URBAN GROWTH MONITORING & ANALYSIS

GROWTH SUMMARY 2011-2020

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PLANNING & ENVIRONMENTAL SERVICES
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Edmonton

EXECUTIVE SUMMARY

In 2012, Council approved the Growth Coordination Strategy. The Strategy provided a framework to identify and manage future publicly funded infrastructure and services and accommodate expected growth through monitoring, reporting, coordination, and communication. One of the critical elements directed by the Growth Coordination Strategy was preparing an annual Growth Monitoring Report to report on progress made on The Way We Grow, Edmonton's former Municipal Development Plan, which was in effect from 2010 to 2020.

The Growth Monitoring Report contained information on key demographic, residential and non-residential growth trends across the City. Along with the Mature Neighbourhood Reinvestment Report, the Growth Monitoring Report provided planners annual growth analysis data sets, growth snapshots, and specialized reports on vacant land supply, residential lot servicing, lot registration, residential density and building permits by zoning since 2012.

In 2020, The City Plan, Edmonton's Municipal Development Plan and Transportation Master Plan, was approved by the City Council. The City Plan directs accommodating growth within Edmonton's current boundary in an integrated, organized way that balances competing demands and prioritizes public investment. The City Plan, and

emerging District Plans and Growth Management Framework necessitate an update and expansion of current growth monitoring activities and products in the context of the plan's policies and geographies.

This report reviews and summarizes the current growth monitoring indicators from 2011 to 2020, laying the foundation for the City's growth monitoring program renewal. The summarized indicators include population growth trends, low-density residential lot registration, lot servicing, greenfield residential growth, infill, vacant industrial land inventory and other key performance measures and analyses.

This report provides stakeholders with historical growth monitoring information for their urban growth-related decision-making.

* Please refer to the Growth Analysis site at Edmonton.ca/Growth Analysis/ for detailed data and analysis of the topics presented.

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GLOSSARY

City Sector- A geographic topology (i.e. North, Northeast, Southeast, Southwest, and West) used to monitor infrastructure and demographic changes (Map 2).

Greenfield Area - A developing suburban area with agricultural zoning that remains in its natural state or has been used only for farming purposes.

Infill (Residential) - Residential infill is the development of new housing in established neighbourhoods (see Neighbourhood Typology glossary definition). This new housing may include secondary suites, garage suites, duplexes, semi-detached and detached houses, rowhouses, apartments, and other residential and mixed-use buildings.

Lot Supply - The potential lot supply refers to the estimated number of future single or semi-detached housing lots within approved structure plans. Once a lot has been registered, it is considered absorbed and no longer part of the lot supply.

Lot Servicing - The complete construction of underground infrastructure, including storm and sanitary sewers, water mains and shallow utilities (i.e. gas and power).

Low-Density Residential (LDR) Lot Registration - The number of single or semi-detached residential lots (excluding country residential) in developing neighbourhoods, registered at Alberta Land Titles after subdivision. The 2012 Growth Coordination Strategy and The Way We Grow used a threshold of 95% planned LDR lots registration rate to indicate neighbourhood completion.

Neighbourhood Typology - The geographic planning areas identified in The Way We Grow (Map 1):

- Core Areas (downtown and adjacent neighbourhoods);
- Mature areas (neighbourhoods outside the core, generally completed before 1970);
- Established Areas (completed neighbourhoods, generally within the Anthony Henday transportation/utility corridor);
- Developing areas (currently developing, planned or plan under preparation neighbourhoods);
- Planned Areas (areas identified for future residential development and have an approved ASP or an approved servicing concept design brief, but no approved NSP).

Net Residential Dwelling Unit Density - The spatial concentration of dwelling units within an area designated for residential purposes. It is calculated by dividing the total residential dwelling units using the net residential land area, excluding land designated for non-residential uses (roads, parks, neighbourhood commercial land use, etc.).

Vacant Industrial Land Inventory - A listing of vacant land zoned for industrial use or reserve land designated for future industrial use. The vacant Industrial land inventory provides an overview of the supply and demand of industrial lands.

BACKGROUND

In 2010, Council approved the Municipal Development Plan (MDP), The Way We Grow. In November 2012, the Growth Coordination Strategy was adopted by Council to provide a framework to identify and manage future publicly funded infrastructure and services obligations and to accommodate expected growth through monitoring, reporting, coordination, and communication. One of the key elements prescribed by the Strategy was the preparation of an annual Growth Monitoring Report.

Following the mandate laid out in the Growth Coordination Strategy, the former City Planning Branch redeveloped the Growth Monitoring Report program in 2012. A Growth Coordination Committee comprised of diverse stakeholders was established to inform the report structure, content, and presentation style. The Committee identified the importance of an integrated communications approach for the release, timing, distribution, and cross-referencing of the City's growth-related information in various formats.

A Growth Monitoring Program working team (currently the Monitoring and Analysis team in the Planning and Environment Services Branch) established an information framework that made data and analysis available annually via ongoing publications of summary reports, newsletter updates, websites, and the continual release of open-source data (Figure 1).

Figure 1: The Growth Monitoring Report Program Information Framework (from The Growth Monitoring Report).

