Photo credit: Tourism Saskatoon

OCTOBER 2021

GROWTH MONITORING Report

City of Saskatoon

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INTRODUCTION

The Growth Monitoring Report is an annual report that provides information on residential, commercial, and industrial development in Saskatoon, as well as several other growth-related indicators for the city. This report includes general demographic changes and statistical information on how the city is growing, as well as specific information on planned servicing of residential, commercial, and industrial lands, and information on potential infill projects in the city.

The report provides data that will help monitor progress towards policy goals, plan servicing needs, and inform policy and program reviews. It includes the following:

- summary of City of Saskatoon (City) guiding documents and targets;
- summary of key indicators;
- review of demand profiles;
- builder and developer inventory levels and housing market assessment;
- market absorption and new neighbourhood build-out time frames;
- inventory of infill opportunities on lands owned by the City; and
- planned servicing schedules for 2022 to 2024.

The Growth Monitoring Report is produced by the City. As part of this process, Administration collects servicing information from all major land developers in Saskatoon. The collected information is used by various departments to plan and budget for growth-related infrastructure including investments that are detailed in the Land Development Capital Budget.

CITY OF SASKATOON GUIDING DOCUMENTS AND TARGETS

CITY OF SASKATOON GUIDING DOCUMENTS & TARGETS

Official Community Plan & Strategic Plan

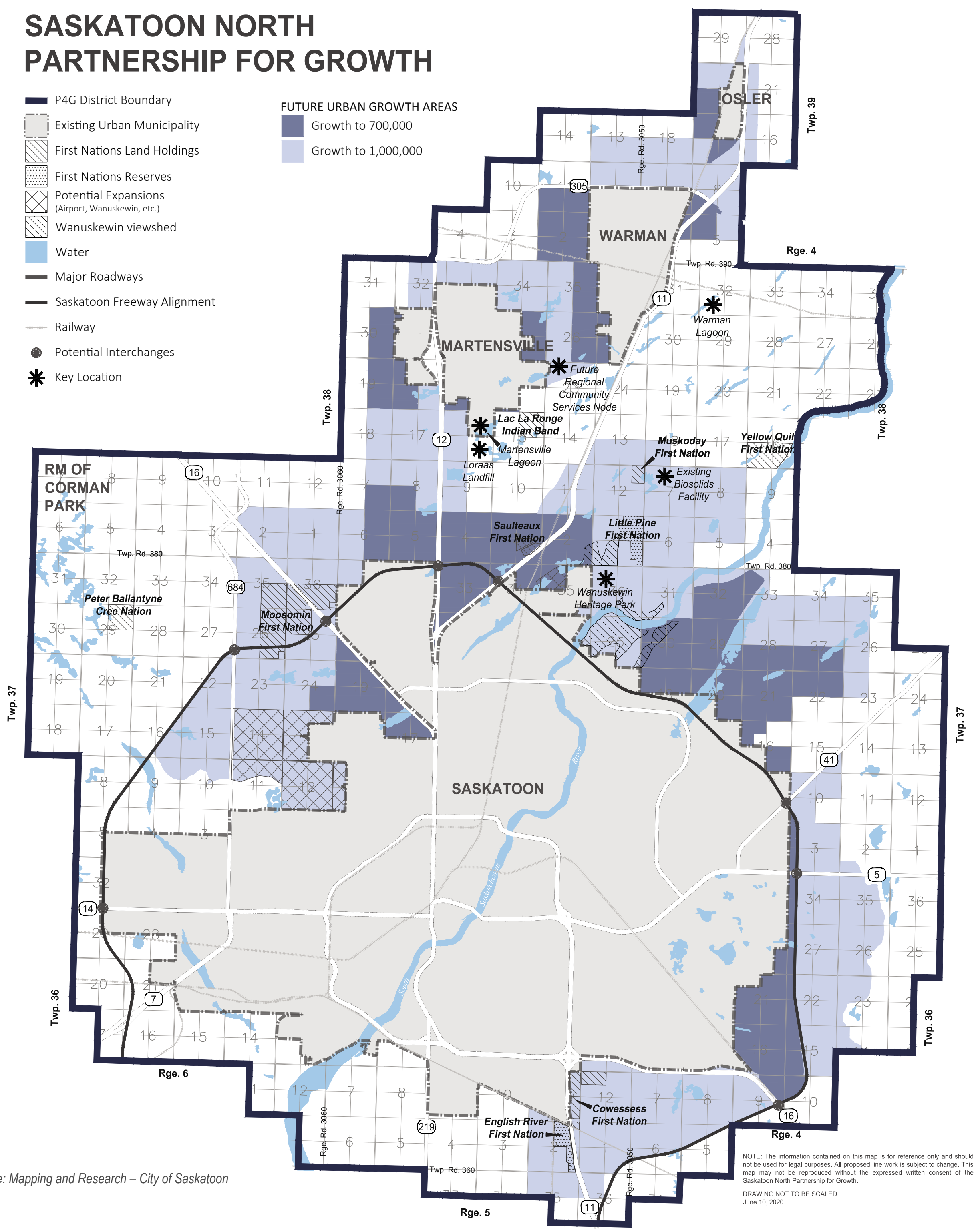
The Official Community Plan is a bylaw that provides a comprehensive policy framework for long-term planning and development in Saskatoon. It guides the physical, environmental, economic, social, and cultural development of our community through a broad set of goals, objectives, and policies. The City of Saskatoon Strategic Plan identifies short-term (four year) priorities for achieving those goals and objectives. The two documents work together to guide how development occurs in Saskatoon.

Saskatoon North Partnership for Growth (P4G) Region

The latest projections show that within the next twenty years, the Saskatoon Region will reach a population of 500,000. Given the economic climate, it is anticipated the Saskatoon region could achieve a population of one million in the next sixty years. The region should be ready for growth, to enable economic prosperity and support quality of life for all residents. This has reinforced the need for a more coordinated approach to regional planning and servicing. The City is the urban centre of the P4G Region. The P4G Region is comprised of the cities of Saskatoon, Martensville, and Warman, the town of Osler, and the Rural Municipality of Corman Park No. 344.

Photo Credit: Tourism Saskatoon

Figure 1: Saskatoon North Partnership for Growth (P4G) Future Urban Growth Areas



Source: Mapping and Research – City of Saskatoon

Plan for Growth

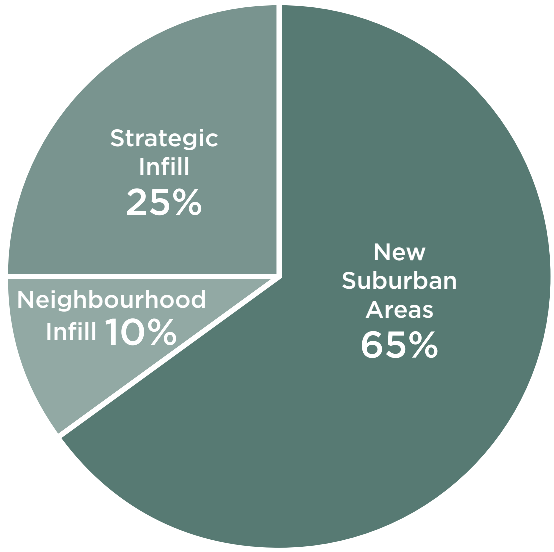
In 2016, the City approved the Growth Plan to Half a Million (Plan for Growth), which set a new direction for how the city will grow, develop, and move around. A key direction from the Plan for Growth is a shift in how and where the city will develop. It includes a goal of 50% of new growth to be infill, with 25% being Strategic Infill, 10% being Neighbourhood Infill, and 15% being Corridor Growth. This represented a substantial shift in Saskatoon's overall growth pattern. Figure 2 compares the growth pattern that existed at the time of the Plan for Growth's approval (February, 2016) and the new direction included in the Plan for Growth.

The City currently has several projects underway or recently completed to support the direction of the Plan for Growth. These projects include the recently completed University Sector Plan for the University of Saskatchewan's Endowment Lands (a Strategic Infill site), as well as the Corridor Planning Program that is developing plans for how Saskatoon's major transportation corridors can be expected to change and accommodate new infill growth.

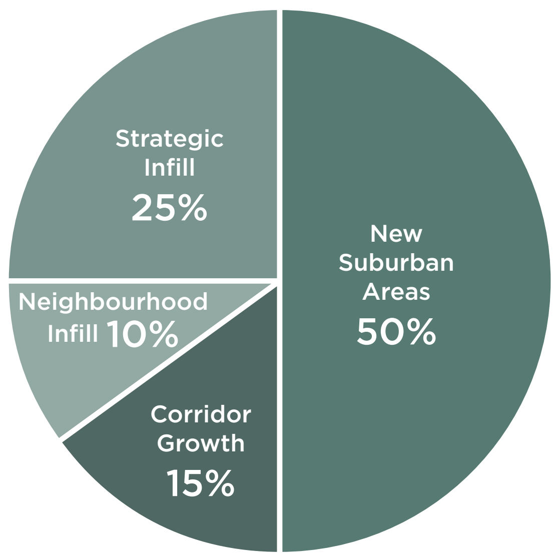
Figure 3 shows the locations of planned growth in Saskatoon, including Strategic Infill, Neighbourhood Infill, and Corridor Growth areas, as identified in the Official Community Plan. Table 1 on page 13 outlines detailed target levels for each area identified as part of the Plan for Growth, and actual population numbers for each.

Figure 2: Distribution of Population

Current Growth Framework

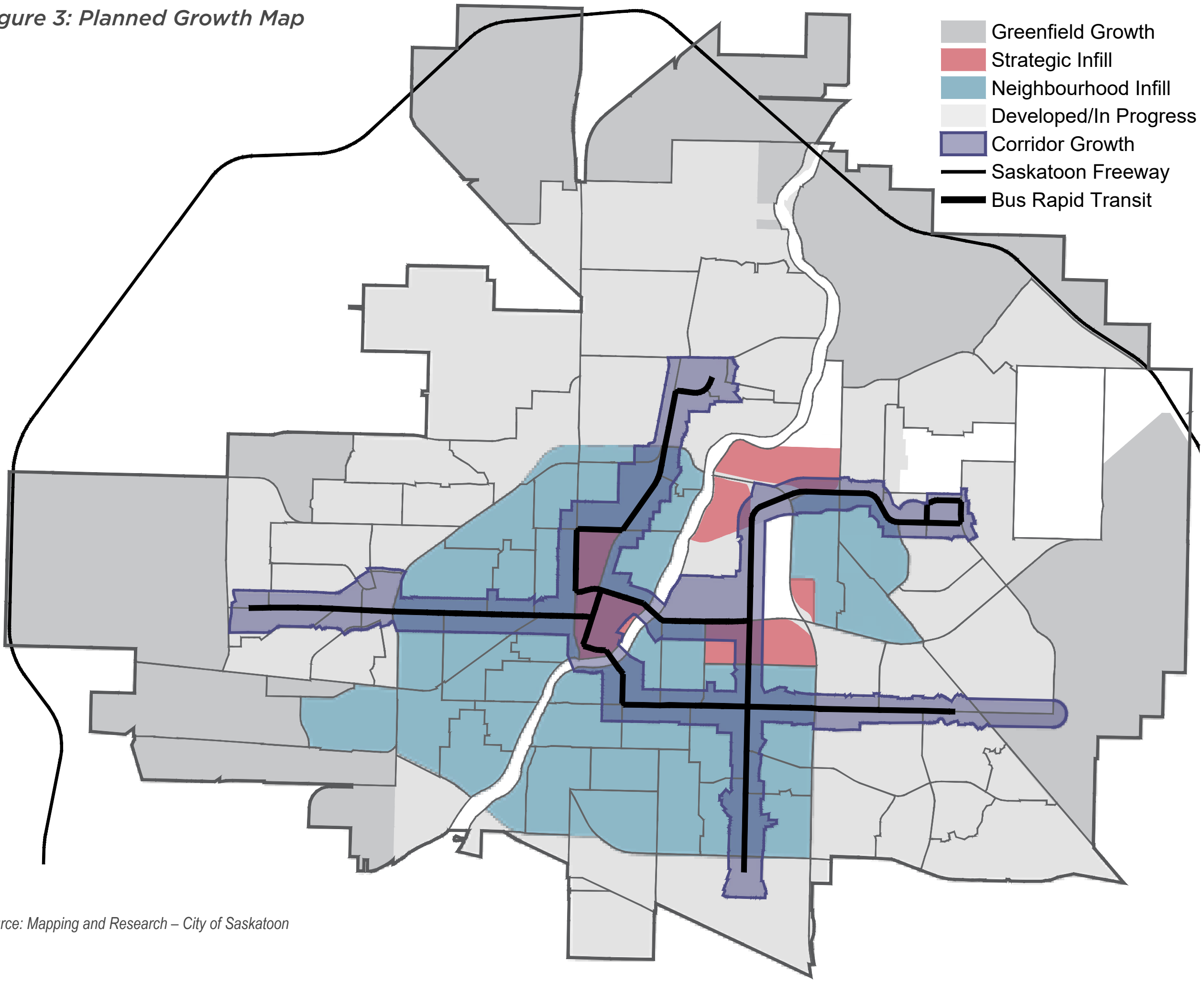


Planned & Corridor Growth



Source: Mapping and Research – City of Saskatoon

Figure 3: Planned Growth Map



Source: Mapping and Research – City of Saskatoon

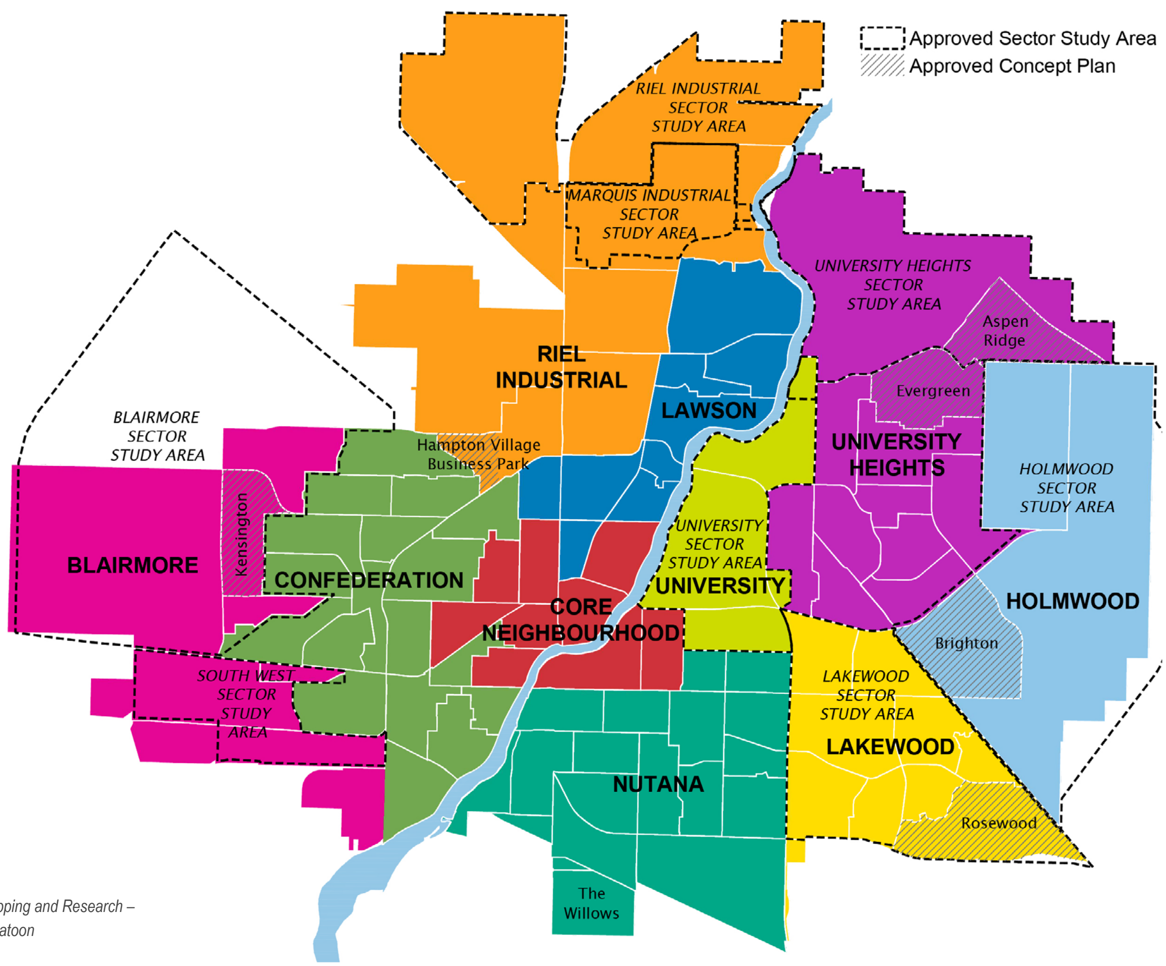
Sector Plans & Concept Plans

Sector Plans provide a framework for how large areas of land (six to ten neighbourhoods and their supporting amenities) are to be developed. They guide growth in Saskatoon by providing direction on the size and location of neighbourhoods, commercial development, major infrastructure, and open space, as well how development will be phased.

There are currently five active residential sectors that are under development – Blairmore, Holmwood, Lakewood, University, and University Heights. In addition, the Riel Industrial Sector Plan guides industrial development in Saskatoon's north end. The University Sector Plan, which was approved by City Council in April, 2021, is the first Sector Plan developed for an existing, built-up area of the city. The completion of this Sector Plan has been a key step toward achieving the City's infill goals. It provides the framework for the development of the largest collection of infill areas available in Saskatoon.

Once a Sector Plan is in place, a Concept Plan can then be created for an individual neighbourhood or development area within a Sector. To ensure the City achieves its vision of compact, contiguous development, residential development occurs in a phased fashion with development of a new neighbourhood in a Sector not beginning until the preceding neighbourhood has been substantially completed. Figure 4 shows the locations of active Sectors, including areas that are currently under development. These plans, which require Council approval, ensure that growth and development occurs in such a way to help achieve the overall vision and goals of the Official Community Plan.

