2014 Mature Neighbourhood Reinvestment

GROWTH ANALYSIS TECHNICAL SERIES

Edmonton

INTRODUCTION

The mature neighbourhood reinvestment analysis is undertaken annually based on residential building permits granted within Edmonton's mature neighbourhoods (see Table 1). Residential building permits are broadly divided into two categories: single-family permits and multi-family permits. Multi-family permits include semi-detached dwellings and duplexes, as well as low and high-rise apartments/condominiums; and single-family permits include secondary suites. The permits are analyzed by neighbourhood based on the:

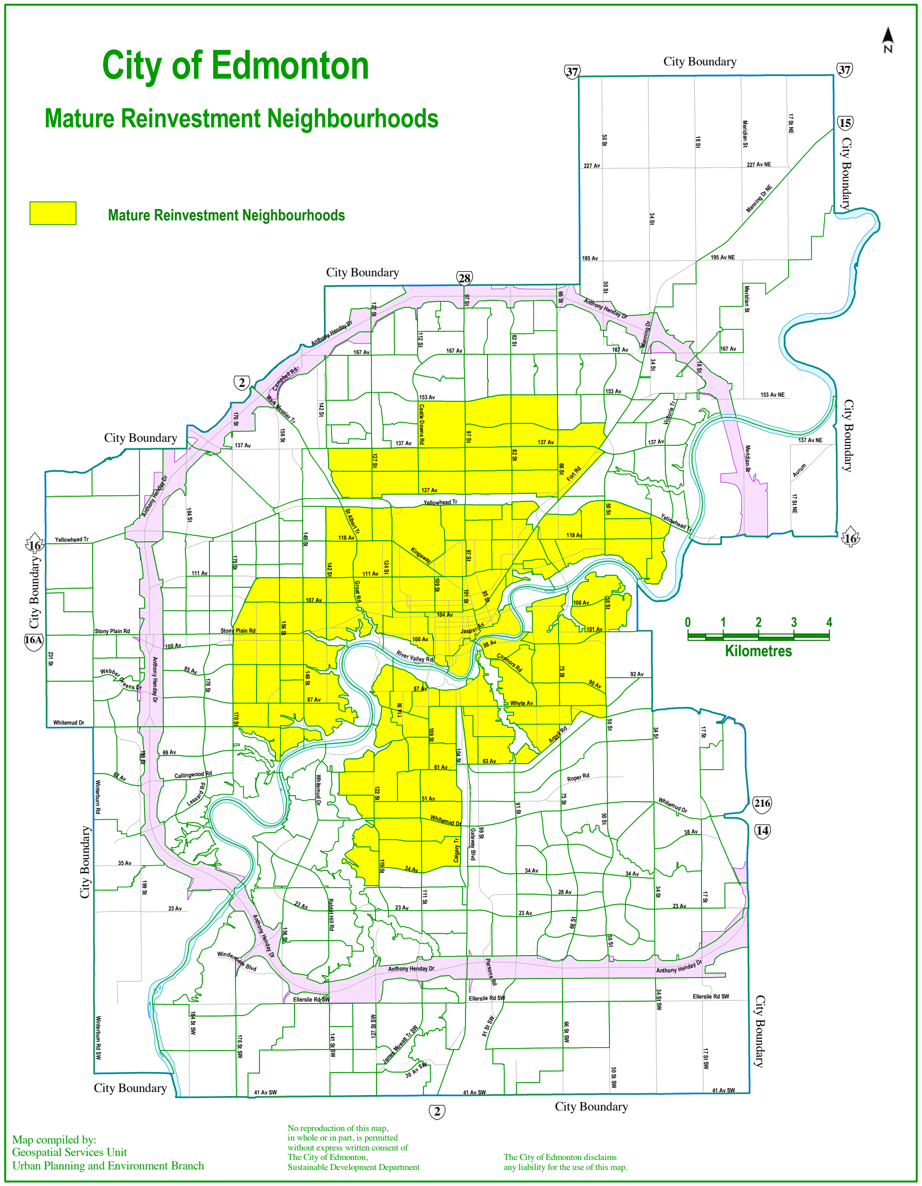
- total number of residential permits granted;
- number of permits for additions and interior/exterior alterations;
- number of secondary suites;
- number of net single family unit gain per neighbourhood (new units minus demolitions);
- number of multi-family unit gain per neighbourhood (new units minus demolitions); and
- estimated construction value for all residential projects in each neighbourhood and the overall value for all mature neighbourhoods.

