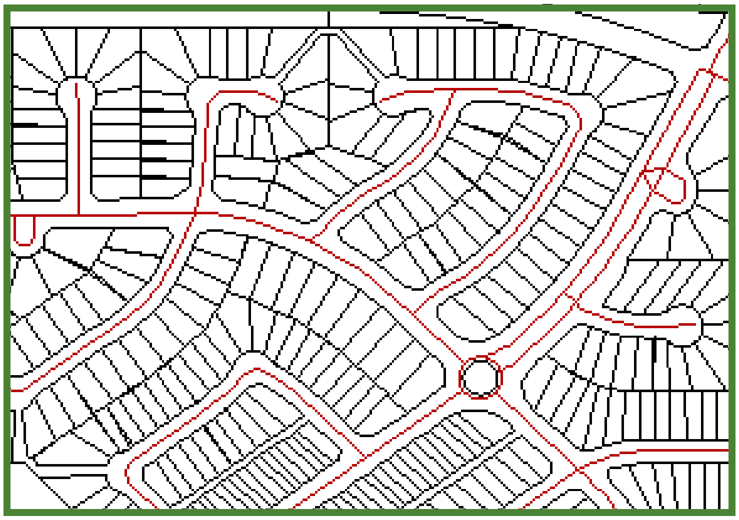
# EDMONTON
# DEVELOPING NEIGHBOURHOODS:
## LOW DENSITY RESIDENTIAL LOT SERVICING
## 2014





Growth Analysis: Technical Series, 2014
Edmonton's Developing Neighbourhoods Low Density Residential Lot Servicing

# EDMONTON'S DEVELOPING NEIGHBOURHOODS:
## LOW DENSITY RESIDENTIAL LOT SERVICING

### Introduction

Each year the Growth Analysis Unit of the Sustainable Development Department coordinates and prepares a 'Low Density Residential Lot Servicing' report for the city's developing neighbourhoods. A historic perspective of low density lot servicing is provided for the past ten years. A summary of the 2014 low density residential servicing is broken down by city Subsector and Area Structure Plan. A servicing forecast for the next six years (inclusive of the current one) includes low density servicing activity within developing neighbourhoods in approved Area Structure Plans (ASPs).

### Servicing Activity

Servicing activity is based on low density residential lots (single and semi units). Low density residential home construction constitutes the majority of development in most developing residential neighbourhoods and is also more consistent in terms of the rate of development than is multi-family development. Low density residential lots (single and semi units) also consume more land, proportionally, than do multi-family developments, thereby providing a stronger indication of the general direction and volume of growth expected to take place in approved neighbourhoods over the forecast period. All annual reporting, both historic and forecast, is based on the calendar year of

### Historic Low Density Residential Lot Servicing 2005-2014

The total number of lots serviced between 2005 and 2014 was 40,382 (Table 1). The years with the highest lots serviced were 2005 and 2014 with 5,922 and 5,889 lots serviced respectively. The two with the lowest years were 2006 and 2009 with 2,700 and 595 lots serviced respectively. Six of the last ten years have seen servicing exceed 4,400 lots (Figure 1). Prior to 2008 the low density lot servicing calculation excluded semi-detached units.

