

SEPTEMBER 2020

# GROWTH MONITORING



*City of*  
**Saskatoon**

## Report



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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 a number of 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 2021 to 2023.

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 & 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 2018 – 2021](#) 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.

### SASKATOON NORTH PARTNERSHIP FOR GROWTH

### SCHEDULE C: FUTURE URBAN GROWTH AREAS

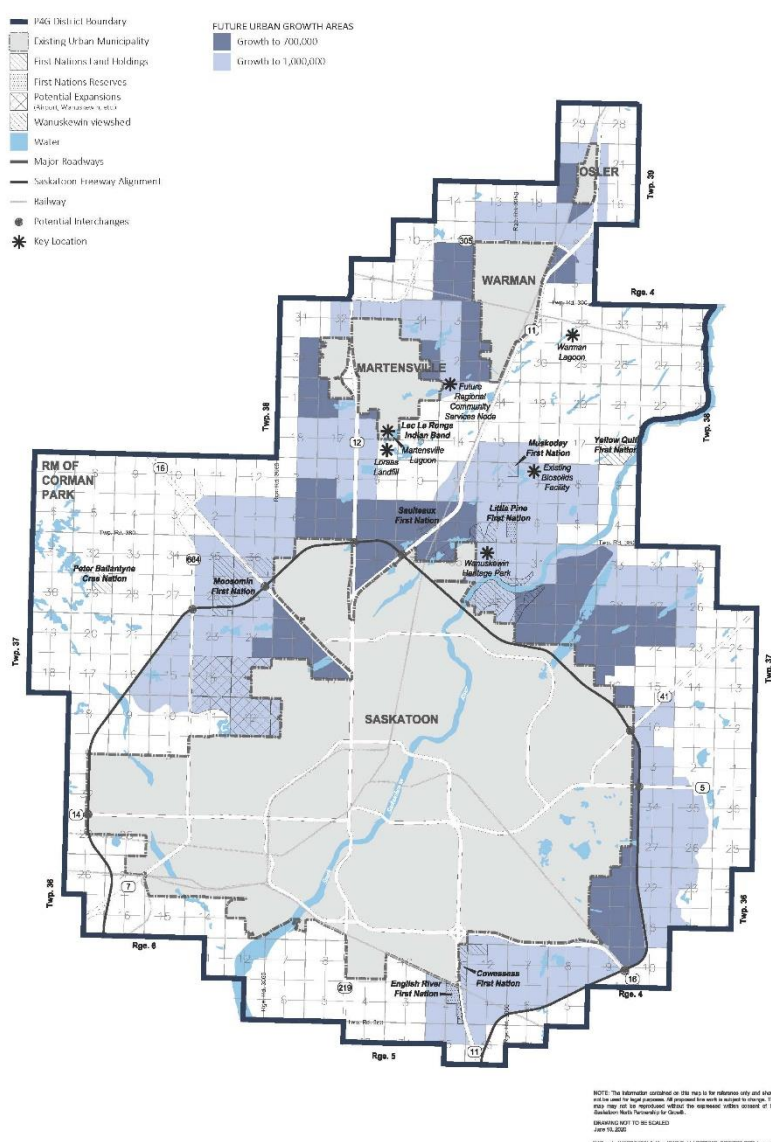


Figure 1: Saskatoon North Partnership for Growth (P4G) Future Urban Growth Areas

## 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 to support the direction of the Plan for Growth. These projects include the University Sector Plan for the University of Saskatchewan's Endowment Lands (a Strategic Infill site), as well as identified Corridor Growth Areas and a 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 the page five outlines detailed target levels for each area identified as part of the Plan for Growth, and actual population numbers for each.

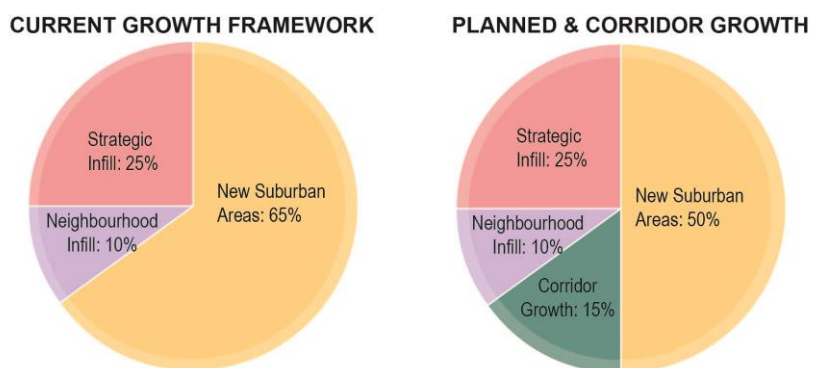


Figure 2: Distribution of Population

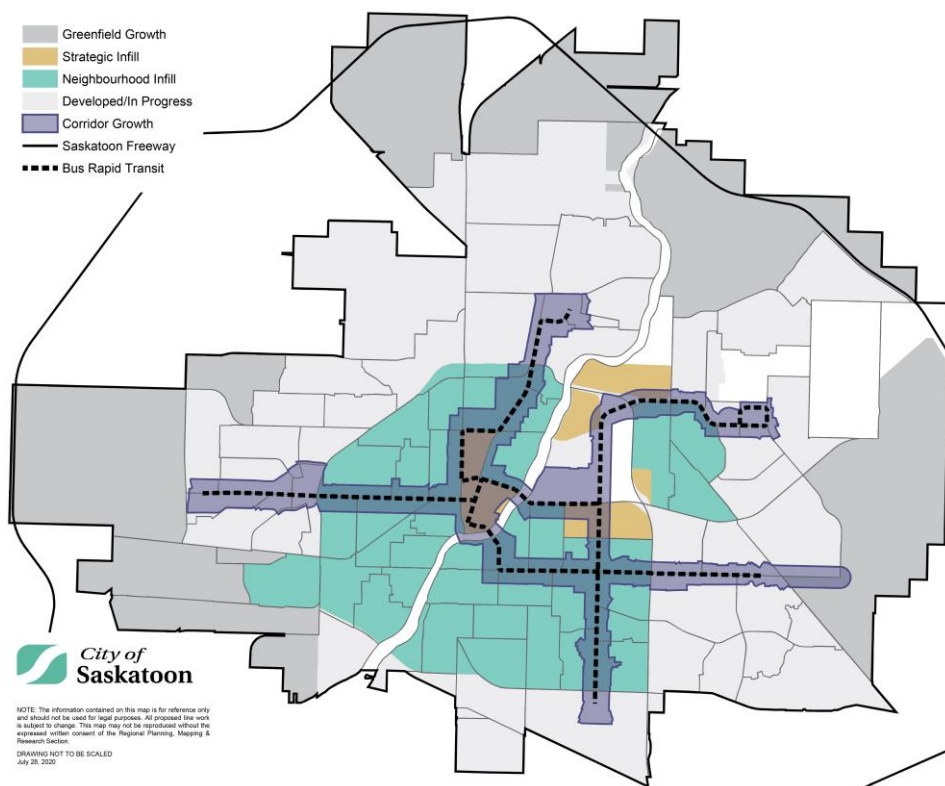


Figure 3: Planned Growth Map

## 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 four active residential sectors that are under development – Blairmore, Holmwood, Lakewood, and University Heights. In addition, the Riel Industrial Sector Plan guides industrial development in Saskatoon's north end. The University Sector Plan, which is now under development, will be the first Sector Plan developed for an existing, built up area of the city. The completion of this Sector Plan is a key step toward achieving the City's infill goals. It will provide 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.

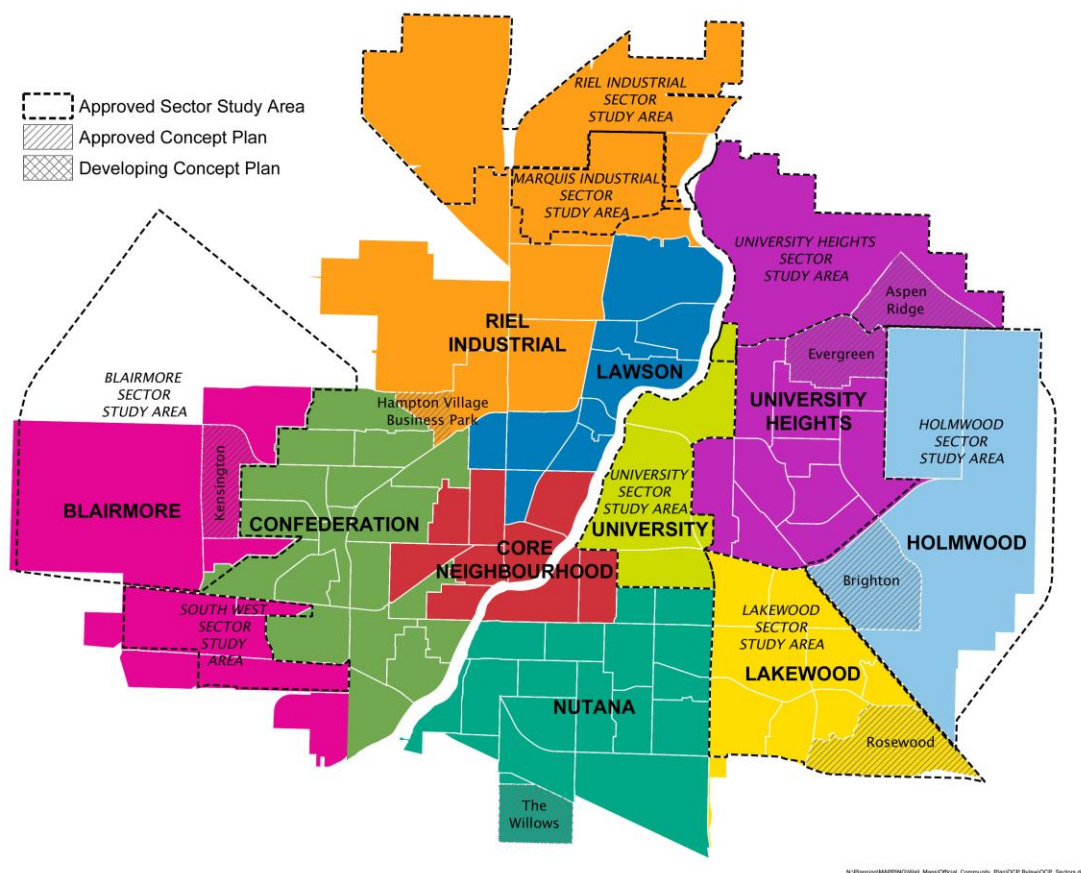


Figure 4: Current Development Areas



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 (2020)	Target Population (Growth to 500,000)
<b>Strategic Infill 25%</b>			
Downtown		3,278	18,000
North Downtown		139	10,000
University Sector		767	49,000
<b>Corridor Growth 8 – 15% + 26,500*</b>			
<b>Neighbourhood Infill 10%</b>			
Confederation Sector		62,980	65,000
Core Neighbourhood Sector <sub>1</sub>		30,738	37,500
Nutana Sector (Infill Areas) <sub>2</sub>		41,267	49,000
Lawson Sector		29,183	32,500
<b>Greenfield Development 50%</b>			
Holmwood Sector		907	76,143
University Heights Sector		44,765	79,464
Blairmore Sector		3,965	72,168
Lakewood Sector		43,343	48,755
Nutana Sector (Greenfield Areas) <sub>2</sub>		14,044	14,044
<b>TOTAL</b>			
		<b>279,900</b>	<b>578,074</b>

1 – 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.

2 – Core Neighbourhood Sector excludes Downtown

3 – 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.

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 regards 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 (2016 – Year to Date)

	<b>Target Rate</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020 (ytd)</b>	<b>Average (2016 – 2020 ytd)</b>
Strategic Infill Development	<b>25%</b>	0%	0%	12%	0%	0%	<b>3%</b>
Corridor Growth	<b>8 – 15%</b>	4%	11%	8%	5%	11%	<b>5%</b>
Neighbourhood Infill	<b>10%</b>	7%	7%	6%	5%	8%	<b>9%</b>
Greenfield Development	<b>50%</b>	89%	82%	74%	90%	81%	<b>83%</b>

Ytd = Year to Date

# 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 2.03% for the last 10 years (2010 to 2019) and 1.50% for the last 3 years (2017 to 2019). The City's estimated population of Saskatoon is 279,900 as of July 1, 2020. 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 is estimated to be 1.7%. 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.

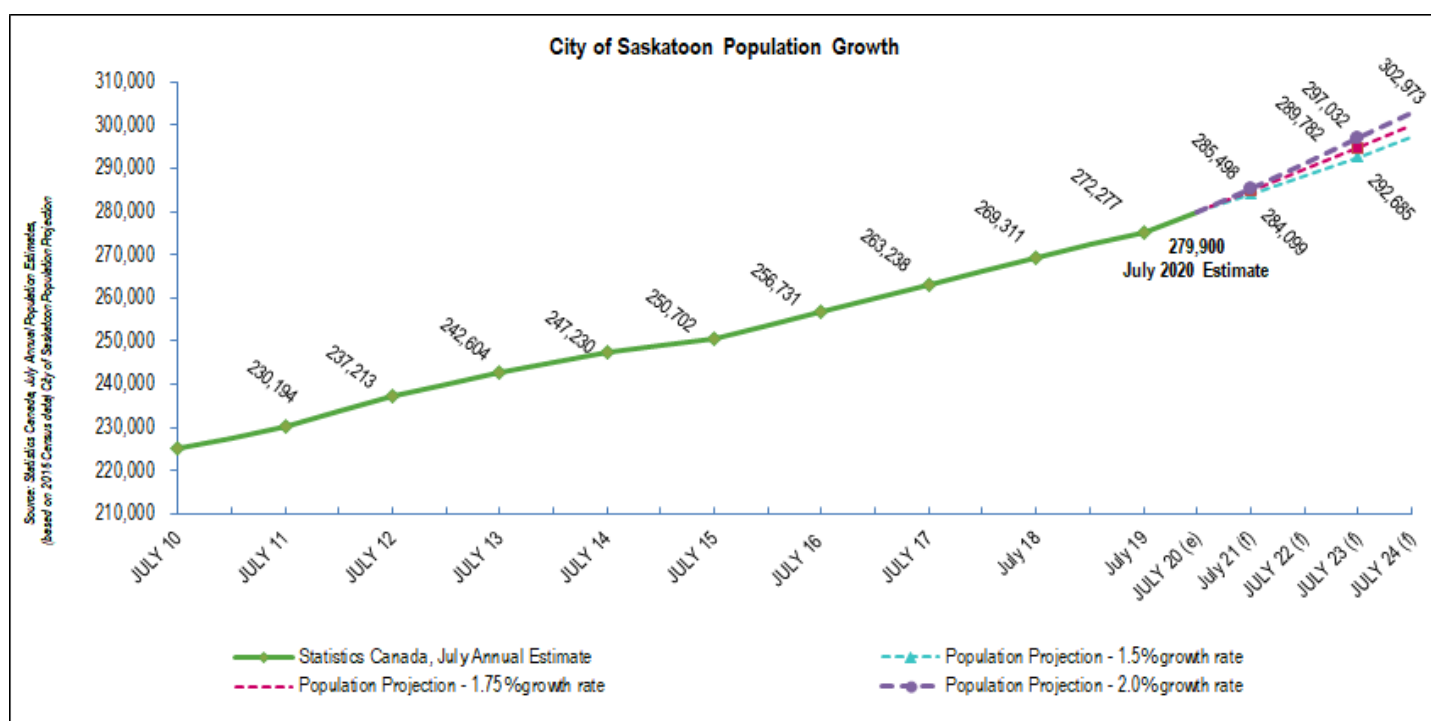
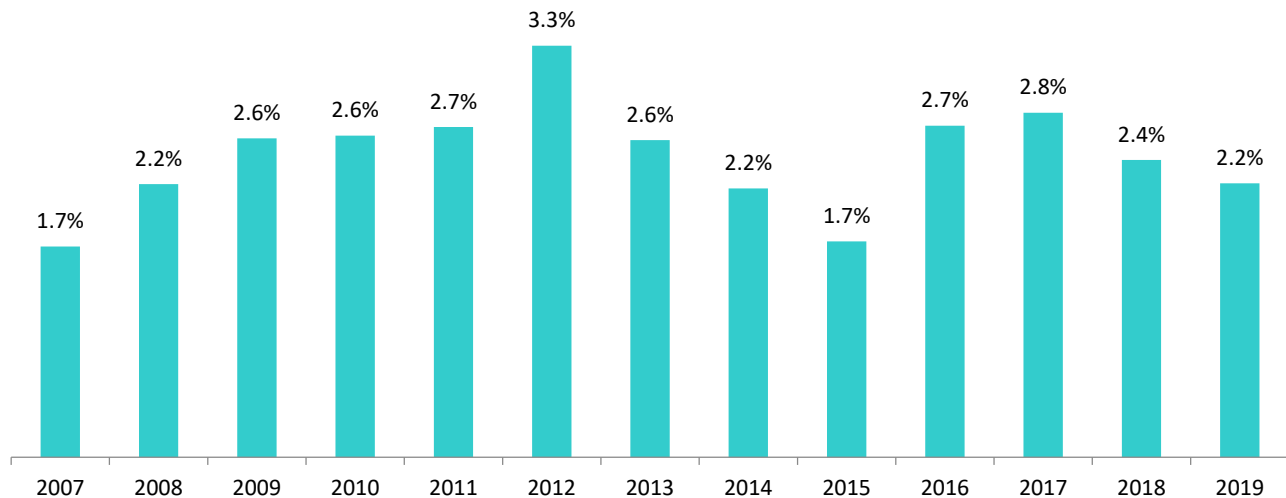


Figure 5: City of Saskatoon Population Projections, 2010 – 2022 (f)

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 1.1% in 2019. The annual average growth rate over the past ten years has been 2.3%. The 2019 growth rate fell well below the 10 year average.