Figure 4: Current Development Areas



Source: Mapping and Research – City of Saskatoon

Table 1 outlines the Plan for Growth target population for each category of infill and greenfield development. The population projections are based on the City Council approved Plan for Growth, Sector Plans, and Concept Plans. The current population is based on Census Population Data. For a full detailed summary of approved Sector Plan calculations, including Municipal Reserve dedication requirements for each Sector, please refer to Appendix 1.

Table 1: Plan for Growth Population Target Rates

	Plan for Growth Rate Target	Current Population (2021)	Target Population (Growth to 500,000)
Strategic Infill	25%		
Downtown		3,331	18,000
North Downtown		146	10,000
University Sector		952	57,147
Corridor Growth	8 - 15%		+ 26,500*
Neighbourhood Infill	10%		
Confederation Sector		63,517	65,000
Core Neighbourhood Sector [1]		30,970	37,500
Nutana Sector (Infill Areas) [2]		41,734	49,000
Lawson Sector		29,367	32,500
Greenfield Development	50%		
Holmwood Sector		1,373	76,143
University Heights Sector		46,027	79,464
Blairmore Sector		4,859	72,168
Lakewood Sector		44,478	48,755
Nutana Sector (Greenfield Areas) [2]		15,076	15,076
TOTAL		282,900	587,253

* *The 26,500 target population is in addition to the current population that exists within the Corridor Growth Boundary. The current population within the Corridor Growth Boundary is reflected in each respective neighbourhood and Sector boundary.*

[1] *Core Neighbourhood Sector excludes Downtown & Central Industrial (North Downtown)*

[2] *Nutana Sector includes both Greenfield and Infill areas. Stonebridge and The Willows are identified as Greenfield Development areas. The remainder of the areas are identified as Neighbourhood Infill areas.*

Sources: Planning & Development - City of Saskatoon, eHealth Saskatchewan

Table 2 below identifies the past five years of growth broken down by the growth rate displayed for each growth category, as identified by the Plan for Growth. This information highlights the trends in regard to strategic growth, along with future efforts that may be needed to ensure the growth rates for each category strive to meet the targets outlined within the Plan for Growth. The percentages within the table below are based on building permit issuance per year.

Table 2: Growth Rate Scenarios (2017 – Year to Date)

	Target Rate	2017	2018	2019	2020	2021*	Average 2017-21*
Strategic Infill Development	25%	0%	12%	0%	0%	0%	2%
Corridor Growth	8 – 15%	11%	8%	5%	20%	3%	11%
Neighbourhood Infill	10%	7%	6%	5%	7%	7%	7%
Greenfield Development	50%	82%	74%	90%	73%	91%	80%

** 2021 year to date. Source: Building Standards – City of Saskatoon*

The University Sector Plan, which was approved by City Council in April, 2021, is the first Sector Plan developed for an existing, built-up area of the city.

Photo credit: Tourism Saskatoon/Carey Shaw Photography

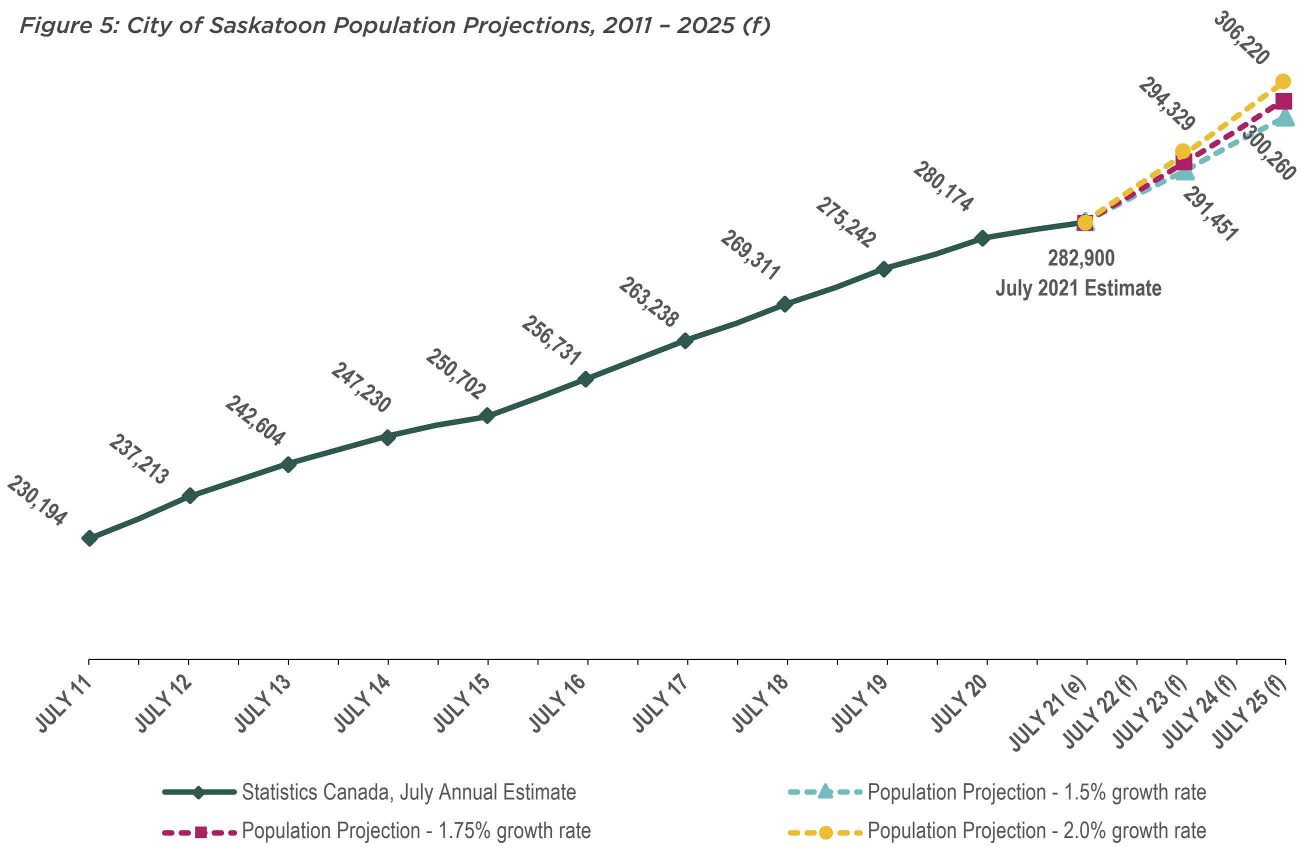
KEY INDICATORS

KEY INDICATORS

Population

Over the past 10 years, Saskatoon has experienced substantial population growth. Based on the City's annual population estimates, Saskatoon has been growing at an average annual rate of 2.01% for the last 10 years (2011 to 2020) and 1.60% for the last 3 years (2018 to 2020). The City's estimated population of Saskatoon is 282,900 as of July 1, 2021. While growth rates have moderated from the more robust growth rates experienced prior to 2015, Saskatoon is still experiencing steady population growth. The projected population growth rate for Saskatoon in 2021 is estimated to be 1%. The actual rate at which growth will occur is unknown but projecting various growth rates allows the City and land developers to plan for adequate levels of serviced land and support amenities to meet demand in these scenarios. Population projections for growth rates from 1.5% to 2.0% are shown in Figure 5.

Figure 5: City of Saskatoon Population Projections, 2011 – 2025 (f)



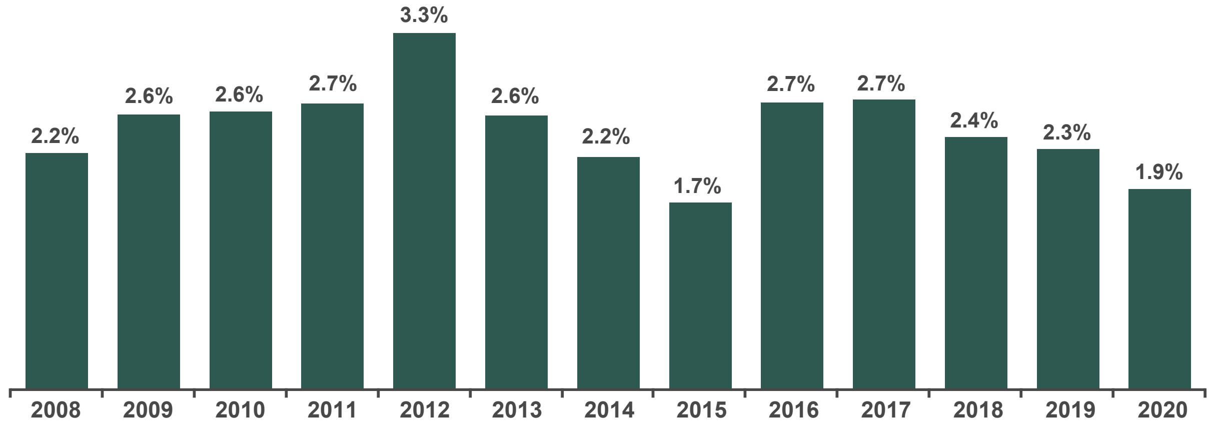
Source: Statistics Canada, July Annual Population Estimates (based on 2016 Census data) City of Saskatoon Population Projection

Population change drives the demand for new housing. A stable or declining population will reduce housing demand to that required to replace old or inappropriate housing stock. On the other hand, a growing population drives demand for the investment in, and construction of, new housing.

The population growth rate for the Saskatoon Census Metropolitan Area (CMA) has experienced a similar moderation as Saskatoon, achieving 1.9% in 2020. The annual average growth rate over the past ten years has been 2.26%.

Gross Domestic Product Growth

Figure 6: Saskatoon CMA Growth Rate, July 2008 – 2020



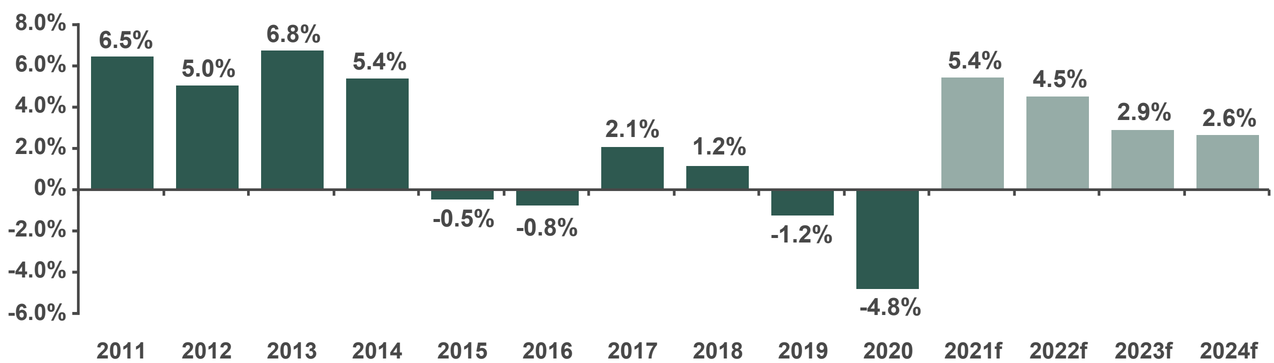
Source: Statistics Canada. Table 051-0056 - Estimates of population by census metropolitan area, sex and age group for July 1, based on the Standard Geographical Classification (SGC) 2016, annual (persons)

Gross Domestic Product (GDP) is the total dollar value of all unduplicated goods and services produced in an economy. It is the total amount of productive economic activity occurring within a region, during a given period, and expressed in dollar value. GDP is measured in three ways: (1) by income; (2) by expenditure; and (3) by output (or industry).

GDP can also be calculated in nominal (current dollar) and real (chained dollar) amounts. Real GDP removes the effects of price level changes (i.e. inflation) and reports only the value of quantities consumed and produced in an economy. GDP by income is calculated in only nominal terms. This is because the components of income-based GDP cannot be separated into price and quantity terms. GDP by expenditure is calculated in both nominal and real terms. Finally, GDP by output is calculated in real terms. GDP at the CMA level is calculated by output or industry, commonly referred to as Real GDP by Industry at Basic Prices. It measures the value of a producer's output in an economy and includes subsidies but removes indirect taxes (except sales taxes).

The City obtains its Real GDP by Industry at Basic Prices from the Conference Board of Canada. It is calculated using a weighted share of employment in both the CMA and the province, and provincial GDP is estimated by summing all the industrial GDP values. Values are posted in 2012 dollars and inflationary effects are removed. GDP growth rates are expressed as the percentage change in the value of output from one year to the next.

Figure 7: Saskatoon CMA Real GDP Growth (% change), 2011 – 2024 (f)

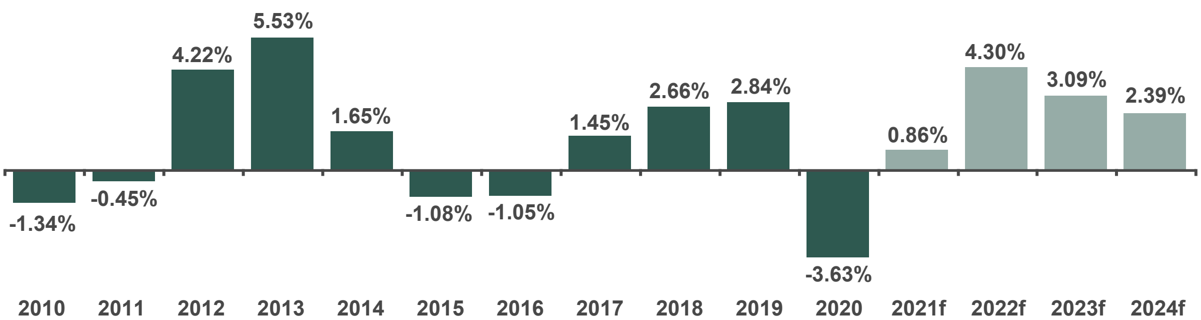


Source: Conference Board of Canada, May 2021

Employment & Unemployment

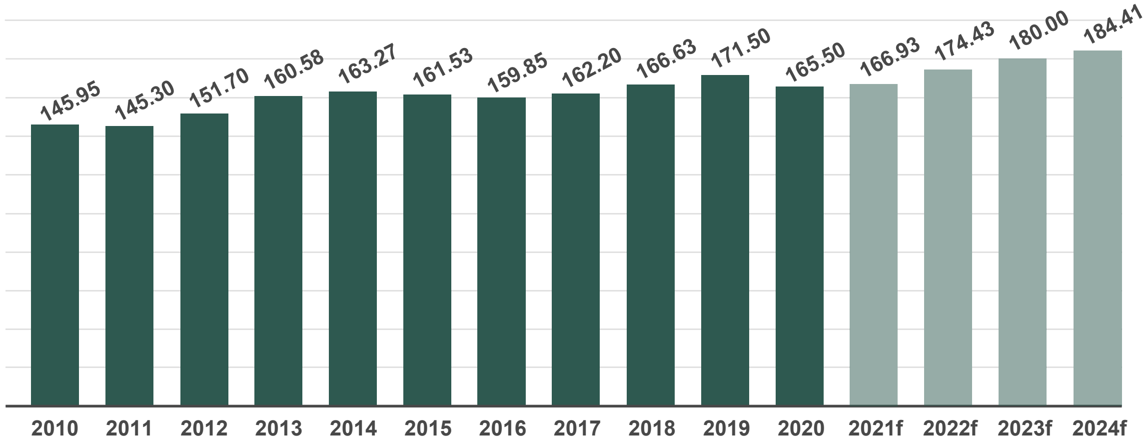
Economies that have higher employment levels and positive employment growth mean higher levels of consumption and investment; however, this is dependent on the nature and type of employment (i.e. industry and occupation and full-time or part-time). Consumption is driven by income, so the more people employed and earning will mean greater demand for goods and services, including housing. Total employment is the sum of employment in all industries. The data is presented in units of thousands and the value in annual percentage growth. Labour force statistics are commonly reported by the unemployment rate. The unemployment rate is simply the ratio of the number of unemployed workers to the total labour force. Generally, a low unemployment rate means that the economy is at or near capacity.

Figure 8: Saskatoon Total Employment Growth (% Growth), 2010 – 2024 (f)



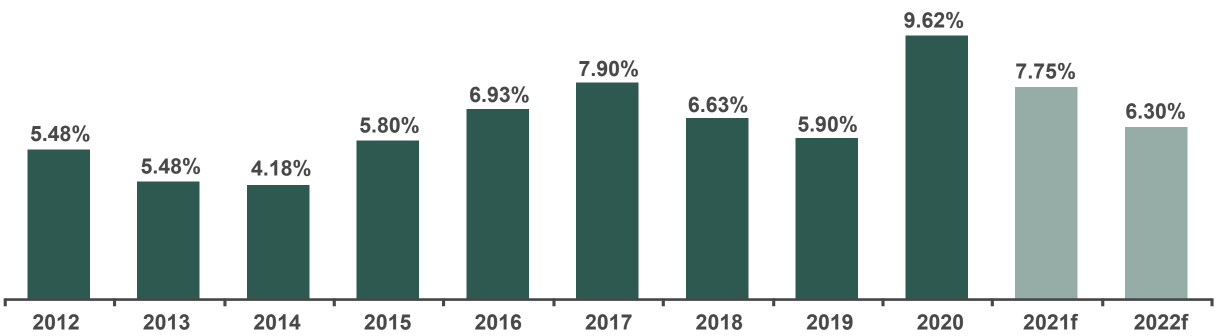
Source: Conference Board of Canada, June 2021

Figure 9: Saskatoon Total Employment (Thousands 000s), 2010 – 2024 (f)



Source: Conference Board of Canada, June 2021

Figure 10: Saskatoon Unemployment Rate, 2012 – 2022(f)



Source: Conference Board of Canada, July 2021

Photo credit: Tourism Saskatoon/Carey Shaw Photography

The City's estimated population of Saskatoon is 282,900 as of July 1, 2021.