The core product, the Growth Monitoring Report, was published in 2012, 2014, 2016, and 2018. It contained information on key demographic, residential and non-residential growth trends across the City. The report included information on Edmonton's

neighbourhoods, using the neighbourhood typology of The Way We Grow (Map 1)

Along with the Growth Monitoring report, the program included the development of the Mature Neighbourhood Reinvestment Report, Infill Snapshots, Low-Density Residential Lot Registration Report, Lot Servicing Report, and Vacant Industrial Land Inventory Report. These reports were published annually beginning in 2012 and served to disseminate data related to growth in the City of Edmonton to communicate objectives of the Growth Coordination Strategy and related Municipal Development Plan policy.

Following the publication of the 2017 Growth Monitoring Report in 2018, the decision was made to move components of the report to interactive formats that were more timely (monthly vs. annually or bi-annually), accompanied by more succinct reports addressing specific components of the past report format. This decision was informed by engagement with a broad cross-section of stakeholders, including impacted internal partners, city school boards, and development industry partners. The move to a more interactive format in concert with succinct, more frequent reporting, supports the emphasis on technology adoption and the responsible use of resources in the face of resourcing constraints.

The increased flexibility facilitated by the change in formats, allowed for the analysis of additional key indicators/analytics: developing area

net residential density, planning capacity, and zoning change analysis.

In the preceding decade, the Growth Monitoring Report served as a key information source, supporting evidence-based decision-making planning processes across the corporation. The development of The City Plan from 2018 to 2020 was facilitated by data-driven analysis underpinned by the Growth Monitoring & Analysis program. With the adoption of The City Plan in 2020, the associated analysis and resulting policies lay the foundation for updating and enhancing monitoring and analysis in the coming years.

The Growth Monitoring program is being renewed in the context of The City Plan. As part of the renewal, it will be essential to identify the key monitoring and analysis indicators that will support progress reporting on The City Plan and its key initiatives, including District Plans and the Growth Management Framework, renewing the mandate for growth monitoring activities previously provided by the Growth Coordination Strategy. This report reviews and summarizes the current growth monitoring indicators from 2011 to 2020, laying the foundation for the City's growth monitoring program renewal.

POPULATION GROWTH PATTERN

Edmonton's population increased from 845,000 in 2011 to over 1 million in 2020 - a net gain of approximately 20,000 people annually. However, not all city areas have experienced consistent population growth over this period; there are essential differences between neighbourhoods depending on their era of development and current development opportunities.
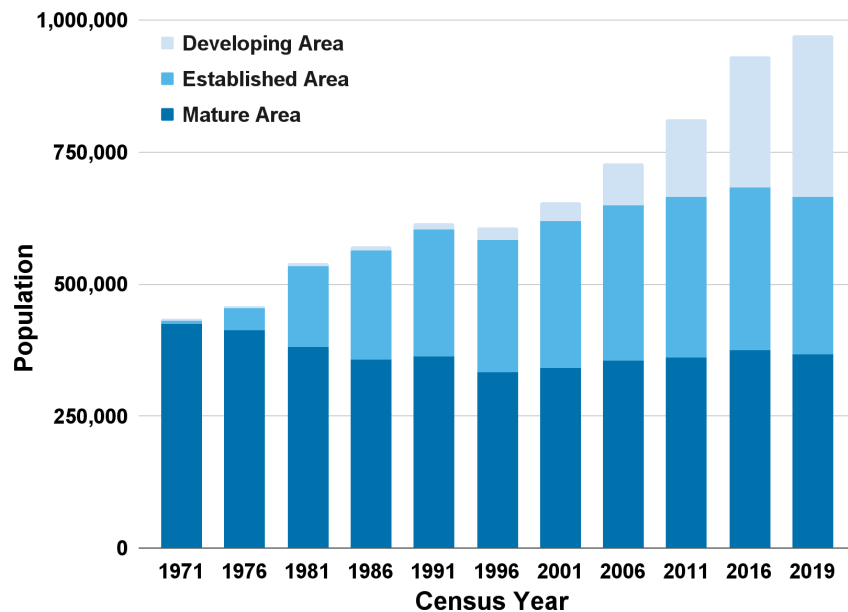

Figure 2: Edmonton Population Change by Neighbourhood Typology.