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)

Figure 6: Saskatoon CMA Growth Rate, July 2007 – 2019

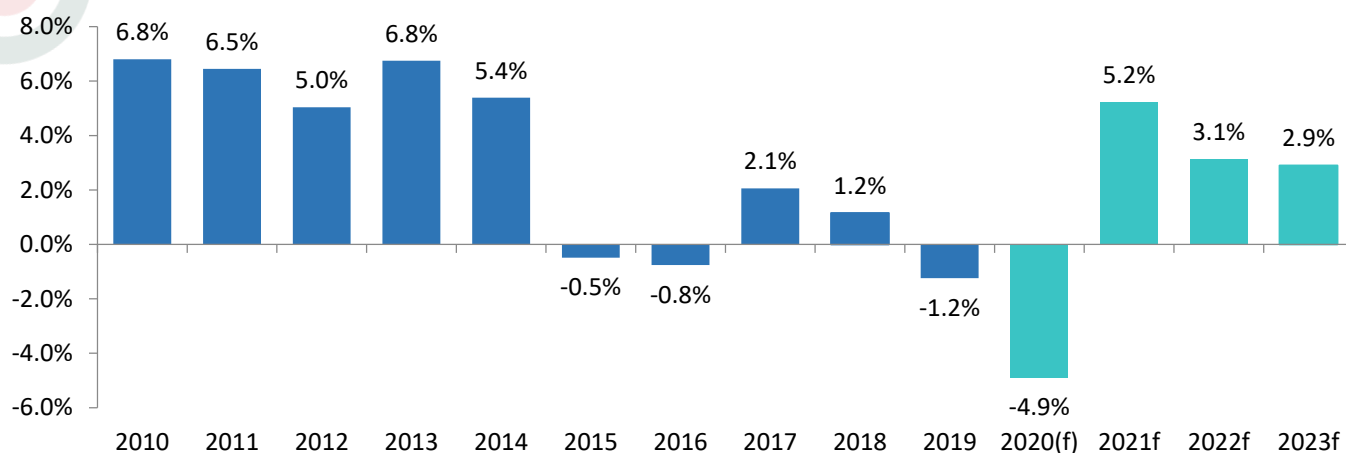
## Gross Domestic Product Growth

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 of time, 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.



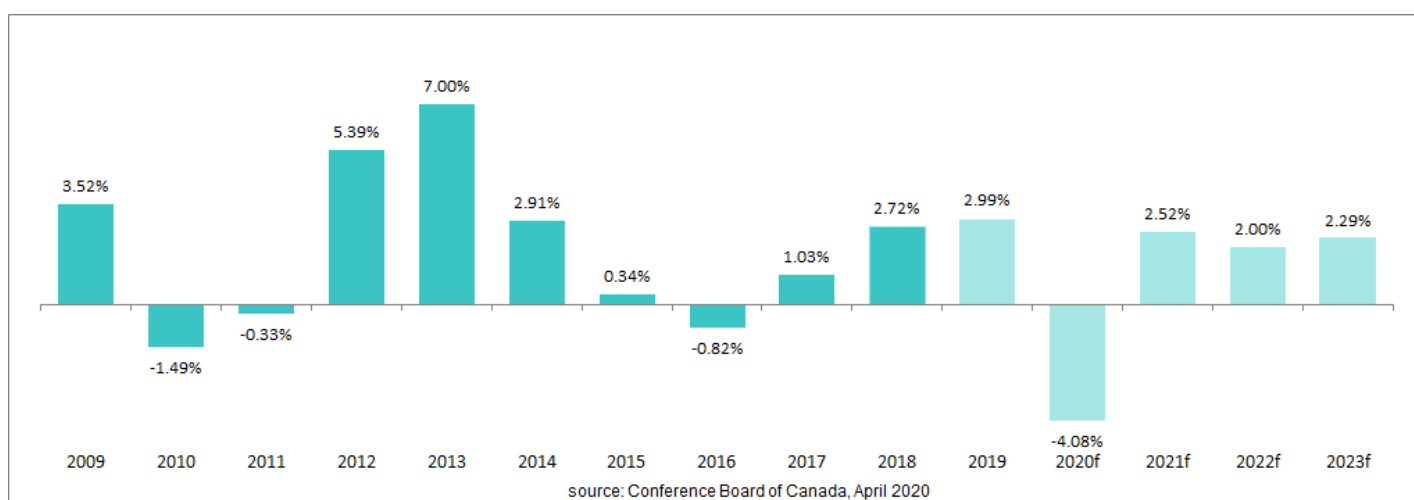


source: Conference Board of Canada, May 2020

Figure 7: Saskatoon CMA Real GDP Growth (% change), 2010 – 2023(f)

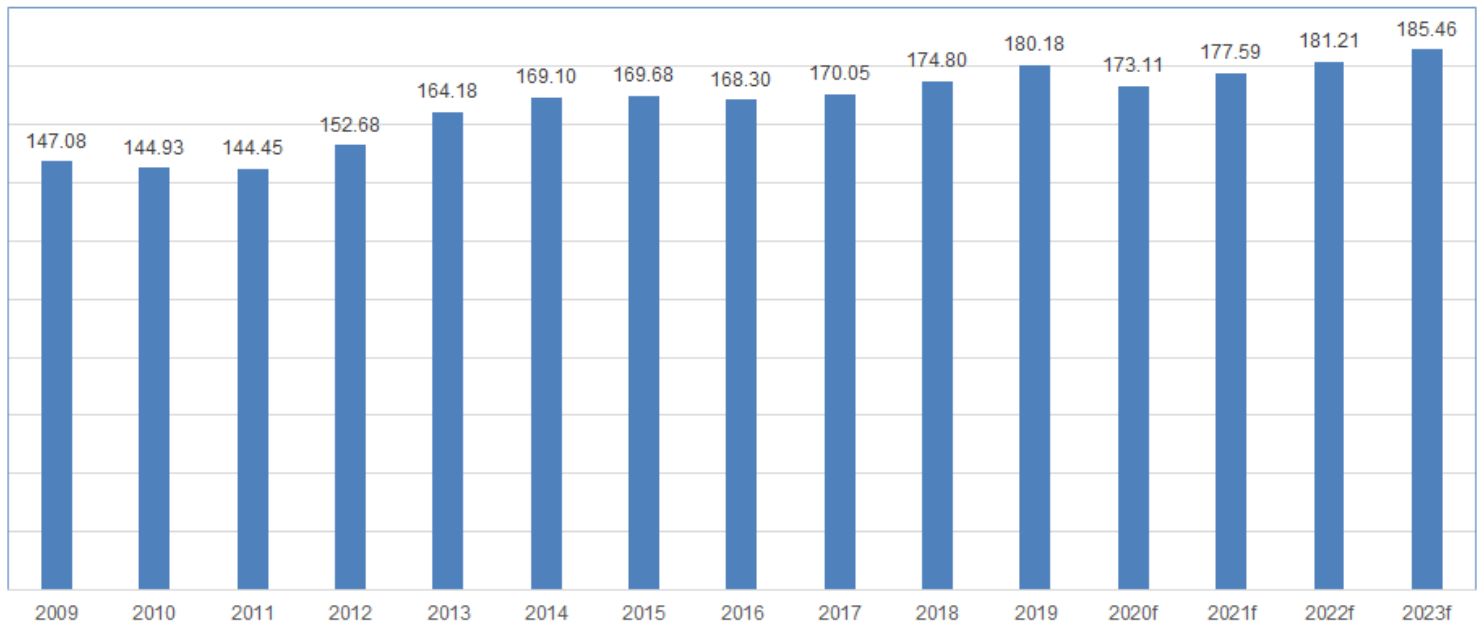
## Employment & Unemployment

Economies that have higher employment levels and positive employment growth generally 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 incomes, so the more people employed and earning incomes generally means 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.



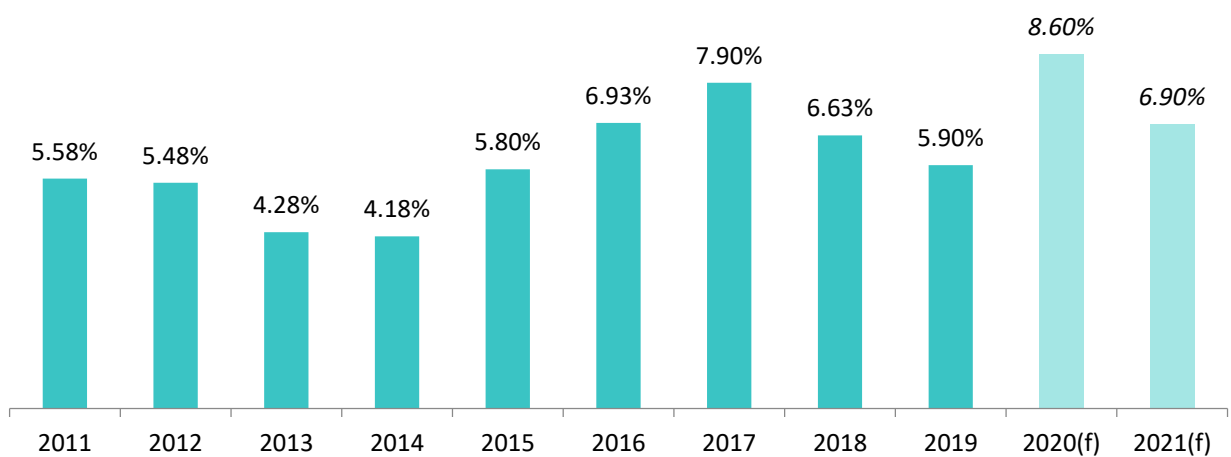
source: Conference Board of Canada, April 2020

Figure 8: Saskatoon Total Employment Growth (% growth), 2009 – 2023(f)



Source: Conference Board of Canada, April 2020

Figure 9: Saskatoon Total Employment (Thousands 000s), 2009 – 2023(f)



source: Conference Board of Canada, April 2020

Figure 10: Saskatoon Unemployment Rate, 2011 – 2021(f)

# Residential Indicators

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 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.

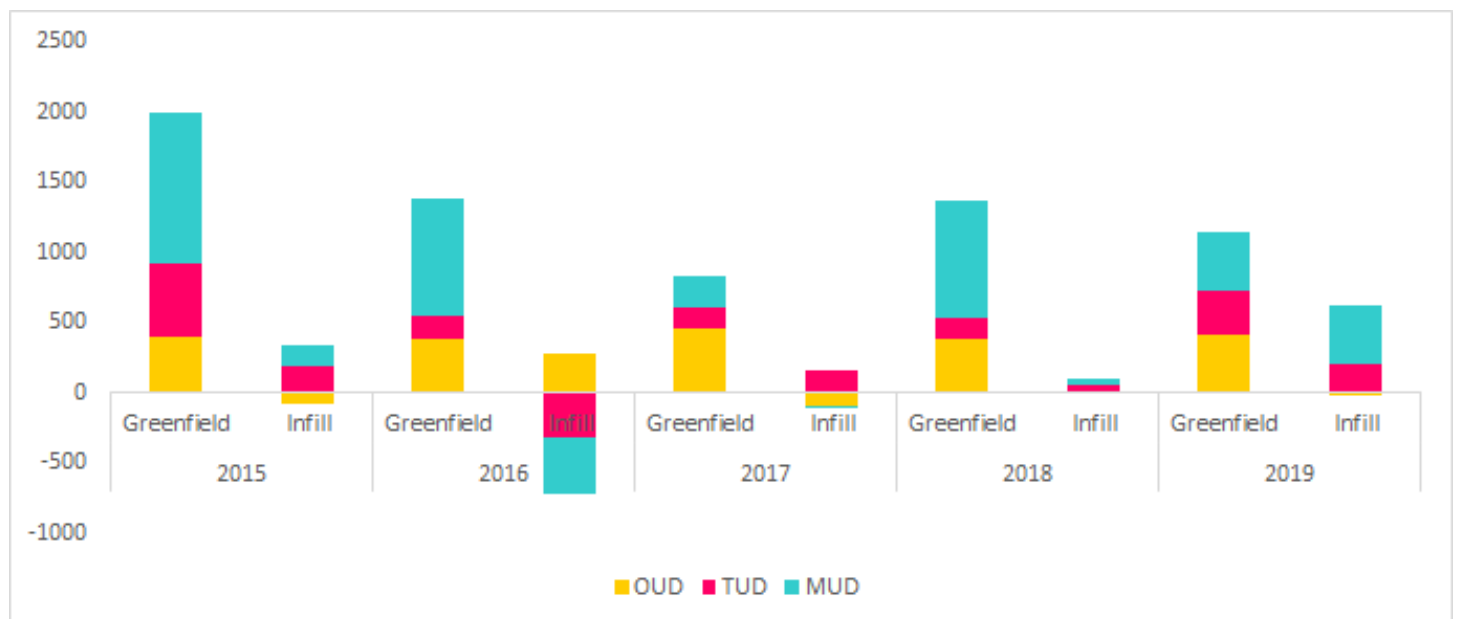


Figure 11: Annual Residential Development by Dwelling Type, 2015 – 2019

With this additional new development, Saskatoon's total dwelling unit count hit 114,548 total units in 2019, split between one-unit dwellings, (51.1%), two-unit dwellings (9.7%), and multiple-unit dwellings (39.1%).

Table 3: Total Dwelling Units, July 2017 – 2019

	OOD	TUD	MUD	Total
<b>2017</b>	57,807	10,422	43,106	111,335
<b>%</b>	51.9%	9.4%	38.7%	100%
<b>2019</b>	58,580	11,156	44,812	114,548
<b>%</b>	51.1%	9.7%	39.1%	100%

## 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 time frame.

Housing starts is an economic indicator that reflects the number of privately owned new houses on which construction has been started in a given 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 downward for Saskatoon in the short-term, and upward in the long-term, as of July 2020.