Photo credit: Tourism Saskatoon

RESIDENTIAL INDICATORS

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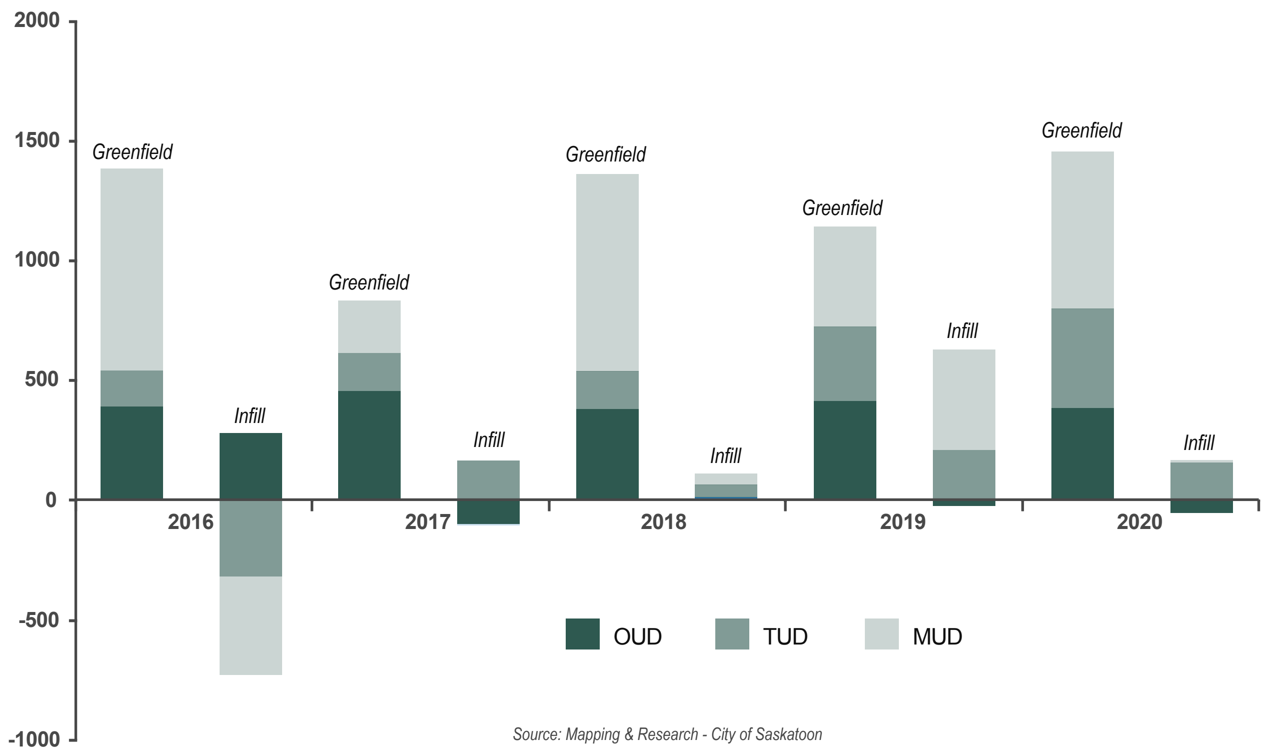
Residential development is typically characterized by dwelling type and general location. Greenfield development refers to development happening on the periphery of the city in areas that previously did not have urban development. Infill development refers to new development in built up areas of the city.

Residential development is broken down into four basic categories of dwelling types:

- MUD – Multiple-unit Dwelling - one Building with three or more units;
- TUD – Two-unit Dwelling - one Building containing two units; and
- OUD – One-unit Dwelling - includes single-family detached homes and mobile homes.

Figure 11 shows the net change to the number of residential dwelling units. Typically, the annual number of residential dwelling types has increased, but in some cases a decrease in the amount of infill units is shown. This is the due to both the demolition of existing units and administrative reasons, such as the re-classification of dwellings to reflect the removal of illegal suites or the conversion of private apartments to assisted living beds.

Figure 11: Annual Residential Development by Dwelling Type, 2016 – 2020



With this additional new development, Saskatoon's total dwelling unit count hit 116,117 total units in 2020, split between one-unit dwellings, (50.7%), two-unit dwellings (10.10%), and multiple-unit dwellings (39.2%).

Table 3: Total Dwelling Units, 2019-2020

	OUD	TUD	MUD	Total
2019	58,580	11,156	44,812	114,548
%	51.10%	9.70%	39.10%	100%
2020	58,915	11,724	45,478	116,117
%	50.70%	10.10%	39.20%	100%

Source: Mapping & Research - City of Saskatoon

New Residential Sales Prices & Housing Starts

The average sales price of new development has been consistently more expensive in infill than in greenfield neighbourhoods over the past four years. This may be due to a wider variety of new development being offered in greenfield neighbourhoods and/or increased demand for infill over that period.

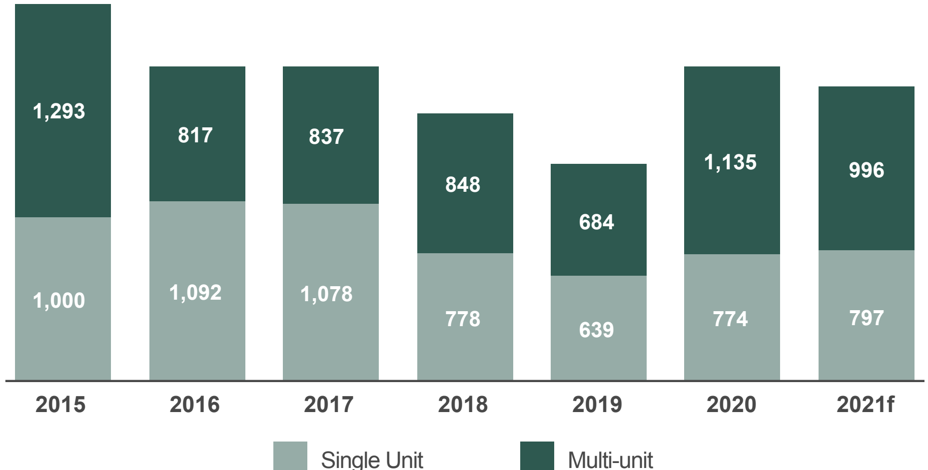
Table 4: Average Real Estate Sales Price for New Residential Units (built 2018 – 2020)

	Greenfield		Infill	
	Count	Average Price	Count	Average Price
Semi-Detached	71	$319,542	16	$395,894
Single Family	942	$454,812	153	$531,971
Condo Lowrise	164	$317,187	4	$306,500
Condo Highrise	0	n/a	125	$468,099
Townhouse	55	$246,856	9	$357,768
Condo Bareland	281	$327,433	30	$381,290

Source: Corporate Financial Services - City of Saskatoon

Housing starts is an economic indicator that reflects the number of privately owned new houses on which construction has been started in each period. This data is divided into two types: single-unit and multi-unit buildings. The Conference Board of Canada maintains an expectation that housing starts will decrease over the short-term across most metropolitan areas in Canada. The housing starts expectation is upward for Saskatoon in the short-term and long-term, as of July 2021.

Figure 12: Saskatoon CMA Housing Starts, 2015 – 2021 (f)

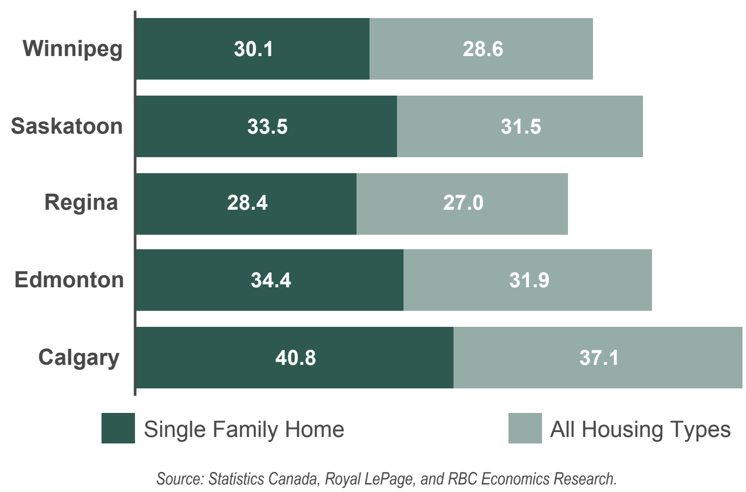


Source: Conference Board of Canada, May 2021

Housing Affordability

Royal Bank of Canada describes the Affordability Measure as the percentage of a typical household's pre-tax income used towards mortgage expenses (mortgage, taxes, and utilities). The higher the percentage, the less affordable the home becomes. Canada Mortgage and Housing Corporation (CMHC) indicates that no more than 32% of gross income should go towards mortgage expenses. In 2020, this measure characterized the Saskatoon market as more affordable than Calgary and Edmonton, but less affordable than Regina and Winnipeg for both single-family homes and a composite of all housing types. Calgary rated as the least affordable.

Figure 13: Housing Affordability Measure by City and Type, 2020



The City has made significant efforts to encourage and support the provision of attainable housing through a wide range of programs that target home ownership and rental opportunities.

The City did not reach the lower target number of 200 units in 2020 due to decreased demand for affordable ownership housing and entry level ownership projects during the COVID-19 pandemic. Affordable rental demand remained strong with an approval of 81 affordable rental units, which was the highest total since 2012. With growing wait lists being experienced by affordable housing providers and market vacancy rates stabilizing from 5.7% in 2019 to 5.9% in 2020, the need for affordable rental units remains high. Those with fixed incomes will continue to be priced out of the market and be at the highest risk of homelessness.

Figure 14: New Attainable Housing Units, 2010 – 2020

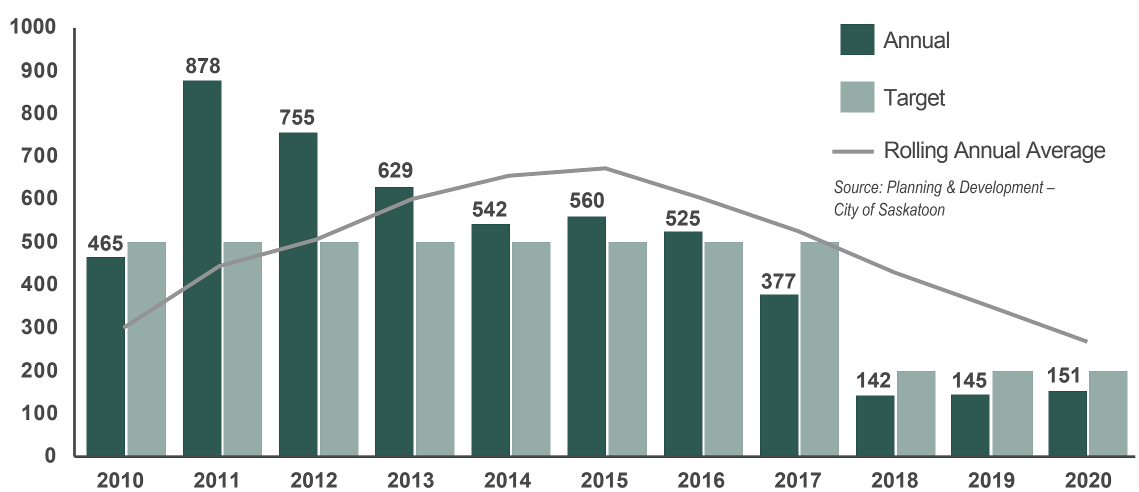
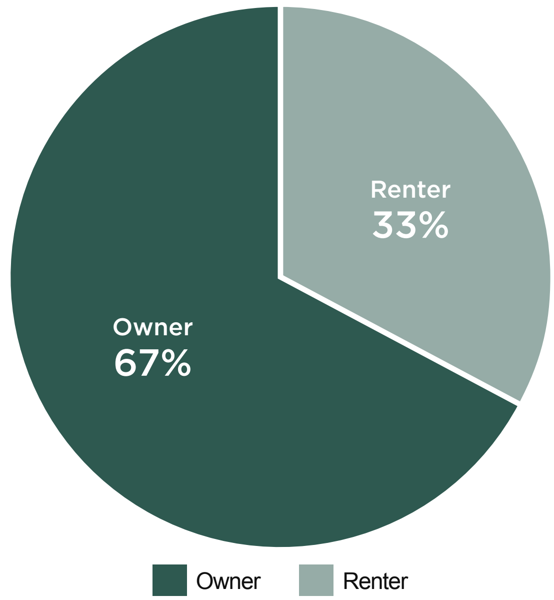


Figure 15: Total Private Households by Tenure



Source: 2016 Census

Rental Housing

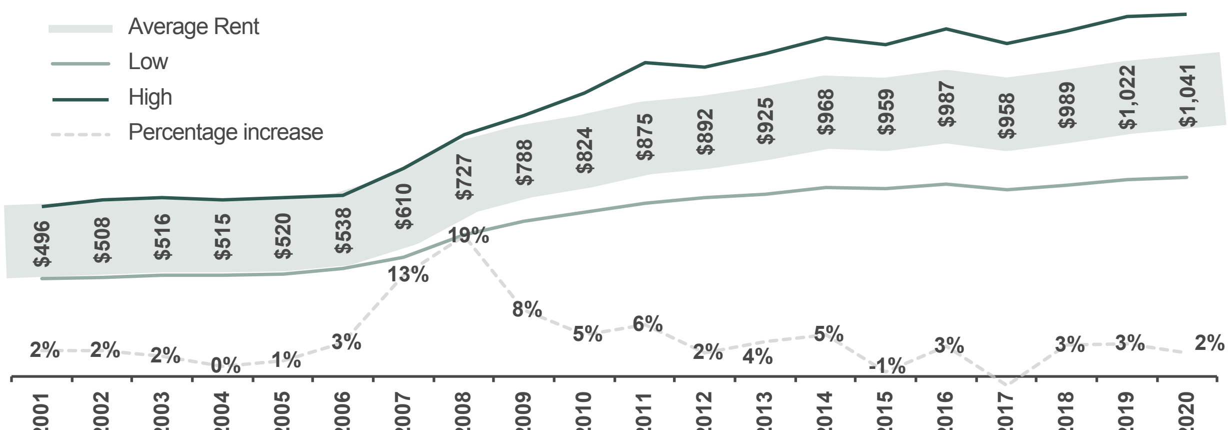
Rental housing is an important part of the housing market in a city. Many people prefer or require rental housing. According to CMHC, the average rent in the Saskatoon CMA increased by 2% from 2019 to 2020. The average rent increased by an average of 2.63% over the past ten years. CMHC has predicted continued downward pressure on the average rental price due to steady vacancy rates, but this has yet to be seen.

Table 5: Rental Housing Vacancy Rates

	2016	2017	2018	2019	2020
Annual Vacancy Rate (%)	10.30%	9.60%	8.30%	5.70%	5.90%
10 Year Average Actual (%)	2.80%	3.51%	4.41%	5.05%	5.76%
Date Range	2007-2016	2008-2017	2009-2018	2010-2019	2011-2020
10 Year Average Target (%)	3.00%	3.00%	3.00%	3.00%	3.00%

Source: CMHC Rental Market Report Saskatoon CMA

Figure 16: Saskatoon CMA Average Rent & Annual Increase (%), 2001 – 2020

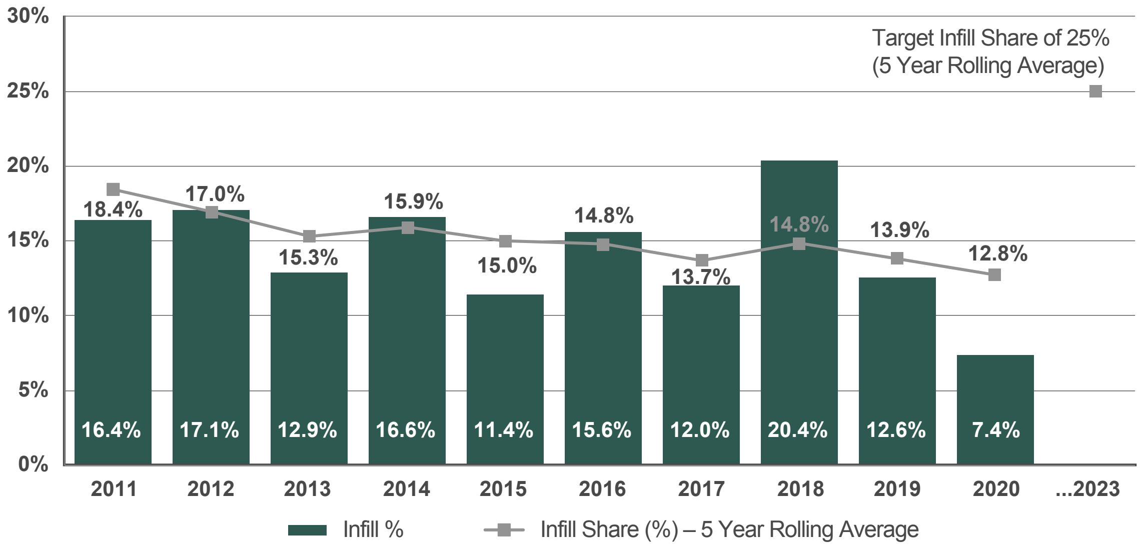


Source: Table 027-0040 - Canada Mortgage and Housing Corporation, average rents for areas with a population of 10,000 and over, annual (dollars), CANSIM (database).