From 2011 to 2019, the population of the Established neighbourhoods decreased by 5,500 people in total. Among the 92 established neighbourhoods, 69 saw net population loss. This decline is typical of historic neighbourhood lifecycles as household occupants age, and household sizes decrease. In contrast, the population of Mature neighbourhoods increased by 2,700, reflecting that the populations stabilized or increased following a long-term decline beginning in 1971. The developing neighbourhoods' populations doubled from 2011 to 2019, with younger households rapidly populating these neighbourhoods as development was initiated (Figure 2).
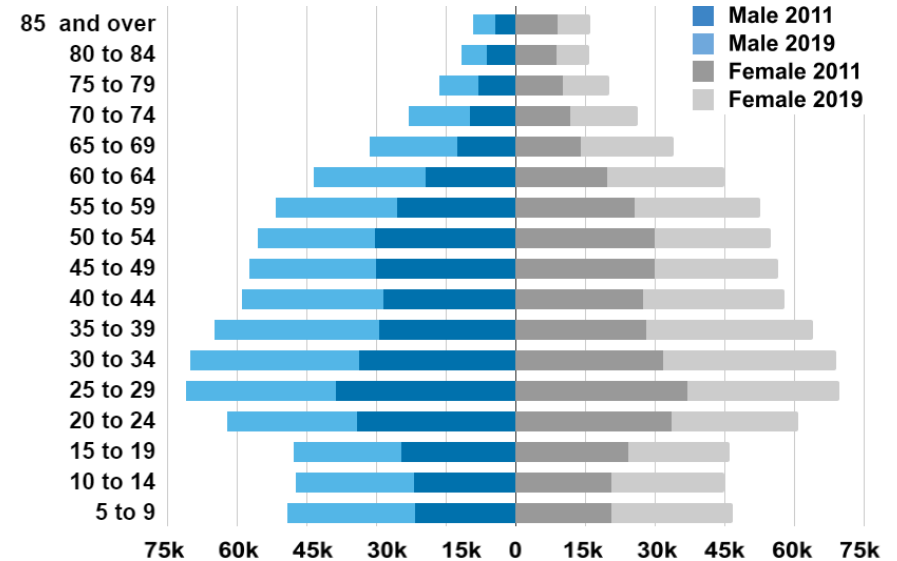

Figure 3: Edmonton Population Age-gender Pyramid Change.

The age-gender pyramid (Figure 3) illustrates the significant growth in the 5-15 age group (44%), 30-40 age group (37%) and 60-70 age group (69%) over this same period. These patterns illustrate a population both ageing and attracting younger adults with children over the period of interest.

LOW-DENSITY RESIDENTIAL LOT REGISTRATION*

Over the last decade, the annual registered LDR lots varied considerably. Between 2011-2015, there was a notable rise in lot absorption, averaging above 5,000 lots per year. Between 2016-2020, the number of lots absorbed averaged over 2,800 representing a decrease of 45% between the two time periods. The highest number of LDR lots absorbed (5,761 lots) occurred in 2015; 2020 had the lowest lot absorption count (1,927 lots), on par with 2016. The decrease in lot absorption between 2015 and 2016, coincided with the economic downturn, resulting in lower demand for residential property.
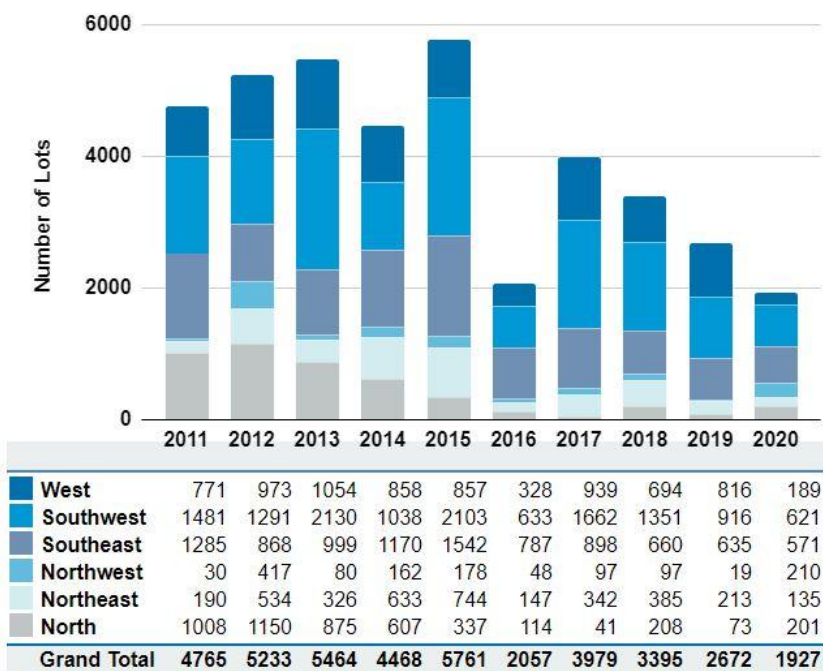

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
West	771	973	1054	858	857	328	939	694	816	189
Southwest	1481	1291	2130	1038	2103	633	1662	1351	916	621
Southeast	1285	868	999	1170	1542	787	898	660	635	571
Northwest	30	417	80	162	178	48	97	97	19	210
Northeast	190	534	326	633	744	147	342	385	213	135
North	1008	1150	875	607	337	114	41	208	73	201
Grand Total	4765	5233	5464	4468	5761	2057	3979	3395	2672	1927

Figure 4: Number of Low-Density Lots Absorbed over the Past Ten Years.

The Southwest sector had the highest number of LDR lot registrations (13,226) over the decade, followed by the Southeast (9,415), West (7,479), North (4,614), Northeast (3,649) and Northwest (1,338) sectors (Figure 4). LDR lot registrations have been initiated in nearly all the developing neighbourhoods in the Southwest sector.

City Sector	Developing	Planned	95% Complete	Potential Lot Supply
West	12,604	5,484	10	18,098
Southwest	10,235	2,450	0	12,685
Southeast	11,605	14,697	0	26,302
Northwest	5,057	0	0	5,057
Northeast	6,784	12,120	79	18,983
North	4,370	0	190	4,560
Citywide	50,655	34,751	279	85,685

Figure 5: Total LDR Lot Supply by City Sector as of December 2020.