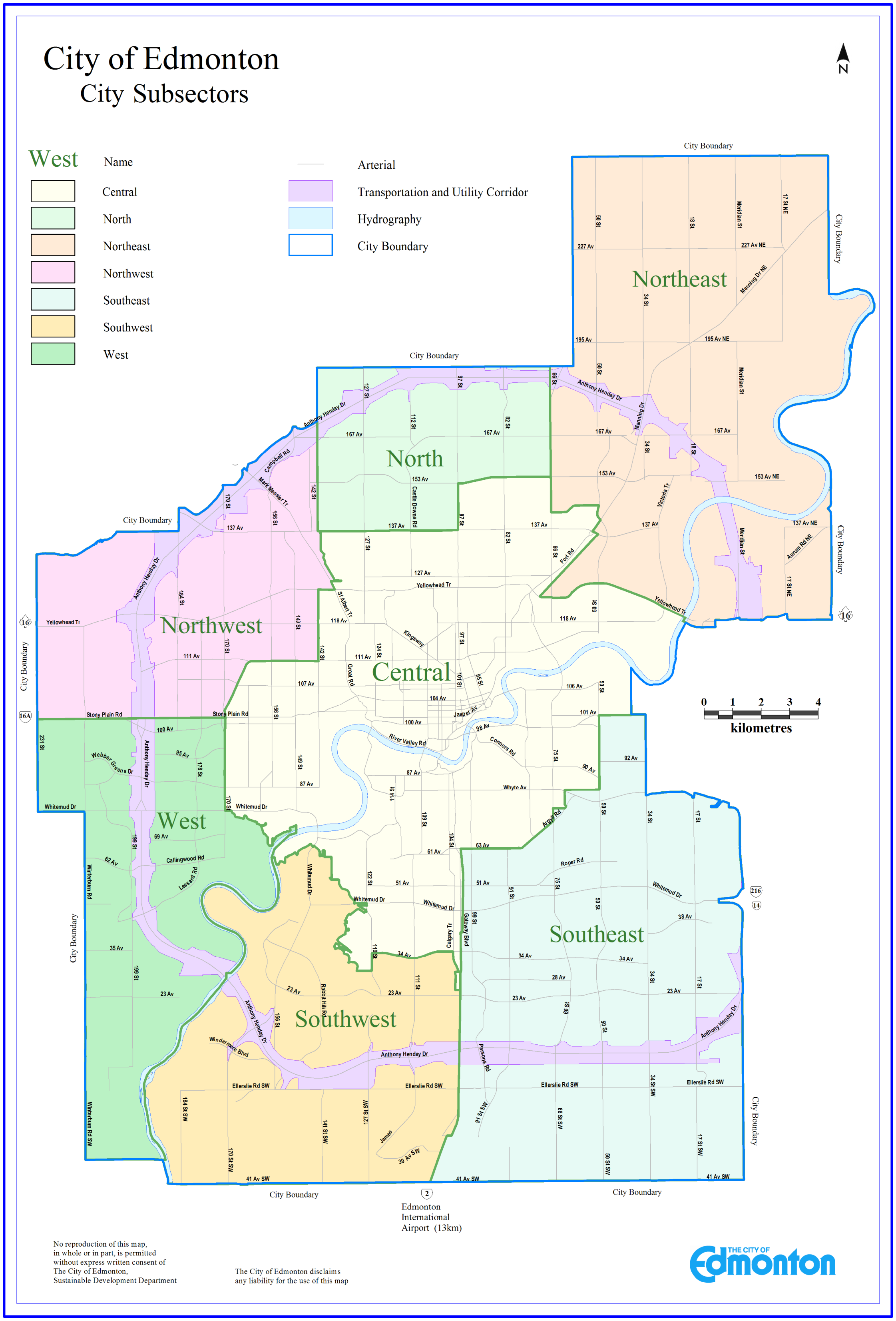
Historically, the percentage share of low density residential lot servicing has exhibited considerable variation across the different Subsectors of the city (Table 2). Except for the years 2005 (31%) and 2013 (34%), the combined servicing activity of the North and Northeast sectors has been between 10-25% of the City total. Over the last five years West Edmonton has been increasing it's share from the low teens to over 20% of lot servicing. Southwest and Southeast Edmonton continue to attract about 50-60% of the lot servicing.

