pattern with a high quality of urban design.
- Review non-residential zoning regulations periodically to ensure that the overall vision and land use plan for employment areas can be realized as development occurs.

- Create employment area design guidelines to provide greater clarity on how to achieve the desired outcomes for employment areas as outlined in the OCP and the Growth Plan, including guidance for transit-oriented development, building placement and orientation, parking, etc.

- Identify additional commercial and industrial employment areas where site plan control can be applied.

2) Future Industrial Land:

- Remove current OCP policy that encourages the majority of heavy industrial development to be concentrated in the city's northwest.
- Policies that guide the location of future industrial land should consider matters such as:
 - Balanced distribution of employment areas,
 - Impacts to existing and planned infrastructure,
 - Commuting patterns,
 - Proximity to existing and future residents, and
 - Results of environmental screenings.

- Future planning work should consider emerging best practices relating to mixing employment with residential and other types of land uses.

3) City Centre Office Development:

- Retaining the City Centre as the heart of commerce in Saskatoon and the Region is a key goal of this Study.
- Office development is a major employment generator in the City Centre.
- To ensure that the City Centre continues to be the preferred location for major office developments, a supplementary report has been prepared with a key focus on identifying options to ensure that the City Centre remains the pre-dominant office employment area in Saskatoon.

Note: All photos credited to City of Saskatoon.

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Looking south at the North West Industrial Employment Area



Broadway Street Fair

1.0 Introduction

Employment areas contribute significantly to the fabric of Saskatoon. They are vital to the city's economy, providing opportunities for the production, distribution and trade of goods and services. They are also places that residents travel to and from daily for work, often spending a large portion of their time there. The Saskatoon Speaks Community Vision for Sustainable Growth and Moving Around provide the basis for the goals for employment areas.

Goals for Employment Areas

- To retain the City Centre as the primary destination for corporate head offices, store-front retail and cultural amenities for the city and region.
- To achieve a balanced distribution of employment areas throughout Saskatoon, supporting the efficient use of existing and planned transportation infrastructure and providing employment options closer to where people live.
- To ensure that existing and planned employment areas are well-designed, can facilitate travel by all transportation modes (walking, cycling, automobiles, public transit) and support convenient and higher frequency transit service.
- To ensure an adequate supply of employment land is available to support new businesses and a growing workforce.

1.1 Purpose

The Employment Areas Study forms an integral component of the city's overall Growth Plan to Half a Million (Growth Plan). Focused on the areas that Saskatoon's residents work, the Employment Areas Study has two main purposes:

- 1) To determine if our existing and planned employment areas can support employment growth to a population of 500,000, and
- 2) To evaluate whether our current plans and policies for facilitating employment growth will achieve the goals for employment areas.

1.2 Context

Planning for population growth also means planning for corresponding employment growth. The relationship between where people live and work can have significant impacts on land use and transportation patterns and can greatly influence the number of automobile, pedestrian, cycling and transit trips. The most predictable trips are those to and from work. Locating employment areas closer to where people live and considering their design and accessibility to all modes of transportation can have positive impacts on our civic infrastructure and the quality of life of Saskatoon residents. A long-term goal of the City has been to direct a significant portion of

employment growth to the City Centre so that it remains the heart and centre of commerce in the city and region as Saskatoon grows.

For the purposes of this study, employment areas are defined as:

- Areas of the city where employment is a defining characteristic of the land use,
- A broad category that includes commercial, industrial and office/institutional lands, as well as some special use areas, such as the University of Saskatchewan.

City of Saskatoon Strategic Plan 2013-2023 (Strategic Plan)

The Strategic Plan outlines a corporate vision to describe Saskatoon 20-30 years from now. Informed by the community vision developed through Saskatoon Speaks, the Strategic Plan serves as a road map to achieve the vision of what our city will look like in the decades to come. Seven Strategic Goals were identified to realize this vision.

The Employment Areas Study is specifically identified as a four-year priority under the Strategic Goal of Sustainable Growth, forming an integral part of the City's Growth Plan. Creating new employment areas adjacent to existing residential areas is identified as a long-term strategy under the Strategic Goal of Economic Diversity and Prosperity.



33rd Street

Growth Plan

This Study is a related component of the City's Growth Plan, paying particular attention to the characteristics of employment in our city today, what it may look like in the future and how we ensure that existing and future employment areas contribute to making Saskatoon a healthier, more sustainable, attractive and accessible place to live.

How we design and locate employment areas affects how people get to their jobs, how they move around within employment areas, and whether or not they are able to access the services and amenities they may want or need while at work.

Considering these factors is integral in:

- supporting growth along major corridors;
- coordinating investments in transit and roadway infrastructure;
- managing demands for new river crossings; and
- enhancing active transportation opportunities.



Figure 1: Growth Plan Themes

2.0 Employment Today

To effectively plan for employment growth it is important to understand current employment characteristics as they relate to population, commuting trends, industry sectors and geographic distribution across the city. This baseline data represents a snapshot of employment in Saskatoon today, providing valuable data to project employment trends and understand how current policies and plans will affect employment growth and associated land and infrastructure needs. Unless otherwise noted, population and employment figures used and projected in this study are based on 2011 data in order to align with the Federal Census. Job count figures used throughout this report were obtained from the City of Saskatoon Business License Program which collects data from all commercial, industrial and institutional businesses in Saskatoon.

2.1 Current Employment Trends

Saskatoon's forecasted population in July of 2015 was 260,900 with yearly growth averaging 3.0% since 2010.

Between 2010 and 2014 population growth in Saskatoon has outpaced other major western Canadian cities such as Calgary, Edmonton and Winnipeg.ⁱ This population growth has been matched by employment growth with an estimated 133,635 jobs in 2014.ⁱⁱ

According to a recent study conducted by the Conference Board of Canada, the cost of doing business in Saskatoon remains lower than other Western Canadian cities making Saskatoon an attractive place to do business.ⁱⁱⁱ Key sectors in Saskatoon's economy include mining, construction, wholesale trade, and professional services. Jobs in the manufacturing sector decreased by 12 percent^{iv} between 2006 and 2011 and are not expected to see significant gains in the future.^v During the same time period jobs in the construction and mining, oil and gas sectors grew by 99 percent and 80 percent respectively.^{vi} Industries most important to Saskatoon's growth include: mining, education and health services, and construction.^{vii}

Downtown office vacancy rates have risen in recent years reaching a 10 year high of nearly 15 percent at

the end of 2015 and are expected to remain high into 2016.^{viii} The contraction of the resource sector and increasing competition from new suburban areas are cited as the main reasons for the reduction in downtown office tenants.^{ix} As Saskatoon continues to grow it is important to ensure that the downtown remains the heart of commerce in the city and region.

Business Characteristics

Small businesses constitute a significant portion of the overall employment in Saskatoon with over 70 percent of businesses employing less than 10 people. Saskatoon's economy is primarily comprised of businesses in the services producing sector (77 percent) highlighting its role as a regional service centre. Business growth was highest in the mining, oil and gas, and construction industries.^x

Home based businesses are becoming an increasing source of employment and entrepreneurship in Saskatoon. Home based businesses constitute 41 percent of all licensed businesses in Saskatoon. Between

i Population Growth and Rate of Change, Performance Dashboard, City of Saskatoon, https://www.saskatoon.ca/sites/default/files/documents/corporate-performance/pip/population_growth_and_rate_of_change.pdf.

ii City of Saskatoon Business License Program, 2014.

iii Butler, Erin and Natalie Ward. Growing Saskatoon: Saskatoon's Regional Economic Map. Ottawa: The Conference Board of Canada, 2014.

iv Saskatoon Employment Trends Employment Profile, City of Saskatoon, 2013.

v Butler, Erin and Natalie Ward. Growing Saskatoon: Saskatoon's Regional Economic Map. Ottawa: The Conference Board of Canada, 2014.

vi Saskatoon Employment Trends Employment Profile, City of Saskatoon, 2013.

vii Butler, Erin and Natalie Ward. Growing Saskatoon: Saskatoon's Regional Economic Map. Ottawa: The Conference Board of Canada, 2014.

viii 2016 Commercial Real Estate – Review and Forecast, Colliers International.

ix Ibid.

x Saskatoon Employment Trends Employment Profile, City of Saskatoon, 2013.

2006 and 2011 home based businesses increased by 74 percent, with the majority of new businesses focused on the construction industry.^{xi} Home based businesses are an important component of overall employment in Saskatoon, providing opportunities for people to work where they live.

2.2 Current Employment Distribution

One of the goals of this study is to achieve a balanced distribution of employment throughout Saskatoon that provides more opportunities for people to work closer to where they live. The distribution of employment in relation to where people live can significantly impact the demands on local infrastructure, such as arterial roads and bridges that move people to and from work each day. The amount of time spent commuting to and from work can have an impact on the quality of life of Saskatoon's residents. While it is important to create opportunities for people to work closer to where they live, this must be balanced with the need to retain a strong City Centre that is a destination for corporate head offices, storefront retail and cultural amenities.

Figure 2 shows the general distribution of jobs in Saskatoon. Jobs are generally well dispersed with three notable concentrations.

Core Neighbourhood Area

Presently, the Core Neighbourhood Area (CNA) is Saskatoon's largest employment area accounting for 27.5 percent of jobs in the city. This employment area includes the Central Business District (CBD) and the neighbourhoods of Pleasant Hill, Caswell Hill, Westmount, King George, Riversdale, City Park,

Nutana and Varsity View. Though the CBD is the major employment generator, the surrounding residential neighbourhoods contain notable amounts of employment that is concentrated along the major corridors leading to the City Centre such as 2nd Avenue, Broadway Avenue, 20th Street, College Drive and Idylwyld Drive.

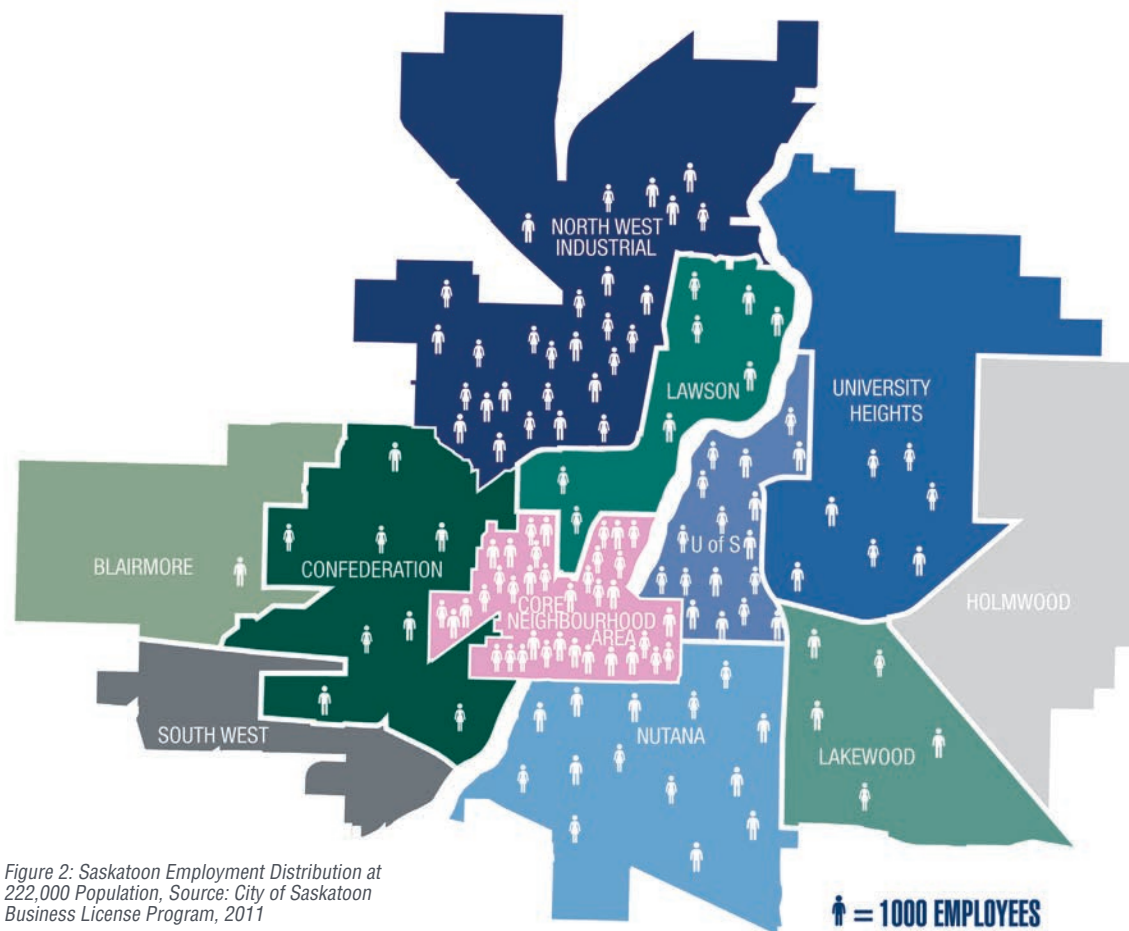


Figure 2: Saskatoon Employment Distribution at 222,000 Population, Source: City of Saskatoon Business License Program, 2011

xi Ibid



The CNA has some of the highest development densities in the city and follows a grid-like street pattern that allows multiple connections for motorized and non-motorized travel. Furthermore, this area is highly accessible for transit as all routes travel through the CBD. The CBD is the heart of commerce in Saskatoon and is the predominant office employment area representing nearly 50 percent of city-wide office development containing most of Saskatoon's largest office buildings.^{xii} Notable office developments are also located along some of the major corridors leading into the CBD.