Table 4: Average Real Estate Sales Price for New Residential Units (built 2017 – 2019)

	Greenfield		Infill	
	Count	Average Price	Count	Average Price
<b>Semi-detached</b>	46	\$320,675	27	\$385,125
<b>Single-family</b>	1,401	\$449,359	165	\$498,640
<b>Condo Lowrise</b>	328	\$325,168	133	\$292,192
<b>Condo Highrise</b>	0	n/a	211	\$387,937
<b>Townhouse</b>	190	\$253,614	9	\$357,768
<b>Condo Bareland</b>	400	\$340,129	73	\$391,788

source: City of Saskatoon, Corporate Financial Services

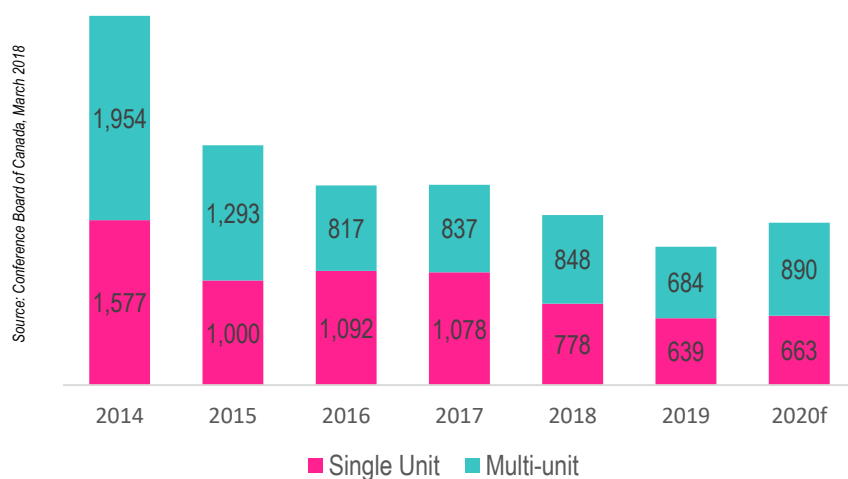


Figure 12: Saskatoon CMA Housing Starts, 2014 – 2020(f)



## 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 2019, 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.

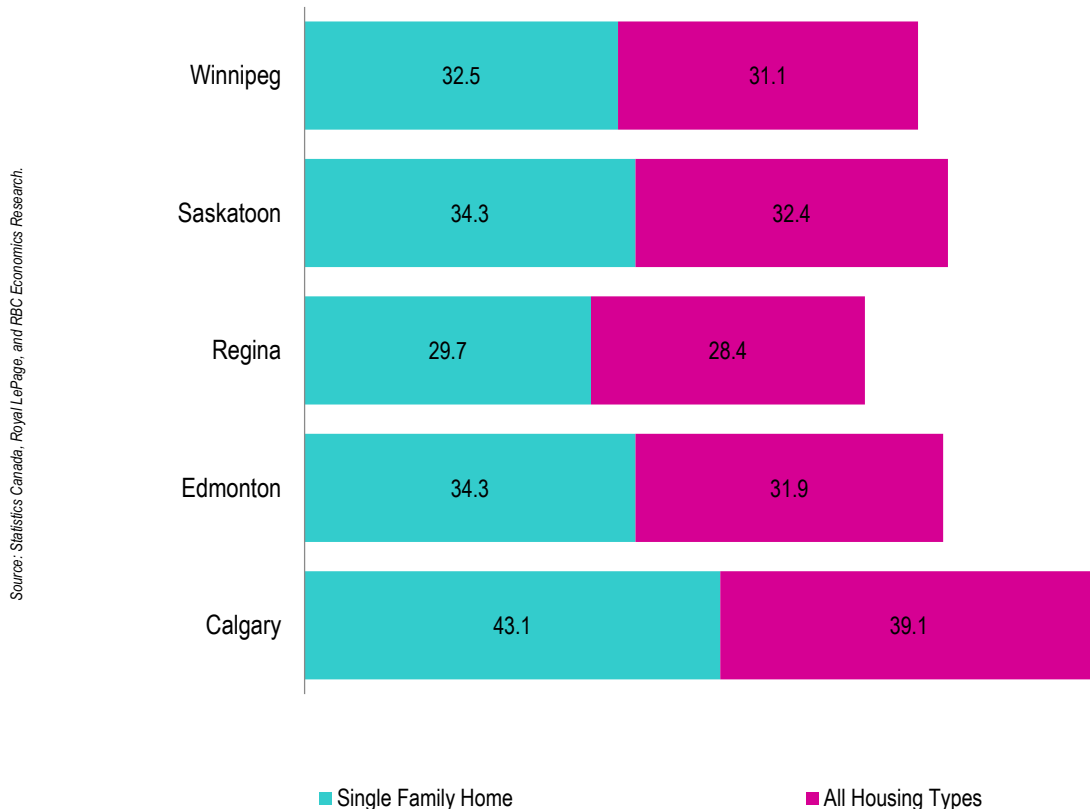


Figure 13: Housing Affordability Measure by City and Type, 2019

The City has made great 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 for the second year in a row in 2019 due to a lower demand to build affordable and entry level ownership housing. Targets for affordable ownership have been reduced due to decreased demand in the short-term. Affordable rental demand remained strong with significant in-kind support for large valued projects. With growing wait lists being experienced by affordable housing providers and market vacancy rates trending downward from 8.3% in 2018 to 5.7% in 2019, 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.

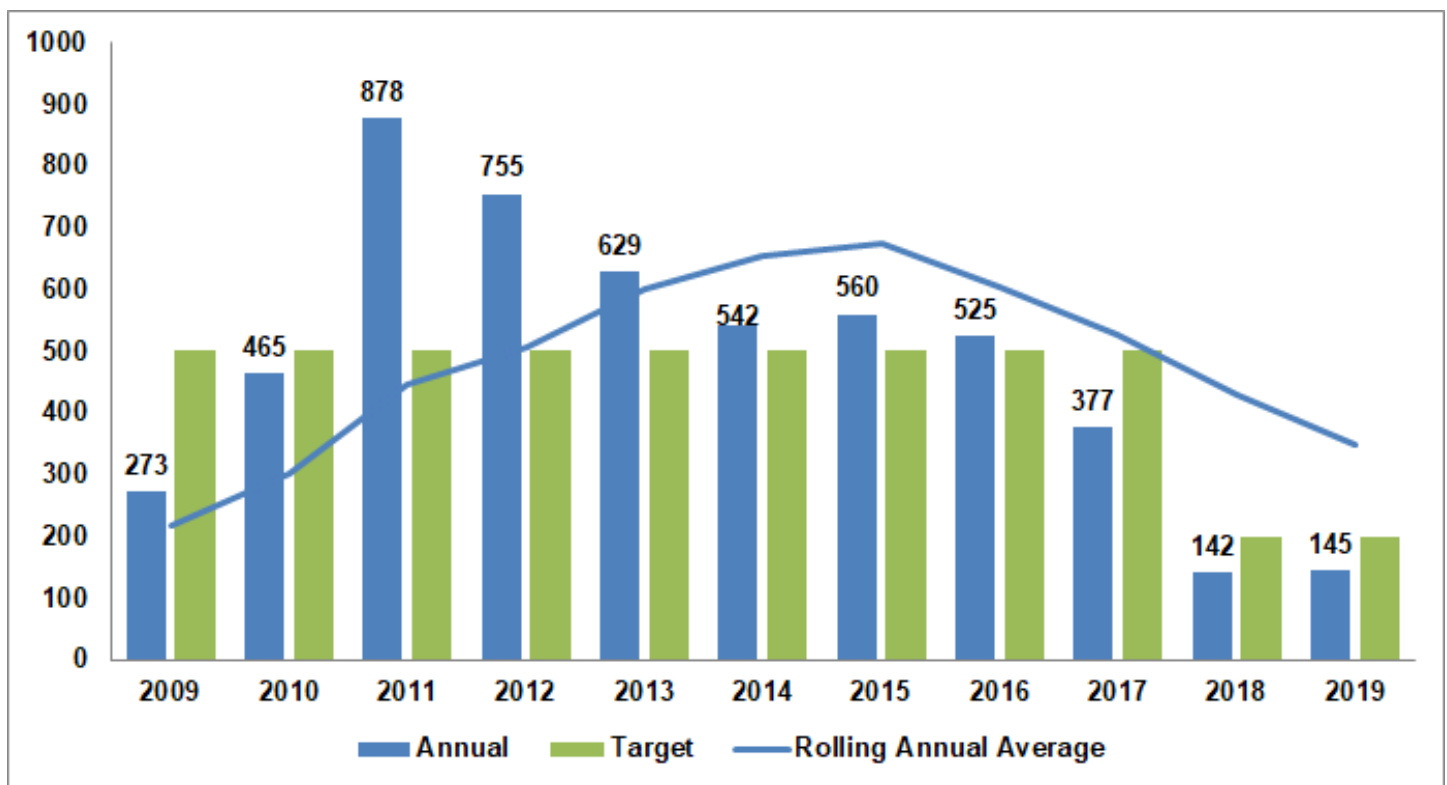
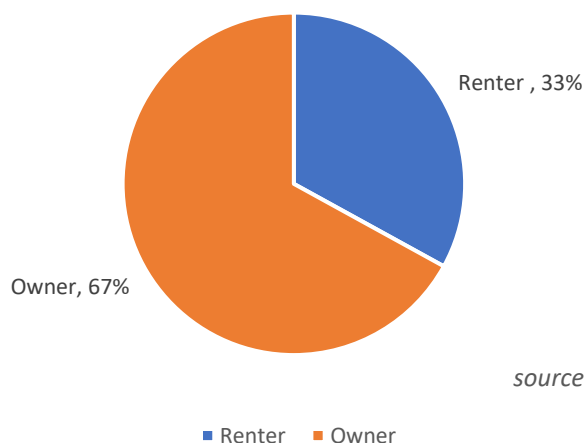


Figure 14: New Attainable Housing Units, 2009 – 2019

## 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 3.3% from 2018 to 2019. The average rent increased by an average of 2.7% 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 in the city of Saskatoon.



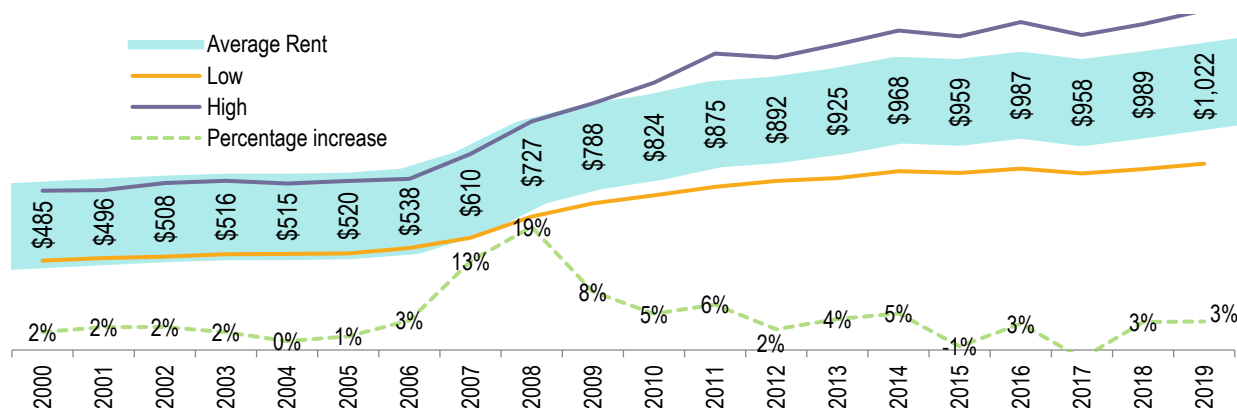
source: 2016 Census

Figure 15: Total Private Households by Tenure

Table 5: Rental Housing Vacancy Rates

	2015	2016	2017	2018	2019
<b>Annual Vacancy Rate (%)</b>	6.5%	10.3%	9.6%	8.3%	5.7%
<b>10 Year Average Actual (%)</b>	2.80%	3.51%	4.41%	5.05%	5.43%
<b>Date Range</b>	2006 - 2015	2007 - 2016	2008 - 2017	2009 - 2018	2010 - 2019
<b>10 Year Average Target (%)</b>	3.0%	3.0%	3.0%	3.0%	3.0%

source: CMHC Rental Market Report Saskatoon CMA



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).

Figure 16: Saskatoon CMA Average Rent & Annual Increase (%), 2000 – 2019

## 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. Tracking this helps gauge if this goal is being achieved and can help guide infill-focused programs and policy. In 2019, the five-year rolling average was 13.9%.

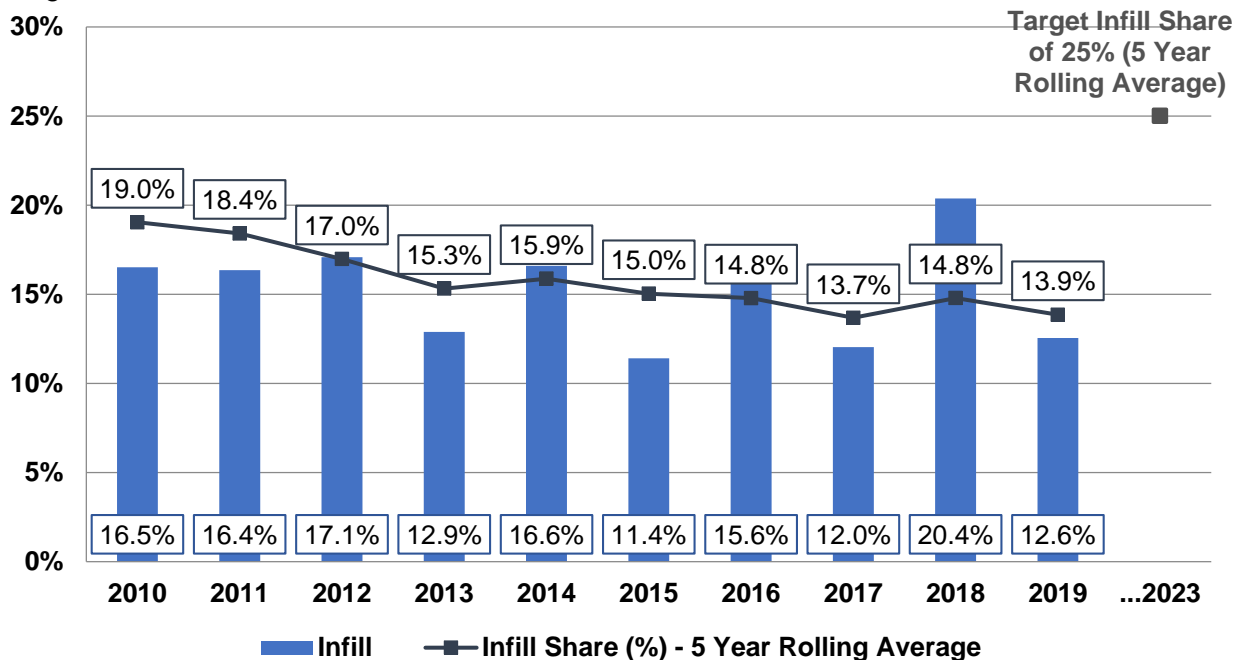


Figure 17: Residential Infill Development (percentage of total new dwellings city-wide, 2010 – 2019)

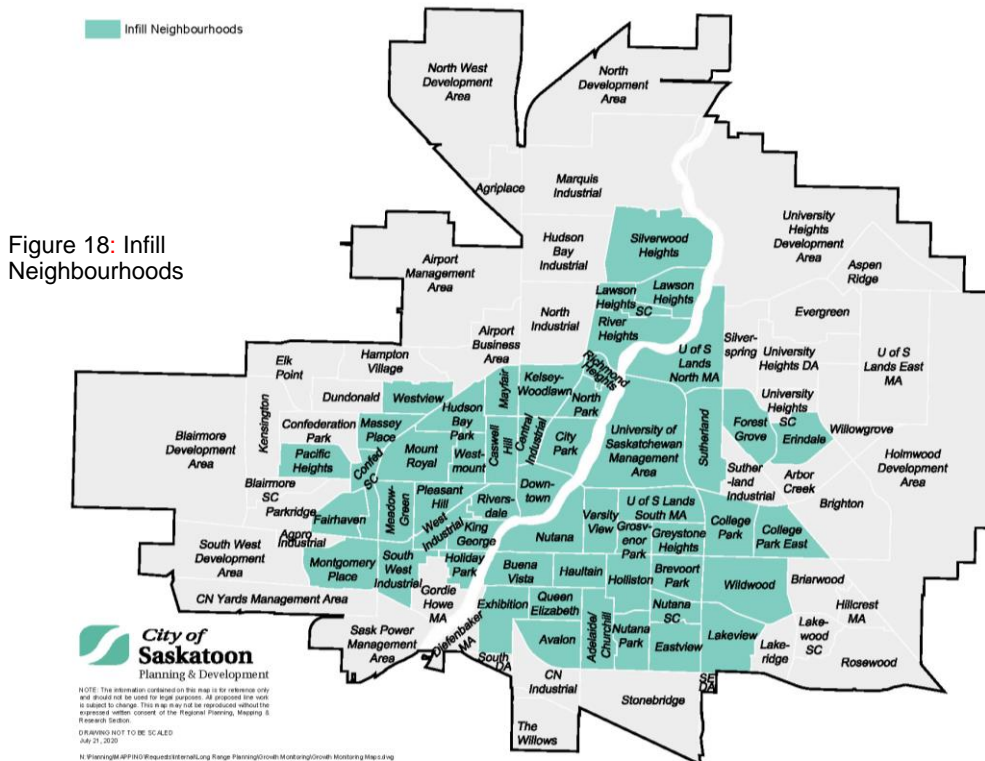


Figure 18: Infill Neighbourhoods



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 2019, the value of residential infill development was \$84.5 million, or 30% of the total dollar value for residential development in Saskatoon.