## Table 1: Historical Share of Low Density Residential Lot Servicing by City Subsector

| ASP by Subsector | Actuals | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | Total |
| **NORTH** | | | | | | | | | | | |
| Castle Downs Extension | 227 | 0 | 215 | 0 | 0 | 139 | 109 | 157 | 212 | 192 | 1,251 |
| Edmonton North | 351 | 285 | 134 | 74 | 67 | 144 | 109 | 341 | 332 | 169 | 2,006 |
| Goodrige Corners | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Greisbach | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 287 | 123 | 410 |
| Palisades | 167 | 94 | 145 | 0 | 0 | 0 | 379 | 184 | 237 | 0 | 1,206 |
| **TOTAL** | **745** | **379** | **494** | **74** | **67** | **283** | **597** | **682** | **1,068** | **484** | **4,873** |
| **NORTHEAST** | | | | | | | | | | | |
| Clareview | 44 | 0 | 62 | 48 | 0 | 48 | 0 | 50 | 217 | 0 | 469 |
| Ebbers | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 93 | 93 |
| Horse Hills | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Pilot Sound | 1,029 | 307 | 266 | 192 | 38 | 349 | 179 | 55 | 205 | 546 | 3,166 |
| **TOTAL** | **1,073** | **307** | **328** | **240** | **38** | **397** | **179** | **105** | **422** | **639** | **3,728** |
| **NORTHWEST** | | | | | | | | | | | |
| Big Lake | 0 | 0 | 0 | 0 | 0 | 238 | 0 | 415 | 80 | 167 | 900 |
| **TOTAL** | **0** | **0** | **0** | **0** | **0** | **238** | **0** | **415** | **80** | **167** | **900** |
| **WEST** | | | | | | | | | | | |
| Cameron Heights | 65 | 0 | 186 | 0 | 41 | 0 | 0 | 0 | 70 | 117 | 479 |
| Edgemont | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 145 | 225 | 92 | 462 |
| Lewis Farms | 188 | 232 | 100 | 158 | 52 | 290 | 267 | 281 | 434 | 1,038 | 3,040 |
| Riverview | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| The Grange | 396 | 304 | 917 | 0 | 164 | 406 | 225 | 155 | 89 | 73 | 2,729 |
| West Jasper Place | 65 | 41 | 36 | 68 | 0 | 0 | 0 | 0 | 0 | 0 | 210 |
| **TOTAL** | **714** | **577** | **1,239** | **226** | **257** | **696** | **492** | **581** | **818** | **1,320** | **6,920** |
| **SOUTHWEST** | | | | | | | | | | | |
| Heritage Valley | 943 | 260 | 322 | 342 | 18 | 988 | 606 | 364 | 701 | 869 | 5,413 |
| Terwillegar Heights | 1,528 | 523 | 1,154 | 116 | 0 | 70 | 27 | 34 | 0 | 0 | 3,452 |
| Windermere | 0 | 0 | 290 | 739 | 43 | 0 | 177 | 899 | 534 | 776 | 3,458 |
| **TOTAL** | **2,471** | **783** | **1,766** | **1,197** | **61** | **1,058** | **810** | **1,297** | **1,235** | **1,645** | **12,323** |
| **SOUTHEAST** | | | | | | | | | | | |
| Ellerslie | 518 | 291 | 520 | 326 | 0 | 567 | 465 | 268 | 310 | 498 | 3,763 |
| Southeast | 0 | 0 | 332 | 579 | 106 | 517 | 566 | 536 | 233 | 494 | 3,363 |
| The Meadows | 401 | 363 | 266 | 486 | 66 | 820 | 549 | 655 | 264 | 642 | 4,512 |
| **TOTAL** | **919** | **654** | **1,118** | **1,391** | **172** | **1,904** | **1,580** | **1,459** | **807** | **1,634** | **11,638** |
| **TOTAL** | **5,922** | **2,700** | **4,945** | **3,128** | **595** | **4,576** | **3,658** | **4,539** | **4,430** | **5,889** | **40,382** |

** Prior to 2008 the low density lot servicing excluded semi-detached units*

*** The Northwest subsector was separated out in 2010*



City of Edmonton
City Subsectors
N
West Name
Central
North
Northeast
Northwest
Southeast
Southwest
West
Arterial
Transportation and Utility Corridor
Hydrography
City Boundary
Northeast
North
Northwest
Central
West
Southwest
Southeast
City Boundary
0 1 2 3 4
kilometres
Edmonton
International
Airport (13km)
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# EDMONTON'S DEVELOPING NEIGHBOURHOODS:
## LOW DENSITY RESIDENTIAL LOT SERVICING