The North sector had eleven neighbourhoods that reached completion status between 2010 and 2020: Albany, Belle Rive, Carlton, Chambery, Cumberland, Eaux Claires, Hudson, Mayliewan, Oxford, Ozerna, and Rapperswill (Map 3). The Southwest sector had five neighbourhoods that reached completion status: Blackmud Creek, Graydon Hill, MacEwan, Richford, and South Terwillegar.

As of 2020, the City has a total of 85,685 low-density residential planned lots available in approved Plans (Figure 5). The Southeast sector has the highest potential LDR lot supply with 26,302 lots, representing 31% of the City's total remaining lots.

*This section of the report and corresponding Map 3 have been updated to reflect the revised low-density residential lot absorbed and lot supply as of 2020 (November 2022).

LOW-DENSITY RESIDENTIAL LOT SERVICING[1]

In the 2011-2016 period, 2014 saw the highest number of LDR lots serviced (5,889), while 2016 had the lowest number of LDR lots serviced (2,949). This aligns with the pattern seen in the LDR lot registration analysis. Lot servicing numbers were higher for the Southeast and Southwest sectors than the remaining areas. The North, West and Northwest sectors dropped the most in the economic downturn from 2015 to 2016 (Figure 6).
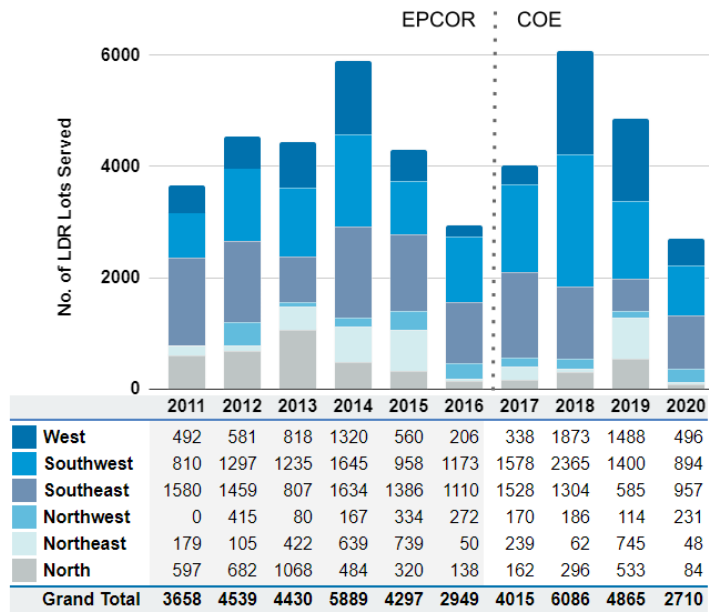

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
West	492	581	818	1320	560	206	338	1873	1488	496
Southwest	810	1297	1235	1645	958	1173	1578	2365	1400	894
Southeast	1580	1459	807	1634	1386	1110	1528	1304	585	957
Northwest	0	415	80	167	334	272	170	186	114	231
Northeast	179	105	422	639	739	50	239	62	745	48
North	597	682	1068	484	320	138	162	296	533	84
Grand Total	3658	4539	4430	5889	4297	2949	4015	6086	4865	2710

Figure 6: Number of Low-Density Lot Servicing over the Past Ten Years.

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[1] Two data sources were used for reporting the LDR lot servicing over the past decade. EPCOR water services data was used between 2011- 2016. It was changed to the City of Edmonton's e-services after 2017. This made the data acquisition comparatively easier, and enabled data automation and publishing of live data possible through an interactive Tableau Dashboard.
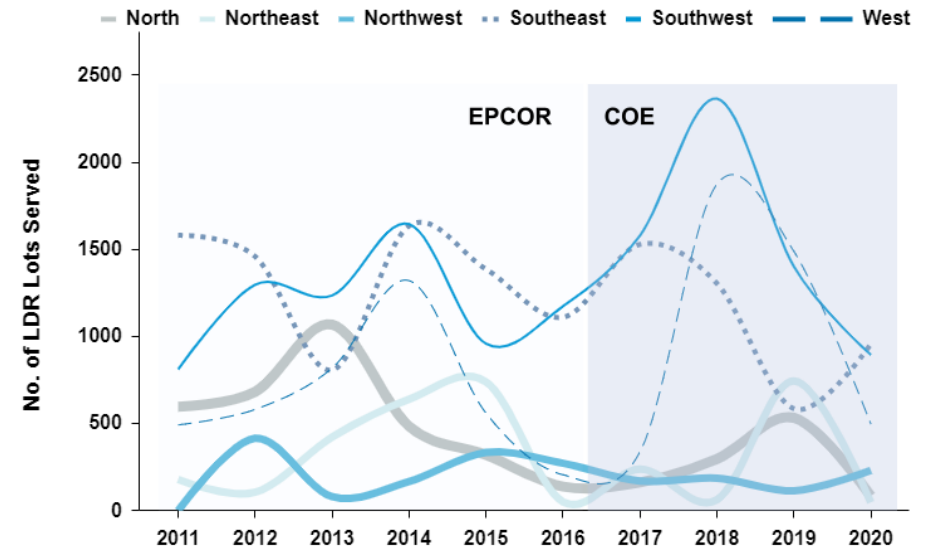

Figure 7: Number of Low-Density Lot Servicing over the Past Ten Years.