Residential Infill Development

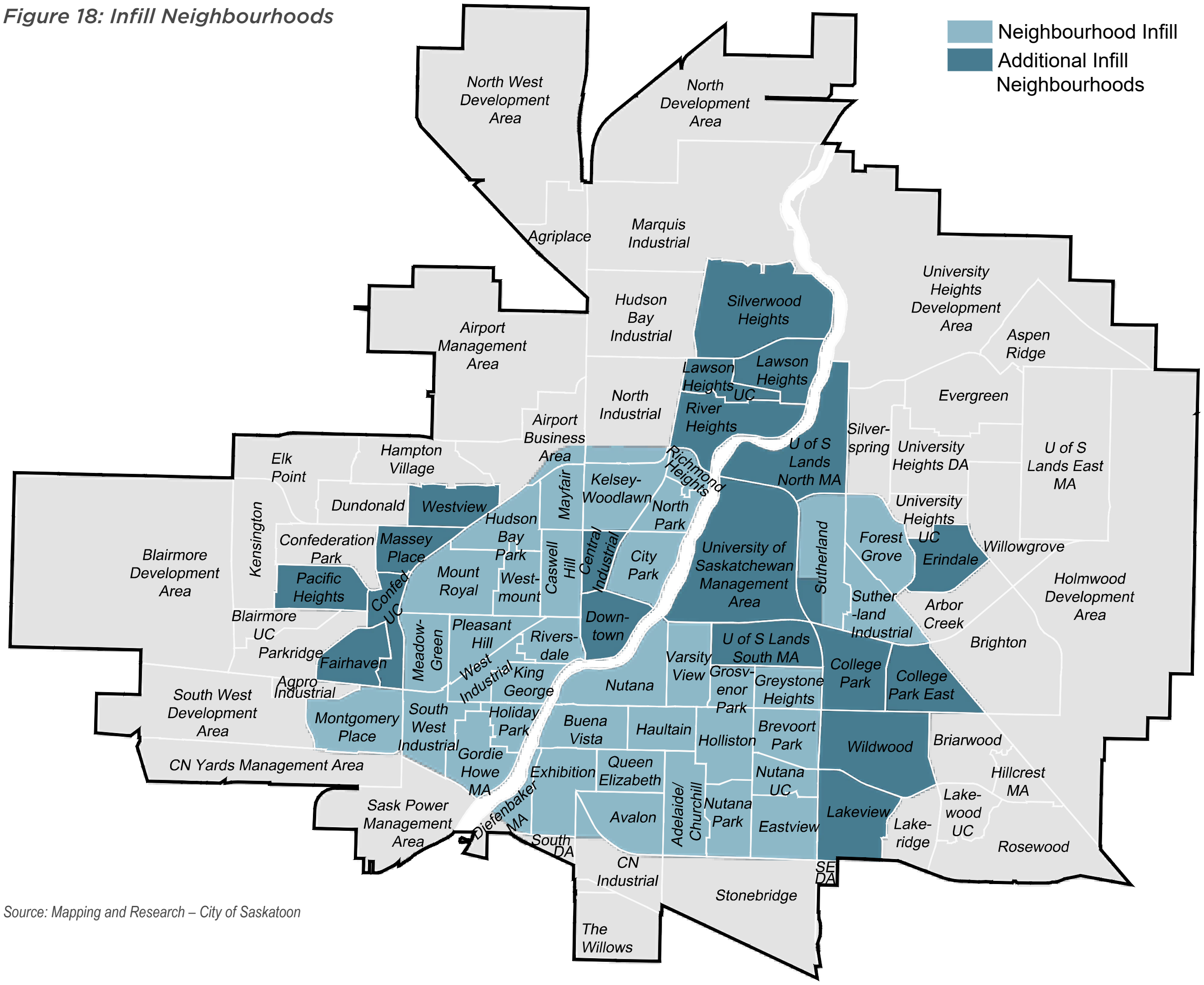
Alongside the targets laid out in the Plan for Growth, the City has set a goal of at least 25% of residential development occurring in infill neighbourhoods (as identified in Figure 18) each year, based on a five-year rolling average, by 2023. Infill neighbourhoods are shown in Figure 17. This target was set as a medium-term target along the way to achieving the City's long term goal of accommodating 50% of long-term growth as infill. Tracking this helps gauge if this goal is being achieved and can help guide infill-focused programs and policy. In 2020, the five-year rolling average was 12.8%.

Figure 17: Residential Infill Development (percentage of total new dwellings city-wide, 2011 – 2020)



Source: Building Standards – City of Saskatoon

Figure 18: Infill Neighbourhoods



Source: Mapping and Research – City of Saskatoon

Tracking the value of building permits and the inventory of vacant land in infill neighbourhoods helps identify the impact that infill development has and what future infill opportunities may exist. Over the last five years, the value of infill development has ranged from 31% to 52% of the total value of development occurring in Saskatoon. In 2020, the value of residential infill development was $92.5 million, or 24% of the total dollar value for residential development in Saskatoon.

Table 6: Building Permit Value in Infill Neighbourhoods

	Building Permit Values Infill & Citywide ($000s)				
	2016	2017	2018	2019	2020
Residential - Citywide	344,606	439,282	294,763	281,960	384,372
Non-Residential - Citywide	376,833	295,076	341,171	359,978	154,920
Total - Citywide	721,439	734,358	635,934	641,938	539,292
Residential - Infill	77,484	99,196	83,830	84,485	92,526
% of Total	22%	23%	28%	30%	24%
Non-Residential - Infill	148,179	184,217	222,646	250,375	92,642
% of Total	39%	62%	65%	70%	60%
Total - Infill	225,663	283,413	306,476	334,860	185,168
% of Total	31%	39%	48%	52%	34%

Source: Building Standards - City of Saskatoon

There are currently 511 vacant sites within Saskatoon's Infill Neighbourhoods, with a total site area of 340 hectares. This represents 34.5% of all vacant sites in Saskatoon and 5% of total vacant site area in Saskatoon; and therefore indicates a significant opportunity for infill development. In addition to these vacant sites, many other sites could be considered potential infill sites because the buildings on them have reached their usable lifespan, or the sites are used for less than their full development potential. Note that sites with active permits have been removed from the 2021 totals, resulting in lower than usual numbers.

Table 7: Vacant Land Inventory – Infill Neighbourhoods

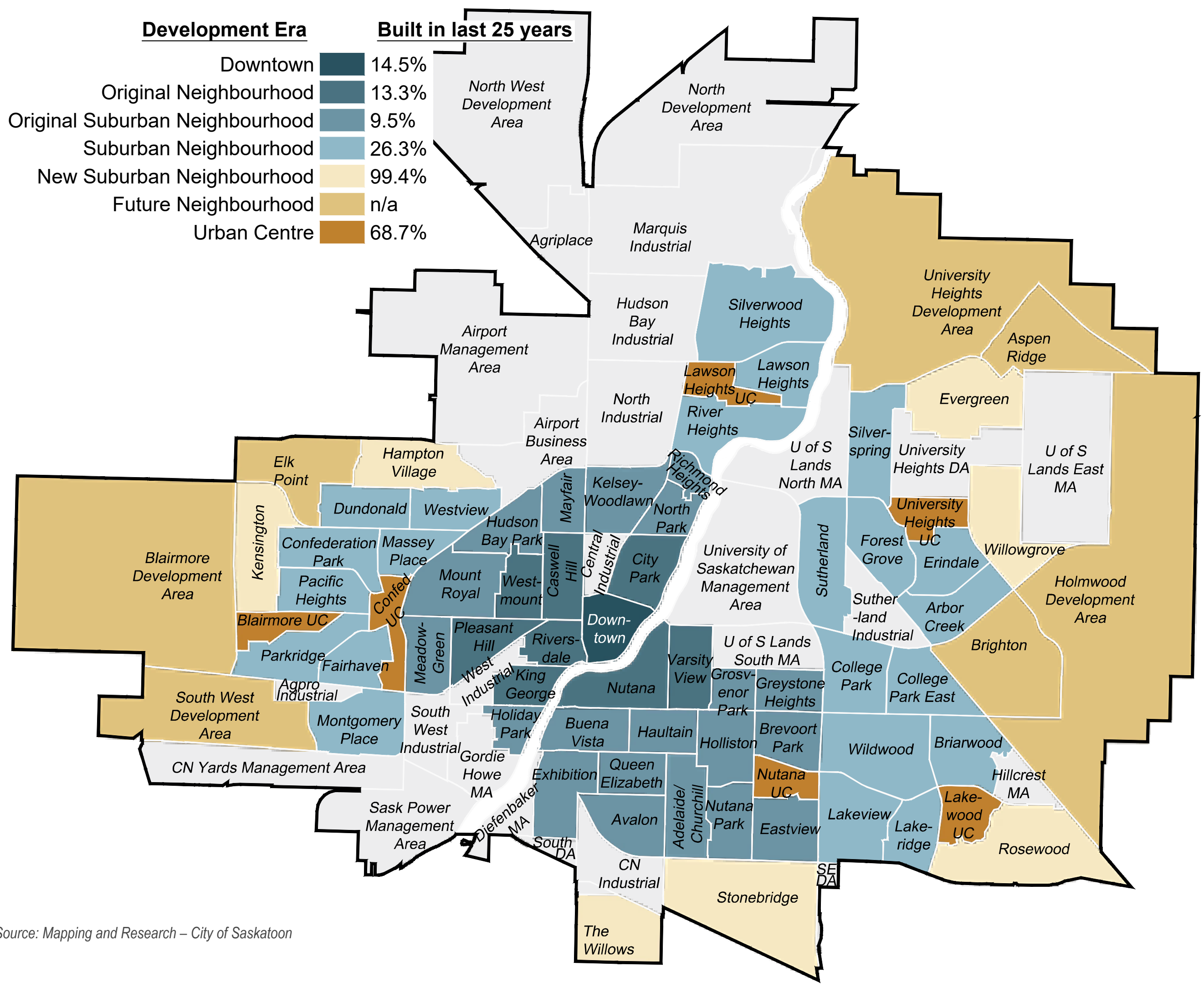
	Sites	% of City-Wide Total	Site Area (ha)	% of City-Wide Total
2021	511	34.5%	340	5.0%
2020	602	26.2%	378	5.2%
2019	679	23.4%	417	5.3%

Source: SITE Database - City of Saskatoon, July 2021

Age of Housing Supply

The age of housing stock identifies the percentage of houses built in different eras throughout the city. This can provide insight into where new development is occurring and can provide insight into where infill development may begin occurring as ageing housing stock is replaced. Figure 19 divides the city into development eras and identifies the percentage of housing stock that has been built in the last 25 years.

Figure 19: Percentage of Private Dwellings Built in the Last 25 Years



Source: Mapping and Research – City of Saskatoon

Table 8: Housing Supply by Development Era (# of units)

Development Era	1960 or before	1961 to 1980	1981 to 1990	1991 to 2016	Average - % built in last 25 years
Downtown	440	720	320	250	14.5%
Developed Suburban	1405	17740	12070	10410	26.3%
Industrial	300	130	15	35	8.5%
New Suburban	20	45	80	12835	99.4%
Original	6840	3675	1325	1845	13.3%
Original Suburban	9060	9760	1240	2065	9.5%
Urban Centre	240	805	850	3890	68.7%
City of Saskatoon	18305	32875	15900	31330	30.9%

Source: Census 2016

COMMERCIAL INDICATORS

COMMERCIAL INDICATORS

Business Licenses

The total number of businesses and their location gives an indication of the amount of commercial activity and development in Saskatoon. Businesses in Saskatoon tend to be in the City Centre (which includes the Downtown and portions of Nutana, Riversdale, City Park, and the portion of College Drive that interface with the University of Saskatchewan), and the industrial areas of the city's north end (which include the Airport Business Area, Marquis Industrial, Hudson Bay Industrial, and the North Industrial area) and at Urban Centres. Growth in business licenses issued slowed in 2020 due to COVID-19 but previous years have suggested that there has been increasing confidence in the Saskatoon market.

Figure 20: New Business Licenses Issued, 2014 – 2020

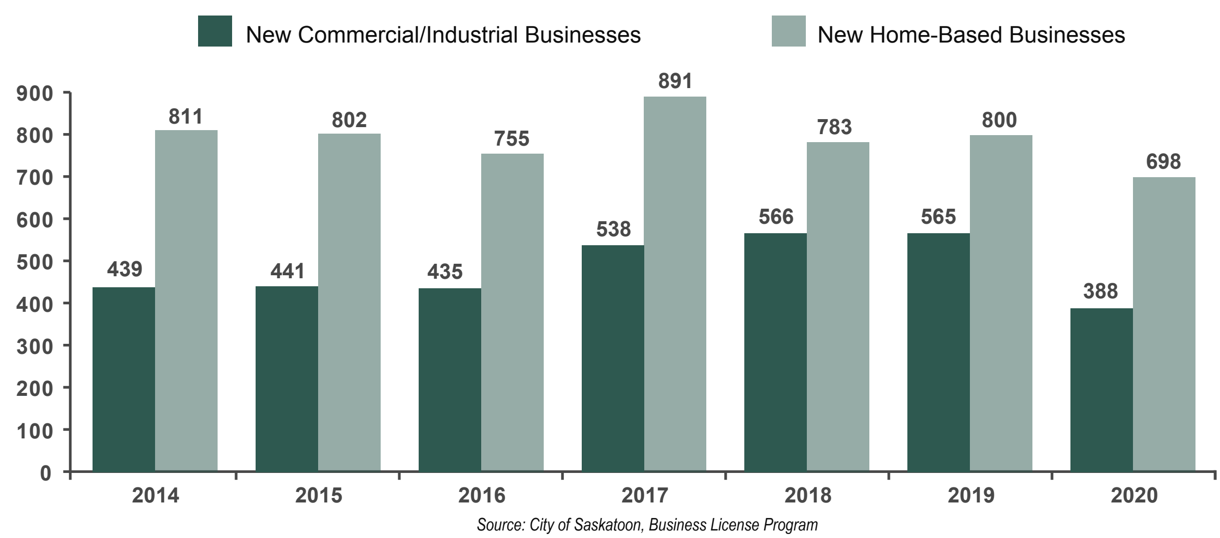
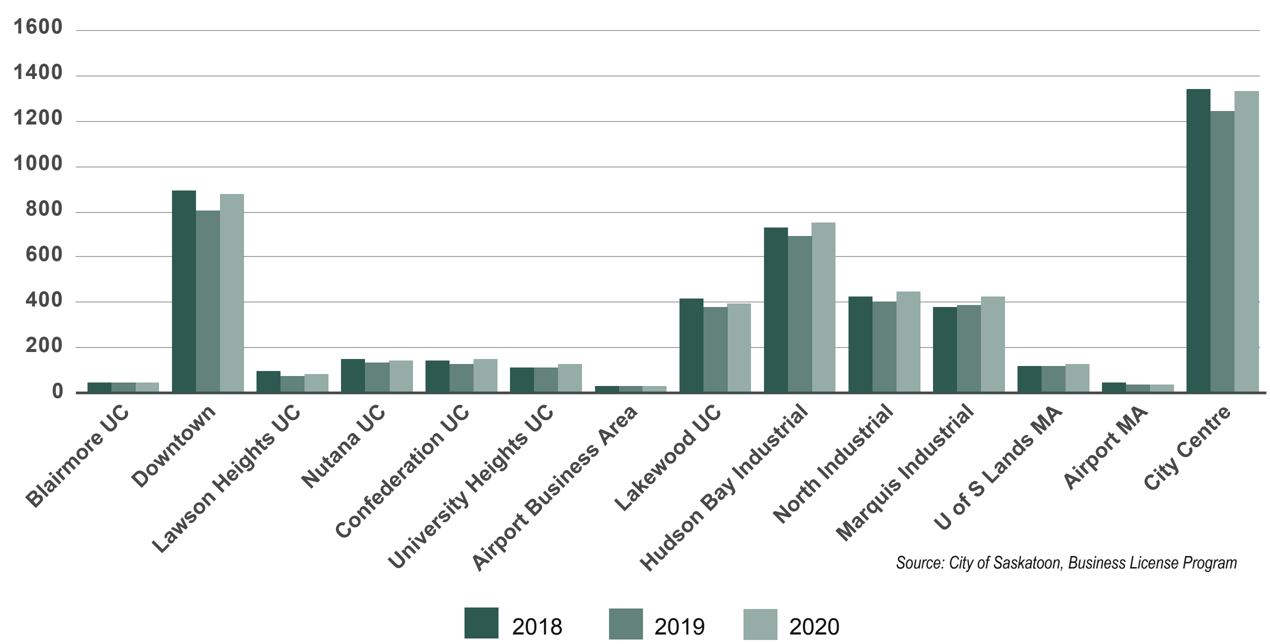


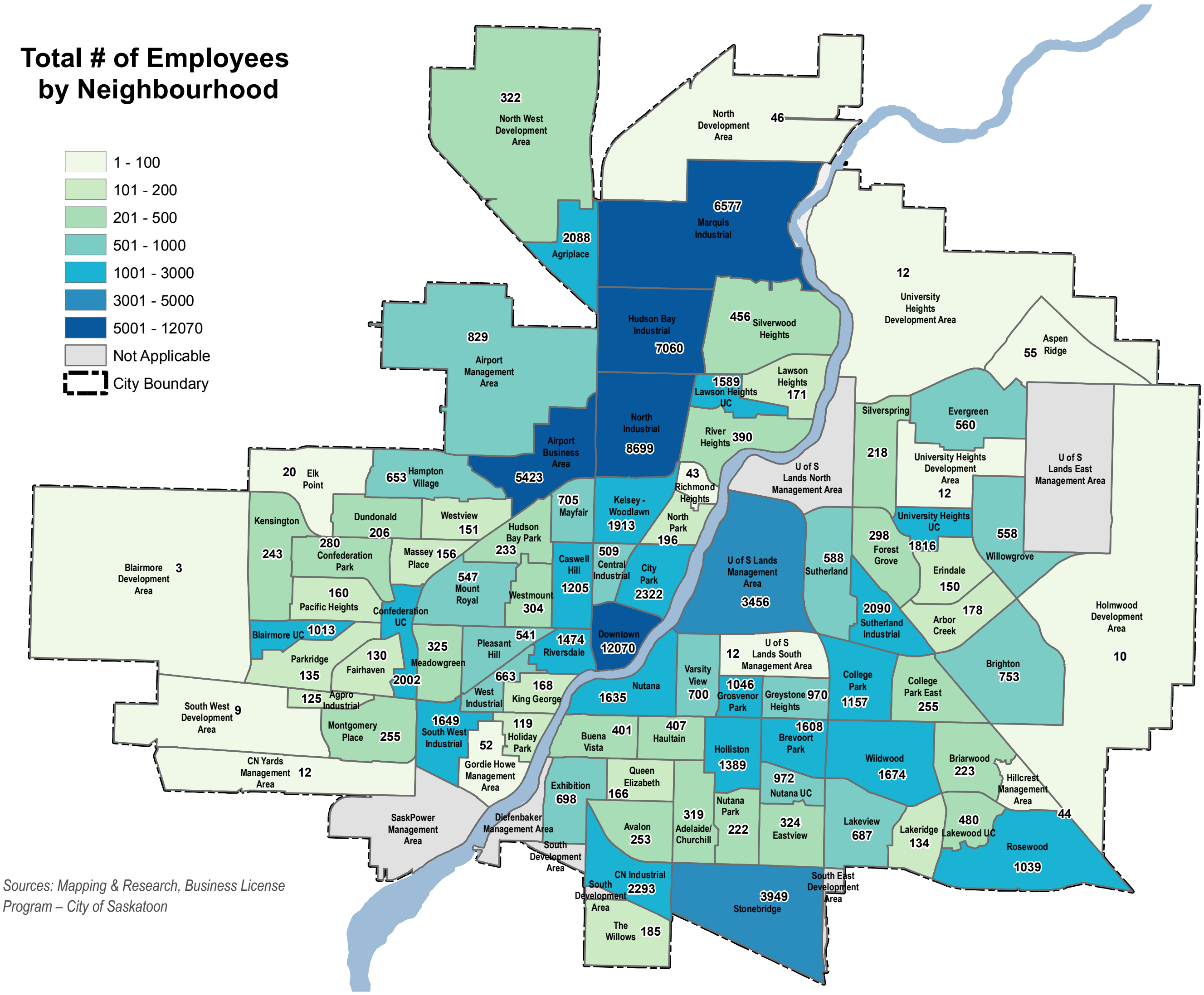
Figure 21: Licensed Commercial Businesses by Area, 2018 – 2020