**Figure 1: Number of Low Density Residential Lots Serviced, 2005-2014**

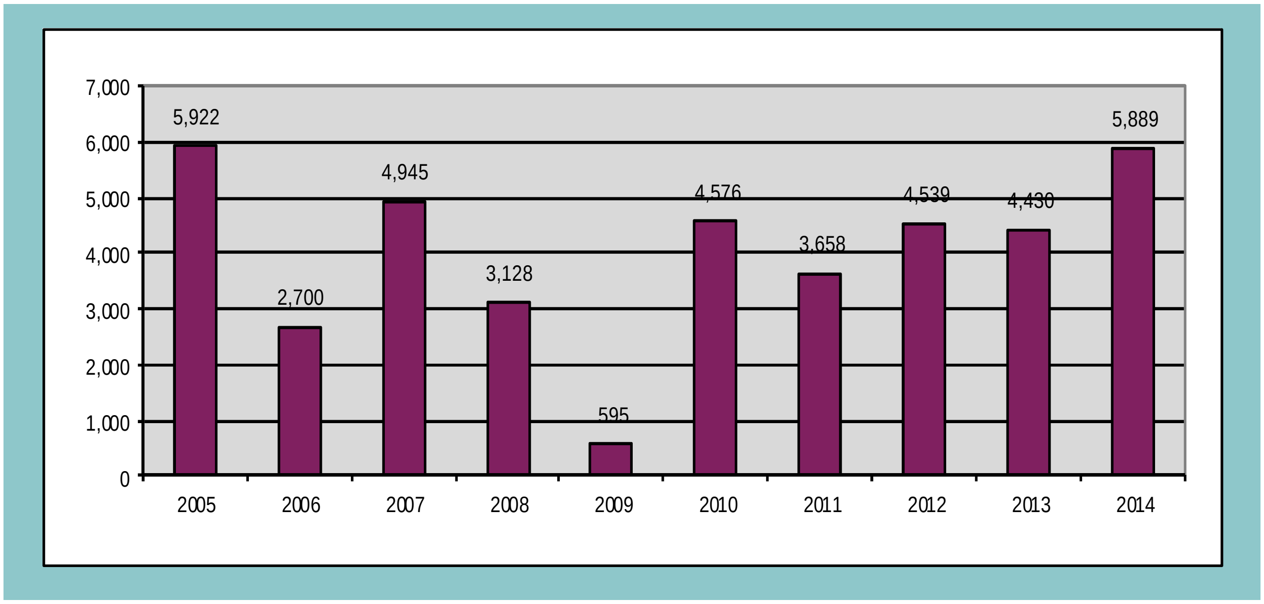


**Table 2:**

**Percent of Low Density Residential Lot Servicing Share by Subsector, 2005-2014**

| City Subsector | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|---|---|---|---|---|---|---|---|---|
| North | 13% | 14% | 10% | 2% | 11% | 6% | 16% | 14% | 24% | 8% |
| Northeast | 18% | 11% | 7% | 8% | 6% | 9% | 5% | 10% | 10% | 11% |
| Northwest* | 0% | 0% | 0% | 0% | 0% | 5% | 0% | 2% | 2% | 3% |
| West | 12% | 21% | 25% | 7% | 43% | 15% | 13% | 16% | 18% | 22% |
| Southwest | 42% | 29% | 36% | 38% | 10% | 23% | 22% | 30% | 28% | 28% |
| Southeast | 16% | 24% | 23% | 44% | 29% | 42% | 43% | 28% | 18% | 28% |
| **Total Lots** | **5,922** | **2,700** | **4,945** | **3,128** | **595** | **4,576** | **3,658** | **4,539** | **4,430** | **5,889** |

* Northwest Subsector was separated out in 2010

# EDMONTON'S DEVELOPING NEIGHBOURHOODS:
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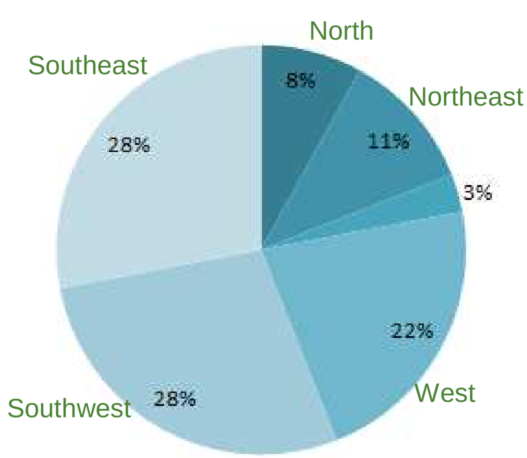
### 2014 Low Density Residential Lot Servicing