In the 2017-2020 period, the LDR serviced lots count recovered and peaked in 2018 (6,086) before dropping to the all-time low in 2020 (2,710) with the impact of the Covid-19 pandemic. The LDR lot servicing trend is more responsive to economic fluctuations.

The LDR lot servicing trend for the Southwest sector shows faster growth than the rest of the City. Among the top five newly approved neighbourhoods regarding the number of LDR lots serviced from 2017 to 2020, four were in the Southwest sector. The Northwest sector shows relatively flat curves indicating a slower growth and a larger amount of LDR lot capacity remaining in Big Lake ASP, the only ASP in this sector (Figure 7).

GREENFIELD RESIDENTIAL GROWTH

From 2010 to 2020, 28 NSPs and NASPs were approved in the greenfield area of the City: Southwest (9), Southeast (4), Northwest (4), West (5), Northeast (3), and North (3). The developing area building permit dwelling unit count peaked in 2015 with more than ten thousand units approved. The number dropped to 5,919 in 2016 and has gradually increased since then (Figure 8).
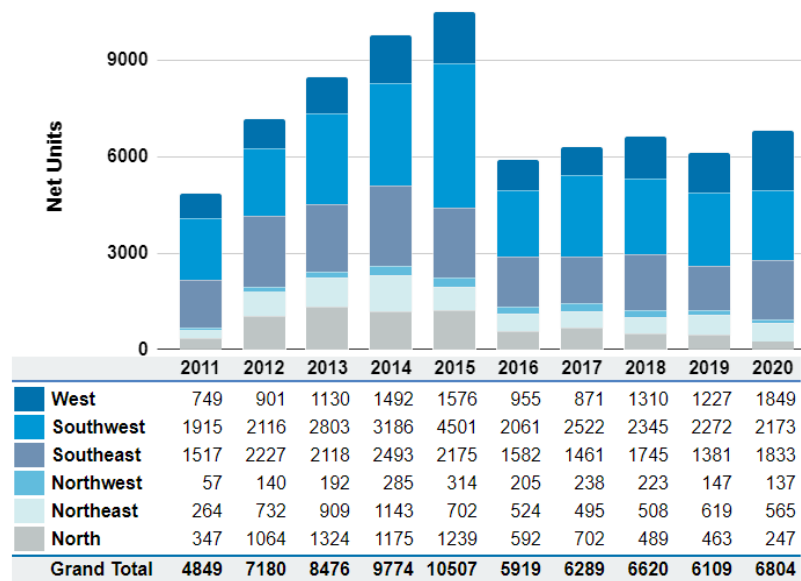

Figure 8: Developing Area Units Permitted by City Sector.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
West	749	901	1130	1492	1576	955	871	1310	1227	1849
Southwest	1915	2116	2803	3186	4501	2061	2522	2345	2272	2173
Southeast	1517	2227	2118	2493	2175	1582	1461	1745	1381	1833
Northwest	57	140	192	285	314	205	238	223	147	137
Northeast	264	732	909	1143	702	524	495	508	619	565
North	347	1064	1324	1175	1239	592	702	489	463	247
Grand Total	4849	7180	8476	9774	10507	5919	6289	6620	6109	6804

The Southwest, Southeast and West sectors led developing area growth during the past ten years, capturing more than 80% of permits issued. The Southwest sector topped the list with some 4,500 units approved in 2015, double the Southeast sector unit count and three times the West sector unit count. In 2020, each of the three sectors had around 2,000 unit permits issued.
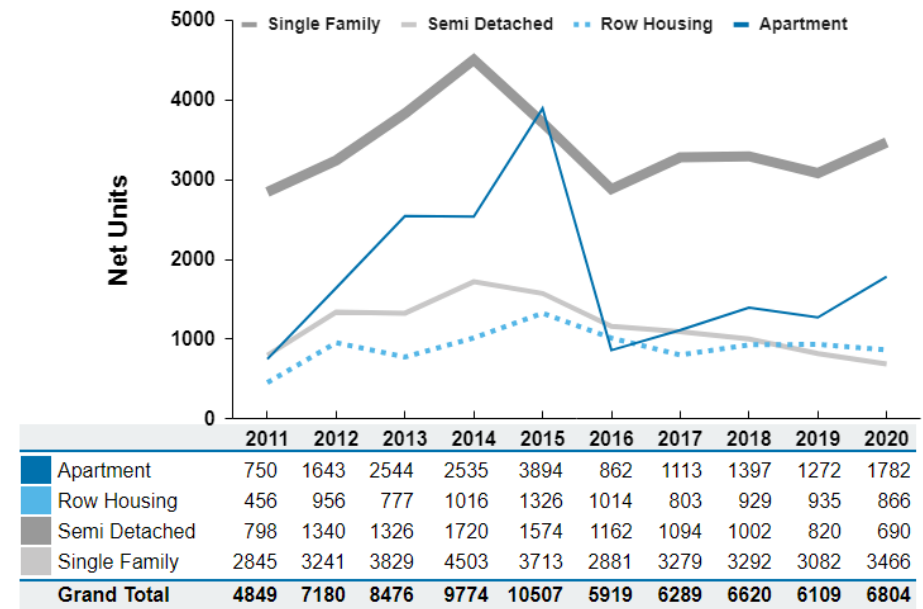