The City Centre Plan, focused on the CBD and the major corridors leading to it, is one of several initiatives undertaken by the City of Saskatoon to enhance the City Centre and ensure that a portion of residential and business growth is encouraged here.

North West Industrial Area

The Official Community Plan directs that the majority of heavy industrial development occur in the northwest area of Saskatoon, which provides easy access to rail,

air and highways 11, 12 and 16. Due, at least in part, to this policy direction, the North West Industrial Area contains 75 percent of all industrial zoned lands in Saskatoon and accounts for 23.5 percent of city-wide jobs. Furthermore, the recently adopted North Sector Plan provides a broad framework for the expansion of the North West Industrial Area. The North Sector Plan identifies approximately 1984 hectares (4903 acres) of land primarily for light and heavy industrial uses with a few arterial commercial nodes located at key intersections within the sector.



Industrial employment areas typically require large parcels of land, convenient access to rail and highway infrastructure, and adequate separation distances from residential uses to reduce conflicts. The North West Industrial Area is generally segregated from residential areas and follows a dispersed pattern of low density light and heavy industrial development. Typical of many industrial areas, Saskatoon's North West Industrial Area offers limited sidewalks and pedestrian amenities, and transit service that is infrequent with limited coverage.

As such, opportunities for active transportation or the use of transit as a viable commuting option is limited making it difficult for people to commute to this area of Saskatoon without the use of a private vehicle. The completion of the North Commuter Parkway bridge project will improve connections to the North West Industrial Area for growing residential neighbourhoods in the northeast.

University of Saskatchewan (U of S) Area

This area is the third largest employment area in Saskatoon in terms of total jobs. It includes the Royal University Hospital, the University of Saskatchewan core campus and Innovation Place, and accounts for 13.6 percent of city-wide employment. The U of S employment area is located in close proximity to the City Centre and several residential neighbourhoods on both sides of the South Saskatchewan River. The area is well served by transit and is located adjacent to the Growth Plan's proposed east-west bus rapid transit corridor that will be accommodated on College Drive and Preston Avenue.



xii City of Saskatoon Assessment Data, 2014

The U of S employment area contains a significant amount of undeveloped land that represents a significant infill opportunity for residential and employment uses adjacent to Saskatoon's Core Neighbourhood Area. The University of Saskatchewan Vision 2057 Plan (Vision 2057) has identified 401 hectares (991 acres) of land for potential mixed-use development over the next 50 years. The first phase of Vision 2057, the College Quarter Concept Plan, is a detailed plan for an academic mixed-use development on 59 hectares (146 acres) of land located directly south of the main campus adjacent to College Drive.

Remaining Employment Areas

The three largest concentrations of employment described above account for approximately 65 percent of jobs in Saskatoon. The remaining 35 percent is dispersed throughout the city in smaller concentrations. Specifically, the remaining jobs tend to be concentrated in industrial areas, large-scale institutional lands, along major arterial roadways and at larger commercial nodes such as suburban centres. Typically, there are few jobs within residential neighbourhoods, except home base



businesses and where there are nodes of commercial and/or institutional activities such as schools or hospitals present in neighbourhoods. This dispersed employment complements the three major employment areas by creating additional opportunities for people to work closer to where they live.

2.3 Commuting Patterns

Transportation Mode Share to Work

Best practices in urban planning suggest it is important to encourage new and existing employment areas to be designed and located such that opportunities for non-motorized travel and use of public transit are enhanced. Currently, of the total labour force that lives and works in Saskatoon excluding those that worked at home, approximately 7.5 percent of residents cycle or walk to work, while 5.1 percent use public transit. Figure 3 illustrates the transportation mode share to work for the city and within and outside of Circle Drive.

There is significant variation in transportation mode choice to work throughout Saskatoon. The most apparent difference in mode choice is between those living within and those living outside of Circle Drive. Within Circle Drive, approximately 13.9 percent of residents walked or cycled to work compared to 3.2 percent of those living outside of Circle Drive. Transit usage within Circle Drive was 6.2 percent, compared to 4.3 percent beyond Circle Drive.

The higher percentages of travel by transit and non-motorized means within Circle Drive can be attributed to the proximity of significant and relatively high density residential development to major employment areas

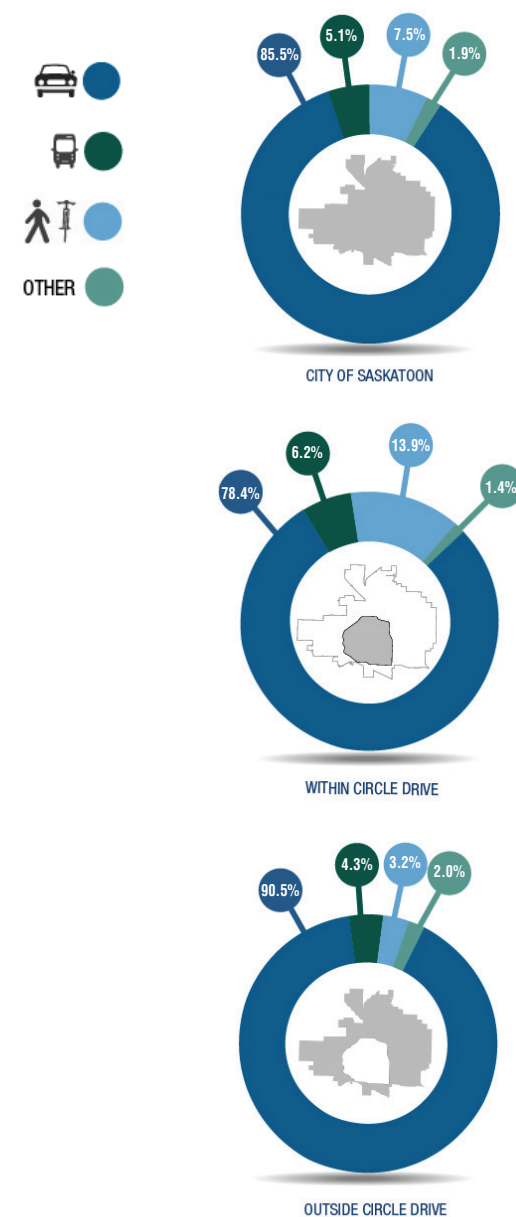


Figure 3: Transportation Mode to Work, City of Saskatoon, 2011, Source: Statistics Canada, National Household Survey 2011

such as the Core Neighbourhood and U of S areas. Additionally, development patterns within Circle Drive consist of many streets with frequent connections between them providing multiple routes and direct connections for walking and cycling. Conversely, urban development outside of Circle Drive tends to be much more segregated by land use than inside Circle Drive, with longer distances between places of residence and places of work. These areas have few arterial roads, spaced relatively far apart, and focused on moving large volumes of traffic. Despite reasonable connectivity within neighbourhoods and provision for occasional trails and connections for non-motorized modes of transportation, these areas of the city generally limit access and include significant barriers between neighbourhoods and to other areas of the city.

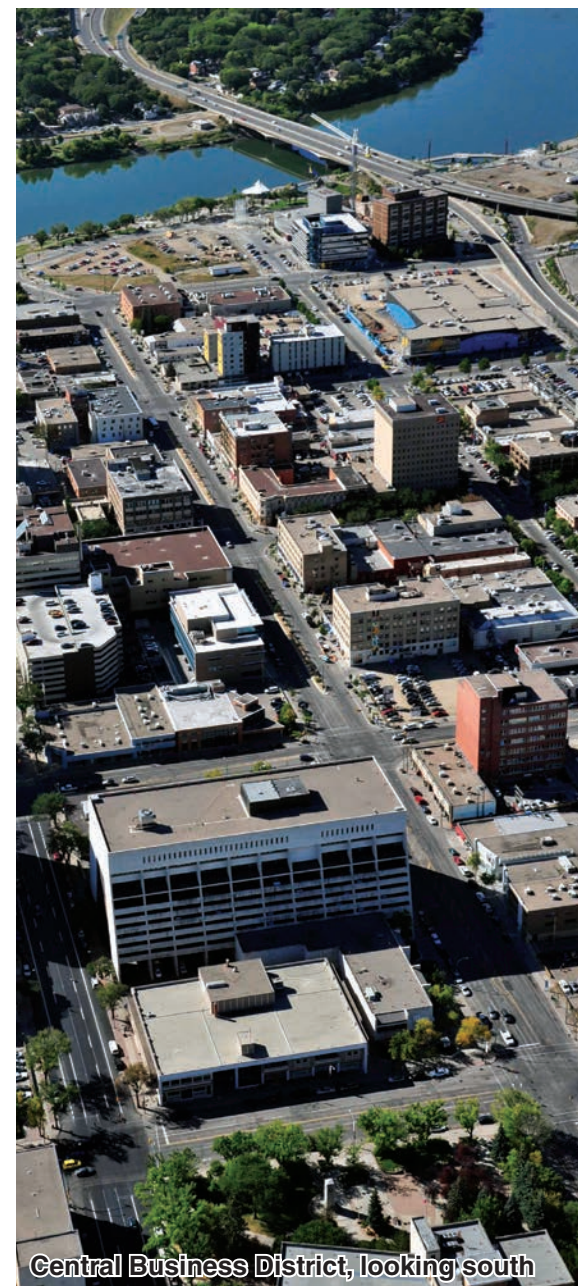
Trips by personal motor vehicles represent a significant amount of the overall transportation mode share to work in Saskatoon. This is expected to continue into the future. However, encouraging the development of employment areas close to where people live and even within neighbourhoods (in well-designed, mixed-use communities) can help mitigate overall travel demand by reducing distances travelled to work. This reduces the overall impact of each vehicle on the transportation system.

City of Saskatoon Transportation Mode Share Targets

The City of Saskatoon monitors several indicators in order to measure our progress and performance in furthering the strategic goals set out in the City's Strategic Plan. Under the Strategic Goal of Moving Around the City monitors the proportion of residents using transit, walking, and cycling to get to work with a long-term combined target of 20 percent. City-wide this target is not met; however within Circle Drive the transit, walking and cycling mode share is 20 percent.

Mobility Considerations

When planning for future employment areas or redeveloping/intensifying existing ones it is important to consider the implications of how people commute between their place of residence and their place of work. There are several natural and man-made factors that can impact mobility in Saskatoon, including work trips. Major transportation infrastructure such as rail lines, airports and freeways typically offer few crossings with limited connections between the areas that they bisect. Major geographical features such as the river and swales, as well as large undeveloped parcels such as the University of Saskatchewan agricultural lands, can limit access to certain areas to a few crossings and major roadways. While many of these factors will not change, consideration should be given on how to improve connectivity around these areas when planning for employment areas.



Central Business District, looking south

2.4 Regional Considerations

Saskatoon is a regional service centre and provides employment opportunities to people who live outside of the city. The Saskatoon Census Metropolis Area (CMA) has experienced significant population growth in recent years, outpacing population growth in Saskatoon. This trend is expected to continue and as such, more jobs in Saskatoon will be filled by non-residents. According to the most recent census data available from 2011, approximately 16,740 workers commuted to Saskatoon from outside the city for employment. The neighbouring communities of Warman, Martensville and the Rural Municipality of Corman Park account for 47.5 percent of inbound commuters to Saskatoon. Given the pace of growth in the region since 2011 it is anticipated that the 2016 census data will show a marked increase in workers commuting to Saskatoon for employment.

Though many residents from the region fill jobs in Saskatoon, notable employment opportunities can be found outside of Saskatoon. 2011 census data indicates that 6,645 Saskatoon residents are employed outside of the city. The Rural Municipalities of Corman Park and Vanscoy accommodate the largest share of Saskatoon's labour export which is likely attributed to the Cory and Agrium potash mines, and the Biz Hub and East Cory Industrial Parks situated within these municipalities.