The number of low density residential lots serviced in Edmonton's developing neighbourhoods in 2014 was 5,889. This is much higher (46%) than the 10 year average (4,038). In 2014, the percentage share of development continues to be strong in the South. South Edmonton (Southwest and Southeast combined) accounted for fifty-six percent of the servicing in 2014. North Edmonton (North and Northeast combined) accounted for nineteen percent. West Edmonton (Northwest and West combined) has the second highest lot servicing at twenty-five percent. Table 3 shows the 2014 low density residential servicing by city subsector and Area Structure Plans.




### Table 3
### 2014 Low Density Residential Lot Servicing by City Subsector and Area Structure Plan

| Subsector | Area Structure Plan | Lots Serviced | Percent Share |
|---|---|---|---|
| **NORTH** | Castle Downs Extension | 192 | 3% |
| | Edmonton North | 169 | 3% |
| | Goodridge Corners | 0 | 0% |
| | Greisbach | 123 | 2% |
| | Palisades | 0 | 0% |
| | **TOTAL** | **484** | **8%** |
| **NORTHEAST** | Clareview | 0 | 0% |
| | Ebbers | 93 | 2% |
| | Horse Hills | 0 | 0% |
| | Pilot Sound | 546 | 9% |
| | **TOTAL** | **639** | **11%** |
| **NORTHWEST**** | Big Lake | 167 | 3% |
| | **TOTAL** | **167** | **3%** |
| **WEST** | Cameron Heights | 117 | 2% |
| | Edgemont | 92 | 2% |
| | Lewis Farms | 1,038 | 18% |
| | Riverview | 0 | 0% |
| | The Grange | 73 | 1% |
| | **TOTAL** | **1,320** | **22%** |
| **SOUTHWEST** | Heritage Valley | 869 | 15% |
| | Terwillegar Heights | 0 | 0% |
| | Windermere | 776 | 13% |
| | **TOTAL** | **1,645** | **28%** |
| **SOUTHEAST** | Ellerslie | 498 | 8% |
| | Southeast | 494 | 8% |
| | The Meadows | 642 | 11% |
| | **TOTAL** | **1,634** | **28%** |
| | **TOTAL** | **5,889** | **100%** |

# EDMONTON'S DEVELOPING NEIGHBOURHOODS:
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### Low Density Residential Servicing Forecast, 2015-2020

Accurate forecasting of land servicing activity for small areas of the city is a difficult exercise. The intentions and capabilities of the development industry, potential servicing limitations, marketing successes in particular geographic areas, and the underlying economic outlook on the local, regional and global scales are all important factors that influence the accuracy of the forecasts. This report makes what are considered reasonable forecasts for the upcoming six year period.

In the spring of each year the City of Edmonton's Sustainable Development Department and the Urban Development Institute (UDI) Greater Edmonton Chapter independently prepare low density residential lot servicing forecasts for a six year timeframe from 2015 to 2020. UDI canvasses its membership on their development intentions over the next six years. Sustainable Development reviews land development applications and servicing agreements in light of expected population growth, knowledge of potential servicing constraints, and the overall economic climate. Taken together, the Sustainable Development and Urban Development Institute forecasts provide a range of expected servicing activity in Edmonton's developing neighbourhoods.

Sustainable Development anticipates the servicing activity to start slow in 2015-2016, due to current oil prices slowing the economy, and a slight growth in the forecast over the next 4 years from 2017-2020. The Urban Development Institute forecasts sustained servicing activity over the next three years and then slowing down from 2019 to 2020 (Table 5). The Sustainable Development forecast for the 2015-2020 timeframe indicates an average annual lot servicing of about 5,100 low density residential lots per year. The UDI forecast estimates an average of about 4,800 low density lots serviced per year for 2015-2020.