Figure 9: Developing Area Building Permits by Housing Type.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Apartment	750	1643	2544	2535	3894	862	1113	1397	1272	1782
Row Housing	456	956	777	1016	1326	1014	803	929	935	866
Semi Detached	798	1340	1326	1720	1574	1162	1094	1002	820	690
Single Family	2845	3241	3829	4503	3713	2881	3279	3292	3082	3466
Grand Total	4849	7180	8476	9774	10507	5919	6289	6620	6109	6804

Single-family housing dominated the developing area growth with close to 3,500 units approved annually. Apartment housing peaked in 2015 with close to 4,000 units approved, slipping to less than 1,000 units in 2016 (Figure 9). This points to multi-family housing being more sensitive to fluctuations in the economy.

In 2019, the City annexed 8,260 hectares of land south of 41 Avenue SW to support future growth and expand greenfield residential land capacity significantly in the long term.

MATURE & ESTABLISHED[2] NEIGHBOURHOODS INFILL

Between 2010 and 2020, Core/Mature neighbourhoods saw an increase of 20,839 net new residential units. The Core/Mature area infill first surpassed the 25% target set in The Way We Grow in 2018 (26%) and peaked in 2020 with an all-time high 30% infill rate (Figure 10). The annual net dwelling unit increase passed 2,000 in 2018 and reaching over 3,000 in 2020.
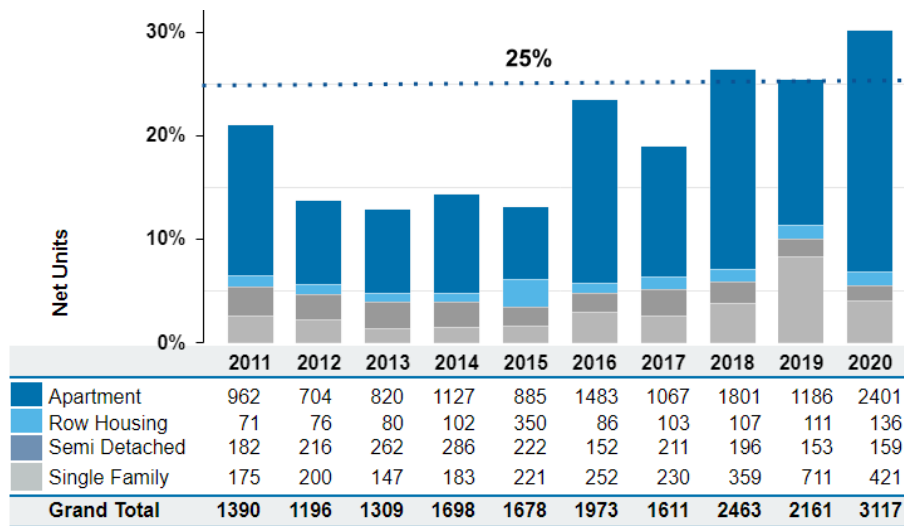

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Apartment	962	704	820	1127	885	1483	1067	1801	1186	2401
Row Housing	71	76	80	102	350	86	103	107	111	136
Semi Detached	182	216	262	286	222	152	211	196	153	159
Single Family	175	200	147	183	221	252	230	359	711	421
Grand Total	**1390**	**1196**	**1309**	**1698**	**1678**	**1973**	**1611**	**2463**	**2161**	**3117**

Figure 10: Core & Mature Area Net Infill Counts from 2011 to 2020.

Apartment development, especially high-rise apartments, peaked at a maximum of 2,401 units in 2020. Secondary suites had a sharp rise in

the core and mature area during 2019-2020 (Figure 11). The approval of secondary suites in row housing and newly subdivided single/semi housing contributed to the increase. A zoning bylaw amendment in 2018 expanded allowances for secondary suites in a variety of housing types leading to a rise in approval of garden /garage suite developments.
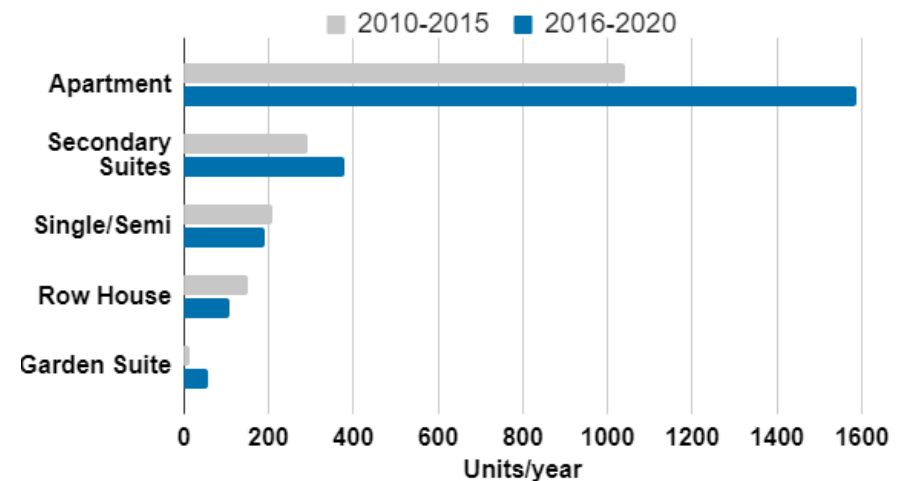

Figure 11: Net New Housing Units by Housing Type.