Table 6: Building Permit Value in Infill Neighbourhoods

<b>Building Permit Values Infill &amp; Citywide (\$000s)</b>					
	2015	2016	2017	2018	2019
<b>Residential - Citywide</b>	442,480	344,606	439,282	294,763	285,451
<b>Non-Residential - Citywide</b>	568,551	376,833	295,076	341,171	359,978
<b>Total - Citywide</b>	1,011,031	721,439	734,358	635,934	645,429
<b>Residential - Infill</b>	84,879	77,484	99,196	83,830	84,500
<b>% of Total</b>	19%	22%	23%	28%	30%
<b>Non-Residential - Infill</b>	286,007	148,179	184,217	222,646	250,375
<b>% of Total</b>	50%	39%	62%	65%	70%
<b>Total - Infill</b>	370,886	225,663	283,413	306,476	334,875
<b>% of Total</b>	37%	31%	39%	48%	52%

To date there are 602 vacant sites within Saskatoon's Infill Neighbourhoods, with a total site area of 378 hectares. This represents 26.2% of all vacant sites in Saskatoon and 5.2% 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.

Table 7: Vacant Land Inventory – Infill Neighbourhoods

	<b>Sites</b>	<b>% of City-Wide Total</b>	<b>Site Area (ha)</b>	<b>% of City-Wide Total</b>
<b>2020</b>	602	26.2%	378	5.2%
<b>2019</b>	679	23.4%	417	5.3%
<b>2018</b>	589	23.3%	574	6.7%
<b>source: City of Saskatoon SITE Database – July 2020</b>				

## 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.

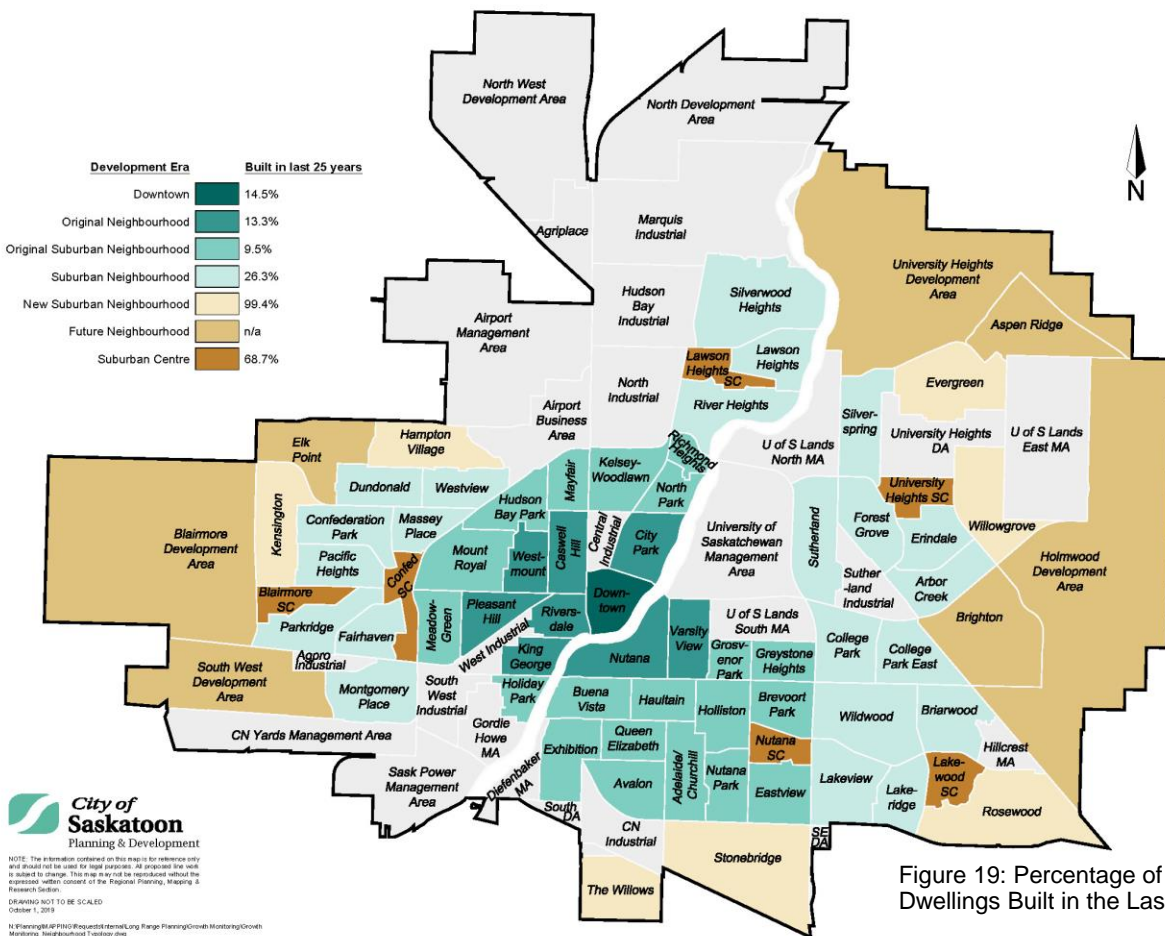


Figure 19: Percentage of Private Dwellings Built in the Last 25 Years

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

Development Era	1960 or before	1961 to 1980	1981 to 1990	1991-2016	Average - % built in last 25 years
Downtown	440	720	320	250	14.5%
Developed Suburban	1,405	17,740	12,070	10,410	26.3%
Industrial	300	130	15	35	8.5%
New Suburban	20	45	80	12,835	99.4%
Original	6,840	3,675	1,325	1,845	13.3%
Original Suburban	9,060	9,760	1,240	2,065	9.5%
Suburban Centre	240	805	850	3,890	68.7%
<b>City of Saskatoon</b>	<b>18,305</b>	<b>32,875</b>	<b>15,900</b>	<b>31,330</b>	<b>30.9%</b>

source: Census 2016

# 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 located in the City Centre (which includes the Downtown and portions of Nutana, Riversdale, City Park, and the portion of College Drive that interfaces 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 Suburban Centres. The last three years have seen a steady increase in new commercial and industrial business licenses, suggesting confidence in the Saskatoon market.

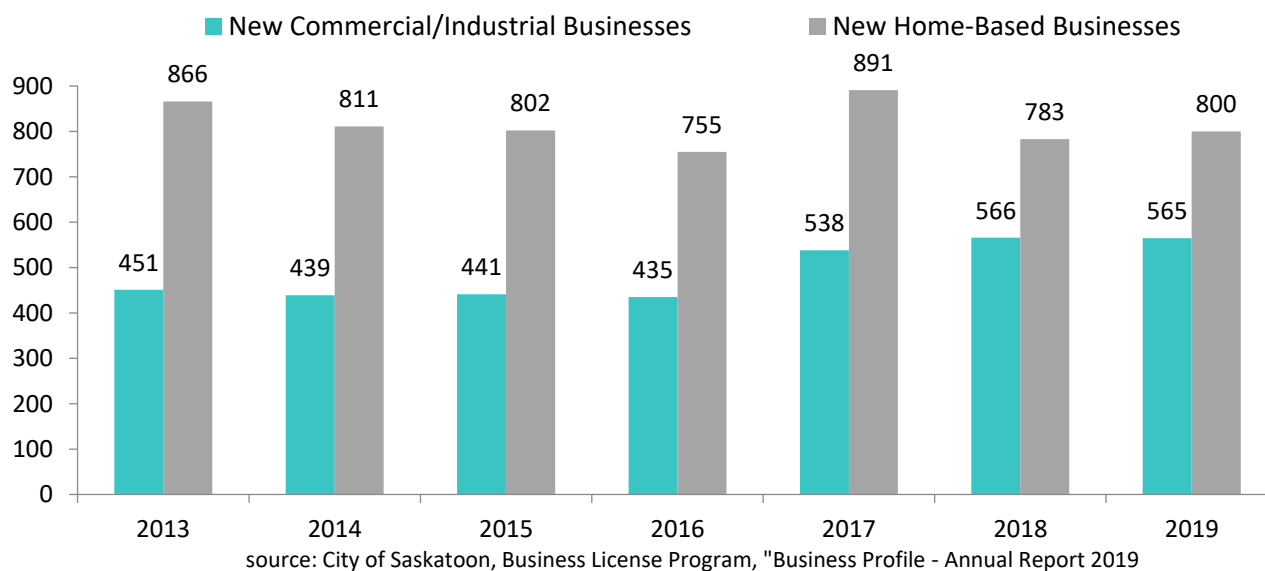


Figure 20: New Business Licenses Issued, 2013 – 2019

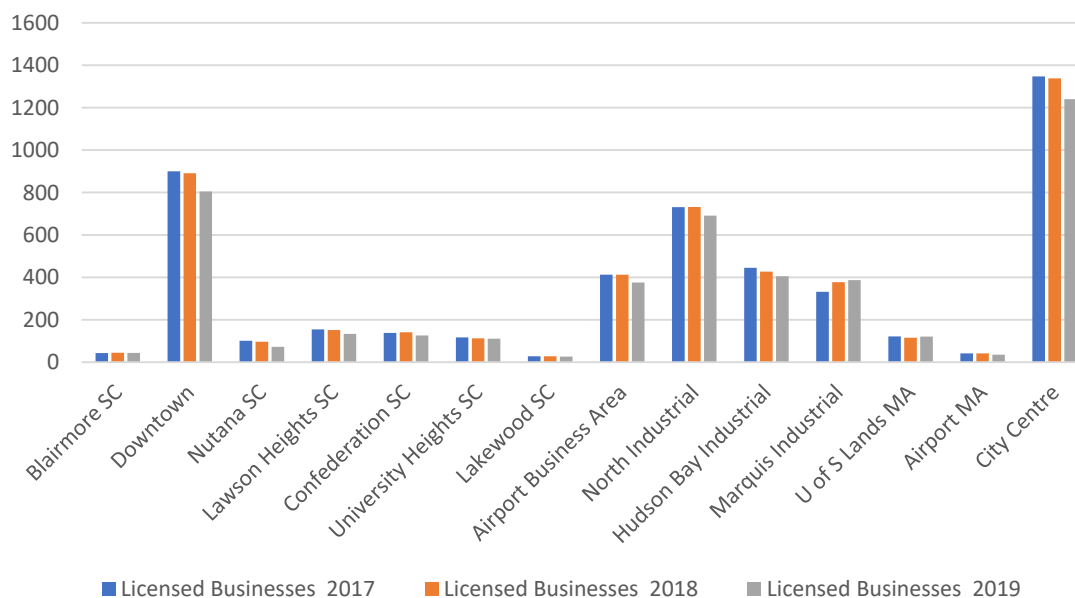


Figure 21: Licensed Businesses by Area, 2017 – 2019

## 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.

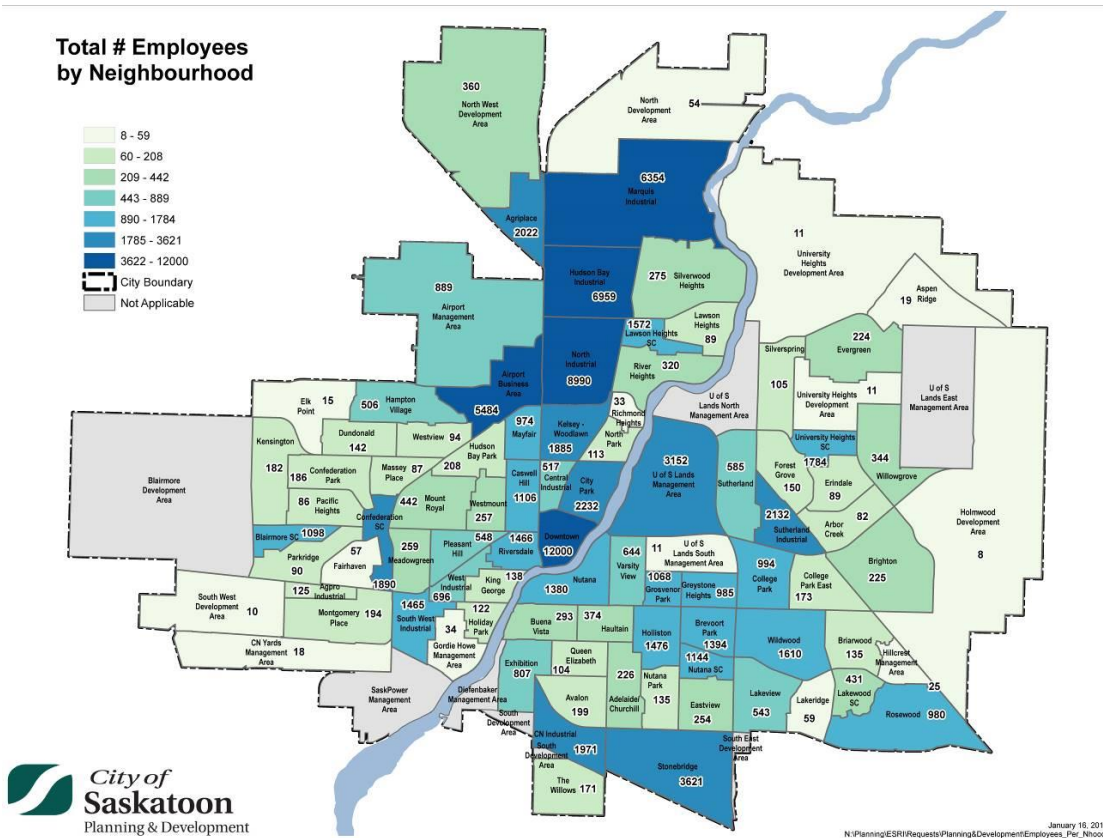
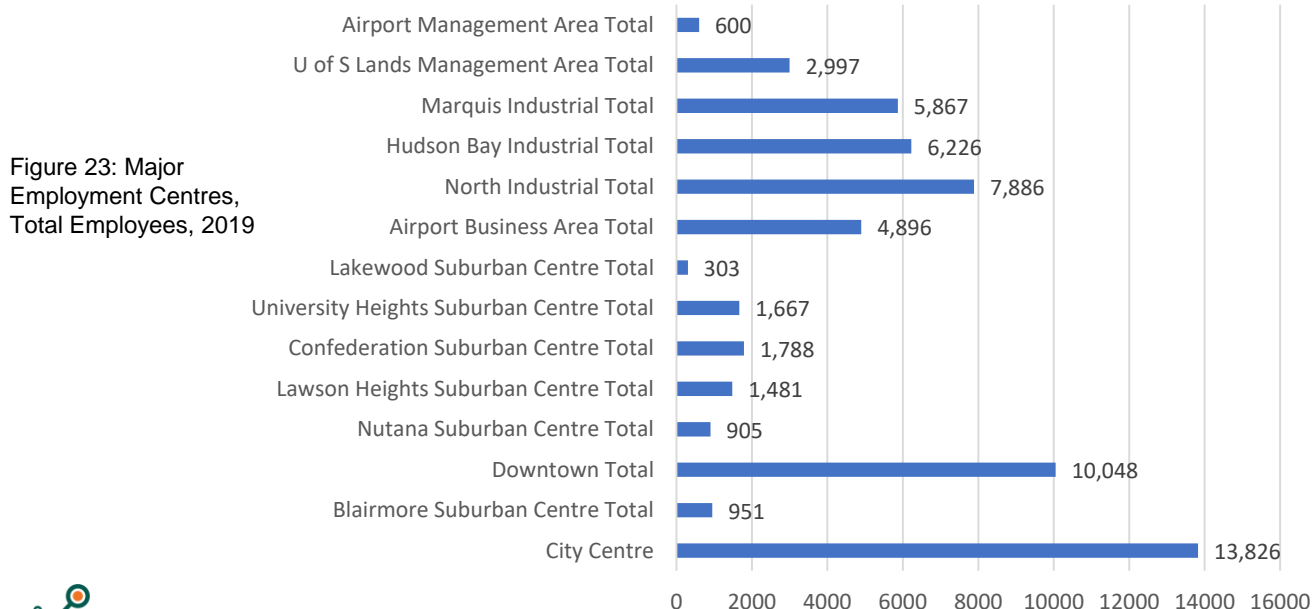


Figure 22: Total Number of Employees by Neighbourhood





# 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, 2020 population estimate of 279,900. 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 projected population growth rate for Saskatoon is estimated to be 1.7%. At that rate, approximately 1,900 dwelling units per year would be required to accommodate the expected population growth.