Sustainable Development and the Urban Development Institute have a similar forecast that the South and West subsectors will account for a majority of all lot servicing activity. Sustainable Development has the Northeast having a slightly higher percentage share of the growth than the amount the Urban Development Institute has projected. Horse Hills ASP is a new development with a lot of potential. Over the forecast period, both organizations suggest the combined Southeast and Southwest subsectors will experience over 50% of new low density residential lot servicing. The Decoteau Area ASP will likely be approved over the forecast period providing for future growth in the Southeast. Urban Development Institute forecasts stronger growth in the West subsector.

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### Servicing Activity Methodology

“Servicing activity” refers to low density lots for which complete underground servicing has been constructed, including: storm and sanitary sewers, water mains, and shallow utilities (i.e. gas and power). To determine the actual number of serviced lots, Sustainable Development has partnered with EPCOR Water Services to establish the date from which water mains for stages of development within new neighbourhoods were “in service.” This means that the mains have been charged with water, a new home could readily be connected with this infrastructure, and a building permit could be issued immediately. The “in service” date, sometimes referred to as the “commission date,” is used as guide to servicing completion because water mains are a shallower utility than storm and sanitary sewers, meaning that storm and sanitary construction would necessarily precede it. Functioning shallow utilities (gas and power) are required to ensure that the water service can flow into new homes without the risk of freezing as they emerge from underground. Functioning water service is also required for fire protection purposes prior to the construction of the first show home in a new neighbourhood.

Prepared by the Growth Analysis Unit, Sustainable Development
For more information, contact the City of Edmonton at: 311 (in Edmonton) or 780-442-5311