To coordinate growth in the region the Saskatoon North Partnership for Growth Regional Plan is currently under development to outline a land use and servicing strategy for areas surrounding Saskatoon and includes the Rural Municipality of Corman Park, the cities of Warman, Martensville and Saskatoon, and the Town of Osler. Though the scope of the Employment Areas Study does not include the region, it is important to recognize the

contributions the region makes to Saskatoon's workforce and the employment opportunities provided to residents of Saskatoon when planning for employment growth.



East Cory Industrial Park, looking south

3.0 Employment Tomorrow

In order to determine the future land requirements needed to support a growing population it is important to note the pace of population growth so that the appropriate land and infrastructure is available when needed. The same is true for employment growth. While we need to plan for where people will live we also need to consider where future residents will work and how this impacts transportation and land use patterns in order to grow in an efficient and sustainable manner. The concept of 'complete communities' is founded on the basis of creating places where people can live, work, shop, and play. Considering employment and population growth together is a step towards achieving more complete communities in Saskatoon. Furthermore, the relationship between where people live and where they work has a significant impact on the number of automobile, pedestrian, cycling and transit trips and the infrastructure needed to support these trips.

A key goal of this study is to ensure that there is an adequate supply of employment land available to support new businesses and a growing workforce. This section of the report describes the methodology behind the employment projection, key findings and the projected future distribution of employment at a population of 500,000.

3.1 Methodology

3.1.1 Employment Projection

To evaluate the need for employment lands at a 500,000 population as well as a number of intermediate population horizons, it was first necessary to project

population growth. The population projection uses the 2011 Census population for Saskatoon (222,189) as a base, applying an annual compounding growth rate of 2.5 percent to the population. This growth rate is consistent with the "Medium" scenario used in the City of Saskatoon & Saskatoon Census Metropolitan Area

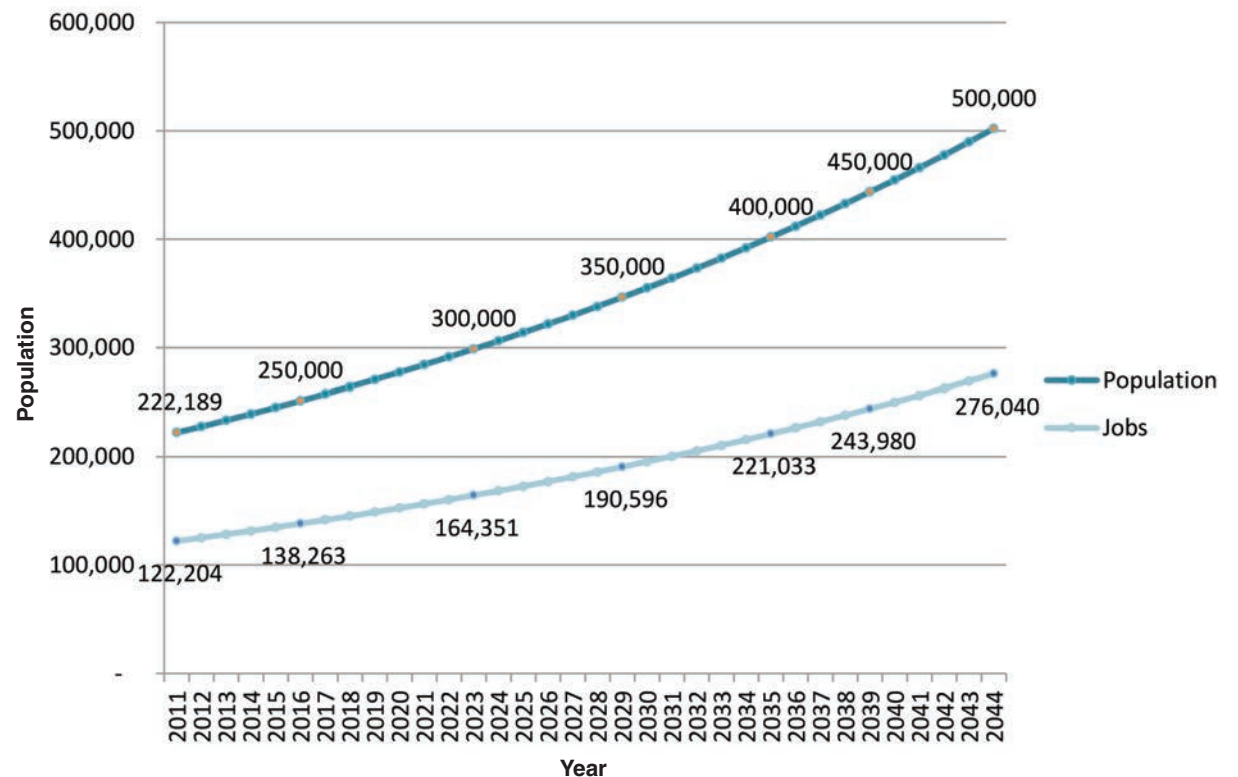


Figure 4: Population and Job Projection Based on a 2.5 Percent Growth Rate

Population Projection 2012-2032. The City has adopted this Medium growth scenario (2.5 percent) in the Growth Plan.

To determine the number of jobs in Saskatoon at any population horizon, job data from the City of Saskatoon's Business License database (2011-2012)¹ was compared to the 2011 Census data. The result was a jobs/population ratio of 0.550. Figure 4 is a chart that shows the forecast population and job count within Saskatoon based on a 2.5 percent annual growth rate. Based on this projection, Saskatoon can be expected to reach a population of 500,000 by 2044 at which point there are projected to be approximately 276,000 jobs within the city.

Recent indications are that Saskatoon's pace of growth may have moderated since 2014. It is too early to predict whether the growth rate has fallen below the 2.5 percent projection. If it has, the length of time it may remain below this level is uncertain. In all cases, this does not present any significant problems for the job growth projection or job distribution modelling as these focus on projecting the count and distribution of jobs at any population level. The rate of population growth only affects the timing.

Regional impacts on employment are factored into the projection implicitly. The projection is based on the assumption that jobs in the city are directly related to population and that this relationship will remain the same in the future. Thus, it is assumed that the net effect of regional employment (i.e. city residents working outside and outside residents working in) is constant over time.

This is a modest oversimplification of the actual trend which shows regional population growth occurring faster than city growth (likely meaning a larger share will be commuting into the city in the future than do currently). However, the effect of this oversimplification on the overall job projection (± 2.85 percent) is not considered to be significant given the timeframe of the projection.

3.1.2 Job Distribution Model

The job distribution model allocates the projected job growth across the city for each population horizon (300,000, 400,000 and 500,000) based on the City's approved and in-progress growth plans and assumptions about job growth in existing built up areas of the city. In all cases, these allocations should be considered as "best guess" estimates based on the available information at the time of this study and reasonable assumptions made about likely future development. A

high degree of accuracy at this scale, given the multi-decade timeframe, is not possible. However, this modelling exercise provides a reasonable methodology to predict future employment land needs and the general distribution of jobs around the city. The results of the job distribution model indicate that there is sufficient land available within current city boundaries to accommodate employment growth to 500,000 people. Table 1 provides a summary of the job distribution model. A more detailed methodology for each of the allocation areas summarized in Table 1, including an overview of the process and key assumptions, can be found in Appendix A.

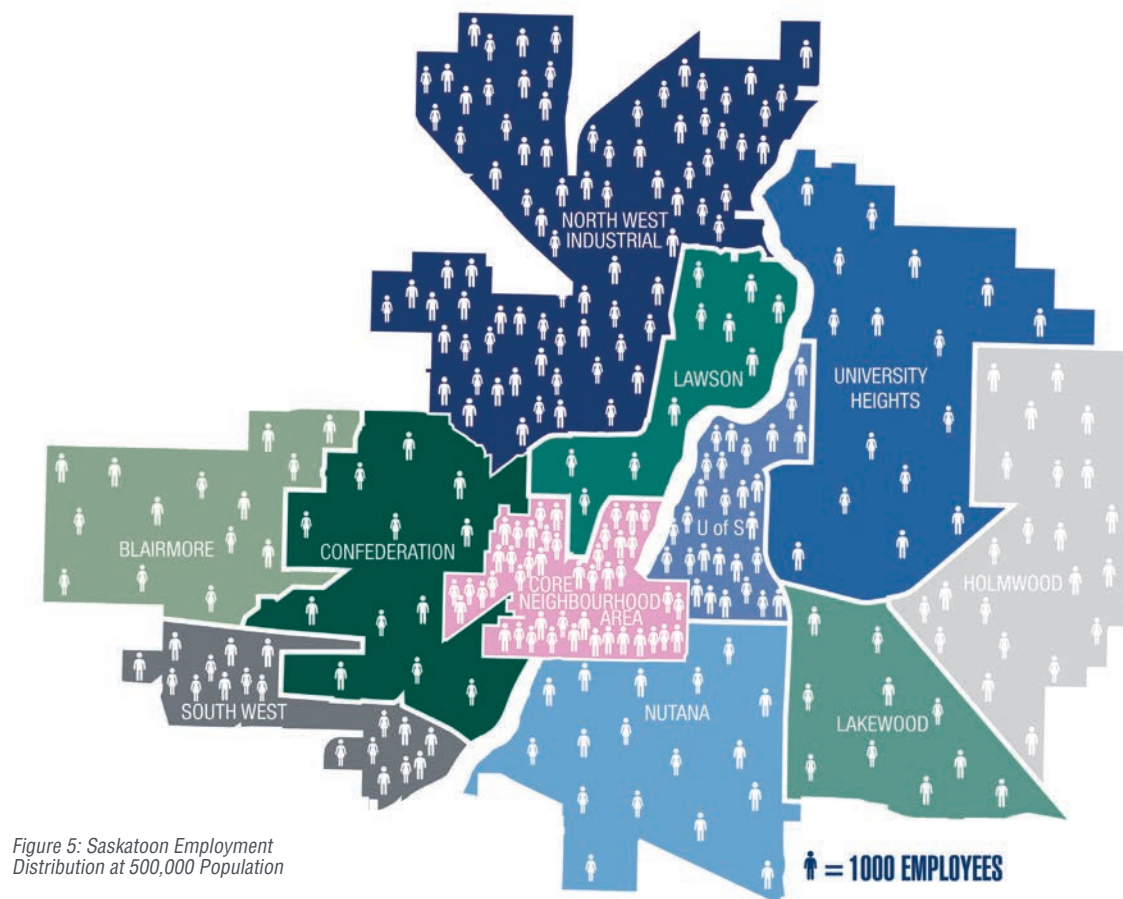
3.2 Future Employment Distribution

The allocation of jobs at 500,000 was based on employment lands identified in existing approved and in-progress sector plans. The job distribution model described in section 3.1.2 is illustrated in Figure 5.

Population Horizon	222,189	300,000	400,000	500,000
Allocation Area				
Central Business District	20,322	22,222	25,188	31,139
U of S Lands	16,665	20,067	24,478	27,690
Existing Industrial	39,513	45,865	55,714	61,467
Existing Neighbourhoods	34,042	34,592	35,643	37,857
Existing Suburban Centres	7,851	8,460	8,774	8,774
Future Growth Areas	2,929	32,731	68,860	105,988
Existing Management and Residual Areas	950	1,154	1,466	2,025
Projected Job Count (projection-based)	122,272	165,092	220,123	275,153

Table 1: Job Distribution Model Summary

¹ Business License Job Count is preferred over 2011 Census employment data because the Business License data represents jobs within the city and can be linked directly to specific site and land use requirements whereas the Census counts employed persons which may or may not work more than one job either inside or outside the city



Major Employment Areas

The employment projection indicates that the three major employment areas today will remain the top three employment areas when Saskatoon's population reaches 500,000; however their combined share of city-wide jobs will decrease from 65 percent to 56.6 percent. Though today's major employment areas will remain prominent as Saskatoon grows there will be a shift in order of dominance. Presently, the Core Neighbourhood Area (CNA), which includes the Central Business

District (CBD), is the largest employment area representing 27.5 percent of city-wide jobs. As Saskatoon's population doubles the CNA share of employment will decrease to 16.7 percent and the North West Industrial Area will become the largest employment area representing 29.9 percent of city-wide jobs, up from 23.5 percent today. It is anticipated that the U of S employment area will continue to be an important employment area with a 10 percent share of jobs at 500,000 population.