Employment Locations

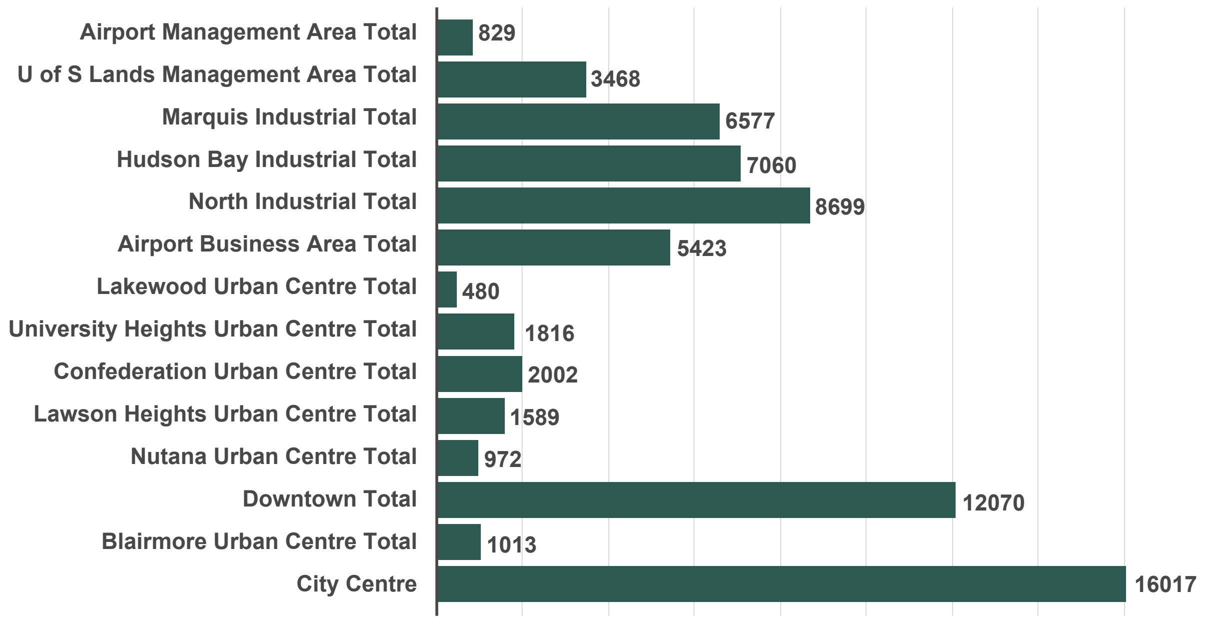
The number and location of employees closely follows the number and location of business licenses, with employees similarly concentrated in the City Centre and the industrial areas of the city's north end. Beyond these areas, jobs tend to be clustered around Urban Centres or along major transportation corridors throughout the city, with each of these being an employment and amenity hub for the surrounding neighbourhoods.

Figure 22: Total Number of Employees by Neighbourhood



Sources: Mapping & Research, Business License Program – City of Saskatoon

Figure 23: Major Employment Centres, Total Employees, 2020



Source: Business Licence Program, City of Saskatoon

DEMAND PROFILE

DEMAND PROFILE

Residential Land Demand

Demand for residential land is estimated based on assumptions of population growth, household size, and density of development. Estimates of total population growth are divided by the average household size to determine the number of housing units. Estimating the amount of land required to develop these units requires assumptions about the type of housing that will be required. Based on population growth scenarios, and average household size, it is possible to estimate how many dwelling units may be required to meet a given population increase.

Table 9 indicates the population increase, based on various growth scenarios determined from the City's July 1, 2021 population estimate of 282,900. It also demonstrates the dwelling unit demand, specifically the number of dwelling units needed to accommodate the population growth at each growth rate scenario. The number of dwelling units for each growth rate scenario is calculated by dividing the number of persons added by the average household size, which is 2.50 persons per dwelling unit in Saskatoon.

The 2021 projected population growth rate for Saskatoon was estimated to be 1.0%. At that rate, over 1,100 dwelling units per year would be required to accommodate the expected population growth.

Table 9: Growth Rate Scenarios, Population Growth, Dwelling Unit Demand

	2022		2023		2024		TOTAL	
Growth Rate	Population Growth (persons)	Dwelling Unit Demand (dwellings)	Population Growth (persons)	Dwelling Unit Demand (dwellings)	Population Growth (persons)	Dwelling Unit Demand (dwellings)	Population Growth (persons)	Dwelling Unit Demand (dwellings)
0.50%	1,415	566	1,422	569	1,429	571	4,265	1,706
1.00%	2,829	1,132	2,857	1,143	2,886	1,154	8,572	3,429
1.50%	4,244	1,697	4,307	1,723	4,372	1,749	12,922	5,169
2.00%	5,658	2,263	5,771	2,308	5,887	2,355	17,316	6,926

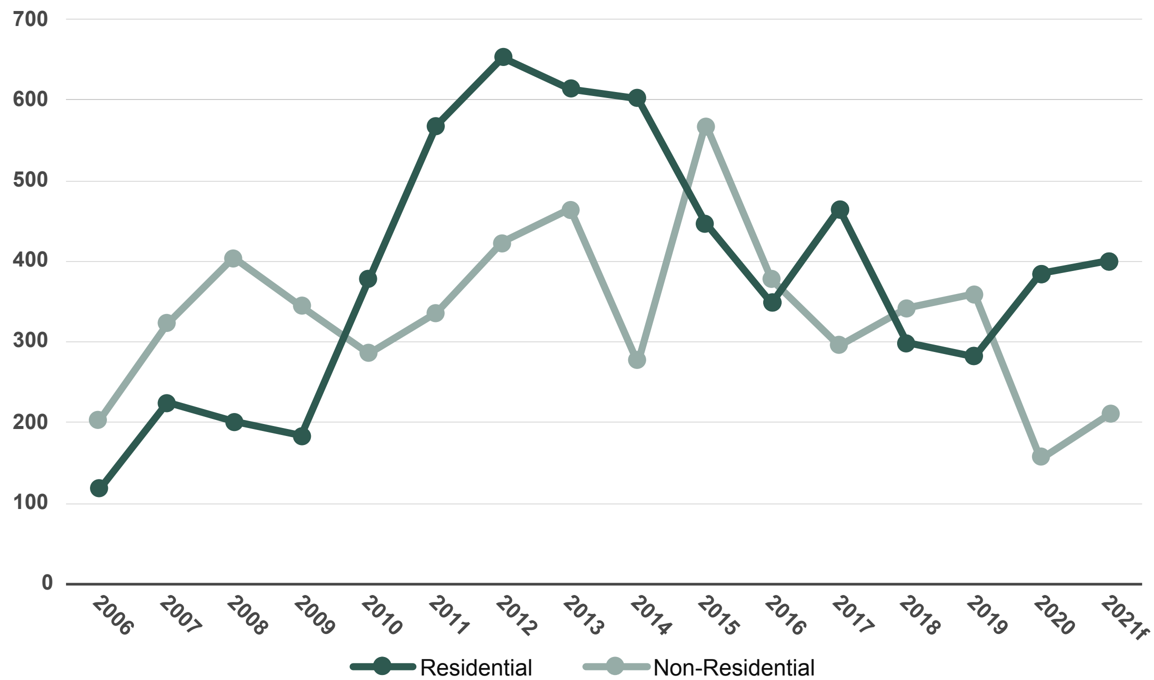
Source: Mapping and Research – City of Saskatoon

Non-Residential Land Demand

Non-residential development does not follow the same growth pattern of residential development. GDP growth drives employment, labour force, and income trends and results in demand for both development of industrial and commercial facilities.

Commercial and industrial development in Saskatoon also services the surrounding area, so household growth in the CMA, and within an approximate 100-kilometre surrounding area, will influence the demand for commercial and industrial land in Saskatoon. Data from the City's Building Standards Department indicates that in 2020, building permit values for both residential and non-residential permits were $538 million. Based on the construction activity in the first two quarters of 2020, building permit values for residential are projected at $400 million and non-residential are projected to be at $210 million.

Figure 24: Building Permit Values ($000s), 2006 – 2021(f)



Source: Building Standards – City of Saskatoon

The 2021 projected population growth rate for Saskatoon was estimated to be 1.0%. At that rate, over 1,100 dwelling units per year would be required to accommodate the expected population growth.

LAND INVENTORY

LAND INVENTORY

Residential Inventory

As of July 1, 2021, major land developers held 1124 vacant one-unit dwelling lots, and home builders held 1365 vacant one-unit dwelling lots, for a total of 2489 vacant one-unit dwelling lots (see Table 10).

Table 11 identifies the inventory of vacant multiple unit dwelling land held by builders and developers. As of July 1, 2021, there are 252 acres of vacant land zoned for multiple-unit dwellings, which can accommodate up to 5993 multiple-unit dwelling units.

Council has set a target of maintaining a minimum one-year supply of one-unit dwelling lots, and a two-year supply of multiple-unit dwelling land. These targets are based on historical building permits, projected population growth and projected demand for one-unit and multiple-unit dwellings in the upcoming year. Based on current inventory levels, these targets have been met or exceeded. The current inventory has the potential to accommodate a total of 8482 dwelling units or an additional 16,717 people.

Table 10: Builder and Developer One-unit Dwelling Lot Inventory, July 1, 2020

Neighbourhood	Number of Vacant One-Unit Dwelling Lots held by Builders	Number of One-Unit Dwelling Lots held by Major Land Developers
Arbor Creek	1	0
Aspen Ridge	173	325
Avalon	2	0
Briarwood	4	0
Brighton	458	226
Buena Vista	6	0
Caswell Hill	13	0
City Park	7	0
College Park East	1	0
Dundonald	3	0
Evergreen	37	0
Exhibition	3	0
Forest Grove	1	0
Grosvenor Park	1	0
Hampton Village	3	0
Haultain	5	0
Holiday Park	6	0
Holliston	1	0
Hudson Bay Park	2	0
Kelsey - Woodlawn	3	0
Kensington	121	396
King George	9	0
Lakeridge	3	0
Massey Place	4	0

Table 10 continued on page 41.

Table 10: Builder and Developer One-unit Dwelling Lot Inventory, July 1, 2020

Continued from page 40.

Neighbourhood	Number of Vacant One-Unit Dwelling Lots held by Builders	Number of One-Unit Dwelling Lots held by Major Land Developers
Mayfair	11	0
Meadowgreen	3	0
Montgomery Place	3	0
Mount Royal	7	0
North Park	3	0
Nutana	10	0
Parkridge	128	114
Pleasant Hill	45	0
Queen Elizabeth	2	0
Riversdale	19	0
Rosewood	202	63
Silverwood Heights	30	0
Stonebridge	6	0
Sutherland	6	0
Varsity View	8	0
West Industrial	2	0
Westmount	8	0
Westview	2	0
Willowgrove	3	0
Total	**1365**	1124
Total	**2489**	

Source: Mapping & Research, City of Saskatoon, and 2021 City of Saskatoon Developer Survey

Table 11: Builder and Developer Multiple-unit Dwelling Inventory, July 1, 2020

Neighbourhood	Builders Vacant Multi-Unit Land (acres)	Potential Dwelling Units	Developer Vacant Multi-Unit Land (acres)	Potential Dwelling Units
Aspen Ridge	28.87	884	24.58	806
Blairmore Development Area	0	0	4.84	205
Brighton	45.82	710	16.83	235
City Park	0.31	29	0	0
Downtown	2.23	112	0	0
Dundonald	1.62	16	0	0
Evergreen	8.25	216	23.13	794
Haultain	0.14	4	0	0
Kensington	19.13	433	17.65	409
Meadowgreen	0.19	10	0	0
Nutana	0.43	22	0	0
Riversdale	0.18	9	0	0
Rosewood	33.3	613	13.99	223
Stonebridge	1.82	29	0	0
Sutherland	6.85	153	0	0
Willowgrove	0	0	2.03	81
Total	**149.14**	**3240**	**103.05**	**2753**
Grand Total		**252.19 acres**	**5993 units**	

Source: Mapping & Research, City of Saskatoon, and 2021 City of Saskatoon Developer Survey

Industrial Inventory

Industrial land is the least dependent on local demand. While industrial land is used extensively to service the local economy, demand for industrial services and land can be generated by regional, inter-provincial, and international demand. However, local labour force and community characteristics play an essential part in attracting non-local industrial capacity. Current inventories and historical absorption rates of industrial land area are an essential baseline for guiding the development of additional industrial land.

Saskatoon Land has typically been the only major industrial land developer operating in Saskatoon. Their five-year average for industrial land sales and long-term leases is shown in Table 12. From 2016 to 2020, Saskatoon Land averaged 17.51 acres per year of industrial land sales and long-term leases.

Table 13 displays the vacant industrial land inventory in Saskatoon. There are a total of 707 acres of vacant industrially zoned sites.

Table 12: Five-year Average Industrial Land Sales/Lease, 2016 – 2020

Year	Acres (ac)
2016	21.52
2017	10.92
2018	38.96
2019	9.76
2020	6.39
Average	**17.51**

Source: Saskatoon Land – City of Saskatoon

Saskatoon Land's mandate includes providing an adequate supply of industrial land to the market at competitive market values. In addition to providing investment returns, Saskatoon Land's role in industrial development is to facilitate opportunities for economic development in the areas of business attraction and expansion. This is accomplished by having a suitable inventory of fully serviced shovel-ready sites that are available to potential new businesses considering a location in Saskatoon. Much of the current inventory held by Saskatoon Land can facilitate these employment-generating opportunities when they arise. The City's Industrial Land Incentive Program provides further benefits that are available for new or expanding businesses considering industrial sites.

Commercial Inventory

Table 14 displays the vacant commercial land inventory in Saskatoon. Currently there are a total of 135.68 acres of vacant commercially zoned sites. This vacant commercial space has the potential to accommodate 5.9 million square feet of retail and/or office space.

According to Colliers International's (Colliers) Saskatoon Retail Market Report 2020, despite remaining one of the strongest performing commercial real estate assets, Saskatoon's retail market is not immune to prevalent economic factors in the province and Saskatoon is now experiencing a modest rise in retail vacancy. At the time of this report, it is too early to predict what economic impacts the Covid-19 pandemic will have on commercial growth and/or decline.

Table 13: Industrial Land Inventory, July 1, 2020

Neighbourhood Name	Amount of Light Industrial zoned land (acres)	Amount of Heavy Industrial zoned land (acres)	Total (acres)	Amount of Vacant Industrial Land (acres)
Agpro Industrial	41.55	0.00	41.55	12.18
Agriplace	298.23	0.00	298.23	39.64
Airport Business Area	314.88	35.12	350.00	19.48
Airport MA	51.60	0.00	51.60	0.00
Caswell Hill	5.01	0.24	5.25	0.75
Central Industrial	44.41	38.47	82.88	9.20
City Park	30.58	0.00	30.58	0.77
CN Industrial	200.73	0.00	200.73	27.94
Downtown	2.14	0.00	2.14	0.00
Exhibition	11.24	0.00	11.24	3.00
Fairhaven	2.21	0.00	2.21	0.00
Holiday Park	3.97	0.00	3.97	0.40
Hudson Bay Industrial	332.34	337.09	669.42	64.06
Hudson Bay Park	0.00	0.00	0.00	0.17
Kelsey - Woodlawn	127.33	19.36	146.70	9.16
King George	0.00	0.70	0.70	0.00
Marquis Industrial	773.81	801.38	1575.19	344.22
Mayfair	6.25	0.00	6.25	0.07
North DA	10.43	15.03	25.46	5.00
North Industrial	361.85	278.72	640.57	28.65
North West DA	138.45	14.56	153.02	14.56
Riversdale	2.64	0.00	2.64	0.35
Rosewood	36.62	0.00	36.62	23.09
South West DA	0.00	0.00	0.00	65.49
South West Industrial	215.41	5.84	221.25	2.43
Stonebridge	0.00	34.29	34.29	5.47

Table 13 continued on page 45.

Table 13: Industrial Land Inventory, July 1, 2020

Continued from page 44.