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

Growth Rate	2021		2022		2023		TOTAL	
	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)
1.00%	2,799	1,120	2,827	1,131	2,855	1,142	8,481	3,392
1.50%	4,199	1,679	4,261	1,705	4,325	1,730	12,785	5,114
2.00%	5,598	2,239	5,710	2,284	5,824	2,330	17,132	6,853
2.50%	6,998	2,799	7,172	2,869	7,352	2,941	21,522	8,609

## 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 Division indicates that in 2019, building permit values for both residential and non-residential permits were approximately \$650 million. Based on the construction activity in the first two quarters of 2020, building permit values combined for residential and non-residential are anticipated to be at approximately \$440 million, roughly \$210 million lower than last year's value.

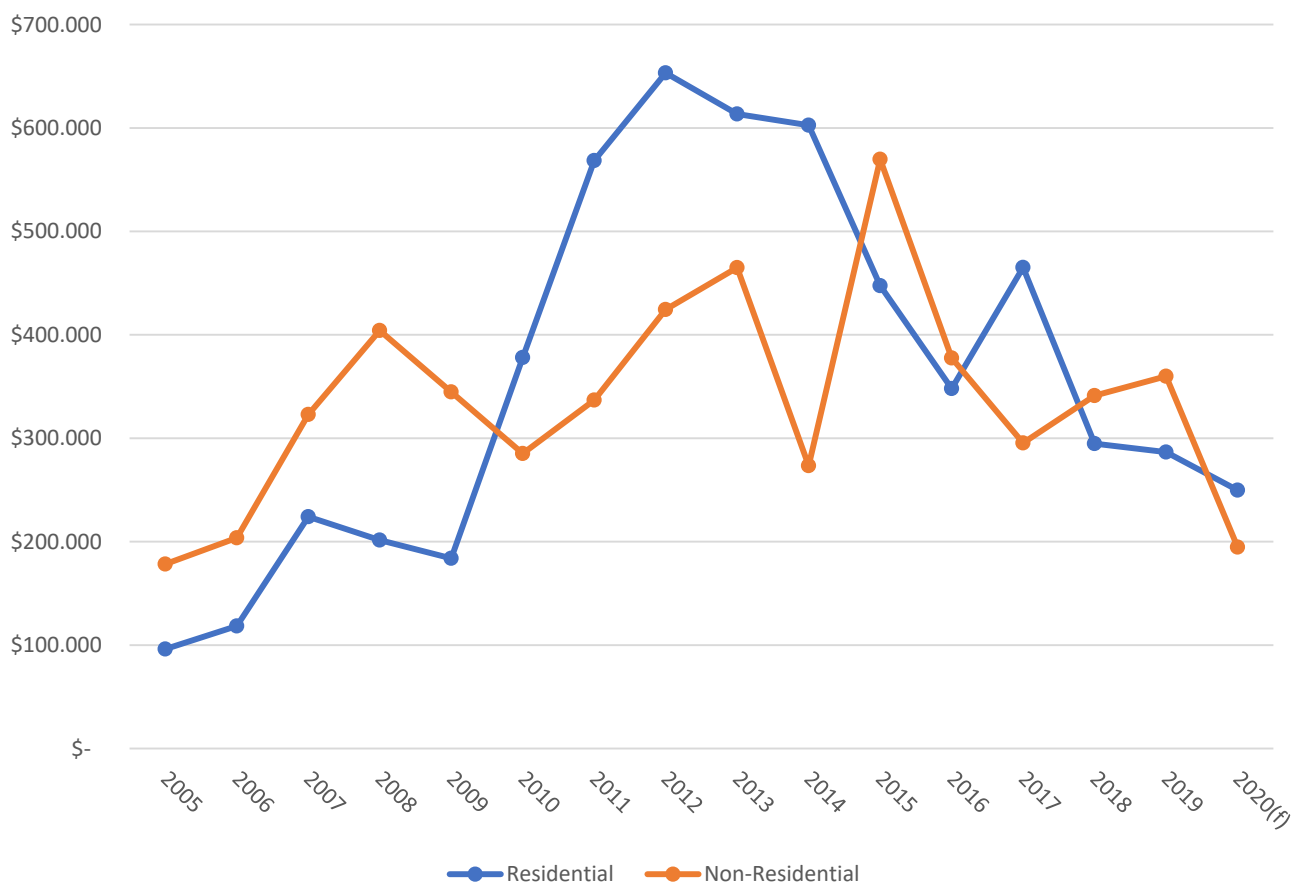


Figure 24: Building Permit Values, 2005 – 2020(f)  
(source: Building Standards Division)



# LAND INVENTORY

## Residential Inventory

As of July 1, 2020, major land developers held 734 vacant one-unit dwelling lots, and home builders held 655 vacant one-unit dwelling lots, for a total of 1,389 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, 2020, there are approximately 133 acres of vacant land zoned for multiple-unit dwellings, which can accommodate up to 3,484 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 4,873 dwelling units or an additional 9,605 people. At an annual growth rate of 1.7%, it is expected that this number of units could be absorbed into the market in approximately two years.

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

Neighbourhood	# of Vacant One-unit Dwelling lots held by Builders	# of Vacant One-unit Dwelling lots held by Major Developers
Arbor Creek	1	0
Aspen Ridge	176	165
Avalon	1	0
Briarwood	5	0
Brighton	139	25
Buena Vista	3	0
Caswell Hill	11	0
City Park	2	0
College Park East	1	0
Evergreen	40	4
Exhibition	3	0
Grosvenor Park	1	0
Hampton Village	3	0
Haultain	3	0
Holiday Park	6	0
Holliston	1	0
Kelsey-Woodlawn	2	0
Kensington	64	263
King George	9	0
Lakeridge	2	0
Massey Place	3	0
Mayfair	11	0
Meadowgreen	4	0
Montgomery Place	2	1
Mount Royal	5	0
North Park	1	0
Nutana	9	0
Parkridge	2	135
Pleasant Hill	32	0
Queen Elizabeth	1	0
Riversdale	13	0
Rosewood	67	141
Stonebridge	4	0
Sutherland	8	0
Varsity View	9	0
Westmount	7	0
Westview	2	0
Willowgrove	2	0
<b>TOTAL</b>	<b>655</b>	<b>734</b>
<b>GRAND TOTAL</b>	<b>1,389</b>	

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

Neighbourhood	Vacant land zoned for Multiple-unit Dwellings held by Builders		Vacant land zoned for Multiple-unit Dwellings held by Major Developers	
	Acres (ac)	Potential Dwelling Units	Acres (ac)	Potential Dwelling Units
Aspen Ridge	0.00	0	6.34	123
Blairmore SC	0.00	0	4.84	61
Brighton	0.00	0	19.34	454
Buena Vista	0.36	22	0.00	0
Caswell Hill	2.53	94	0.00	0
Central Business District	2.78	168	0.00	0
City Park	1.76	95	0.00	0
Dundonald	2.78	168	0.00	0
Evergreen	2.57	41	39.00	1,023
Forest Grove	0.22	9	0.00	0
Hampton Village	1.00	40	0.00	0
Haultain	0.37	17	0.00	0
Holliston	0.14	8	0.00	0
Kensington	2.65	58	14.93	272
Lakewood SC	2.23	89	0.00	0
Meadowgreen	0.19	8	0.00	0
Mount Royal	0.60	24	0.00	0
Nutana	0.90	28	0.00	0
Nutana SC	0.81	49	0.00	0
Pleasant Hill	2.60	120	0.00	0
Riversdale	4.09	144	0.00	0
Rosewood	0.00	0	8.81	141
Stonebridge	1.82	29	0.00	0
Sutherland	0.65	36	0.00	0
Varsity View	0.60	24	0.00	0
West Industrial	4.45	156	0.00	0
<b>TOTAL</b>	<b>39.73</b>	<b>1,410</b>	<b>93.26</b>	<b>2,074</b>
<b>GRAND TOTAL</b>			<b>132.99 Acres</b>	<b>3,484 units</b>



## Industrial Inventory

Industrial land is perhaps 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 2015 to 2019, Saskatoon Land averaged approximately 20 acres per year of industrial land sales and long-term leases.

Table 13 displays the vacant industrial land inventory in Saskatoon. There are approximately a total of 556 acres of vacant industrially zoned sites.

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 if and when they arise. The City's Industrial Land Incentive Program provides further benefits that are available for new or expanding businesses considering industrial sites.

Table 12: Five-year Average Industrial Land Sales/Lease, 2015 – 2019

YEAR	ACRES (ac)
2015	20.97
2016	21.52
2017	10.92
2018	38.96
2019	9.76
Average	20.42

## Commercial Inventory

Table 14 displays the vacant commercial land inventory in Saskatoon. Currently there are approximately a total of 177 acres of vacant commercially zoned sites. This vacant commercial space has the potential to accommodate approximately 1.8 million square feet of retail and/or office space.

According to Colliers International's (Colliers) Saskatoon Retail Market Report 2019, 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	Amount of light industrial zoned land (acres)	Amount of heavy industrial zoned land (acres)	Total (acres)	Amount of Vacant Land (acres)
Agirplace	298.22	-	298.22	21.88
Airport Business Area	310.51	-	310.51	189.42
Airport Management Area	51.65	-	51.65	-
Avalon	0.04	-	0.04	-
Caswell Hill	5.04	0.24	5.28	1.02
Central Industrial	44.41	38.53	82.94	1.53
City Park	30.58	-	30.58	0.76
CN Industrial	200.71	-	200.71	4.15
CN Yards Management Area	55.87	13.79	69.66	-
Downtown	2.14	-	2.14	-
Exhibition	11.24	-	11.24	-
Fairhaven	2.24	-	2.24	-
Holiday Park	3.97	-	3.97	-
Hudson Bay Industrial	332.30	337.15	669.45	35.98
Kelsey-Woodlawn	127.40	19.36	146.76	2.30
King George	-	0.70	0.70	-
Marquis Industrial	773.82	805.08	1,578.90	208.77
Mayfair	6.25	-	6.25	-
North Industrial	361.90	278.70	640.60	2.57
NorthWest Development Area	118.49	14.56	133.05	-
Riversdale	2.71	-	2.71	0.28
Rosewood	36.62	-	36.62	36.62
SouthWest Industrial	215.42	5.84	221.26	32.42
Stonebridge	34.31	-	34.31	-
Sutherland Industrial	125.91	144.85	270.76	1.51
West Industrial	24.51	98.75	123.26	17.12
<b>Total</b>	<b>3,176.26</b>	<b>1,757.55</b>	<b>4,933.81</b>	<b>556.33</b>

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	Total (acres)	Amount of Vacant Land (acres)
Blairmore	53.39	64.76	-	118.15	-
Confederation	107.44	86.79	15.11	209.34	6.69
Riel Industrial	10.68	-	-	10.68	-
Lawson	78.71	168.32	5.40	252.43	1.75
Core	257.86	133.75	38.26	429.87	41.29
Nutana	201.28	253.02	-	454.30	2.55
Lakewood	163.72	79.34	-	243.06	59.52
Holmwood	44.32	-	-	44.32	12.92
University Heights	69.61	158.96	50.32	278.89	51.32
University	70.71	-	-	70.71	-
<b>TOTAL</b>	<b>1,057.72</b>	<b>944.94</b>	<b>109.09</b>	<b>2,111.75</b>	<b>176.04</b>

## Market Absorption

Table 15 outlines projections for the full build-out of neighbourhoods currently under development, based on building permit issuance. New neighbourhoods initiated in the early 2000's such as Hampton Village and Willowgrove experienced shortened build-out time frames of approximately 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 to up to a 20 year time frame, or longer dependent on the size and density of each neighbourhood. Estimated full neighbourhood build-out is based on the previous three years of building permits issued for each neighbourhood, as well as, 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 Build-outs, July 1, 2020

Neighbourhood	OOD (to date)	MUD (to date)	Total Est. OOD	Total Est. MUD	Build- out % SF	Build- out % MF	Overall Buildout %	% of City Share of building permits from last 5 years	Est. Full Build- out
Aspen Ridge	378	0	2,088	3,662	18%	0%	7%	6%	2040
Brighton	638	368	2,489	3,621	26%	10%	16%	17%	2032
Evergreen	2,132	1,642	2,176	3,691	98%	44%	64%	13%	2025
Kensington	1,021	276	1,680	1,714	61%	16%	38%	10%	2028
Rosewood	1,652	660	2,731	1,532	60%	43%	54%	9%	2027
Stonebridge	2,883	2,981	2,887	2,981	100%	100%	100%	17%	2020
The Willows	126	240	481	530	26%	45%	36%	1%	2028

OOD = One-unit Dwelling

MUD = Multiple-unit Dwelling

(source: Building Standards Division, Monthly Housing Reports)