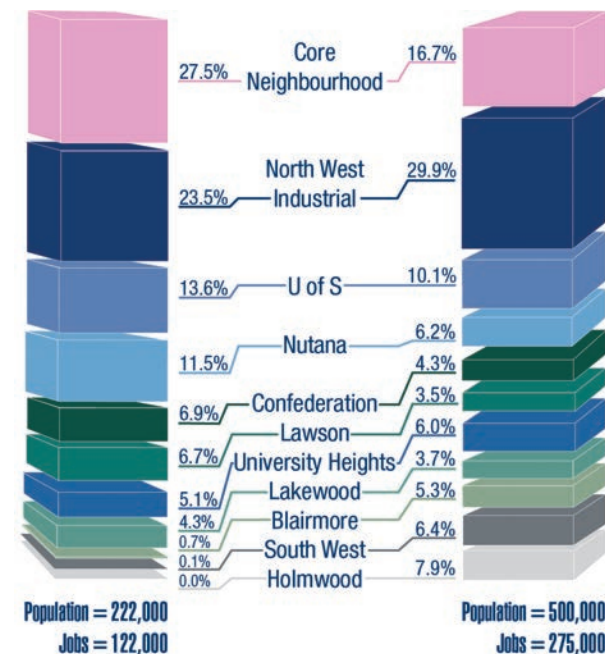


Figure 6: Saskatoon Employment Distribution at 222,000 and 500,000 Population Horizons

Though the overall share of city-wide employment decreases in the CNA, the employment projection indicates that approximately 12,300 additional jobs will be added to this employment area at a population horizon of 500,000. This represents 7 percent of overall employment growth over the time horizon of this study. Job growth in the CNA is primarily attributed to incremental redevelopment of individual properties while factoring some planned major redevelopment projects in the North Downtown and River Landing that serve to increase the overall density of the area. The CNA and CBD in particular, are expected to see significant employment intensification (an increase of 50 percent for the CBD or 10,800 jobs) as the city grows to 500,000. However, given that the CNA is constrained in area and

adding employees requires incremental redevelopment, it is assumed that employment will grow at a slower rate than the other major employment areas which have significant amounts of undeveloped land to accommodate new employment growth.

U of S Area

Vision 2057, the University of Saskatchewan's long-term vision for the redevelopment of their core lands, was the basis for the employment allocation in this area. This project is a significant opportunity for the University and the City and has been identified as "Strategic Infill". While some significant employment growth is expected as part of the long-term vision, the nature of this project as a mixed-use development means that the projected growth in jobs is not as high as it might be were this a single-use employment area.

North West Industrial Area

Employment growth in the North West Industrial Area is primarily attributed to new greenfield development. However, some modest intensification of existing industrial lands in some areas was included to account for full build out and maturation of recently-developed industrial employment land over time.

Core Neighbourhood Area

Job growth in the CNA represents significant intensification within an already-existing area and thus a gradual change in character over time. Job growth on the U of S lands and the North West Industrial Area means urban expansion into rural/undeveloped areas. The character of already-developed land in these areas is therefore not expected to change significantly.

Remaining Employment Areas

As population growth and urban development continue, employment in Saskatoon will become more dispersed. Today jobs outside of the three major employment areas account for 35 percent of the city-wide share. At 500,000 people this figure is projected to reach 44.4 percent. In order to create opportunities for employment closer to where people live, current Official Community Plan policies require that significant employment areas be identified in Suburban Development Areas (SDAs). As a result of this policy direction sector plans for new areas

have identified significant amounts of land to support employment growth in SDAs which will result in more dispersed employment in Saskatoon. The effect of this policy is apparent in the significant increase in share of total employment seen in the Blairmore and Holmwood SDAs in the 500,000 projection. Growth along major corridors resulting from the Growth Plan is beyond what is projected in this job distribution model and is expected to increase employment densities along major streets such as 8th and 22nd Streets to support investments in bus rapid transit.

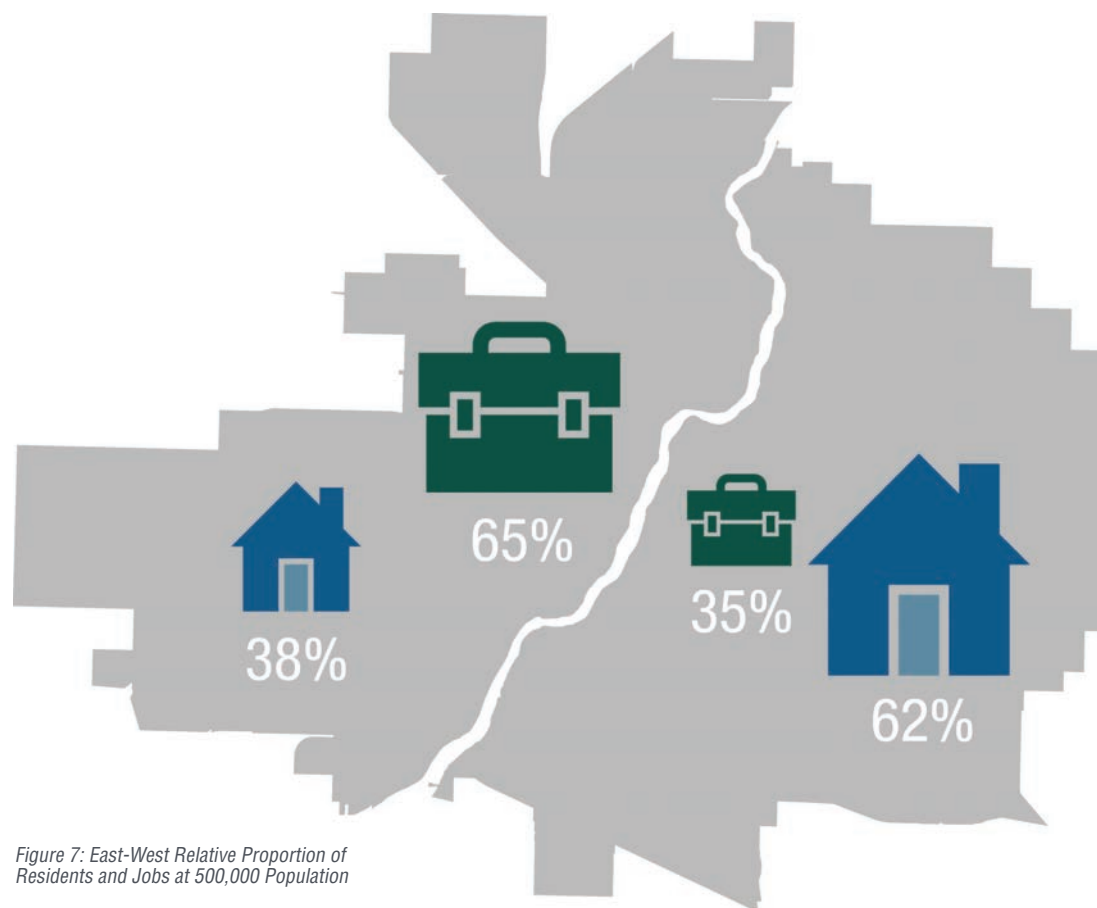


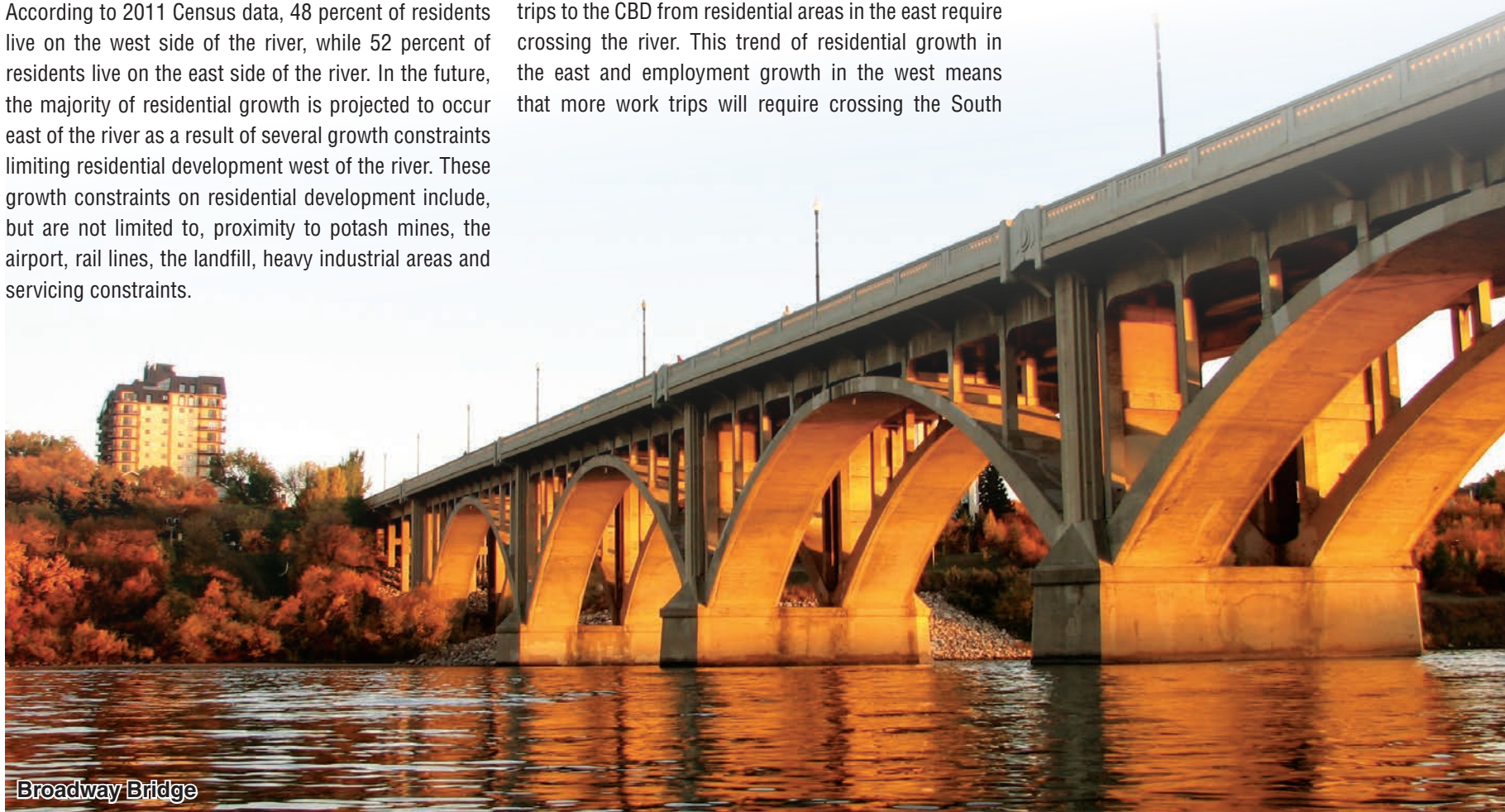
Figure 7: East-West Relative Proportion of Residents and Jobs at 500,000 Population

The River and Balancing Growth

Saskatoon is bisected by the South Saskatchewan River which limits east-west movement throughout the city to five vehicular crossings. The location of residential areas in relationship to employment areas is especially important when work trips require crossing the river. Presently, Saskatoon's residential population has a relatively well balanced east-west distribution. According to 2011 Census data, 48 percent of residents live on the west side of the river, while 52 percent of residents live on the east side of the river. In the future, the majority of residential growth is projected to occur east of the river as a result of several growth constraints limiting residential development west of the river. These growth constraints on residential development include, but are not limited to, proximity to potash mines, the airport, rail lines, the landfill, heavy industrial areas and servicing constraints.

As illustrated in Figure 7, when Saskatoon's population reaches 500,000, the growth model projects that 62 percent of residents will live on the east side of the river, up from 52 percent today. At the same time, employment on the west side of the river is projected to reach 65 percent. This figure includes the Central Business District (CBD), which accounts for 11.3 percent of total employment west of the river. Though centrally located, trips to the CBD from residential areas in the east require crossing the river. This trend of residential growth in the east and employment growth in the west means that more work trips will require crossing the South

Saskatchewan River, placing added pressure on existing river crossings and potentially resulting in a need for additional river crossings. Considering work trips when planning for future residential and employment areas is integral in ensuring our infrastructure is used to its fullest potential and will help to reduce the need for premature upgrades and/or construction of new infrastructure.



Broadway Bridge



South Saskatchewan River, looking south at Silverwood Heights and the North West Industrial Employment Area

4.0 Planning For Employment Areas Today

The purpose of this section is to review how we currently plan for employment areas and determine if our current policies and practices guide us in achieving employment areas that are well-designed, accessible to multiple transportation modes, and located closer to where people live. There are a number of plans and policies that shape employment growth in Saskatoon today. These were reviewed to identify any gaps or inconsistencies in our current planning practices that may limit us from achieving the goals for future employment areas as outlined at the beginning of this report. The following is a brief summary of some of the key documents that guide the growth and development of employment areas in Saskatoon.