MATURE NEIGHBOURHOODS, DEFINED

Mature neighbourhoods in Edmonton are generally those completed before 1970, the majority of which experienced their greatest growth in the post-WWII era. These neighbourhoods form a rough concentric oval around the city centre and are formally defined by the "Mature Neighbourhood Overlay" (MNO) (see Map 1). The Griesbach and Downtown neighbourhoods do not fall within the MNO but are considered mature neighbourhoods for the purpose of this analysis based on their central location and specific characteristics as are older industrial neighbourhoods where recent plan amendments have added a residential compound. There are 286 residential neighbourhoods in Edmonton, and 111 of these are classified as mature neighbourhoods for the purpose of this analysis.

Abbottsfield	Alberta Avenue	Allendale	Argyll
Aspen Gardens	Athlone	Avonmore	Balwin
Beacon Heights	Belgravia	Bellevue	Belvedere
Bergman	Beverly Heights	Bonnie Doon	Boyle Street*
Britannia Youngstown	Calder	Canora	Capilano
Central McDougall*	Cloverdale*	CPR Irvine**	Crestwood
Cromdale	Delton	Delwood	Dovercourt
Downtown*	Duggan	Eastwood	Elmwood
Elmwood Park	Empire Park	Evansdale	Forest Heights
Fulton Place	Gainer Industrial **	Garneau*	Glengarry
Glenora	Glenwood	Grandview Heights	Gold Bar
Greenfield	Griesbach*	Grovenor	Hazeldean
High Park	Highlands	Holyrood	Idylwylde
Inglewood	Jasper Park	Kenilworth	Kensington
Kildare	Kilkenny	King Edward Park	Killarney
Lansdowne	Lauderdale	Laurier Heights	Lendrum Place
Lynnwood	Malmo Plains	Mayfield	McCauley*
McKernan	McQueen	Meadowlark Park	Montrose
Newton	North Glenora	Northmount	Oliver*
Ottewell	Parkallen	Parkdale	Parkview
Patricia Heights	Pleasantview	Prince Charles	Prince Rupert
Queen Alexandra	Queen Mary Park*	Quesnell Heights	Rideau Park
Rio Terrace	Ritchie	Riverdale*	Rossdale*
Rosslyn	Royal Gardens	Rundle Heights	Sherbrooke
Sherwood	Spruce Avenue	Strathcona*	Strathearn
Terrace Heights	Virginia Park	Wellington	West Jasper Place
West Meadowlark Pk	Westmount	Westbrook Estates	Westwood
Windsor Park	Woodcroft	York	

* Core Neighbourhoods and Griesbach are included based on their characteristics and central location.
** Gainer Industrial and CPR Irvine are industrial areas that have experienced residential development and are included based on their central location.



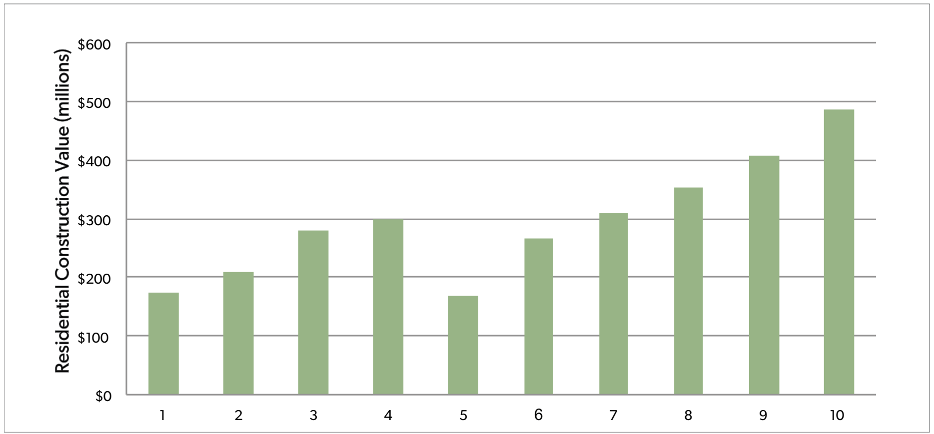
MAP 1: MATURE NEIGHBOURHOODS

2014 HIGHLIGHTS

CONSTRUCTION VALUE

The value of residential construction in the mature neighbourhoods (including downtown) increased in 2014, up 19.5% to $487 million (Figure 1). This increase in construction values is in part due to large scale, multi-unit development in Boyle Street, Downtown and Oliver. Citywide residential construction values also saw an increase of 17% in 2014.