Neighbourhood Name	Amount of Light Industrial zoned land (acres)	Amount of Heavy Industrial zoned land (acres)	Total (acres)	Amount of Vacant Industrial Land (acres)
Sutherland	2.39	0.00	2.39	0.00
Sutherland Industrial	122.62	144.85	267.47	4.97
West Industrial	24.63	98.62	123.25	25.71
Total	**3169.48**	**1824.27**	**4993.75**	**706.76**

Source: Mapping & Research, City of Saskatoon, and 2021 City of Saskatoon Developer Survey

Table 14: Commercial Land Inventory, July 1, 2020

Sector	Amount of commercial zoned land (acres)	Amount of institutional zoned land (acres)	Amount of mixed-use zoned land (acres)	Total (acres)	Amount of Vacant Land (acres)
Blairmore	45.88	68.72	7.29	121.89	6.54
Confederation	106.90	102.62	16.13	225.64	1.51
Core	257.85	134.17	38.40	430.42	45.16
Holmwood	45.16	0.00	0.00	45.16	10.55
Lakewood	155.84	79.05	7.88	242.77	10.06
Lawson	78.70	167.70	5.40	251.80	5.21
Nutana	207.98	134.78	7.64	350.40	5.71
Riel Industrial	10.67	0.00	0.00	10.67	0.92
University Heights	223.81	166.74	55.60	446.15	50.02
Total	**1132.80**	**853.77**	**138.33**	**2124.90**	**135.68**

Source: Mapping & Research, City of Saskatoon, and 2021 City of Saskatoon Developer Survey

Market Absorption

Table 15 outlines projections for the full build-out of neighbourhoods currently under development, based on building permit issuance. Figures 25 through 30 show where and when development permits were issued in each of the developing neighbourhoods. New neighbourhoods initiated in the early 2000's such as Hampton Village and Willowgrove experienced shortened build-out time frames of 7 to 8 years due to the robust growth rates during those times.

As population growth rates have moderated, new neighbourhood build-out time frames are anticipated to increase up to a 20-year period, or longer dependent on the size and density of each neighbourhood. Estimated full neighbourhood build-out is based on the building permits issued for each neighbourhood in past years, trends seen in other neighbourhoods, and the future three years of planned servicing for each neighbourhood. As growth rates and phasing can be variable from year to year, the build-out timeframe is an estimate that is currently tracked and monitored throughout the year.

Table 15: New Neighbourhood Buildouts, July 1, 2021

Neighbourhood	OUD (to date)	MUD (to date)	Total Est. OUD	Total Est. MUD	Build-out % OUD	Build-out % MUD	Overall Buildout %	% of City share of building permits from last 5 years	Est. Full Build-out Date
Aspen Ridge	716	0	2,153	3,517	33%	0%	13%	8%	2032
Brighton	979	510	2,892	3,636	34%	14%	23%	18%	2030
Evergreen	2,204	1,865	2,176	3,691	101%	51%	69%	11%	2025
Kensington	1,254	317	1,688	1,714	74%	18%	46%	11%	2028
Rosewood	2,138	893	2,685	3,301	80%	27%	51%	15%	2031
The Willows	126	240	481	530	26%	45%	36%	1%	2028

Source: Building Standards – City of Saskatoon

Figure 25: Aspen Ridge Development Permits

Source: Mapping & Research, City of Saskatoon

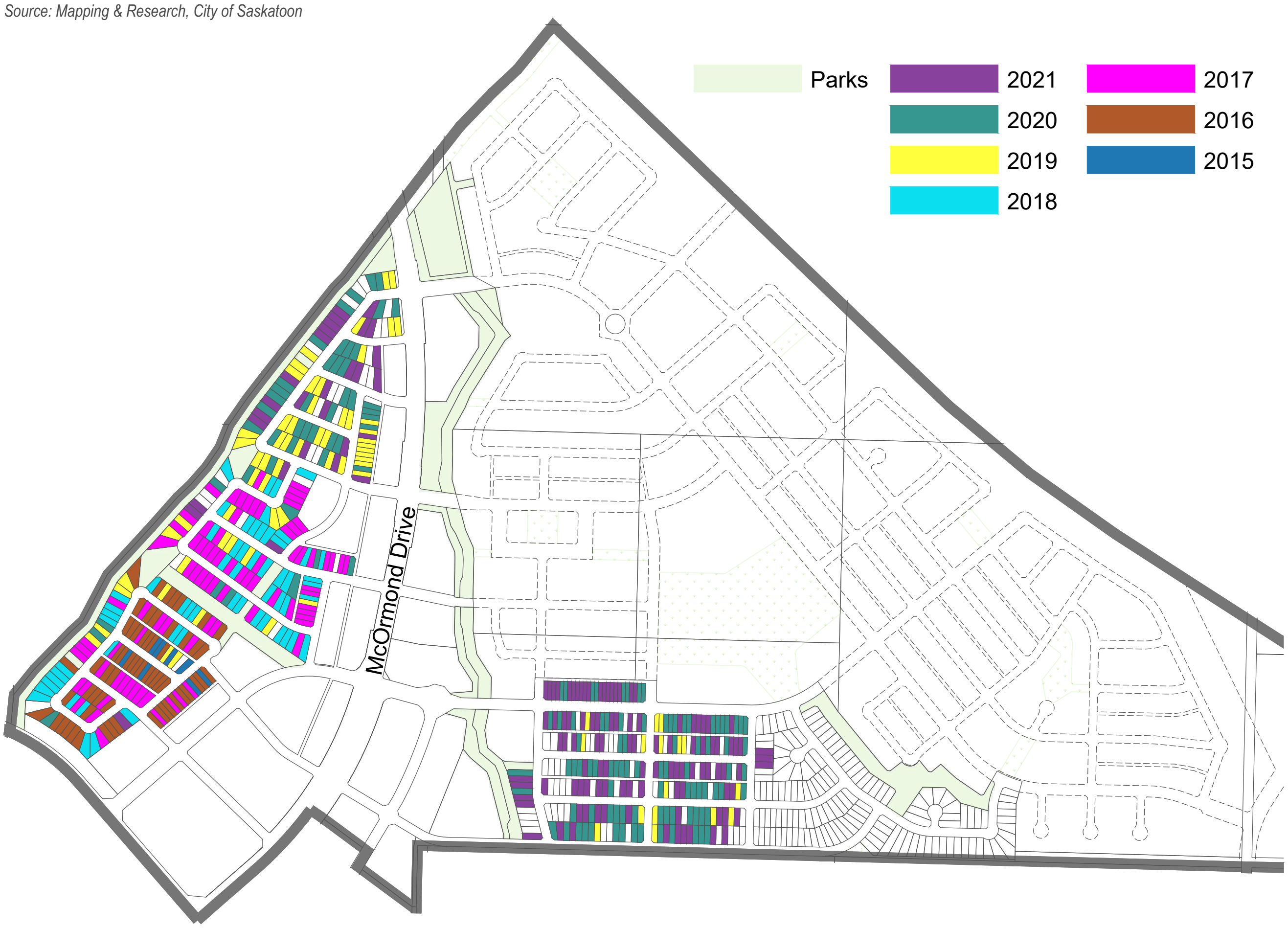


Figure 26: Brighton Development Permits

Source: Mapping & Research, City of Saskatoon

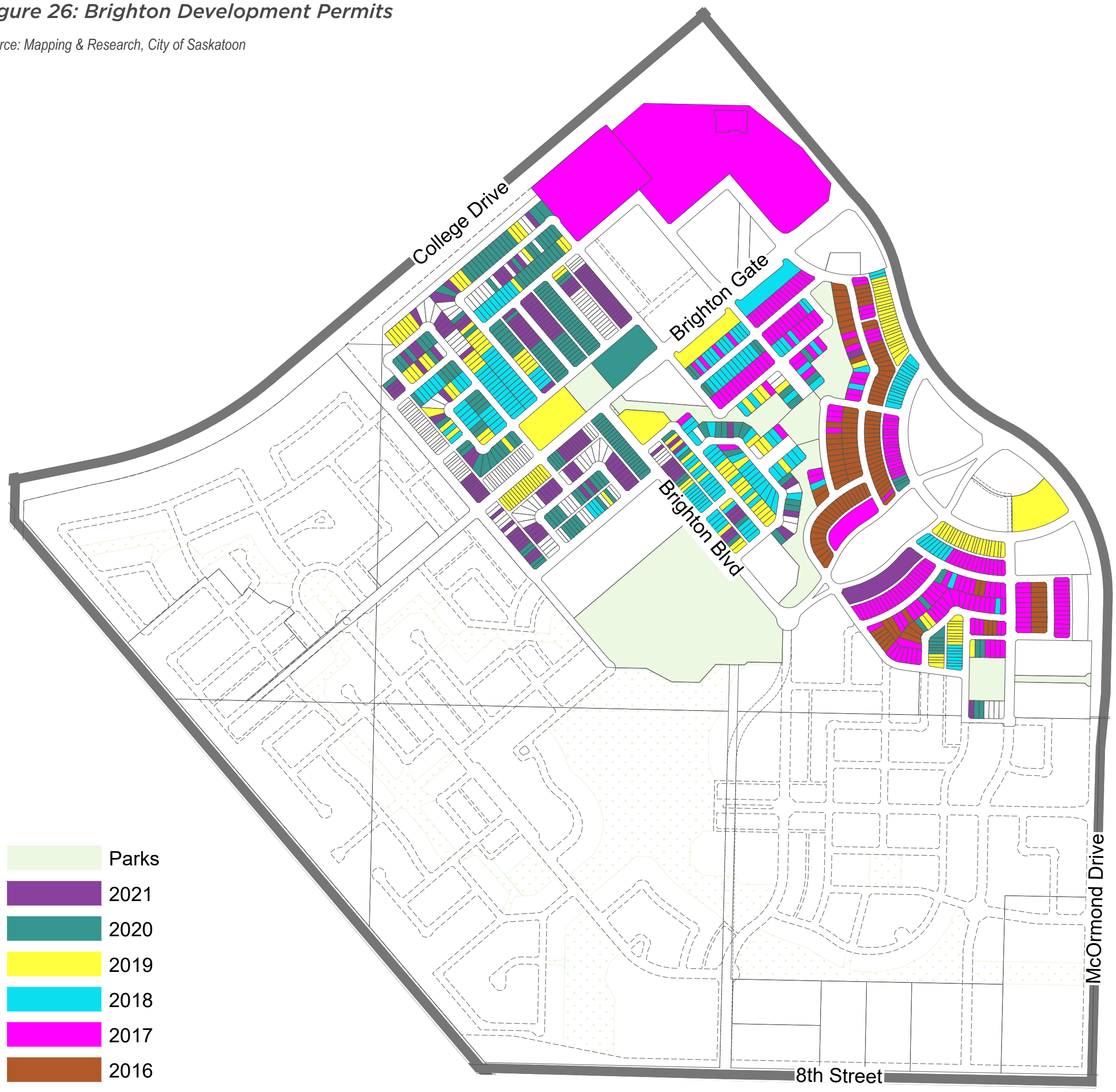


Figure 27: Evergreen Development Permits

Source: Mapping & Research, City of Saskatoon

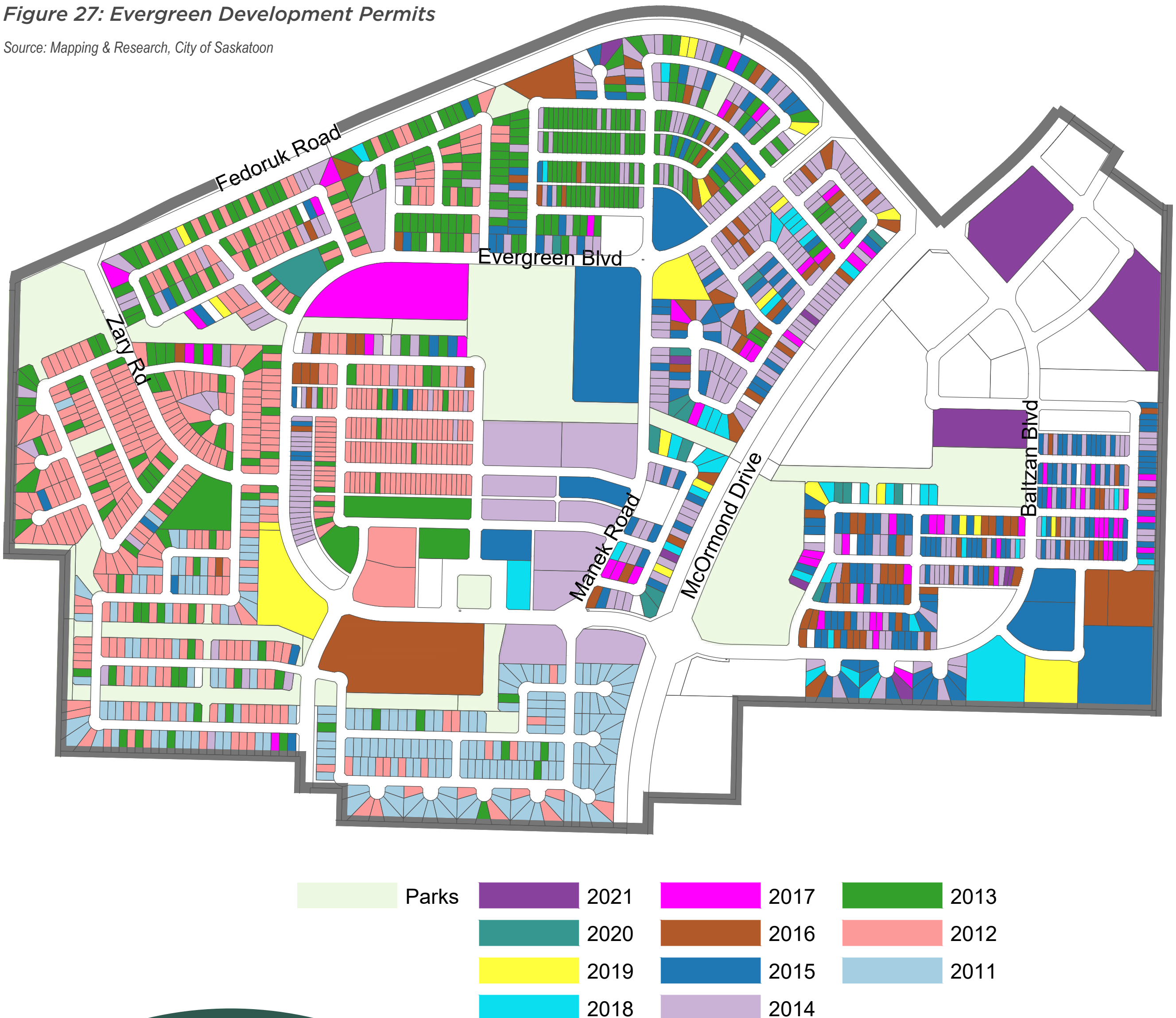


Figure 28: Kensington Development Permits)