City of Saskatoon Official Community Plan Bylaw No. 8769

The Official Community Plan (OCP) shapes the overall growth of the city as a whole. Established under the provisions of the Planning and Development Act, the OCP is intended to guide the growth of Saskatoon to 500,000 people. Policies in the OCP provide general guidance for the location, distribution and design of existing and future employment areas – contributing to the overall form and shape of Saskatoon as the population doubles.

Sector Plans and Concept Plans

In accordance with the policies of the OCP, the size and location of future employment areas are identified through the sector plan process to ensure employment areas are provided in proximity to residential areas. Sector plans are developed for each Suburban Development Area (SDA) and provide a broad, comprehensive framework for future urban development, including the size and location of future neighbourhoods, arterial road alignments, employment areas, parks and significant natural areas. Civic services, concept plans, land use and zoning redesignations are undertaken in accordance with the framework set out in a sector plan.

Concept plans provide a detailed framework for a defined area within a sector plan which includes: land use patterns, lotting arrangements, open spaces and other relevant design features. Concept plans can be required for a neighbourhood, suburban centre, industrial area or similar area; however until recently concept plans have only been undertaken for new neighbourhoods, suburban centres and some special use areas such as College Quarter and the Aerogreen Business Park.

City of Saskatoon Zoning Bylaw No. 8770

The Zoning Bylaw is a statutory plan established under the provisions of the Planning and Development Act and contains specific regulations controlling the use and

development of land in accordance with the policies established in the OCP. The City is divided into a number of different zoning districts each with their own set of land use and site development requirements.

City Centre Plan and North Downtown Master Plan

These plans are focused on the redevelopment and revitalization of Saskatoon's core areas, with a strong focus on encouraging more people to live and work in the City Centre area. The City Centre Plan, which was adopted by City Council in the fall of 2013, is a comprehensive plan for the downtown and the major corridors leading into the core. The Plan is focused on improving the City Centre by creating market demand for residential, office and business uses so that the City Centre continues to be the cultural and entertainment hub for the region with employment, corporate offices, and store-front retail.

The North Downtown Master Plan will create a vision for an integrated community which is compact, diverse and walkable on an underutilized site directly north of Saskatoon's City Centre.

The following sections provide a detailed review of existing policies and plans that guide the growth of employment areas in Saskatoon and how they align with the goals for employment areas outlined in this Study.

4.1 The City Centre

4.1.1 Goal

“To retain the City Centre as the primary destination for corporate head offices, store-front retail and cultural amenities for the City and Region.”

4.1.2 Applicable Policies, Plans and Programs

City of Saskatoon Official Community Plan Bylaw No. 8769 (OCP)

Policies state that the downtown shall remain the centre and heart of financial, administrative, cultural and commercial uses with the highest development densities in the city. Specific policies are in place to encourage store-front retail and pedestrian amenities in the core. Furthermore, the long term viability of retail and commercial in the downtown is to be a key consideration in the review of major retail and commercial developments occurring throughout Saskatoon. Office development is identified as a desired use in the downtown; however policies do not contemplate the impact of major office development locating in areas outside of the City Centre.



The City Centre

Sector Plans

New suburban development areas are intended to accommodate up to 70,000 people and OCP policies require sector plans to include significant employment lands in these new development areas to ensure opportunities are available for employment closer to where people live. As such, recently adopted sector plans have identified significant amounts of land for future employment outside of the City Centre. As growth continues, a careful balance is needed to ensure that these new employment areas meet projected demand for future jobs, while limiting negative impacts to the long-term viability of the City Centre.

Zoning Bylaw No. 8770

The Zoning Bylaw contains zoning districts that are specifically applied to the downtown and the corridors leading to it. These districts allow the highest densities in the city and permit a variety of commercial, institutional and residential uses. Recent amendments were made to the B6 – Downtown Commercial District to allow a building height bonus when a community benefit, such as a green roof or structured parking, is incorporated into the development.

In order to limit negative impacts to the City Centre and established commercial areas, the size of retail uses is limited in industrial districts. Office developments, which are a critical component of a healthy downtown, are listed as a permitted use in most commercial, industrial and institutional zoning districts and have no specific size limitations beyond the minimum development standards of the district. The flexibility of these districts and standards, and the pace of new growth, has resulted in major offices locating outside of the City Centre.

City Centre Plan

The City Centre Plan proposes several policy changes and initiatives that are intended to enhance the downtown experience and promote residential and employment growth in the core. Some of these recommendations include:

- Structured or underground parking requirement for buildings above 40m in height and greater than 5000 square metres in area,
- Surface parking lots as a primary use on a lot will not be a permitted use within the B6 zoning district, and
- Requirement that ground floors contain retail uses and have facades that comply with proposed architectural guidelines to enhance the City Centre streetscape and pedestrian realm.

Phase IV of the City Centre Plan includes the creation of a detailed Civic Precinct Master Plan that will serve to enhance the downtown experience.

Vacant Lot & Adaptive Re-Use Incentive Program

The Vacant Lot & Adaptive Re-use (VLAR) incentive program was initiated in 2011 to promote development on chronically vacant and/or brownfield sites and the adaptive re-use of vacant buildings within Saskatoon's established neighborhood's, including the City Centre. Applicants are given the choice of a grant or five-year tax abatement for eligible infill and adaptive reuse projects. The program is available to developers of residential, commercial, industrial and mixed-use sites provided they have been vacant for a minimum of 48 months. The maximum grant for commercial, industrial and mixed-use projects is \$200,000.

In 2014, as part of the City Centre Plan implementation, amendments were made to the VLAR program to add incentives to further promote Office and Structured Parking development in the downtown. These amendments include:

- Waiver of the 48 month vacancy requirements for office buildings and parking structures in the downtown,
- The expansion of office space within a downtown office building is now eligible for the grants and/or a tax abatement under the program,
- Any office or parking structure proposed in the downtown that does not otherwise meet the criteria of the VLAR program is eligible for a five year tax abatement equal to the incentive amount if a one-time grant were offered.

4.1.3 Summary

The OCP has several policies that support the goal of maintaining the City Centre as the focal point for administrative, cultural and retail activities within the city and region. Furthermore, the City of Saskatoon has undertaken several initiatives to maintain and enhance the prominence of the City Centre as the heart and centre of the city. The City Centre Plan has several short, medium and long term projects to realize the vision of Saskatoon's Downtown as a destination for the region and a premier location to live, grow innovative business, and enjoy the benefits of a strong community. As part of the City Centre Plan short term implementation priorities, amendments were made to the VLAR incentive program to promote the development of new office buildings and

the expansion of existing offices, development of surface parking lots and investments in parking structures. Other City Centre initiatives currently underway include a Comprehensive Parking Strategy and a Civic Precinct Master Plan that will contribute to the overall quality of the downtown environment.

Significant investments have been made in the City Centre to attract a portion of business and residential growth. Though it is important to create a balanced distribution of employment areas in proximity to residential areas, it is also important to maintain a strong City Centre that is the focal point of commerce for the city and region by continuing to promote growth in the city's core. However, because of the increasingly dispersed employment as the city grows, City Centre employment is not expected to grow at the same pace as population. Trends and developments within the City Centre and throughout Saskatoon should be continually monitored to ensure that the core remains a prominent employment area.

Key Findings

- It is important to maintain a strong City Centre that is the focal point of commerce for the city and region by continuing to promote growth in the city's core.
- As growth continues, a careful balance is needed to ensure that new employment areas meet projected demand for future jobs, while minimizing negative impacts to the long-term viability of the City Centre.
- Office development is a critical component of overall employment in the City Centre, particularly large offices.

- Flexible zoning districts and the recent pace of growth have created many opportunities for large office developments to locate outside of the City Centre in suburban and industrial areas.
- Trends and developments within the City Centre and throughout Saskatoon should be continually monitored to ensure that the core remains a prominent employment area as the city grows.

4.2 Balanced Distribution of Employment Areas

4.2.1 Goal

"To achieve a balanced distribution of employment areas throughout Saskatoon, supporting the efficient use of existing and planned transportation infrastructure and providing employment options closer to where people live"

4.2.2 Applicable Policies and Plans

City of Saskatoon Official Community Plan Bylaw No. 8769 (OCP)

Policies guiding the overall form and structure of Saskatoon support this goal by stating that the proximity of residential development to the downtown and other major areas of employment should be the goal in determining the overall form of the city. Furthermore, policies encourage significant commercial, multi-unit residential and community facilities to locate in or along major nodes and corridors to support the efficient use of infrastructure and encourage the use of public transit.



The OCP guides the location of commercial, mixed-use and institutional development areas throughout the city based on a hierarchy of population and area served. This has resulted in a relatively well balanced distribution of these types of employment uses throughout Saskatoon that are located in close proximity to where people live. Office development is primarily concentrated in the City Centre; however notable shares of office development can be found in City Park, Innovation Place, Stonebridge, Airport Business Area, and the North and Southwest Industrial areas.

Industrial employment areas typically require large parcels of land, convenient access to rail and highway infrastructure, and adequate separation distances from residential uses to minimize conflicts. Due in part to these factors, OCP land use policies direct the majority of new heavy industrial development to concentrate in a small number of separate locations, primarily in the north industrial area which provides easy access to rail, air and Highways 11, 12 and 16. As a result of this policy direction, the majority of industrial land is concentrated in the North West Industrial Area. Though the OCP does

not contain a similar policy directing light industrial development to concentrate in the city's northwest, light industrial development has clustered adjacent to the heavy industrial development in the northwest. Approximately 75 percent of all existing industrial zoned

land is located in Saskatoon's North West Industrial Area making it Saskatoon's second largest employment area today, by number of jobs. Figure 8 highlights the existing industrial areas in Saskatoon.

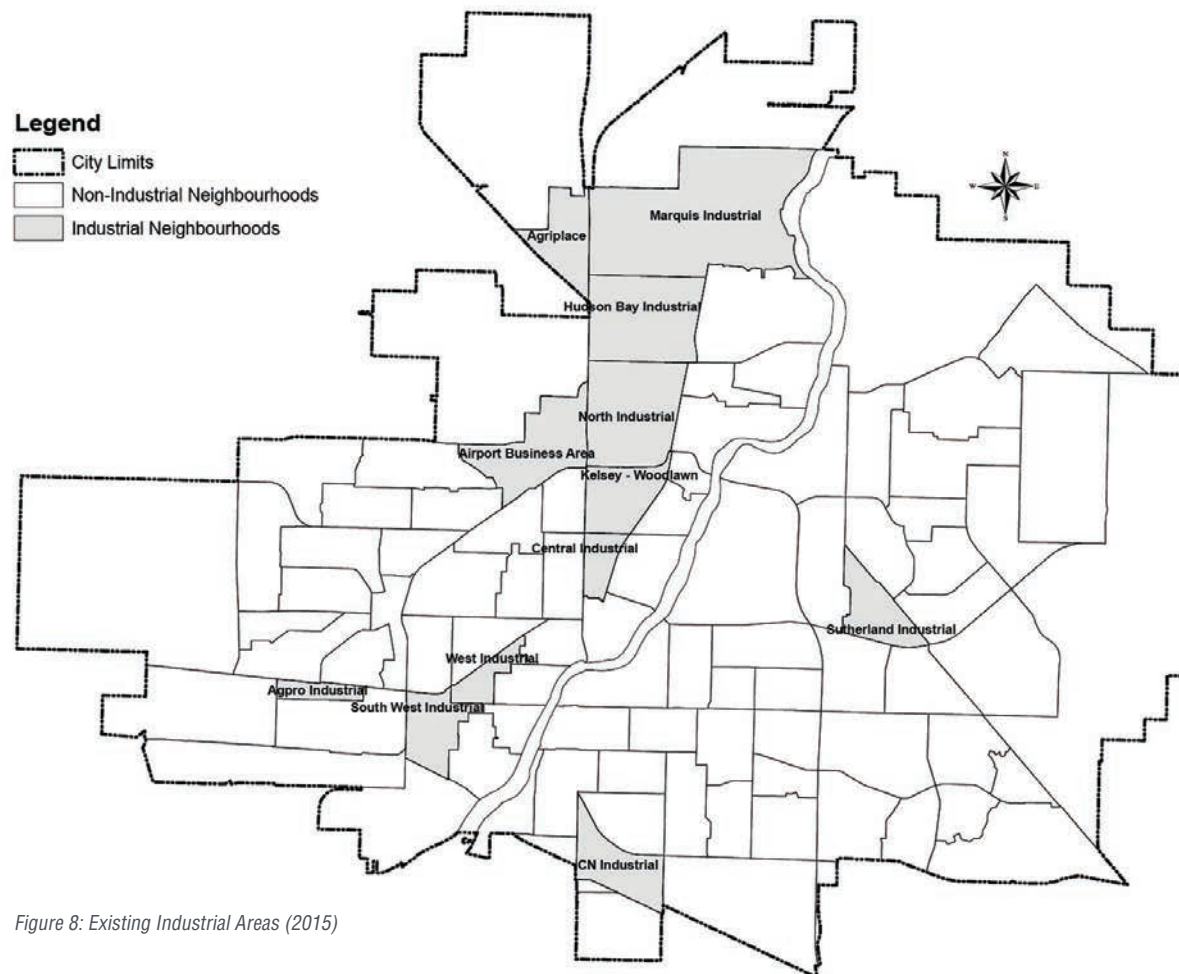


Figure 8: Existing Industrial Areas (2015)

Sector Plans

Sector plans are the primary tool used in planning for employment areas at a city-wide scale. In accordance with the policies of the OCP, sector plans for residential SDA's are required to identify the general location of future employment areas to ensure opportunities for employment are provided in proximity to where people live. In support of these policies, recently-adopted residential sector plans have identified some form of large commercial and/or industrial employment lands within their respective land use plans in addition to residential neighbourhoods. The recently adopted North Sector Plan and the forthcoming Southwest Sector Plan are centered on creating industrial employment areas and do not include a residential component.