# Table 4: Low Density Residential Lot Servicing Forecasts, 2015-2020

| | | Low Density Residential Lot Servicing Forecasts, 2015-2020 | | | | | | | | | | | | Forecast Average (lots/year) | | Forecast Average (% share) | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Subsector** | **Area Structure Plan** | **SD 2015** | **UDI 2015** | **SD 2016** | **UDI 2016** | **SD 2017** | **UDI 2017** | **SD 2018** | **UDI 2018** | **SD 2019** | **UDI 2019** | **SD 2020** | **UDI 2020** | **SD 15-20** | **UDI 15-20** | **SD 15-20** | **UDI 15-20** |
| **NORTH** | Castle Downs Extension | 85 | 231 | 80 | 75 | 75 | 75 | 70 | 0 | 50 | 0 | 30 | 0 | 65 | 64 | 1.3% | 1.3% |
| | Edmonton North | 90 | 90 | 101 | 235 | 93 | 84 | 90 | 267 | 90 | 100 | 80 | 67 | 91 | 141 | 1.8% | 2.9% |
| | Goodridge Corners | 0 | | 0 | | 121 | 121 | 117 | 117 | 110 | 110 | 101 | 101 | 75 | 75 | 1.5% | 1.6% |
| | Greisbach | 125 | 32 | 220 | 137 | 135 | 202 | 180 | 130 | 200 | 150 | 220 | 150 | 180 | 134 | 3.5% | 2.8% |
| | Palisades | 18 | | 16 | | 15 | | 15 | | 12 | | 15 | | 15 | 0 | 0.3% | 0.0% |
| | **North TOTAL** | **318** | **353** | **417** | **447** | **439** | **482** | **472** | **514** | **462** | **360** | **446** | **318** | **426** | **412** | **8.3%** | **8.6%** |
| **NORTHEAST** | Clareview | 91 | 357 | 71 | 27 | 20 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 30 | 64 | 0.6% | 1.3% |
| | Ebbers | 30 | 30 | 60 | 30 | 60 | 30 | 40 | 30 | 40 | 30 | 40 | 30 | 45 | 30 | 0.9% | 0.6% |
| | Horse Hills | 50 | | 300 | 400 | 350 | | 400 | 300 | 400 | | 400 | 300 | 317 | 167 | 6.2% | 3.5% |
| | Pilot Sound | 253 | 212 | 215 | 319 | 172 | 330 | 172 | | 120 | | 90 | | 170 | 144 | 3.3% | 3.0% |
| | **Northeast TOTAL** | **424** | **599** | **646** | **776** | **602** | **360** | **612** | **330** | **560** | **30** | **530** | **330** | **562** | **404** | **11.0%** | **8.5%** |
| **NORTHWEST** | Big Lake | 153 | 220 | 161 | 250 | 167 | 205 | 197 | 100 | 200 | 55 | 200 | 55 | 180 | 148 | 3.5% | 3.1% |
| | **Northwest TOTAL** | **153** | **220** | **161** | **250** | **167** | **205** | **197** | **100** | **200** | **55** | **200** | **55** | **180** | **148** | **3.5%** | **3.1%** |
| **WEST** | Cameron Heights | 60 | 60 | 30 | 30 | 30 | 0 | 10 | 0 | 20 | 0 | 10 | 0 | 27 | 15 | 0.5% | 0.3% |
| | Edgemont | 329 | 336 | 208 | 721 | 205 | 632 | 239 | 750 | 236 | 500 | 230 | 500 | 241 | 573 | 4.7% | 12.0% |
| | Lewis Farms | 264 | 173 | 356 | 300 | 414 | 150 | 478 | 320 | 481 | 100 | 460 | 100 | 409 | 191 | 8.0% | 4.0% |
| | The Grange | 50 | 60 | 60 | 80 | 72 | 75 | 20 | 70 | 10 | 70 | 0 | 70 | 35 | 71 | 0.7% | 1.5% |
| | Riverview | 251 | 325 | 326 | 550 | 312 | 550 | 299 | 550 | 350 | 550 | 400 | 550 | 323 | 513 | 6.3% | 10.7% |
| | **West TOTAL** | **954** | **954** | **980** | **1,681** | **1,033** | **1,407** | **1,046** | **1,690** | **1,097** | **1,220** | **1,100** | **1,220** | **1,035** | **1,362** | **20.2%** | **28.6%** |
| **SOUTHWEST** | Heritage Valley | 860 | 989 | 947 | 1,081 | 995 | 927 | 950 | 650 | 900 | 480 | 900 | 430 | 925 | 760 | 18.0% | 15.9% |
| | Windermere | 632 | 579 | 599 | 468 | 569 | 576 | 575 | 532 | 590 | 428 | 580 | 226 | 591 | 468 | 11.5% | 9.8% |
| | **Southwest TOTAL** | **1,492** | **1,568** | **1,546** | **1,549** | **1,564** | **1,503** | **1,525** | **1,182** | **1,490** | **908** | **1,480** | **656** | **1,516** | **1,228** | **29.6%** | **25.7%** |
| **SOUTHEAST** | Ellerslie | 500 | 320 | 546 | 450 | 580 | 325 | 600 | 527 | 589 | 400 | 545 | 400 | 560 | 404 | 10.9% | 8.5% |
| | Southeast | 101 | 200 | 90 | 148 | 125 | 125 | 145 | 215 | 135 | 275 | 125 | 275 | 120 | 206 | 2.3% | 4.3% |
| | The Meadows | 671 | 694 | 661 | 651 | 650 | 462 | 625 | 462 | 620 | 462 | 520 | 300 | 625 | 505 | 12.2% | 10.6% |
| | Decoteau Area* | 0 | | 0 | | 0 | | 100 | 165 | 200 | 220 | 325 | 220 | 104 | 101 | 2.0% | 2.1% |
| | **Southeast TOTAL** | **1,272** | **1,214** | **1,297** | **1,249** | **1,355** | **912** | **1,470** | **1,369** | **1,544** | **1,357** | **1,515** | **1,195** | **1,409** | **1,216** | **27.5%** | **25.5%** |
| | **TOTAL** | **4,613** | **4,908** | **5,047** | **5,952** | **5,160** | **4,869** | **5,322** | **5,185** | **5,353** | **3,930** | **5,271** | **3,774** | **5,128** | **4,770** | **100.0%** | **100.0%** |