Source: Mapping & Research, City of Saskatoon

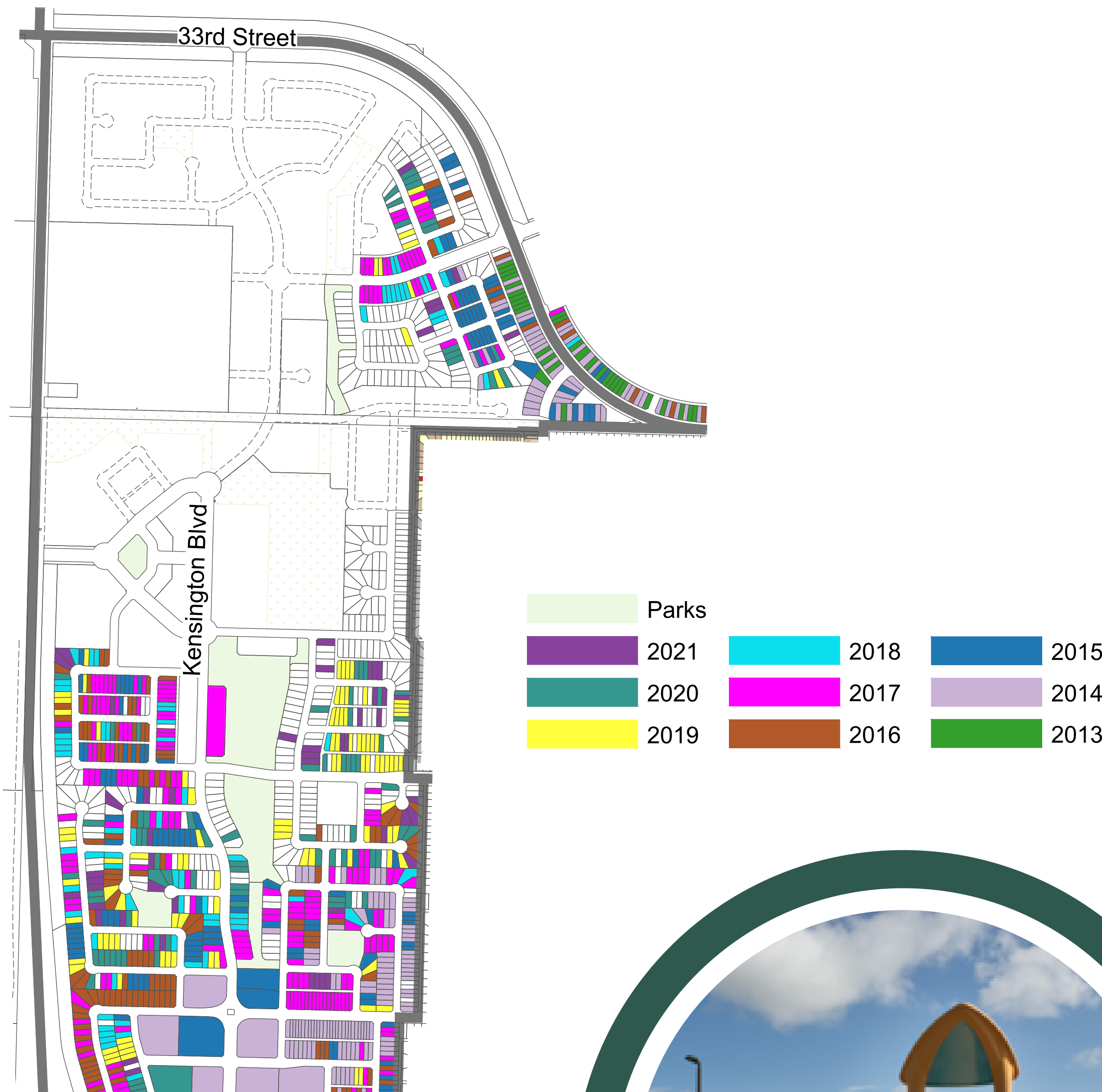


Figure 29: Rosewood Development Permits

Source: Mapping & Research, City of Saskatoon

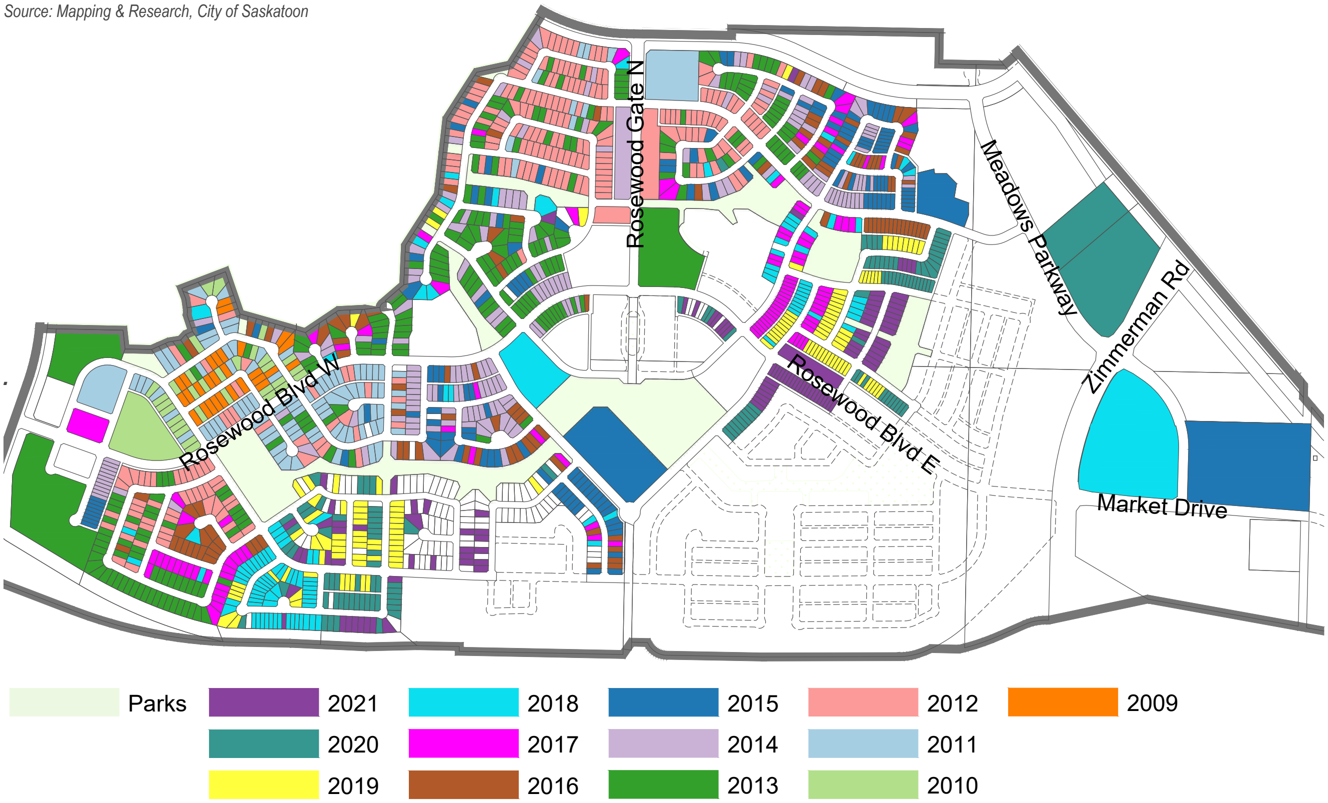
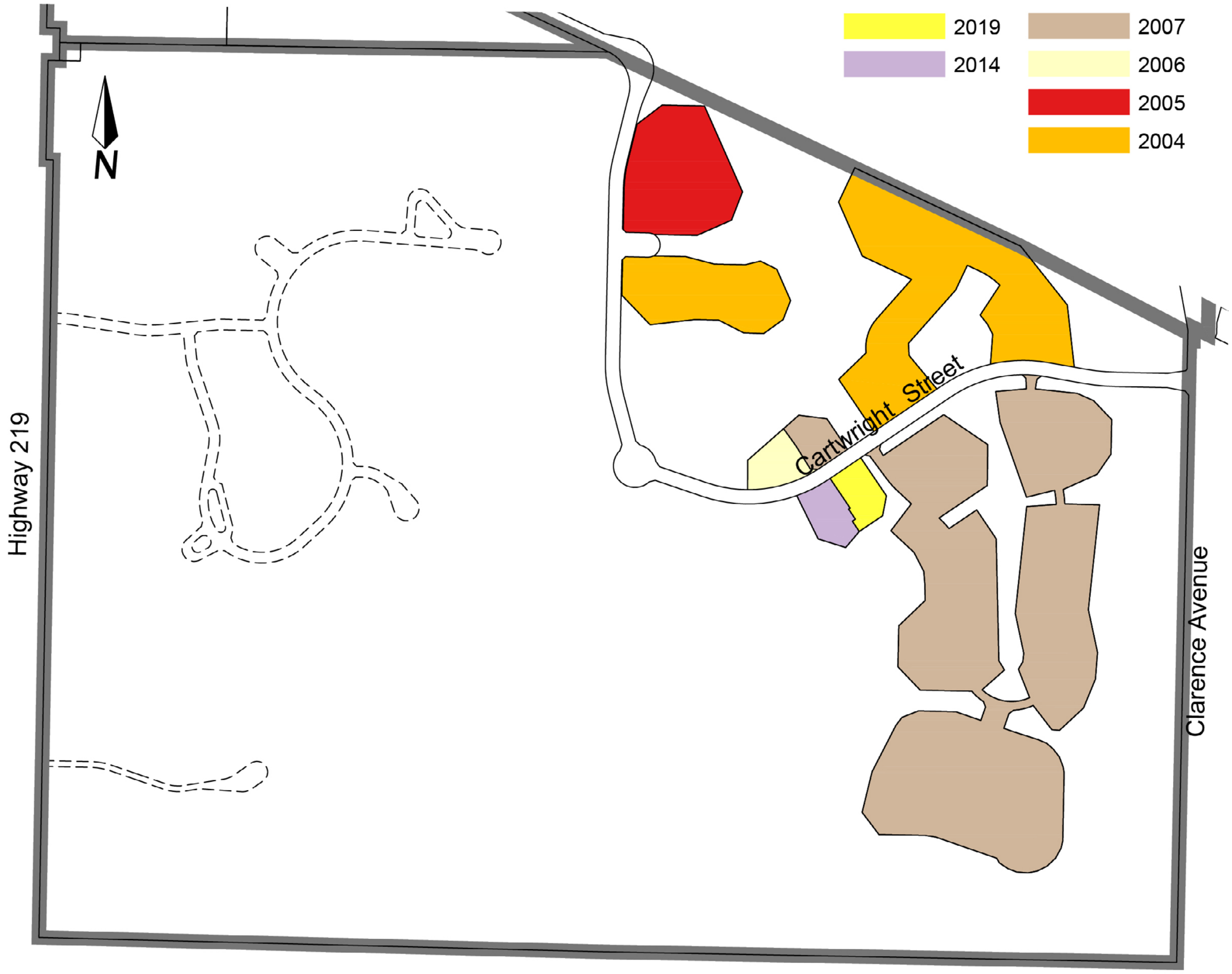


Figure 30: Willows Development Permits

Source: Mapping & Research, City of Saskatoon



SERVICING PLANS

SERVICING PLANS

Residential Servicing - Greenfield

Figures 31 through 35 show the servicing projections for new neighbourhood areas for the years 2022, 2023, and 2024. These servicing forecasts are primarily greenfield in nature, being that servicing typically already exists near infill sites. In some cases, servicing upgrades may be needed to accommodate infill opportunities, however, there are no servicing upgrades currently planned for the next three years.

Servicing projections for greenfield neighbourhoods are assembled from information provided by major developers within the city. Servicing projections represent a best-case scenario for servicing completion and assume satisfactory contractor performance and average weather conditions.

It should be noted that land developers have the option to scale back or accelerate servicing plans in response to market demand. Land developers can also control the timing of one-unit dwelling lots released to the market, further influencing supply. The planned servicing levels outlined in this report are projections and are intended to illustrate all land that is currently planned for servicing.

Table 16 identifies the one-unit dwelling lots projected to be serviced, by year, within each greenfield neighbourhood. These projections are separated, showing Saskatoon Land's land development program (Noted as 'City' in the table below) and planned servicing projections from the private development industry. A total of 2408 one-unit dwelling lots are projected to be serviced over the next three years.

Table 16: One-unit Dwelling Lot Servicing Projections, 2022 – 2024

Neighbourhood	2022		2023		2024		Total
	City	Private	City	Private	City	Private	
Aspen Ridge	122	55	208	40	242	40	707
Brighton	0	294	0	316	200	329	1139
Kensington	40	0	0	0	127	0	167
Rosewood	0	190	0	120	0	85	395
Total	**162**	**539**	**208**	**476**	**569**	**454**	**2,408**

Source: 2021 City of Saskatoon Developer Survey

Table 17 identifies the servicing plans for multiple unit dwelling land by neighbourhood for 2022 to 2024. The number of acres of land being serviced through Saskatoon Land's land development program and the private development industry for each year is shown. Land zoned for mixed-use development may also accommodate residential development; however, because development on mixed-use zoned sites is difficult to predict, they are not included in the multiple unit dwelling estimates.

Table 17: Multiple-unit Servicing Projections, 2022 – 2024

Neighbourhood	2022 Acres	2022 Potential Dwelling Units	2023 Acres	2023 Potential Dwelling Units	2024 Acres	2024 Potential Dwelling Units
Aspen Ridge						
City	26.45	944	12.33	327	0	0
Private	0	0	0	0	0	0
Total	26.45	944	12.33	327	0	0
Brighton						
City	0	0	0	0	0	0
Private	1.39	22	0	0	1.43	23
Total	1.39	22	0	0	1.43	23
Kensington						
City	9.43	161	0	0	3.21	72
Private	0	0	0	0	0	0
Total	9.43	161	0	0	3.21	72
Rosewood						
City	2.49	100	1.93	41	0	0
Private	16	326	0	0	0	0
Total	18.49	426	1.93	41	0	0
Summary						
City	38.37	1205	14.26	368	3.21	72
Private	17.39	348	0	0	1.43	23
Total	55.75	1553	14.26	368	4.64	95
Grand Total			**74.66 acres**	**2016 potential dwelling units**		

Source: 2021 City of Saskatoon Developer Survey

Total Residential Servicing

Table 18 below summarizes the one-unit dwelling and multiple-unit dwelling inventory and projected servicing schedules for new neighbourhood areas from the present through 2024.

Table 18: Residential Servicing Projections Summary, 2022 – 2024

Land Use	Inventory (potential dwelling units)	2022 Servicing (potential dwelling units	2023 Servicing (potential dwelling units)	2024 Servicing (potential dwelling units)	Total (potential dwelling units)
One-Unit Dwelling	2,489	701	684	1,023	4,897
Multiple-Unit Dwelling	5,993	1,553	368	95	8,009
Total	**8,482**	**2,254**	**1,052**	**1,118**	**12,906**

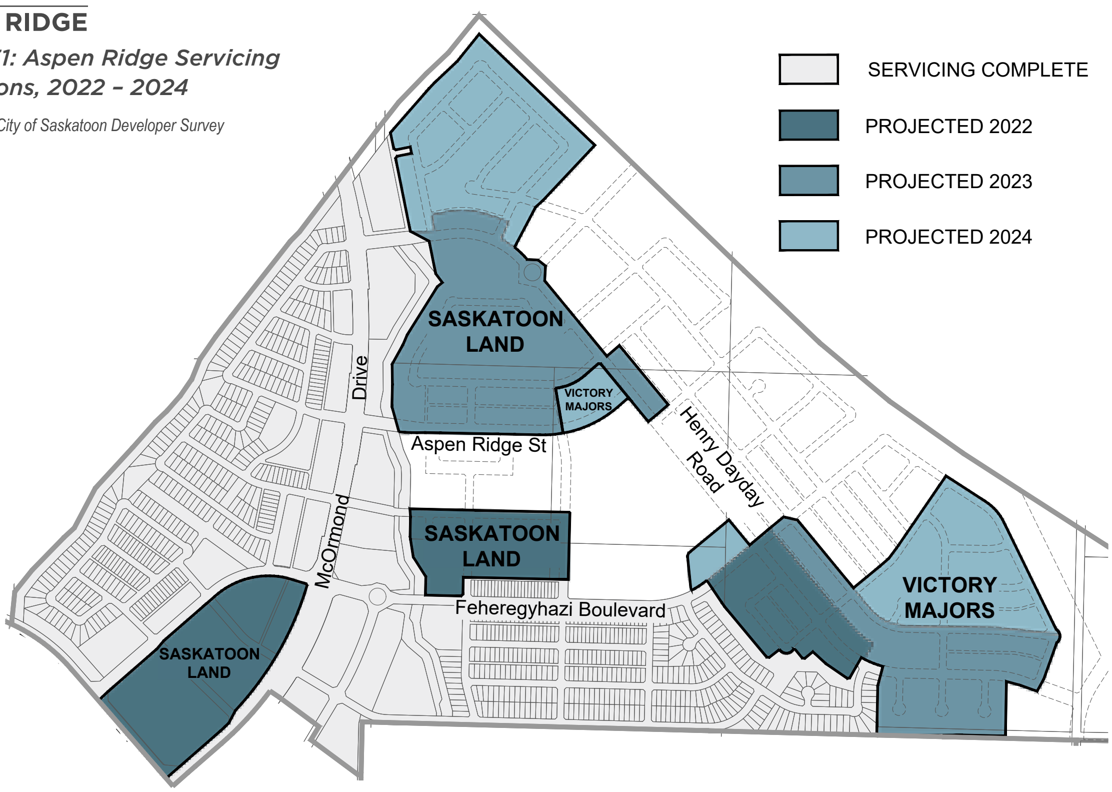
The residential inventory and planned servicing schedules over the next three years will accommodate enough residential dwelling units to accommodate 30,280 people, or 12,906 residential dwelling units. Of these, 8,482 units are existing inventory and 4,424 would be from newly serviced lots. This would support an annual population growth rate of 2% over a three-year period, which exceeds the City's growth projection and inventory targets. As noted, if growth rates are lower, developers can respond by delaying the servicing of new land to avoid an oversupply of serviced land and increased carrying costs. Risk levels, for both the City and private developers, can be managed by continuously monitoring land absorption and inventory levels. Use of a phased servicing approach that involves the installation of deep services one year and roadway construction the following year can also provide additional flexibility in managing capital outlay and land supply objectives.

Figures 31 through 35 identify the projected servicing schedules from 2022 to 2024 in approved new neighbourhood Concept Plan areas in Saskatoon.

ASPEN RIDGE

Figure 31: Aspen Ridge Servicing Projections, 2022 – 2024

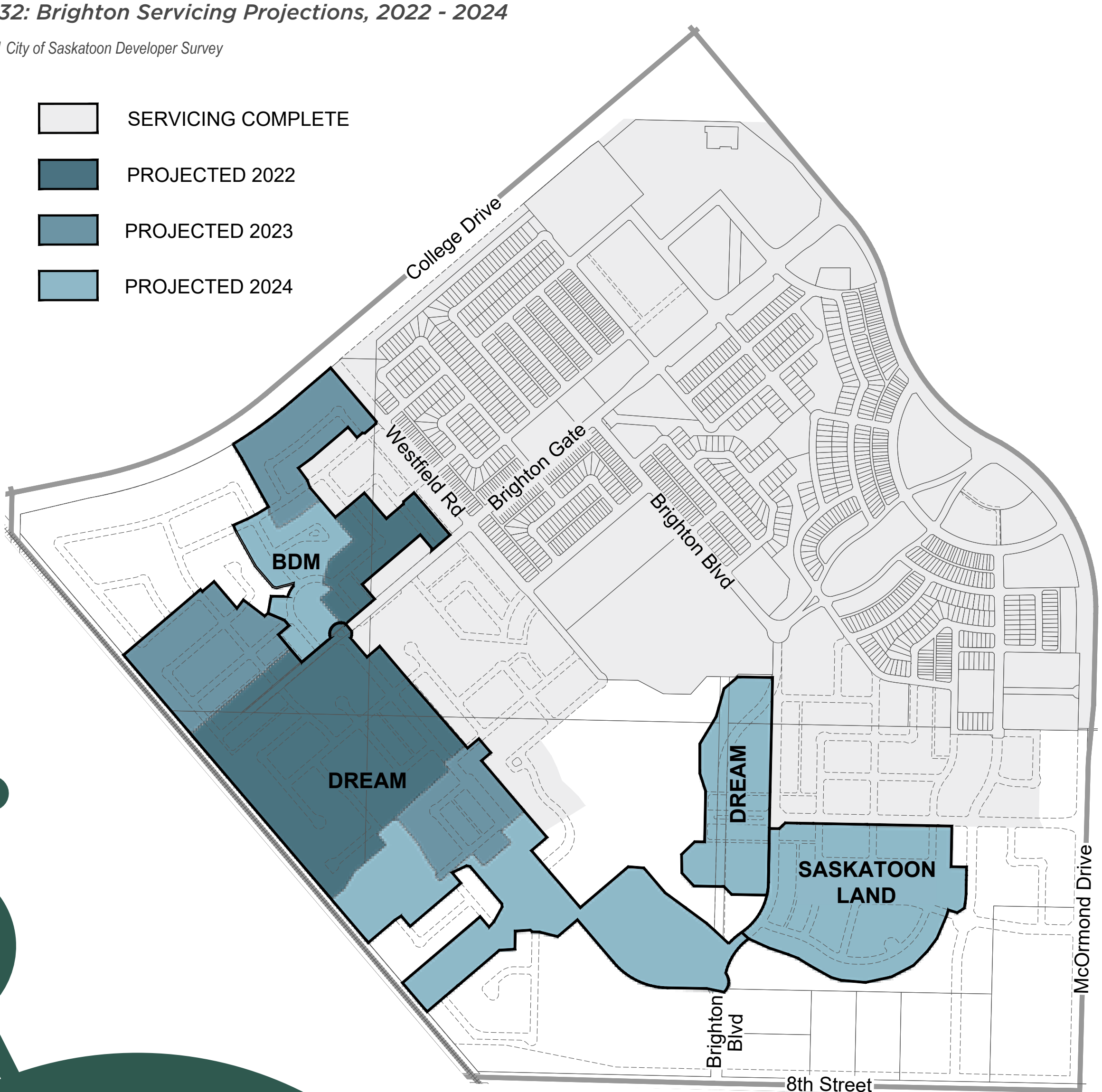
Source: 2021 City of Saskatoon Developer Survey