Conducted in 2011, the *Commercial and Industrial Development Study* identifies the future amount of commercial and industrial lands to support Saskatoon's population to 325,000. The information in this report is used to help guide the amount and location of employment lands in the development of sector plans and subsequent planning work.

The North Sector plan includes an additional 1984 hectares (4903 acres) of land that is intended to accommodate primarily light and heavy industrial development. This supports the current OCP policies that direct the majority of heavy industrial growth to occur in the northwest. Concentrating industrial uses in the northwest has served Saskatoon well as the area is well served by rail, highways and air and, in many cases due to existing land use patterns, may not suitable for residential development. The employment projection, which is based on existing and in-progress plans and

policies including the North Sector Plan, has confirmed that a sufficient amount of land is available to support employment growth to 500,000 people.

City Centre and North Downtown Master Plan

These plans support the goal of creating opportunities for people to live closer to where they work, supporting the efficient use of existing infrastructure. A key objective of the City Centre Plan is to direct a portion of residential and business growth to the City's core while the North Downtown Masterplan will guide the development of a new residential and mixed-use neighbourhood adjacent to the City Centre.

University of Saskatchewan Lands

The University of Saskatchewan has significant land holdings within Circle Drive and in close proximity to the City Centre. The University, through its Vision 2057 planning process, has designated 401 hectares (991 acres) of endowment lands for potential mixed-use development over the next 50 years. These lands represent a significant opportunity to bring more residences in closer proximity to two of the city's largest employment areas, the Core Neighbourhood Area and the U of S. Based on data from the Vision 2057 document, these endowment lands have the potential to accommodate 40,000 new residents to the area, as well as significant commercial, recreational and institutional uses.

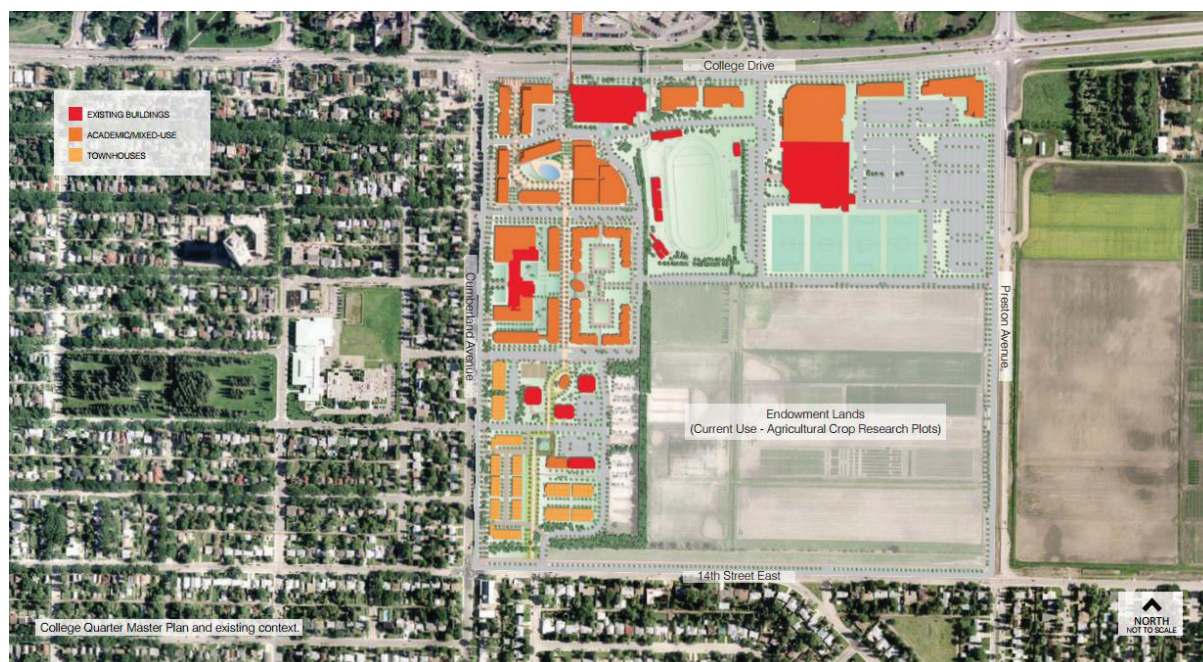


Figure 9: College Quarter Master Plan Concept, Source: College Quarter Master Plan Report, University of Saskatchewan, 2010

Located directly south of the main campus adjacent to College Drive the College Quarter Concept Plan is the first phase of Vision 2057, and includes 59 hectares (146 acres) of land. This site will be developed into a mixed-use site focused primarily, but not exclusively, on academics. It will accommodate a variety of commercial, institutional and residential uses that will serve the university and the surrounding community. This mixed-use development will create more employment opportunities in the university area and enable more people to live in the area.

4.2.3 Summary

Overall, Saskatoon's policies and plans affecting employment growth support the goal to create a balanced distribution of employment areas that support the efficient use of existing infrastructure and enable opportunities for people to live closer to where they work. Commercial, mixed-use and institutional uses are encouraged to locate throughout the city to serve the residential population and Suburban Developments Areas include a significant employment component. The University of Saskatchewan's long term plan for mixed-use development of its endowment lands will establish a strong population base close to the City Centre. Redevelopment of existing industrial areas such as the CN, Sutherland, South West and West industrial areas represents a significant opportunity to utilize existing infrastructure in areas that are already in close proximity to where people live.

The current policy direction to concentrate the majority of industrial development in the northwest has served the City well and has supported the identification of

sufficient lands to support employment growth to a population of 500,000. In the long term, policies and plans guiding the location of industrial areas should be reviewed to encourage a more balanced distribution of major industrial employment areas that support the efficient use of transportation infrastructure and consider the proximity to existing and planned residential areas.

Key Findings

- Commercial, mixed-use and institutional development is relatively well distributed throughout the city, located in close proximity to residences.
- The majority of industrial land is concentrated in the North West Industrial Area which accounts for 75 percent of all industrial zoned lands in the city. This is largely a result of the OCP policy that encourages the majority of heavy industrial land to concentrate in the North West.
- In the long term, policies and plans guiding the location of industrial areas should be reviewed to encourage a more balanced distribution of major industrial employment areas that support the efficient use of transportation infrastructure and consider the proximity to existing and planned residential areas.
- The potential mixed-use development of the University of Saskatchewan's endowment lands over the next 50 years, and development plans for the College Quarter area represent a significant opportunity to bring more residents in proximity to the city's largest employment areas, the Core Neighbourhood and the U of S areas.
- Redevelopment of existing industrial areas such as the CN, Sutherland, South West and West industrial areas represents a significant opportunity to utilize existing infrastructure in areas that are already in close proximity to where people live.

4.3 Travel by All Transportation Modes

4.3.1 Goal

"To ensure that existing and planned employment areas are well-designed, facilitate travel by all transportation modes (walking, cycling, automobiles, public transit) and support convenient and higher frequency transit service"

4.3.2 Applicable Policies and Plans

City of Saskatoon Official Community Plan Bylaw No. 8769 (OCP)

As detailed in section 4.2.2, the OCP contains policies that encourage an overall development pattern that is supportive of facilitating travel by all transportation modes. Transportation policies are centered on the objective to develop an urban form and settlement pattern that will enhance the efficiency of the transportation system and encourage a variety of transportation options to promote a balanced transportation system. Residential, commercial and employment infill development are encouraged as a means to support a variety of transportation options. The downtown is identified as the focal point of the transit system with transit routes provided within walking distance of most residential areas. Cycling policies promote design features for safe and convenient cycling to support the objective to facilitate cycling as an integral form of transportation within a balanced transportation system. Standards for bike parking facilities are encouraged to be included in the Zoning Bylaw. Pedestrian-oriented design is encouraged in new residential, institutional and commercial development areas. However, there is no such provision for pedestrian-oriented design in industrial areas which are

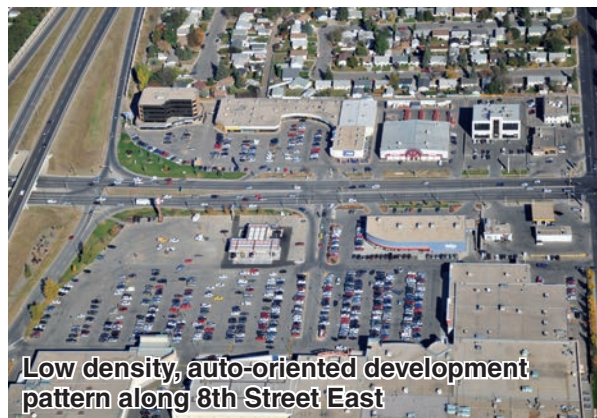
a major source of employment in Saskatoon, accounting for nearly one-third of city-wide employment.

The OCP includes a firm requirement that a concept plan be submitted and approved by Council prior to subdivision and development within any new neighbourhood. There is no explicit requirement for submission of a concept plan for non-residential development areas. As such, the development of large commercial or industrial areas has typically been piecemeal with subdivision and zoning possible with no more than an approved sector plan for the area. This means that there has typically been no comprehensive area plan with sufficient detail to guide a cohesive and integrated development pattern.

Zoning Bylaw No. 8770

Development standards in the zoning bylaw are primarily focused on parking and access requirements for private vehicles only. There are no standards specific to pedestrian and cycling facilities, including bike parking.

Most zoning districts enable a low density development pattern where buildings are set back from the street with parking in the front of the building along the



Low density, auto-oriented development pattern along 8th Street East

principal street. Furthermore, development along major arterials is typically segregated between individual sites often with physical barriers that force people and motorists to use the public street to access adjacent developments. These development patterns are car-oriented and do not support walking, cycling or transit usage. One of the key components of the Growth Plan is to encourage a development pattern that supports all modes of transportation including walking, cycling, transit and driving.

To enable a development pattern that supports transportation choice, the B4MX – Integrated Commercial Mixed-Use District has been added to the zoning bylaw. The B4MX district promotes a compact pedestrian-oriented built form that supports a variety of transportation options, street-oriented buildings and active uses at grade level. This new zoning district is intended to be applied to arterial roadways in new neighbourhoods and to existing arterial roadways as they are redeveloped into more urban, pedestrian and transit-oriented streets. As the Growth Plan is implemented, it is anticipated that new zoning districts and/or standards will be created to achieve a built environment that supports the use of a variety of transportation options.

Recent amendments to the OCP and zoning bylaw have allowed for site plan control on regional commercial sites. Site plan control provides the approving authority with the ability to require enhancements to site design that address traffic calming, pedestrian access between buildings, parking areas, internal and external sidewalks and transit stops to promote safety on the site. The application of site plan control allows the Development Officer some ability to improve pedestrian and transit access to and within a particular site. Without site plan

control civic administration has limited ability, beyond the minimum standards established in the Zoning Bylaw, to require enhancements to site design to improve safety and connectivity for all modes.

Sector Plans

Recently adopted sector plans have placed high importance on the need to consider all transportation modes when undertaking more detailed design work for residential and employment areas. The University Heights, Holmwood, Blairmore and North Sector plans require that any Traffic Impact Assessments address pedestrian, cycling and automobile transportation. Furthermore, in the absence of city-wide design guidelines these sector plans also include general design guidelines and principles for their respective employment areas.

Though the OCP does not explicitly require concept plans for non-residential areas, recently adopted sector plans have included the requirement for concept plans to be submitted for commercial and industrial employment areas within the sector. Through the concept plan process a comprehensive plan for individual employment areas is created which enables the needs of all transportation modes to be better integrated into the overall design of the development area.