Subdivision of single-detached housing lots also contributed to infill as it provided an opportunity to develop homes on 7.5 m wide lots. Beginning in 2013, lot subdivision was permitted for RF2, RF3 and RF4 zones. The change in the minimum site width regulation for the RF1 zone also allowed for these narrow lots to be developed. These regulatory changes led to about 200 new lot registrations annually between 2016 to 2020.

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[2] The Way We Grow defines the Mature Area as a subset of the Established Area. The Growth Monitoring Report refined the definition by separating them to simplify communication. The Established Area includes neighbourhoods beyond the Mature Area.

VACANT INDUSTRIAL LAND INVENTORY

Edmonton has four designated industrial areas: Northeast Industrial District, Edmonton Energy and Technology Park (EETP), Northwest Industrial District, and South Industrial District (including an annexed area in 2019). The areas encompass 59 industrial neighbourhoods and 19 mixed-use neighbourhoods (Map 4).

As of December 2020, the City of Edmonton had 6,792 hectares of vacant industrial land supply (including the recently-annexed Crossroads Area).

	2014	2015	2016	2017	2018	2019	2020
Edmonton Energy and Technology Park	4810	4810	4810	4746	4753	4753	4740
Northeast Industrial District	182	142	122	121	188	188	186
Northwest Industrial District	909	821	802	803	802	799	796
South Industrial District	567	539	490	536	547	528	520
Edmonton South Central					574	552	551
Grand Total	**6468**	**6312**	**6224**	**6206**	**6864**	**6821**	**6792**

Figure 12: Vacant Industrial Land Supply (2014 to 2020).

Excluding EETP, the Northwest Industrial District has the most vacant land zoned and reserved at 909 ha, followed by South Industrial District at 567 ha (Figure 12). From 2014 to 2020, the Northwest Industrial District saw the highest vacant land consumption (113 ha). The decrease of land supply can be attributed to new development on previously vacant parcels and absorption by industrial storage facilities.
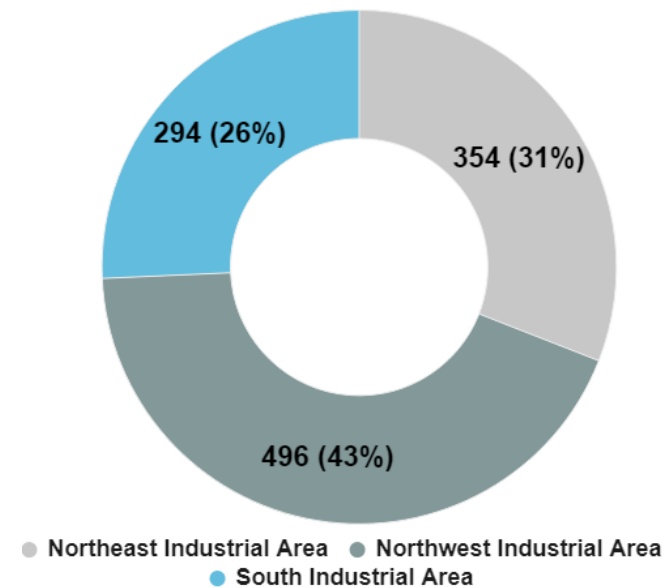

Figure 13: Industrial Land Absorption (2011 to 2020).

The City of Edmonton development permit data shows that 1,144 hectares of land were absorbed by new industrial land development from 2011 to 2020 (Figure 13), at an average of 114 hectares per year. Northwest Industrial had the highest land absorption at 496 hectares (43%) in total, with an average rate of 50 hectares per year absorbed for the last decade.

EDMONTON INDUSTRIAL LAND REZONING[3] (IH/IM to IL/IB)

The shifting economy, increasing population, and diminishing land supply in the City's central area prompted more efficient land uses over the past 15 years. This is reflected in a noticeable amount of redevelopment of old or vacant heavy/ medium density industrial (IH/IM) sites across the City.

Zoning (2014)	Zoning (2019)		
	IB	IL	Total
IH	10	6	16
IM	104	12	116
Total	114	18	132

Figure 14: Industrial zones (IB, IL, IH, IM) Conversion Table.

132 Light Industrial/Industrial Business (IH/IM to IL/IB) rezonings were approved from 2004 to 2019. Among them, 104 lots were rezoned from IM to IB, 12 were rezoned from IM to IL, 10 were rezoned from IH to IB (Figure 14).

Light industrial or industrial business development requires convenient arterial road access. Out of the 132 identified lots, 77 are next to arterial or collector roads (Figure 15). The rezoned areas tend to be smaller lots or portions of bigger lots, but they have the potential to increase per unit tax revenue significantly.