FIGURE 1: VALUE OF RESIDENTIAL CONSTRUCTION IN MATURE NEIGHBOURHOODS 2005-2014 (IN MILLIONS)



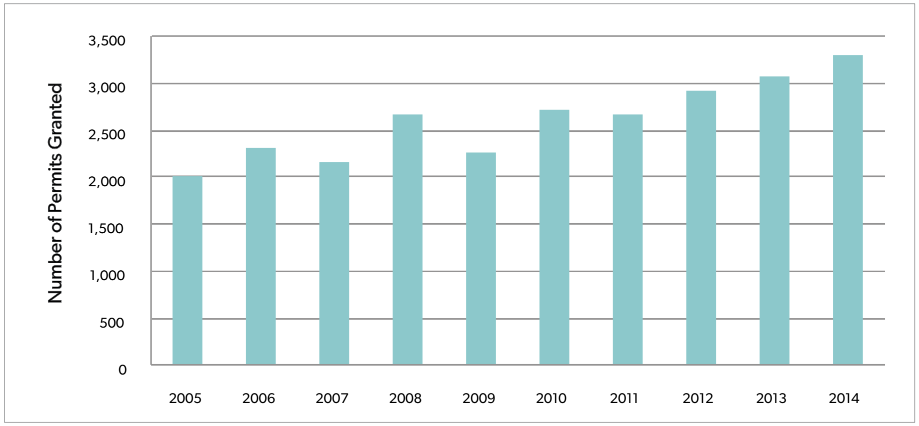
In 2014, in mature neighbourhoods, there were 3,209 permits issued for single-family construction valued at $224 million (including Secondary Suites), and 402 permits issued for multi-family construction valued at $262 million. Of the total permits, 4 were valued at over $35 million. These high-value permits account for 1084 new dwelling units in the mature neighbourhoods. The value of construction in the core neighbourhoods was $180 million in 2014. The core neighbourhoods had 352 permits issued accounting for 904 (52%) of the new dwelling units in the mature area.

NUMBER OF PERMITS

The total number of residential building permits issued in mature neighbourhoods rose from 3,294 in 2013 to 3,902 in 2014 (Figure 2). This is the highest number of permits issued in mature neighbourhoods in the last ten years. The average number of yearly residential building permits in mature neighbourhoods over the last ten years is 2,801.

Permits for alterations, additions and demolitions of existing structures accounted for 52% of the residential permits. New dwelling units (including single, multi and secondary suites) accounted for 48% of residential building permits issued.

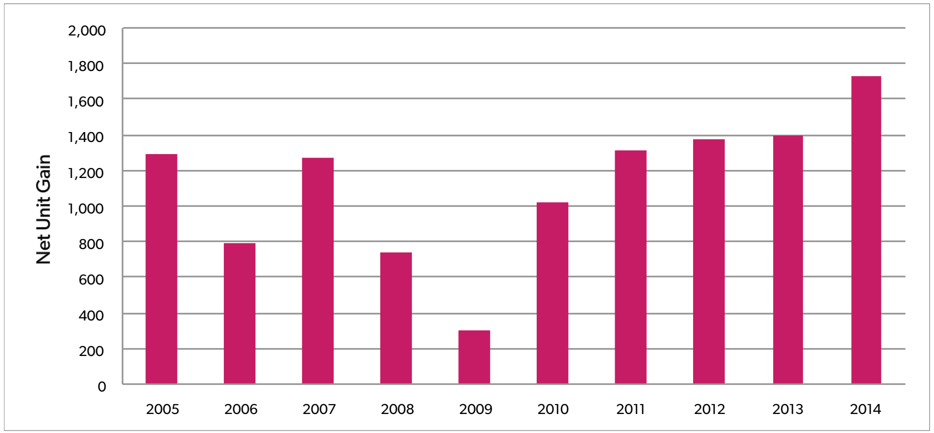
FIGURE 2: NUMBER OF RESIDENTIAL CONSTRUCTION PERMITS GRANTED IN MATURE NEIGHBOURHOODS 2005-2014



UNIT GROWTH

Net unit growth in the mature neighbourhoods (including secondary suites) was up in 2014 to 1,731 (permits were granted to build 2,248 new units and 517 units were demolished) from 1,393 in 2013 (see Figure 3). The highest net unit growth in the last ten years was achieved this year.