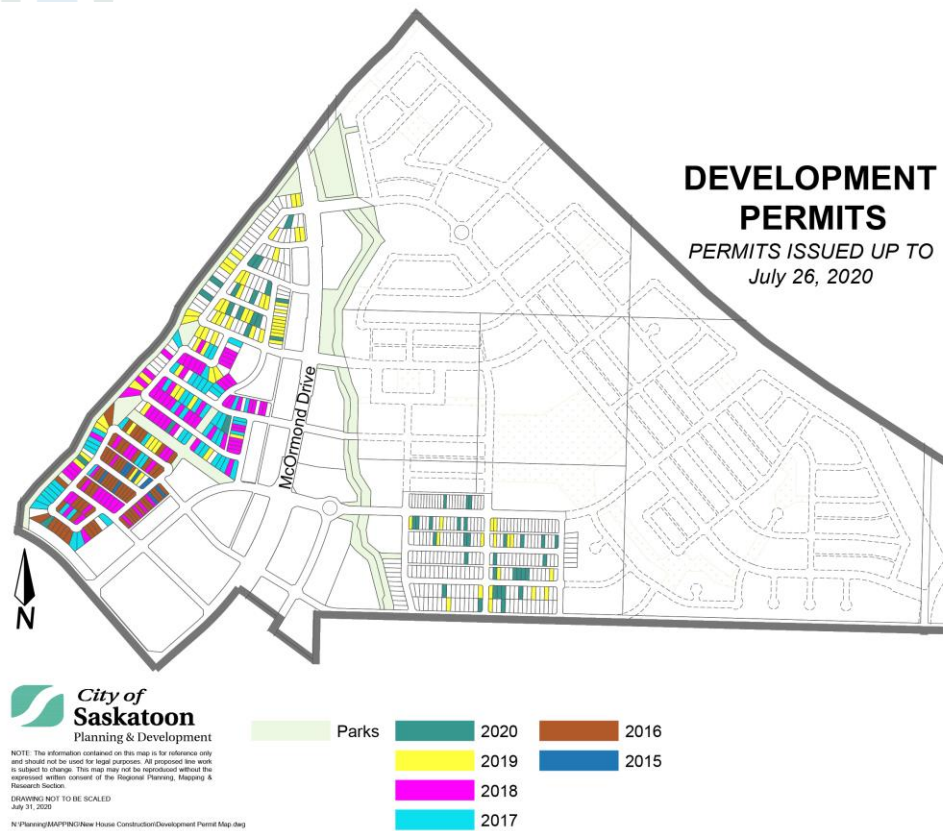


Figure 25 : Aspen Ridge Development Permits  
(source: Mapping & Research, City of Saskatoon)

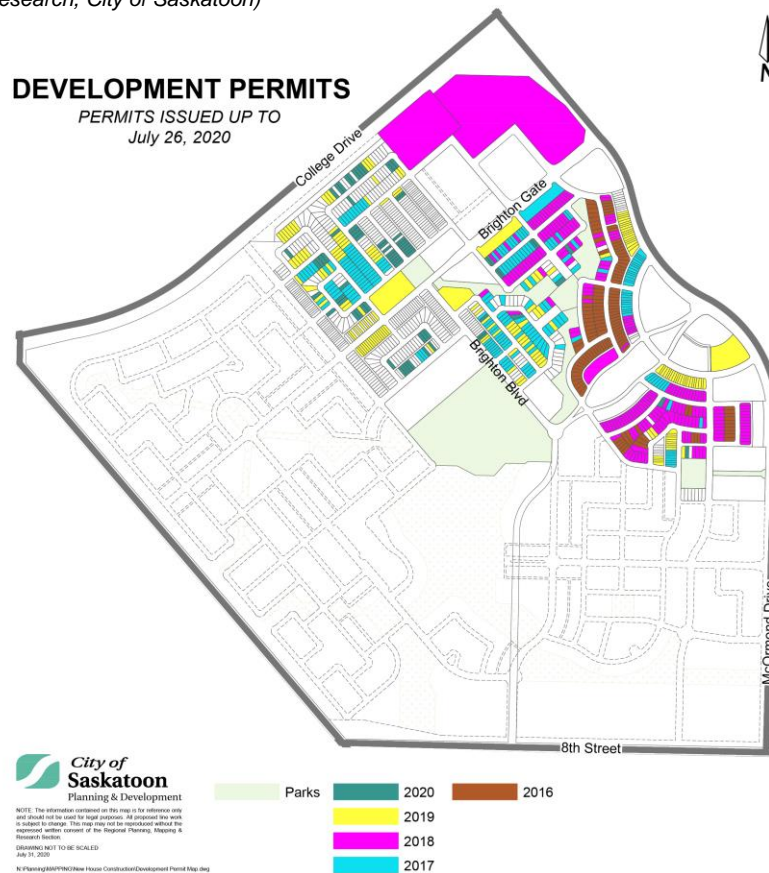


Figure 26 : Brighton Development Permits  
(source: Mapping & Research, City of Saskatoon)

## DEVELOPMENT PERMITS

PERMITS ISSUED UP TO  
July 26, 2020

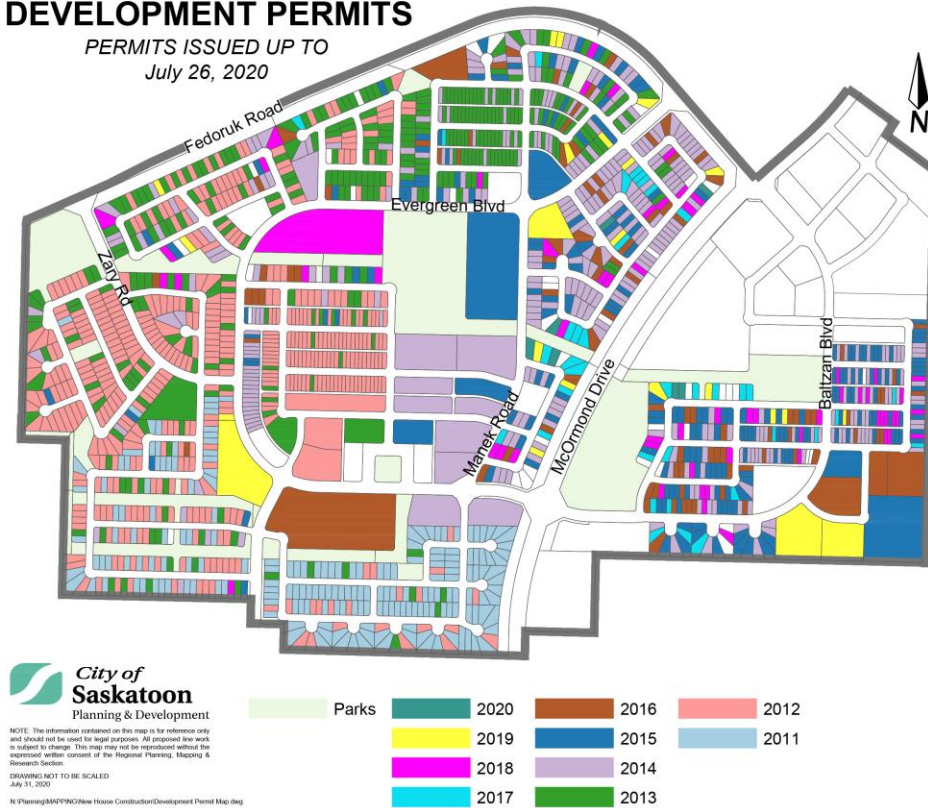


Figure 27 : Evergreen Development Permits  
(source: Mapping & Research, City of Saskatoon)

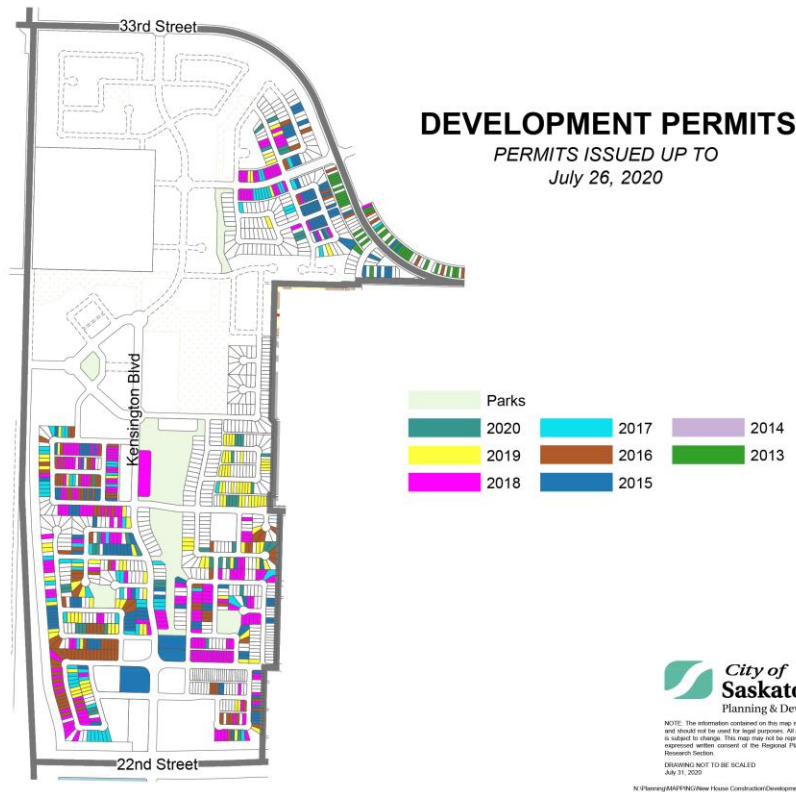
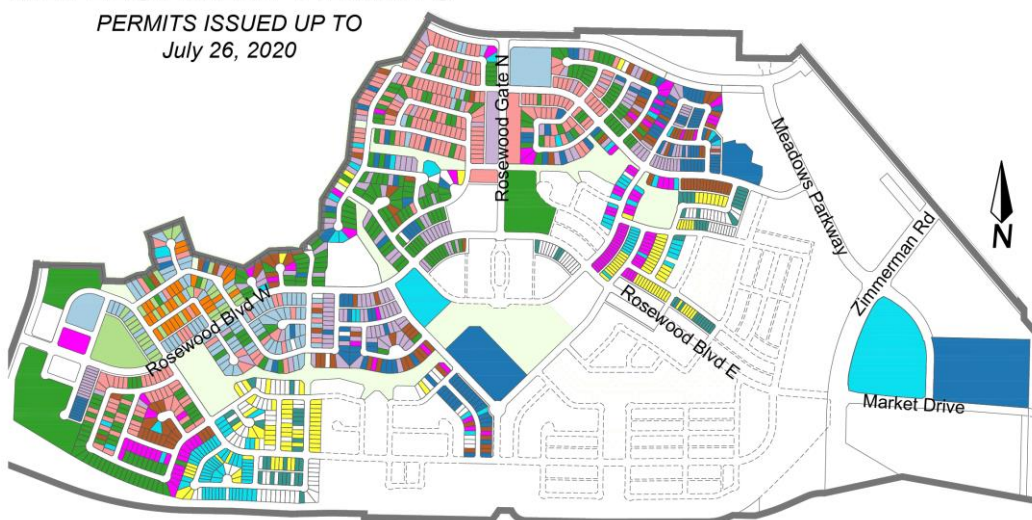


Figure 28 : Kensington Development Permits  
(source: Mapping & Research, City of Saskatoon)



## DEVELOPMENT PERMITS

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Saskatoon**  
Planning & Development

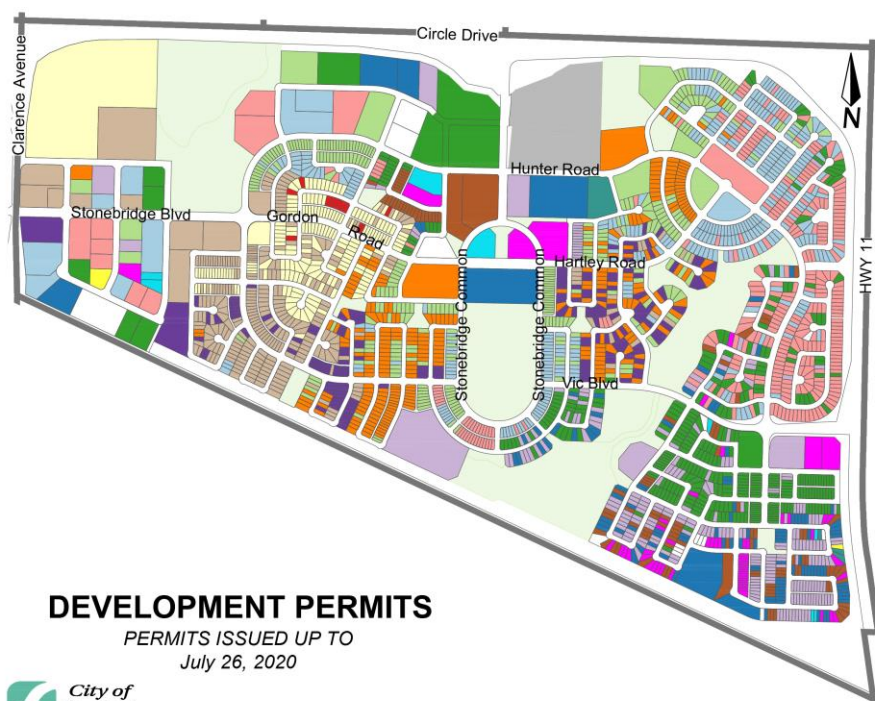
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Figure 29 : Rosewood Development Permits  
(source: Mapping & Research, City of Saskatoon)



## DEVELOPMENT PERMITS

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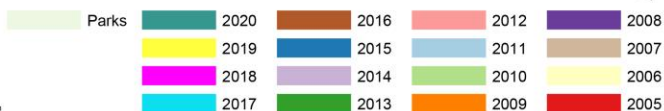


Figure 30 : Stonebridge Development Permits  
(source: Mapping & Research, City of Saskatoon)



# SERVICING PLANS

## Residential Servicing - Greenfield

Figures 31 through 35 show the servicing projections for new neighbourhood areas for the years 2021, 2022, and 2023. 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 1,768 one-unit dwelling lots are projected to be serviced over the next three years.

Table 16: One-unit Dwelling Lot Servicing Projections, 2021 – 2023

Neighbourhood	2021		2022		2023		Total
	City	Private	City	Private	City	Private	
Aspen Ridge	125	92	0	100	122	100	539
Brighton	0	115	289	170	0	126	700
Kensington	0	0	124	0	0	0	124
Rosewood	0	207	0	85	0	65	357
The Willows	0	29	0	19	0	0	48
<b>TOTAL</b>	125	443	413	374	122	291	1,768

Table 17 identifies the servicing plans for multiple-unit dwelling land by neighbourhood for 2021 to 2023. 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. In addition, an estimate of potential residential dwelling units that could be accommodated on that amount of land is included.\*

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, 2021 – 2023

Neighbourhood	2021		2022		2023	
	Acres (ac)	Potential Dwelling Units	Acres (ac)	Potential Dwelling Units	Acres (ac)	Potential Dwelling Units
<b>Aspen Ridge</b>						
City	2.15	32	0.00	0	1.88	28
Private	0.00	0	0.00	0	5.64	171
<b>Total</b>	<b>2.15</b>	<b>32</b>	<b>0.00</b>	<b>0</b>	<b>7.52</b>	<b>199</b>
<b>Brighton</b>						
City	0.00	0	0.00	0	0.00	0
Private	0.00	0	0.00	0	0.00	0
<b>Total</b>	<b>0.00</b>	<b>0</b>	<b>0.00</b>	<b>0</b>	<b>0.00</b>	<b>0</b>
<b>Kensington</b>						
City	0.00	0	0.00	0	3.21	48
Private	0.00	0	0.00	0	0.00	0
<b>Total</b>	<b>0.00</b>	<b>0</b>	<b>0.00</b>	<b>0</b>	<b>3.21</b>	<b>48</b>
<b>Rosewood</b>						
City	0.00	0	2.47	99	1.93	39
Private	0.00	0	1.00	15	0.00	0
<b>Total</b>	<b>0.00</b>	<b>0</b>	<b>3.47</b>	<b>114</b>	<b>1.93</b>	<b>39</b>
<b>The Willows</b>						
City	0.00	0	0.00	0	0.00	0
Private	0.00	0	3.40	51	0.00	0
<b>Total</b>	<b>0.00</b>	<b>0</b>	<b>3.40</b>	<b>51</b>	<b>0.00</b>	<b>0</b>
<b>Summary</b>						
City	2.15	32	2.47	99	7.02	115
Private	0.00	0	4.40	66	5.64	171
<b>Total</b>	<b>2.15</b>	<b>32</b>	<b>6.87</b>	<b>165</b>	<b>12.66</b>	<b>286</b>

\*Dwelling estimates based on 16 units/acre for townhouse sites, 22 units/acre for stacked townhouse sites, and 40 units/acre for apartment sites

## 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 2023.

Table 18: Residential Servicing Projections Summary, 2021 – 2023

Land Use	Inventory (Number of potential dwelling units)	2021 Servicing (Number of potential dwelling units)	2020 Servicing (Number of potential dwelling units)	2023 Servicing (Number of potential dwelling units)	Total (Number of potential dwelling units)
One-unit Dwelling	1,389	568	787	413	3,157
Multiple-unit Dwelling	3,484	32	165	286	3,967
<b>TOTAL</b>	<b>4,873</b>	<b>600</b>	<b>952</b>	<b>699</b>	<b>7,124</b>

The residential inventory and planned servicing schedules over the next three years will accommodate enough residential dwelling units to accommodate 17,810 people, or 7,124 residential dwelling units. Of these, 4,873 units are existing inventory and 2,251 would be from newly serviced lots. This would support an annual population growth rate of 2.00% 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 2021 to 2023 in approved new neighbourhood Concept Plan areas in Saskatoon.