BRIGHTON

Figure 32: Brighton Servicing Projections, 2022 - 2024

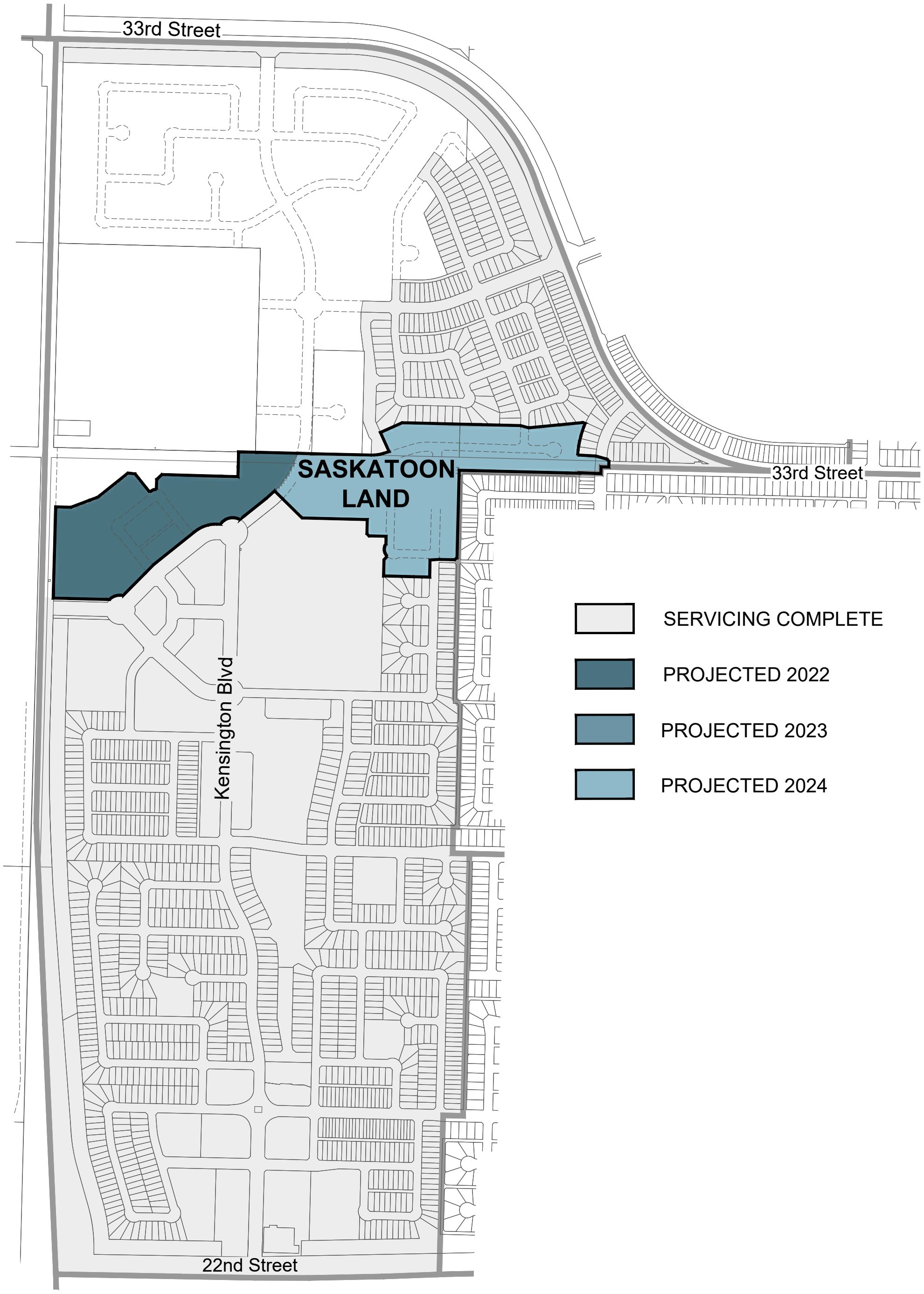
Source: 2021 City of Saskatoon Developer Survey



KENSINGTON

Figure 33: Kensington Servicing Projections, 2022 – 2024

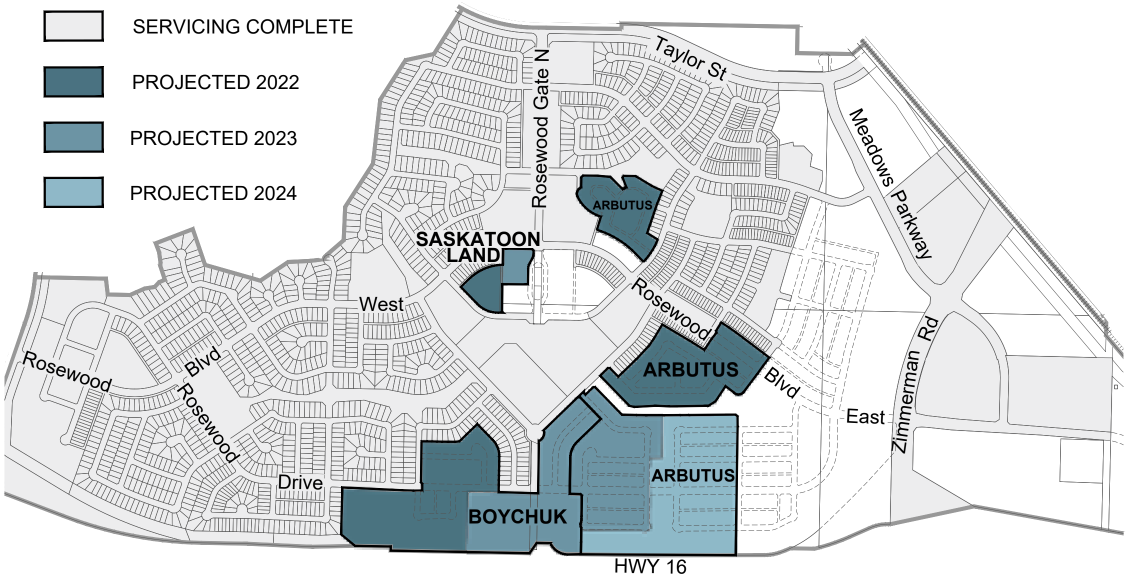
Source: 2021 City of Saskatoon Developer Survey



ROSEWOOD

Figure 34: Rosewood Servicing Projections, 2022 – 2024

Source: 2021 City of Saskatoon Developer Survey



Residential Servicing – Infill Areas & Opportunities

To achieve the City's Strategic Goal of Sustainable Growth, identified in the City of Saskatoon Strategic Plan, Administration has identified target goals for residential infill development. Longer term goals in the City's Growth Plan to Half a Million identify redevelopment strategies that could significantly alter Saskatoon's overall growth pattern, shifting the balance of growth to 50% suburban and 50% infill, and contribute significantly to the availability of land for development.

While several infill opportunities are at the planning or exploratory stage, Table 19 provides a summary of larger projects within the City Centre area that are being undertaken by private developers. Renderings of the projects are shown in Figure 36.

Table 19: City Centre Infill Projects

	Project/Location	Developer	Floors	Units
Under Construction	639 Main Street	Westcliff Properties	15	106
	410, 420 5th Avenue North	Baydo Development Corporation	24, 25	474
	512 - 520 Main Street	102065776 Saskatchewan Ltd.	6	50
	1012 College Drive	North Prairie Developments	12	171
Total				**801**

Photo credit: Tourism Saskatoon/Greg Huszar Photography

Residential Infill Projects

Figure 35: Residential Infill Projects

Source: Planning and Development – City of Saskatoon

Infill Opportunities on City Owned Land

Saskatoon Land has typically focused on greenfield land offerings in its planned developments. More recently the focus of The City and Saskatoon Land has changed to include more infill development opportunities in support of the Plan for Growth. Table 20 highlights some of the projects that The City and Saskatoon Land have under way, with River Landing and The South Caswell Redevelopment Project being undertaken by The City.

Proposed land uses and densities for several the projects listed below have yet to be determined and will be finalized once a thorough servicing and feasibility analysis is completed, and appropriate public engagement has occurred.

Table 20: Saskatoon Land Infill Opportunities

Site/Property	Details
South Caswell	Mixed-use community development on former Saskatoon Transit sites
25th Street Development Sites	Currently exploring zoning changes for the sale and development of parcels Across from Saskatoon Police Headquarters
Dundonald Avenue Parcels	Currently exploring potential development and servicing options for the site Remnant parcels remaining from Circle Drive South project
900 Block - 3rd Avenue	Land holdings retained for potential 3rd Avenue road widening Exploring preliminary development concepts in the event that lands are not required for the right-of-way dedication
Adolph Crescent Development Site	Residential development site zoned RMTN1 - Medium Density Townhouse Residential District 1 Currently for sale
Delayen Crescent (Forest Grove)	Currently exploring development options for remnant land holding remaining from Central Avenue/Attridge Drive intersection
River Landing	Parcel G projected release of 2022 based on market conditions Sale of Parcel E and Parcel BB is TBD

Source: Saskatoon Land

Industrial and Commercial Servicing

Table 21 shows industrial servicing projections for Marquis Industrial for 2022 to 2024. The Hampton Village Business Park area, which is envisioned as an office/business park development, is not projected to receive any servicing upgrades over the next three years. Figures 37 illustrate projected industrial and commercial servicing for the Marquis Industrial.

As previously noted, there are vacant sites currently zoned for commercial development, totaling 136 acres. The current inventory of vacant commercial space has the potential to accommodate 5.9 million additional square feet of retail and/or office space.

Due to the current inventory of commercial space, and the amount of future commercial land that has been identified in Council approved Sector Plans and Concept Plans, it is anticipated that enough land is available for commercial opportunities over the next three years.

Table 21: Industrial & Commercial Servicing Projections, 2022 – 2024

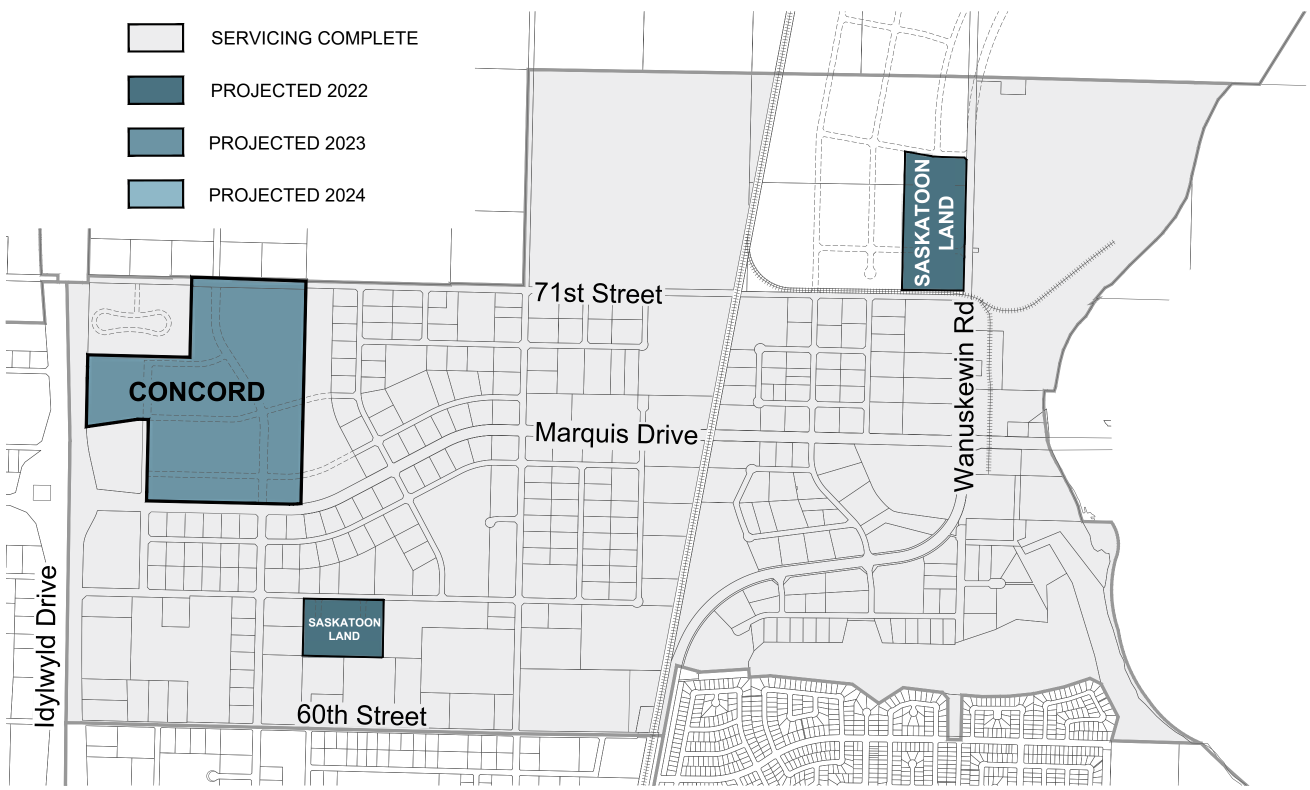
Industrial/Commercial Servicing (acres)	2022		2023		2024		Total	
	City	Private	City	Private	City	Private	City	Private
Marquis Industrial	39.27	0	0	115	0	0	0	0

Source: 2021 City of Saskatoon Developer Survey

MARQUIS INDUSTRIAL

Figure 36: Marquis Industrial Servicing Projections, 2022 – 2024

Source: 2021 City of Saskatoon Developer Survey



The residential inventory and planned servicing schedules over the next three years will accommodate enough residential dwelling units to accommodate 30,280 people, or 12,906 residential dwelling units.

APPENDIX

Appendix 1

Detailed Sector Plan Calculations (acres)

	West				
	Blairmore	Confederation	Riel Industrial	Lawson	Core
Sector Gross Area	7,246.25	6,027.19	11,110.57	3,070.89	2,659.27
Total Unbroken Land	5,105.66	-	4,418.48	-	-
Sector Number of Neighbourhoods	8	18	8	9	9
Sector Average Neighbourhood Size	440.11	330.16	1,115.35	341.21	295.47
Sector Population 2016	3,965	62,980	-	29,183	34,016
Sector Population at Full Build-Out	72,168	62,980	-	36,183	40,738
Total Number of Neighbourhood Parks	4 (13.2 acres)	33 (304.6 acres)	1 (5.1 acres)	12 (129.8 acres)	21 (78.8 acres)
Total Number of District Parks	2 (30.1 acres)	5 (80 acres)	-	5 (50.4 acres)	4 (46.2 acres)
Total Number of Multi-District Parks	1 (34.7 acres)	3 (63.6 acres)	-	1 (23.7 acres)	1 (17.8 acres)
Total Number of Industrial Parks	0	1 (0.9 acres)	-	0	0
Total Number of Special Use Parks	1 (11.7 acres)	3 (10.9 acres)	3 (25.4 acres)	6 (136.8 acres)	11 (139.8 acres)
Total Number of Elementary Schools	-	25	-	12	9
Total Number of High Schools	2	2	-	2	5
Total Commercial	80.60	162.81	15.64	105.17	423.91
Total Industrial	58.43	501.84	4,335.18	288.06	68.99
Total Vacant Commercial Land	2.21	2.30	-	4.13	30.99
Total Vacant Industrial Land	11.68	35.11	255.29	3.83	2.06

Appendix 1 continued on page 67.

Appendix 1

Detailed Sector Plan Calculations (acres)

Appendix 1 continued from page 66..

	East				
	University Heights	**Nutana**	**Lakewood**	**Holmwood**	**University**
Sector Gross Area	8,351.95	6,190.84	4,095.58	6,329.55	2,360.20
Total Unbroken Land	3,918.94	180.56	194.81	5,426.12	2,360.20
Sector Number of Neighbourhoods	11	19	9	3	4
Sector Average Neighbourhood Size	443.30	353.55	455.06	903.43	n/a
Sector Population 2016	44,765	55,311	43,343	907	767
Sector Population at Full Build-Out	79,464	55,311	48,755	76,143	54,878
Total Number of Neighbourhood Parks	46 (228.4 acres)	45 (231.7 acres)	19 (318.8 acres)	2 (13.3 acres)	0
Total Number of District Parks	2 (47.8 acres)	7 (115.1 acres)	4 (129.3 acres)	0	0
Total Number of Multi-District Parks	1 (24.8 acres)	1 (2.3 acres)	2 (31.6 acres)	0	0
Total Number of Industrial Parks	0	0	0	0	0
Total Number of Special Use Parks	5 (8.7 acres)	3 (126.2 acres)	0	0	0
Total Number of Elementary Schools	12	18	12	0	0
Total Number of High Schools	2	3	1	0	0
Total Commercial	164.43	261.01	208.9	70.71	202.68
Total Industrial	341.75	389.95	41.79	0	0
Total Vacant Commercial Land	55	0.68	7.34	12.92	72
Total Vacant Industrial Land	1.51	23.21	22.16	0	0

Source: Mapping and Research – City of Saskatoon

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