FIGURE 3: NET UNIT GAIN IN MATURE NEIGHBOURHOODS 2004-2014



The central core neighbourhoods saw 52% of all net unit gains in the mature area, with the Boyle Street, Oliver and Downtown neighbourhoods experiencing the highest gains at 418, 223 and 181 respectively.

Within the mature neighbourhoods, new dwelling construction continued to follow the trend of more multi-family units than single-family units. In 2014, although permits were issued to construct 390 new single-family units, 484 single units were demolished, resulting in a net loss of 94 single-family units. Permits were also issued for 1,533 multi-family units, and only 18 units were demolished, representing a net gain of 1,515 multi-family units.

While many mature neighbourhoods have not experienced a notable change in the number of dwelling units, other mature neighbourhoods have had significant net unit gains and losses as shown in Table 1 & 2.

TABLE 1: NET UNIT GAIN IN 2014 (INCLUDES SECONDARY SUITES)

NBHDs with Highest Net Unit Gains in 2014	
Boyle Street	418
Oliver	223
Downtown	181
Griesbach	146
Queen Alexandra	128
Parkdale	48
Strathcona	46
Windsor Park	36
Ritchie	33
Inglewood	30

TABLE 2: NET UNIT LOSS IN 2014 (INCLUDES SECONDARY SUITES)

NBHDs with Lowest Net Unit Gains in 2014	
McQueen	-2
Sherwood	-2
Aspen Gardens	-1
Elmwood	-1
Rundle Heights	-1
Westbrook Estates	-1
Cloverdale	-1
Rossdale	-1

SECONDARY SUITES

In 2007 the Zoning Bylaw was amended to allow for Secondary Suites in single-family dwellings. In 2009 the Zoning Bylaw was further amended to allow for Garden and Garage Suites in restricted areas on lots that have a single-family dwelling. As a result, the number of permits issued for Secondary Suites within the City has grown significantly (Figure 4).

In 2014, permits were granted to construct 325 Secondary Suites and demolish 15 Secondary Suites in the mature neighbourhoods, for a total of 310 new Secondary Suite units. This is an increase from the 240 permits issued in 2013. These permits included the addition of Secondary Suites to both new construction (single-family dwellings) and existing single-family dwellings. Secondary Suites made up 14% of all new dwelling units in the mature areas.

FIGURE 4: SECONDARY SUITES 2009-2014

TABLE 3: SUMMARY OF MATURE NEIGHBOURHOOD REINVESTMENT 2014

MATURE NEIGHBOURHOOD REINVESTMENT 2014

Total Residential Permits (Mature Neighbourhood Overlay plus Core Neighbourhoods, Griesbach, Gainer and, CPR Irvine industrial neighbourhoods)

Dwelling Type	Construction Value	% Change in Value (2013 to 2014)	Number of New Units	% Change in New Units (2013 to 2014)	Units Demolished	Net Unit Gain (New Units - Units Demolished)	Number of Permits	% Change in Permits (2013 to 2014)
Single	$224,248,554	34%	390	22%	484	-94	3,209	10%
Multi	$262,821,608	10%	1,533	19%	18	1,515	402	4%
Secondary Suites	-	-	325	35%	15	310	-	-
TOTAL	**$487,070,162**	20%	**2,248**	40%	**517**	**1,731**	**3,902**	18%

Construction Value Summary(s)	Construction Value	Percentage Share
Residential permits in mature neighbourhoods as a % of city-wide residential permits, excluding core neighbourhoods	$306,973,488	10%
Core neighbourhoods residential permits as a % of city-wide residential permits	$180,096,674	6%
Residential permits in developing and established neighbourhoods (suburban) as a % of city-wide residential permits	$2,495,463,546	84%
City-wide residential permit value	$2,982,533,708	100%

Dwelling Unit Summary	Dwelling Units	Percentage Share
Dwelling units in mature neighbourhoods as a % of city-wide dwelling units, excluding core neighbourhoods	827	6%
Core Neighbourhoods as a % of city-wide dwelling units	904	8%
Dwelling units in developing and established neighbourhoods (suburban) as a % of city-wide dwelling units	10,287	86%
City-wide dwelling units	12,018	100%

Detailed Neighbourhood Permit Data is available online at:

http://www.edmonton.ca/growthanalysis

Individual Permit data is available through the City's Open Data Catalogue:

https://data.edmonton.ca/

Prepared by the Growth Analysis Unit, Sustainable Development Department, April 2015
For more information contact growthanalysis@edmonton.ca