# ASPEN RIDGE

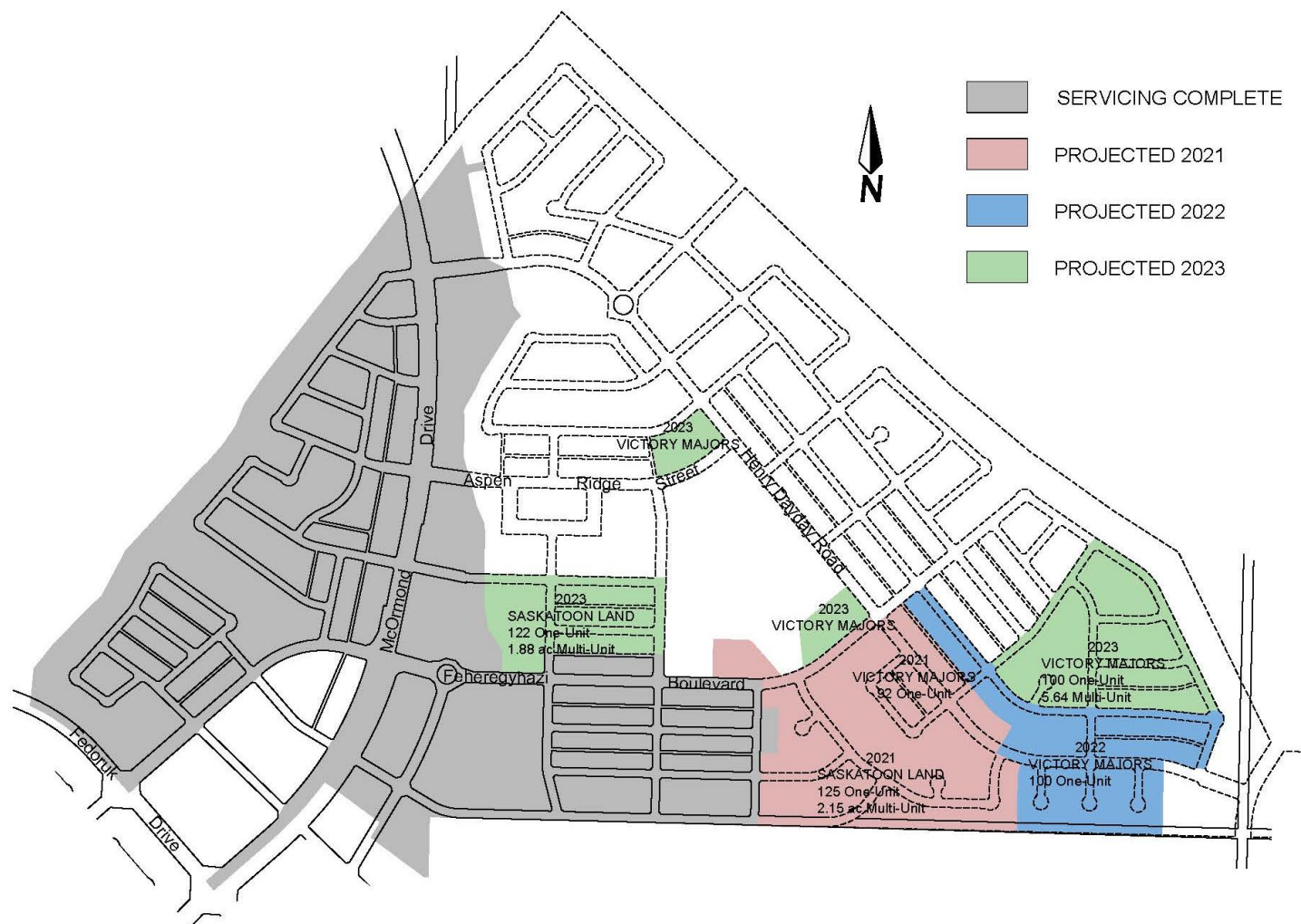


Figure 31: Aspen Ridge Servicing Projections, 2021 – 2023

# BRIGHTON



Figure 32: Brighton Servicing Projections, 2021 – 2023



# KENSINGTON



Figure 33: Kensington Servicing Projections, 2021 – 2023



# ROSEWOOD

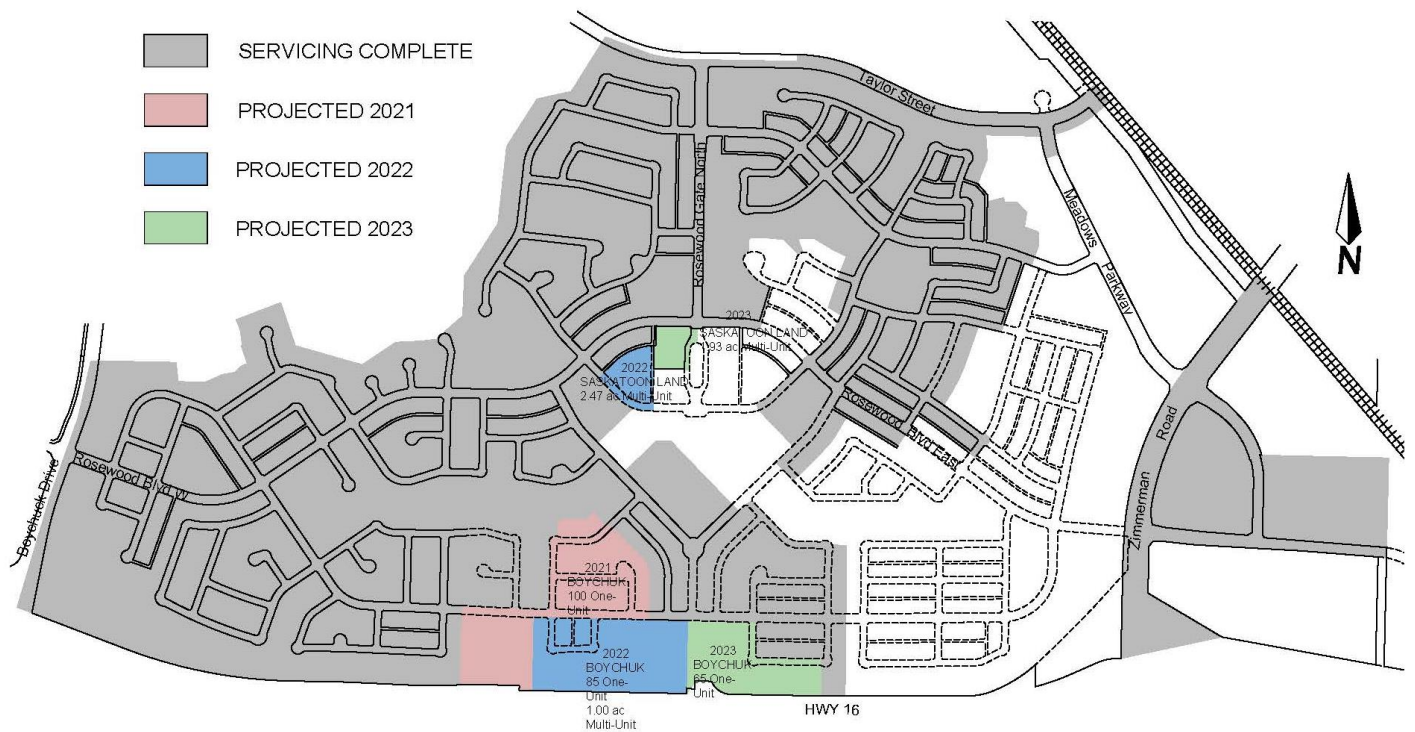


Figure 34: Rosewood Servicing Projections, 2021 – 2023

# THE WILLOWS

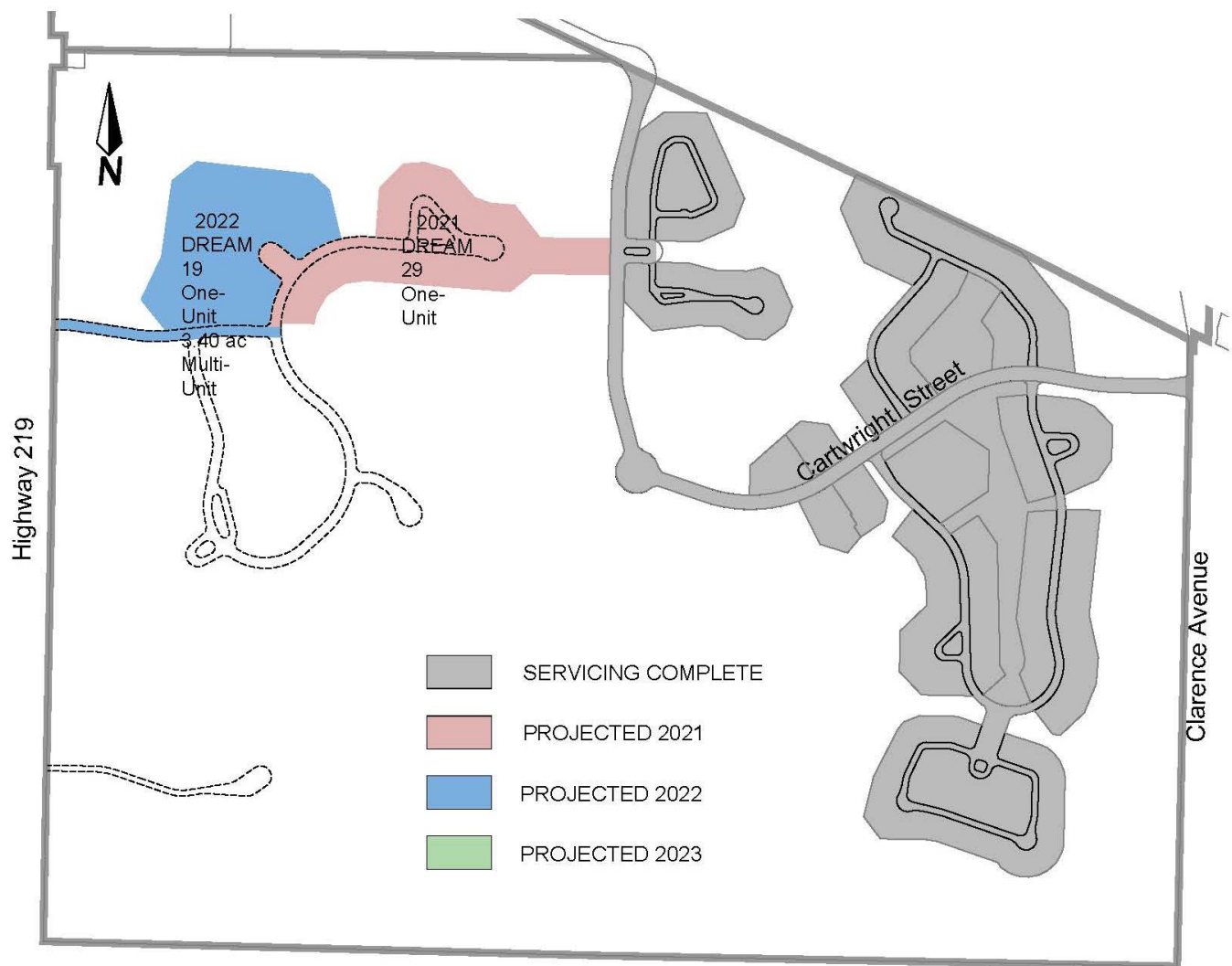


Figure 35: The Willows Servicing Projections, 2021 – 2023

## Residential Servicing – Infill Areas & Opportunities

To achieve the City's Strategic Goal of Sustainable Growth, identified in the [City of Saskatoon Strategic Plan 2018 – 2021](#), 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 a number of 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
<b>Under Construction</b>	Baydo Towers (410, 420 5 <sup>th</sup> Ave. N.)	Baydo Development Corporation	24, 25	474
	Escala (637 University Dr.)	Meridian	7	45
	Broadway & Main (880 Broadway Ave.)	Baydo	9 (2 commercial, 7 residential)	68
<b>Rezoning Approved</b>	College & Clarence (1012 College Dr.)	North Prairie	12	171
	TOTAL			758

# Residential Infill Projects

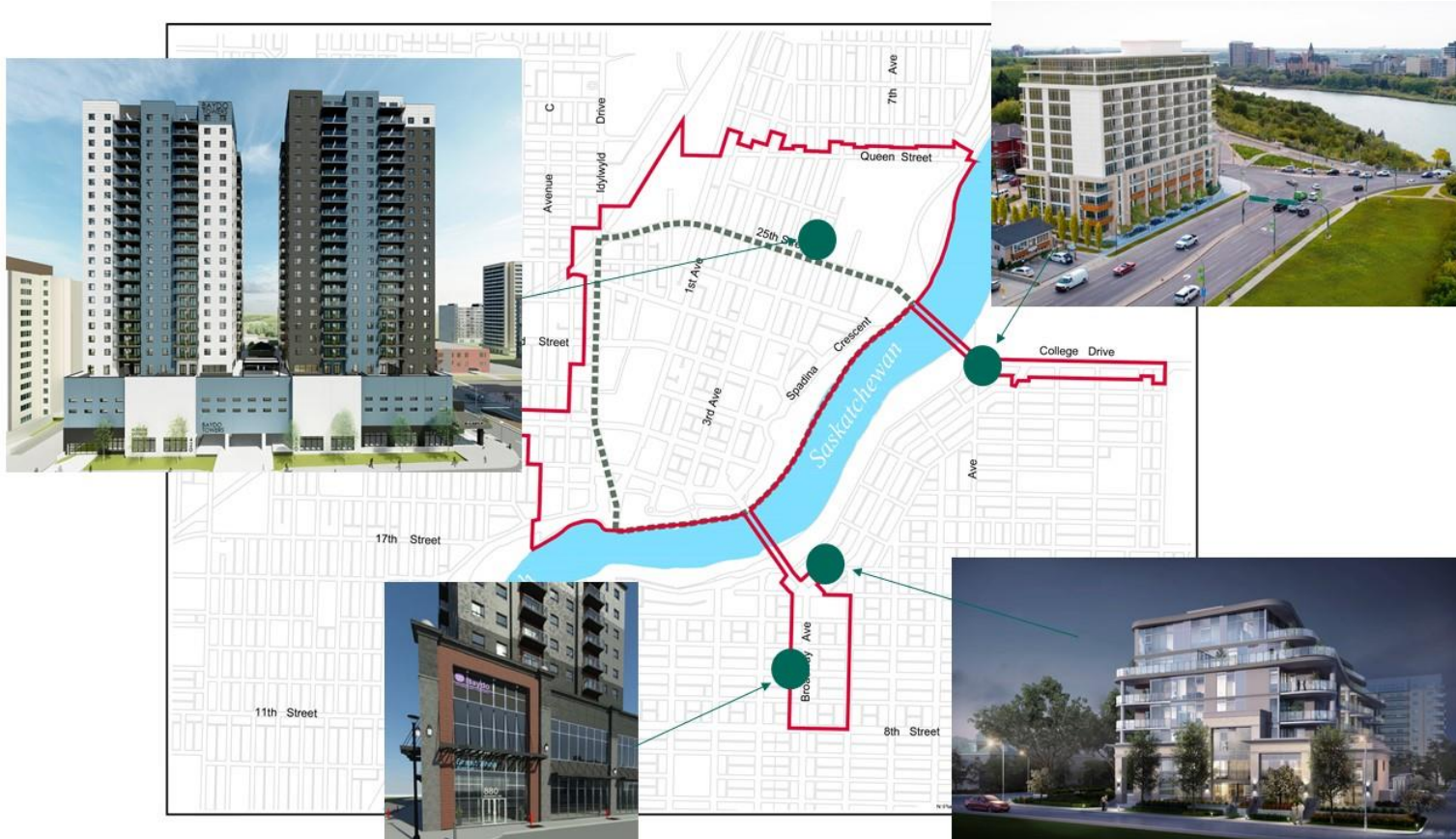


Figure 36: Residential Infill Projects

## Infill Opportunities on City Owned Land

Saskatoon Land has typically focused on greenfield land offerings in its planned developments. This focus has changed to include more infill development opportunities in support of the Plan for Growth. Table 20 highlights some of the projects that Saskatoon Land has under way.