Roadway Design Standards

Standards for roadway design can have a significant impact on the built environment in employment areas and can affect the ability to fully achieve the policies in the OCP and a goal of this study to support the use of all transportation modes as a means to get to work.

The City of Saskatoon Roadway Design Standards provide detailed specifications and drawings for the various roadway classifications in Saskatoon, including requirements for pedestrian and cycling facilities. According to these standards, sidewalks are not required on industrial roadways and are only required on one side of arterial streets.

University of Saskatchewan Lands

Vision 2057 and the College Quarter Master Plan have identified over 404 hectares (1000 acres) of University lands for future mixed-use urban development. The development of these lands will result in more people living closer to the Core Neighbourhood and U of S employment areas thereby enhancing opportunities for greater use of alternative transportation modes to work. Furthermore, the intent to develop these lands into a mixed-use community that includes opportunities for commercial, institutional and residential development promotes greater use of all transportation modes. Increasing the residential and employment population on the University lands will support greater use of public transit as more people will be living and working close to the proposed bus rapid transit route along Preston Avenue and College Drive.

Active Transportation Plan

The ATP is another integral component of the overall Growth Plan. Currently under development, this plan will look at ways to increase opportunities for safe and easy walking to daily activities, including to areas of employment. The final plan will recommend improvements to active transportation facilities, policies

and programs that will help provide more safe and convenient transportation choices for moving around Saskatoon. Recommendations from the ATP will support the enhancement of walking, biking and other modes of active transportation in new and existing employment areas, residential areas, along future bus rapid transit corridors, transit hubs and on core area bridges.

Bus Rapid Transit (BRT)

A key component of the Growth Plan is the development of a long-term transit plan that includes an enhanced customer experience, improved transit services and facilities as well as the provision of BRT. BRT will complement the overall transit system and serve as the spine of the transit network. The proposed BRT system will enhance opportunities for residents to use transit as a means to get to work.

Figure 10 shows the recommended east-west and north-south BRT corridors. The proposed BRT network will serve existing, new and growing employment areas. The Downtown, U of S and Core Neighbourhood employment areas will benefit from more frequent and direct transit service. The proposed red and blue BRT lines will support employment growth along major corridors and will enhance connections to new and growing employment areas in the north and in two new suburban centres located in Blairmore and Holmwood.

4.3.3 Summary

To enable more opportunities for alternative transportation modes the OCP encourages new residential development to be located in proximity to the downtown and other major employment areas. Significant commercial, multi-

unit residential and community facilities are encouraged to concentrate along designated nodes and corridors to support greater use of public transit. The development of the University of Saskatchewan lands will greatly enhance opportunities for alternative transportation modes adjacent to the Core Neighbourhood employment area and the proposed east-west bus rapid transit route.

The OCP contains policies that encourage development to provide facilities for walking, cycling and transit. However, the lack of a firm policy requirement for commercial and industrial area concept plans makes it difficult to achieve an integrated and connected development pattern that supports a variety of transportation options in these areas. Furthermore, the OCP does not contain policies requiring incorporation of facilities for cyclists, pedestrians and transit in industrial areas and the City's Roadway Design Standards do not require sidewalks on industrial roadways. This lack of policy direction to accommodate non-motorized travel modes in industrial areas has resulted in a development pattern in these areas that favours use of private automobiles.

The implementation of site plan control on regional commercial sites provides civic administration with the ability to enhance the design of these sites to better accommodate all transportation modes. At this time, regional commercial sites are the only type of employment area where site plan control can be applied.

Though commercial and industrial concept plans are not an explicit requirement in the OCP, sector plans now include a requirement for a detailed area concept plan to be submitted for the commercial and industrial employment areas identified within the sector. Also, recently adopted

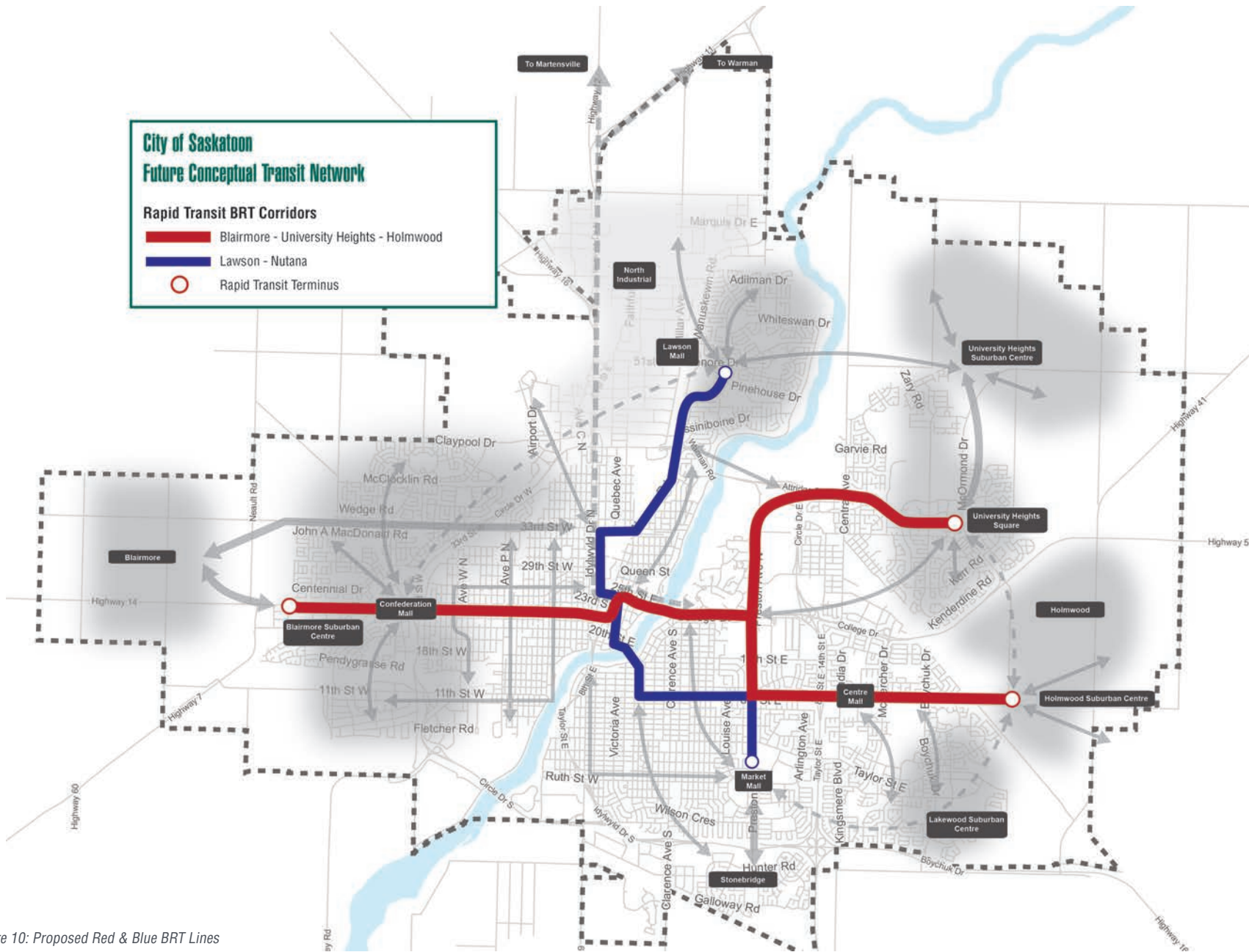


Figure 10: Proposed Red & Blue BRT Lines

sector plans such as Holmwood, University Heights and the North Sector have included general employment area design guidelines and principles to achieve a high quality urban environment. There is a policy gap when it comes to area concept plan requirements and design guidance for non-residential areas.

The Growth Plan will support transportation choice in new and existing employment areas. The proposed BRT system will enhance opportunities for transit use to new and existing employment areas and will support employment growth along the rapid transit corridors. The Active Transportation Plan will support the enhancement of alternative transportation modes, such as walking and cycling, in all employment areas.

Key Findings

- Most zoning districts enable a low density development pattern that favours the use of private automobiles over other transportation modes such as walking, cycling and transit.
- The OCP lacks explicit requirements for non-residential concept plans. As a result, development in these areas is often piecemeal, making it difficult to achieve an integrated and well-designed employment area that is supportive of all transportation modes.
- The lack of OCP direction to accommodate non-motorized travel modes in industrial areas coupled with roadway design standards that do not require sidewalks on industrial roadways, has resulted in a development pattern in these areas that favours the use of private automobiles.
- In the absence of city-wide design guidelines, recently adopted sector plans have included general design guidelines and principles for their respective employment areas.
- There is a policy gap when it comes to area concept plan requirements and design guidance for non-residential areas.
- Site plan control has been implemented on regional commercial sites; however no other employment areas have been identified as areas where site plan control can be applied.
- The proposed BRT system will enhance opportunities for transit use to new and existing employment areas and will support employment growth along the rapid transit corridors.
- The development of the University of Saskatchewan lands will greatly enhance opportunities for alternative transportation modes adjacent to the Core Neighbourhood employment area and the proposed east-west BRT route.

Auto-oriented development pattern at Preston Crossing



5.0 Recommended Policy Directions

Through the policy review, detailed in Section 4.0, a number of recommended policy directions have been identified to enable full achievement of this study's goals for employment areas.

5.1 Employment Areas as Comprehensively Planned Units

A critical first step in achieving employment areas that are well-designed and accessible to all transportation modes is to consider employment areas as comprehensively planned units rather than the current practice of considering them as generally undefined areas featuring one or two “blanket” land uses. The Official Community Plan has well-defined policies regarding the design and development of neighbourhoods. However, this same level of policy direction is not provided for employment areas. Policies related to employment areas are limited to the individual land uses that make up an employment area. The absence of overarching policies to guide the detailed design and development of an employment area makes it difficult to achieve a high quality of urban design that is supportive of a mixture of amenities and all transportation modes. The result is employment areas that are developed in a piecemeal manner, lacking a cohesive and connected development pattern.

The following recommendations provide direction for future policy development to achieve comprehensively planned employment areas that are well-designed and accessible to all modes of transportation.

5.1.1 Official Community Plan Amendments

Amendment #1: New Employment Areas Section

In order to begin planning for employment areas as a whole, rather than the individual land uses that comprise such areas a new “Employment Areas Design and Development” section should be added to the OCP. This section could be structured similar to the existing “Neighbourhood Design and Development” section in the OCP containing an objective statement and policies that would guide the development of detailed area concept plans for employment areas. Establishing policy that considers employment areas as a whole will provide decision makers with the framework necessary to encourage existing and new employment areas to achieve a higher quality of design that is well-integrated with surrounding areas and supportive of all transportation modes. To further support the OCP direction to encourage opportunities to live and work in close proximity, this section could provide guidance as to when it may be suitable to incorporate residential uses into areas intended primarily for employment.

Amendment #2: Clearly define when Non-Residential Area Concept Plans are required

The area concept plan process is an important tool to implement the policies of the OCP and ensure a coordinated development pattern with a high quality of urban design. The OCP is explicit in its requirement that an area concept plan be approved by Council prior to a neighbourhood being subdivided or developed; however this same requirement is not explicit for non-residential development areas. Though not an explicit requirement in the OCP, the recently approved North Sector plan requires that industrial area concept plans be undertaken to ensure growth occurs in a compact and contiguous manner by comprehensively addressing key land use, transportation and servicing components. To align with current practice and ensure that employment areas achieve a high quality of design and are planned in a comprehensive manner, the OCP should be amended to clearly state that an area concept plan should be required for non-residential development areas prior to being subdivided or developed.

Amendment #3: Expand areas where Site Plan Control can be applied

Site plan control is intended to be used in areas with high traffic volumes where there are potential public safety concerns, including conflicts between pedestrians

and vehicles. It provides civic administration with some ability to require a higher quality of site design that takes into account site access/egress, pedestrian circulation and safety, landscaping, and placement of buildings. At this time, site plan control can only be utilized on regional commercial sites. To achieve more comprehensively planned employment areas, the OCP and Zoning Bylaw should be amended to identify additional commercial and industrial areas where site plan control can be applied.

5.1.2 Review Non-Residential Zoning Regulations

Zoning regulations are an important tool to implement the policies of the OCP and the overall land use plan set out in area sector and area concept plans. It is through the zoning and development permit process that proposed developments on each parcel within an employment area are approved and constructed. It is critical that suitable zoning districts are available, with appropriate land uses and development standards, to ensure that development on the ground aligns with the overall vision and land use plan adopted in area sector and area concept plans.