Proposed land uses and densities for a number of 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  
(source: Saskatoon Land)

Site / Property	Details
<b>South Caswell</b>	<ul style="list-style-type: none"><li>• Mixed-use community development on former Saskatoon Transit sites</li></ul>
<b>25th St. Development Sites</b>	<ul style="list-style-type: none"><li>• Currently exploring zoning changes for the sale and development of parcels</li><li>• Across from the Police Headquarters</li></ul>
<b>Dundonald Ave. Parcels</b>	<ul style="list-style-type: none"><li>• Remnant parcels remaining from Circle Drive South Project</li><li>• Currently exploring potential development and servicing options</li></ul>
<b>900 Block – 3rd Ave.</b>	<ul style="list-style-type: none"><li>• Land holdings retained for potential 3rd Avenue road widening</li><li>• Exploring preliminary development concepts in the event that lands are not required for right-of-way dedication</li></ul>
<b>Delayen Cres. (Forest Grove)</b>	<ul style="list-style-type: none"><li>• Currently exploring development options for remnant land holdings remaining from Central Avenue/Attridge Drive intersection improvements</li></ul>
<b>Adolph Cres. Development Site</b>	<ul style="list-style-type: none"><li>• Residential development site zoned RMTN1 - Medium Density Townhouse Residential District 1</li></ul>
<b>River Landing – Parcels BB and DE</b>	<ul style="list-style-type: none"><li>• Projected market release of mixed-use parcels in 2020, to be determined based on market conditions</li></ul>



## Industrial and Commercial Servicing

Table 21 shows industrial servicing projections for the Hampton Village Business Park, Marquis Industrial, and The Willows area for 2021 to 2023. 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 and 38 illustrate projected industrial and commercial servicing for the Marquis Industrial and The Willows, respectively.

There are also a number of commercial construction and redevelopment projects occurring within the City Centre. These projects include the renovation and expansion of the Tees & Persse building (331 1<sup>st</sup> Avenue North), investment and expansion of Midtown Plaza, River Landing, renovation of the former Saskatoon Police Service building (130 4<sup>th</sup> Avenue North) and the construction of a new commercial buildings at 802 Queen Street. Figure 39 shows renderings of some of these projects.

As previously noted, there are vacant sites currently zoned for commercial development, totaling approximately 177 acres. The current inventory of vacant commercial space has the potential to accommodate approximately 1.8 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 a sufficient amount of land is available for commercial opportunities over the next three years.

Table 21: Industrial & Commercial Servicing Projections, 2021 – 2023

Industrial & Commercial Servicing	2021		2022		2023		Total	
	City (ac)	Private (ac)	City (ac)	Private (ac)	City (ac)	Private (ac)	City (ac)	Private (ac)
<b>Hampton Business Park</b>	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Marquis Industrial</b>	58.12	0.00	25.27	0.00	26.13	115.00	109.52	115.00
<b>The Willows</b>	0.00	0.00	0.00	5.90	0.00	0.00	0.00	5.90
<b>Total</b>	58.12	0.00	25.27	5.90	26.13	115.00	109.52	120.90



# Marquis Industrial



Figure 37: Marquis Industrial Servicing Projections, 2021 – 2023

## The Willows

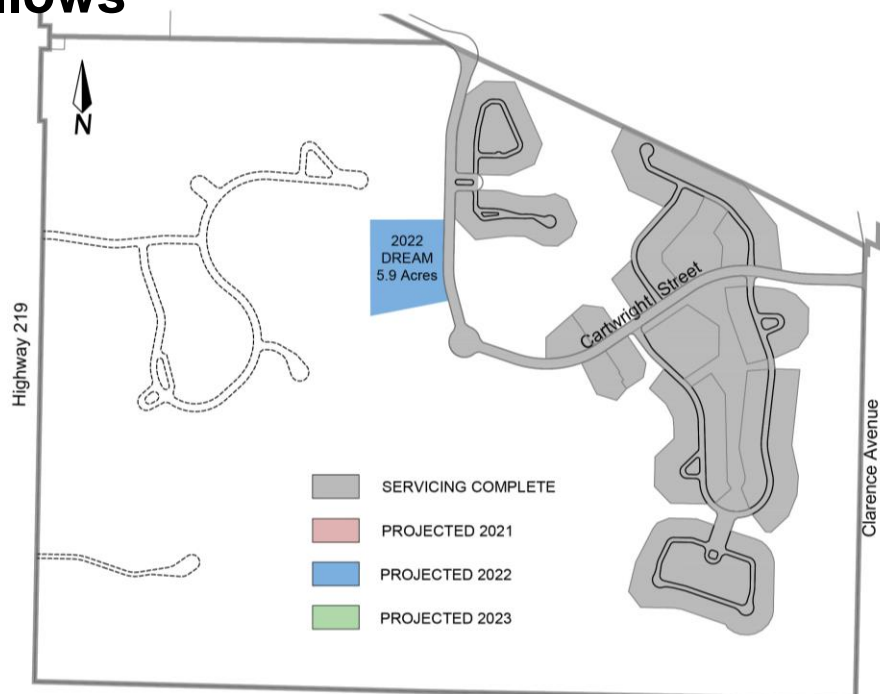


Figure 38: The Willows Commercial Servicing Projections, 2021 – 2023

# Commercial Infill Projects

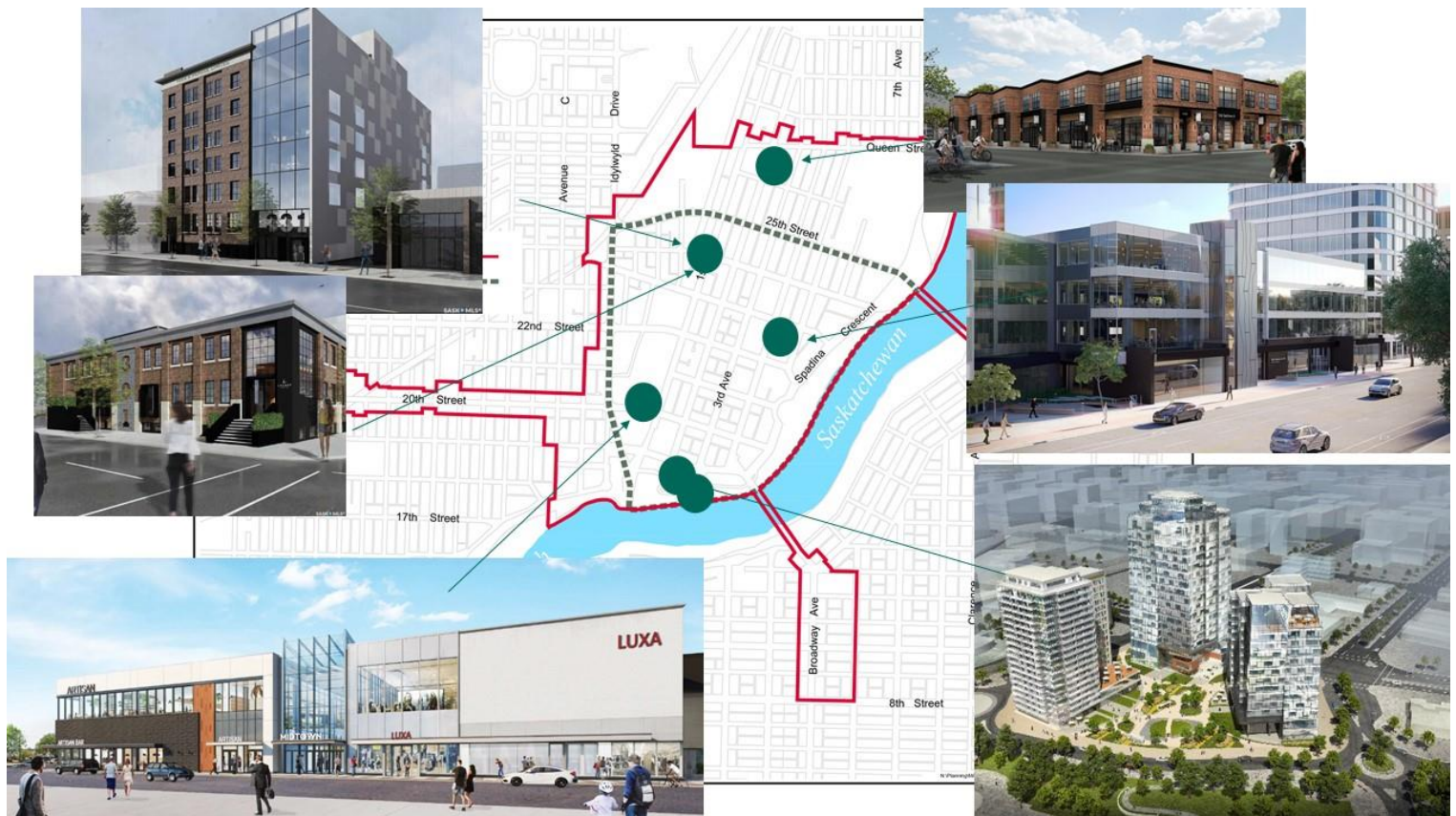


Figure 39: Commercial Infill Projects

# Appendix 1

## Detailed Sector Plan Calculations

	West				Core
	Blairmore	Confederation	Riel Industrial	Lawson	
Sector Gross Area	7246.25	6027.19	11110.57	3070.89	2659.27
Total Unbroken Land	5105.66	0	4418.48	0	0
Sector Number of Neighbourhoods	8	18	8	9	9
Sector Average Neighbourhood Size	440.11	330.16	1115.35	341.21	295.47
Sector Population 2016	3965	62980	0	29183	34016
Sector Population at Full Build-out	72168	62980	0	36183	40738
Total Number of Neighbourhood Parks	4 (13.2 ac)	33 (304.6 ac)	1 (5.1 ac)	12 (129.8ac)	21 (78.8 ac)
Total Number of District Parks	2 (30.1 ac)	5 (80 ac)	0	5 (50.4 ac)	4 (46.2 ac)
Total Number of Multi-District Parks	1 (34.7 ac)	3 (63.6 ac)	0	1 (23.7 ac)	1 (17.8 ac)
Total Number of Industrial Parks	0	1 (0.9 ac)	0	0	0
Total Number of Special Use Parks	1 (11.7 ac)	3 (10.9 ac)	3 (25.4 ac)	6 (136.8 ac)	11 (139.8 ac)
Total Number of Elementary Schools	0	25	0	12	9
Total Number of High Schools	2	2	0	2	5
Total Commercial	80.6	162.81	15.64	105.17	423.91
Total Industrial	58.43	501.84	4335.18	288.06	68.99
Total Vacant Commercial Land	2.21	2.3	0	4.13	30.99
Total Vacant Industrial Land	11.68	35.11	255.29	3.83	2.06

	East				
	University Heights	Nutana	Lakewood	Holmwood	University
Sector Gross Area	8351.95	6190.84	4095.58	6329.55	2360.2
Total Unbroken Land	3918.94	180.56	194.81	5426.12	2360.2
Sector Number of Neighbourhoods	11	19	9	3	4
Sector Average Neighbourhood Size	443.3	353.55	455.06	903.43	n/a
Sector Population 2016	44765	55311	43343	907	767
Sector Population at Full Build-out	79464	55311	48755	76143	54878
Total Number of Neighbourhood Parks	46 (228.4 ac)	45 (231.7 ac)	19 (318.8 ac)	2 (13.3 ac)	0
Total Number of District Parks	2 (47.8 ac)	7 (115.1 ac)	4 (129.3 ac)	0	0
Total Number of Multi-District Parks	1 (24.8 ac)	1 (2.3 ac)	2 (31.6 ac)	0	0
Total Number of Industrial Parks	0	0	0	0	0
Total Number of Special Use Parks	5 (8.7 ac)	3 (126.2 ac)	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

Note: All area calculations are measured in acres

# Appendix 2

## Density per Zoning District – by Neighbourhood Typology

Zoning District	Downtown	Original Neighbourhood	Original Suburban Neighbourhood	Suburban Neighbourhood	New Suburban Neighbourhood
B1	-	-	32.7	19.7	-
B1B	-	-	-	-	21
B2	-	39	28.5	20.9	-
B4	-	39	-	-	-
B5	-	71.8	3.7	-	-
B5B	-	57.6	-	-	-
B5C	-	75.1	-	-	-
B6	143.4	-	-	-	-
DCD1	-	87.8	-	-	-
DCD1 (ac)	84.2	-	-	-	-
DCD4	-	-	-	-	30.6
M1	-	82.2	-	-	-
M2	-	51.7	51.7	21.3	32
M3	-	65.5	51.9	34.8	42.6
M4	145.3	-	-	-	-
MX1	-	35.1	-	-	-
PUD	-	96.2	-	21.7	-
RA1	39.6	-	-	-	-
R2	-	34.1	15.4	-	-
R2A	-	30.3	-	-	-
RM1	-	32.2	26.2	18.5	-
RM2	-	27	-	19.9	11.5
RM3	-	57.2	50.3	29.5	37.8
RM4	-	62.6	51.1	40.9	23.1
RM5	-	94.9	102.1	44.6	-
RMHC	-	-	-	10.5	-
RMTN	-	21.2	9	11.1	15.6
RMTN1	-	-	-	-	21.8

## Density per Zoning District – based on Development Era

Zoning District	Before 1970	1970-1990	1990-2000	2000 - 2010	Since 2010
B1	26.2	-	-	-	-
B1B	-	-	-	-	21
B2	41.2	16.4	-	25.1	-
B4	39	-	-	-	-
B5	-	100.4	29.3	39.3	-
B5B	51.9	-	-	74.8	-
B5C	75.9	-	-	-	-
B6	126.7	78.4	301.2	134.7	209.7
DCD1	-	-	-	-	87.8
DCD1 (ac)	-	-	124.4	-	43.9
DCD4	-	-	-	29.2	31.9
M1	82.2	-	-	-	-
M2	82.2	49.6	19.7	21.5	33.6
M3	43.7	43	35.4	45.1	44.7
M4	145.1	142.8	111.8	222	-
MX1	-	33.1	-	25.9	45.2
PUD	-	40.3	-	-	-
RA1	-	-	-	37.3	41.9
R2	31.9	23.6	30.9	18.2	-
R2A	35.1	27.2	21.5	23.3	-
RM1	40.5	23.5	22.5	20.8	-
RM2	30.6	-	22.8	19.7	16.6
RM3	56.2	48.6	31.9	40.8	37.3
RM4	53	47.4	-	25.6	30.8
RM5	100.3	99.6	23.3	42.4	108.6
RMHC	12.5	8.6	-	-	-
RMTN	9.5	11.4	10	15	15.5
RMTN1	-	-	-	-	21.8