Industrial zoning districts, in particular, tend to be more permissive than most zoning districts in terms of the variety of land uses permitted. While this flexibility is an intentional benefit of industrial zoned land, it can lead to ad hoc development patterns that could undermine the intent of employment area sector and concept plans. For instance, the North Sector Plan identifies specific areas within the sector where commercial nodes should be located. It may not be possible to achieve these nodes as viable commercial locations if significant retail development is permitted throughout the sector. In this circumstance, a review of the industrial zoning districts

should be conducted to ensure that they are able to remain flexible while maintaining a character of primarily industrial land use.

As new area sector and area concept plans for employment areas are brought forward, non-residential zoning regulations should be reviewed periodically to ensure that the overall vision and land use plan for these plans is realized as development occurs.

5.1.3 Employment Area Design Guidelines

One of the key goals of this study is to achieve employment areas that are well-designed and accessible to all transportation modes. Establishing OCP policies that consider employment areas at the same level as neighbourhoods and adding clear and consistent requirements for area concept plans is a critical first step in achieving a higher quality of urban design and a more coordinated development pattern. The creation of urban design guidelines for employment areas would support this by establishing a greater degree of clarity on how to achieve the desired outcomes for employment areas as outlined in the OCP.

Employment area design guidelines would outline the City's expectations regarding the comprehensive design of the entire employment area and individual parcels within the area. This would provide property owners, developers and civic administration with a common understanding and clear expectations on how to achieve well-designed employment areas that support all modes of transportation. It is envisioned that these design guidelines would be used to evaluate area concept plans, redevelopment plans and individual development proposals to encourage a higher quality of site and

building design that supports the policies and objectives in the OCP. These guidelines would provide direction on site and building design addressing matters such as, but not limited to:

- Transit orientation,
- Building placement and orientation,
- Access and circulation for all transportation modes,
- Parking design,
- Landscaping,
- Outdoor Storage,
- Signage, and
- Architectural design features.

The creation of these design guidelines will require alignment and/or integration with other policies, such as roadway design standards, signage regulations, park development guidelines, etc.

5.2 Future Industrial Land

The City's Official Community Plan directs that the majority of heavy industrial development be concentrated in the city's northwest. As a result of this policy direction the majority of existing and planned industrial development is focused in the North West Industrial Area. Concentrating industrial development in the northwest has served the city well as the area is well served by major roadways, rail and air and is not suitable for residential development. The employment projection, which includes future industrial lands identified in the North and South West Sector Plans, indicates that this area will accommodate nearly 30 percent of city-wide

employment when the city reaches a population of 500,000. Also, within that same timeframe, 62 percent of residents are expected to live on the east side of the South Saskatchewan River.

Given the significant concentration of existing and proposed industrial lands in the North West Industrial Area, it is recommended that the current OCP policy that encourages the majority of heavy industrial development to be concentrated in the city's northwest be removed. Policies that guide the location of future industrial land should be more general and include consideration of matters such as:

- Balanced distribution of employment areas,
- Impacts to existing and planned infrastructure,
- Commuting patterns,
- Proximity to existing and future residents, and
- Results of environmental screenings.

Residential sectors plans should continue to incorporate one or more significant industrial employment areas, where feasible. New employment-only sector plans, such

as the South West, should be considered at locations other than the northwest for the possible establishment of major new employment growth areas. Also, in future planning work, consideration should be given to emerging best practices relating to mixing employment with residential and other types of uses.

5.3 City Centre Office Development

Retaining the City Centre as the heart of commerce in Saskatoon and the region is a key goal of this Study. Furthermore, several initiatives have been completed or are underway that are focused on enhancing the City Centre to ensure that a portion of residential and employment growth is directed there.

The employment projection, based on current plans and policies, indicates that the Core Neighbourhood Area (includes the City Centre) will no longer be the largest employment area as Saskatoon reaches 500,000 people. Within the Core Neighbourhood Area (CNA) the city-wide share of employment in the Central Business District (CBD) is projected to decrease to 11.3 percent from

the current 16.6 percent. Though the overall share of employment decreases in the CBD it is important to note that 10,800 employees will be added to the downtown area. Lands within the CBD are constrained by geography and are fully serviced meaning that any additional employment in this area is a result of redevelopment and/or intensification of existing properties.

In addition to supporting growth in the City Centre, OCP policies encourage significant employment opportunities to be provided for within suburban development areas. This policy direction has resulted in several employment areas being proposed in new suburban development areas creating opportunities for businesses to locate or relocate to an area outside of the City Centre. Specifically, office development is a major employment generator in the City Centre. To ensure that the City Centre continues to be the preferred location for major office developments, a supplementary report has been prepared with a key focus on identifying options to ensure that the City Centre remains the pre-dominant office employment area in Saskatoon.



South Saskatchewan River, looking north

6.0 Conclusion

This Study has two main components: an employment projection and a policy review. The intent of the employment projection was to determine if enough land will be available to support employment at a population of 500,000. The policy review focused on reviewing existing policies and plans that shape employment growth in Saskatoon to determine if our current direction for employment growth will guide us in achieving employment areas that are well-designed, accessible to all modes of transportation, and located closer to where people live, while maintaining a strong City Centre.

The employment projection which is summarized in Section 3.0 indicates that there is sufficient land available to support employment growth to a population of 500,000 people. The recommended policy directions in Section 5.0 provide suggestions for future policy development so that growth in new and existing employment areas supports the goals for employment areas outlined in this Study.



Office park example

Appendix A: Job Distribution Model Methodology

Job Distribution Model

The job distribution model allocates the projected job growth across the city for each population horizon (300,000, 400,000 and 500,000) based on the City's approved and in-progress growth plans and assumptions about job growth in existing built up areas of the city. In all cases, these allocations should be considered as "best guess" estimates based on the available information at the time of the study and reasonable assumptions made about likely future development. A high degree of accuracy at this scale, given the multi-decade timeframe, is not possible. However, this modelling exercise provides a reasonable methodology to predict future employment land needs and the general distribution of jobs around the city. Table 1 provides a summary of the job distribution model.

Population Horizon	222,189	300,000	400,000	500,000
Allocation Area				
Central Business District	20,322	22,222	25,188	31,139
U of S Lands	16,665	20,067	24,478	27,690
Existing Industrial	39,513	45,865	55,714	61,467
Existing Neighbourhoods	34,042	34,592	35,643	37,857
Existing Suburban Centres	7,851	8,460	8,774	8,774
Future Growth Areas	2,929	32,731	68,860	105,988
Existing Management and Residual Areas	950	1,154	1,466	2,025
Projected Job Count (projection-based)	122,272	165,092	220,123	275,153

Table 1: Job Distribution Model Summary

Central Business District

The job allocation for downtown was extrapolated from projection work completed by MXD Development Strategists in the *2011 City of Saskatoon Commercial & Industrial Development Study*. This study projected the demand for growth in floor area for retail, office and hotel uses in the downtown from a then population of approximately 230,000 to a city population of 325,000. The projected growth in floor area to 325,000 population was scaled to obtain floor area projections for 300,000, 400,000 and 500,000 population horizons. Jobs at each horizon were then allocated to the downtown based on current data relating the number of jobs to floor area and use. Intermediate job projections (350,000 and 450,000 populations) reflect the trend lines between the major population horizons.

University of Saskatchewan (U of S) Lands

The job allocation for the U of S lands was based on the land uses and phasing described in the University's Vision 2057 report. Job yields for each land use type and area were estimated by applying land area-based job yield ratios derived from existing land uses in the city, adjusted where necessary for land use types, land use mixes and built forms not currently present in Saskatoon. It is necessary to qualify the job allocation for U of S lands given the very conceptual nature of Vision 2057 and the significant assumptions made about likely yields for each area. As more detailed planning for the U of S lands occurs, it is expected to provide more precise estimates of likely employment.

Projections for areas outside of Vision 2057's scope include the Preston Crossing expansion and the hospital area (Saskatchewan Children's Hospital). Job allocation for these areas was calculated using floor area-based job yields for each land use type and assumptions about likely floor area based on the best available knowledge about each project.

Existing Industrial Areas

The job allocation for existing industrial areas was based on a number of assumptions that were generally applied on an area-wide basis. To determine target¹ job densities by area, three classes of industrial areas were established with a corresponding job density assumption assigned to each type (see Table 2).

These job densities were based on observed values in existing industrial areas that were considered to be typical of each type at maturity. All existing industrial areas were then classified according to these types and the corresponding future job count was determined by applying the area-based target.

In general, it was assumed that there is a transition in the characteristics of industrial areas over time with less intense uses giving way to more intense uses as areas mature and land values increase. The model therefore assumes that industrial areas with job densities below a certain range will develop or redevelop such that the job density at the 500,000 population horizon is reflective of the target associated with each area's type.

Existing Neighbourhoods

In general, job growth in existing neighbourhoods is assumed to be very modest (approximately 10.9 percent over the timeframe from the present to a population of 500,000). This is assumed to account for an increase in jobs due to gradual neighbourhood maturation and continued growth of home based businesses. While it must be acknowledged that circumstances may change over the course of three to four decades, and redevelopment may cause a more significant increase in jobs in specific areas, there are contradicting factors such as the closure of schools and other existing institutions that may mean a loss of jobs in others. Given the difficulty in predicting such occurrences and the relatively low proportion of overall jobs present in most neighbourhoods the "constant, gradual change" assumption is deemed to be reasonable for a city-wide model.

For certain unique neighbourhoods, such as core neighbourhoods, Local Area Plan neighbourhoods and other areas where significant redevelopment is expected

or already occurring, some reasonable assumptions were made about likely increases in job counts over time, using the current job counts as benchmarks. Because of their mixed-use nature, proximity to downtown and other employment/commercial districts, and already-significant counts of employment, it is assumed that these areas will add more jobs over time than typical residential neighbourhoods. Examples where such assumptions were made include Riversdale, Pleasant Hill, City Park, etc.

Existing Suburban Centres

For existing suburban centres, (deemed to be Nutana, Lakewood, University Heights, Confederation and Lawson), the assumption was made that jobs will remain constant over the model timeframe. With the exception of Lakewood and University Heights, existing suburban centres were deemed to be fully built out meaning that there is no change in job allocation over the model timeframe. For the Lakewood and University Heights Suburban Centres, jobs were allocated until each achieved an employment density of 21.2 jobs per hectare (assumed to be typical based on job density in Nutana Suburban Centre, excluding the B4-zoned area). Given the degree to which these two suburban centres are already built out, it was assumed that all of the job growth occurs in the timeframe from the current population to 300,000.

Type	Target Jobs/Hectare	Typical Example(s) (current)	Future Examples (assumed; in addition to current)
Standard Industrial	22	North Industrial, Hudson Bay Industrial, Sutherland Industrial	Many, including: Marquis Industrial, Agriplace, CN Industrial, South West Industrial
Employee-Intensive Industrial	36	Kelsey-Woodlawn (industrial area only)	Airport Business Area, Central Industrial
Outdoor Industrial	3	Agpro Industrial	none

Table 2: Industrial Area Types

¹ "Target" is used throughout this explanation of the model to refer to maximum assumed density and/or total number of jobs at maximum build-out within the job distribution model. It is not intended to suggest that the City has established (or should establish) job density targets as a matter of policy.

Future Growth Areas (sector plans and neighbourhoods in development)

The job allocation and timing for the University Heights, Holmwood, North and South West sector plan areas was based on the estimates and phasing plan included in each respective sector plan. In some cases these values were draft as the North and South West Sector Plans were not finalized at the time of modelling. In the case of Blairmore, the job allocation was based on the jobs/hectare estimates from Holmwood (Blairmore Sector Plan did not include job yield estimates) but was based on the phasing plan from Blairmore.

In all cases, developing neighbourhoods outside of the above sector plan areas (i.e. Hampton Village, Stonebridge and Rosewood), did not include estimates of job yields. In each case, target job density was set based on comparison with job densities in established and planned neighbourhoods assumed to have a similar land use mix and density. Existing jobs in these areas were subtracted from the projected future allocation to determine the anticipated job growth, which was assumed to occur within the present population-to-300,000 timeframe.

Existing Management and Residual Areas

For the most part, existing management areas (e.g. Gordie Howe Management Area, Sask Power Management Area, etc.) and other residual areas not identified for city growth were assumed to retain, but not increase, their current job count.

The exception is the Airport Management Area where employment was assumed to be related to passenger traffic. The measured job count was used to calculate a ratio between these values. Recent historic trends in passenger growth (calculated to be 4.56 percent since 2010) were assumed to moderate over time to ultimately reflect the assumed city growth rate of 2.5 percent. The job/passenger ratio was then applied to calculate employment for each time horizon.



Kelsey-Woodlawn Industrial Area