Figure 15: Rezoned IM & IH to IL & IB from 2004 to 2019.

Driven by market forces, new forms of intense industrial development such as mega-distribution facilities and e-commerce logistics facilities have become dominant features of the industrial real estate markets. Underutilized lots with arterial road access represent future opportunities for possible intensification.

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[3] The analysis reflects data up to September, 2019 and excludes DC zones and other specific zones. The data sources include corporate zoning bylaw layer, 2019 taxation assessment values, and arterial / collector roads.
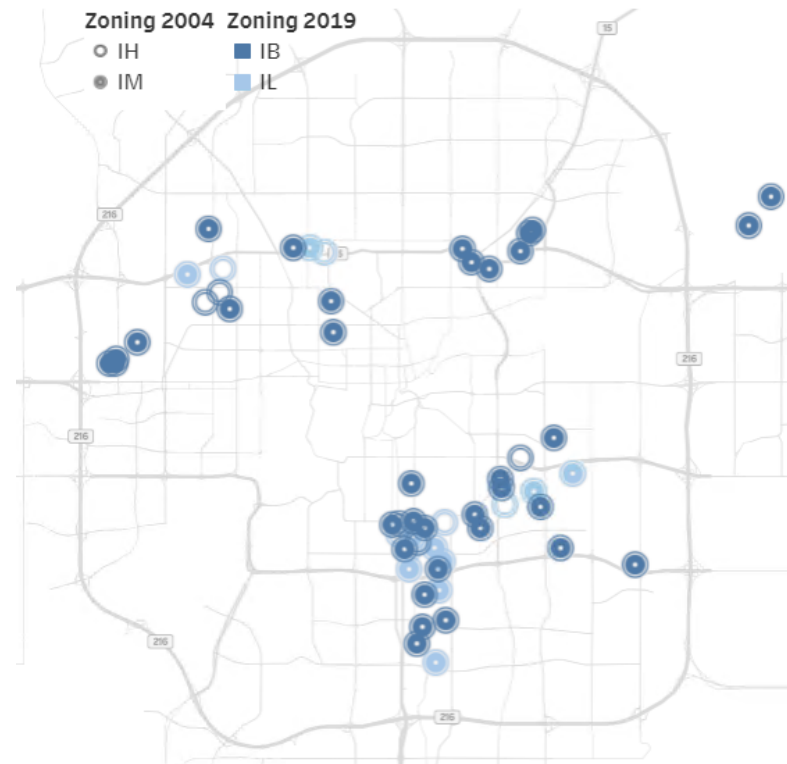
DEVELOPING AREA RESIDENTIAL DENSITY

The residential density in the developing area has been increasing steadily over the past ten years (from 25 du/nrha in 2010 to 35 du/nrha in 2020) (Figure 16). New neighbourhoods on the perimeter of the city may initially have low dwelling unit density, reflecting a predominance of single detached homes in early stages of development. As neighbourhoods approach completion, the built densities draw closer to the planned densities and in some cases may slightly exceed them (e.g. Albany, Carlton, Cumberland).
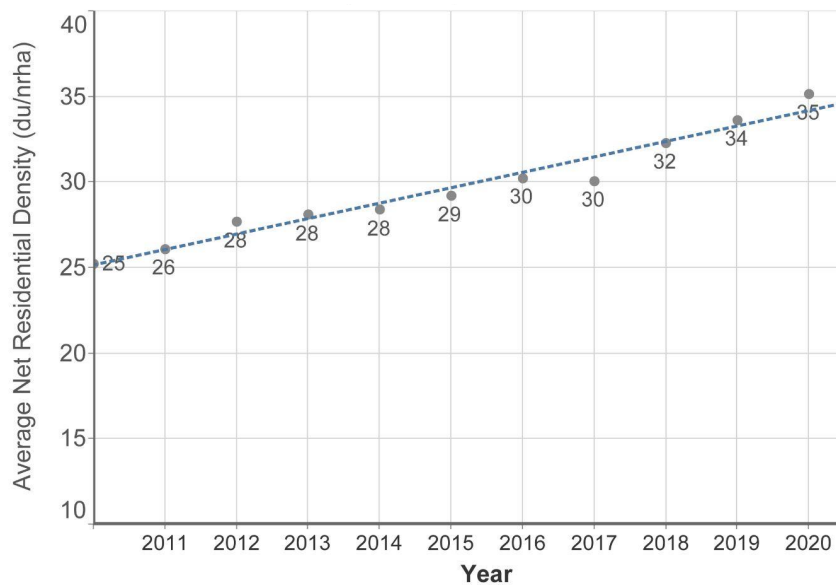

Figure 16 Annual Built Net Residential Density Change from 2010 to 2020.

Of the 84 developing neighbourhoods in Edmonton, 55 of them have NSPs approved before 2010. Older NSPs typically have lower residential density targets, while more recent NSPs trend toward densities greater than 35 dwelling units per net residential hectare (du/nrha) containing a more balanced range of dwelling types. The planned densities for neighbourhoods in the developing areas meet or exceed the Edmonton Metropolitan Region Board (EMRB) density targets that were in effect when they were approved.
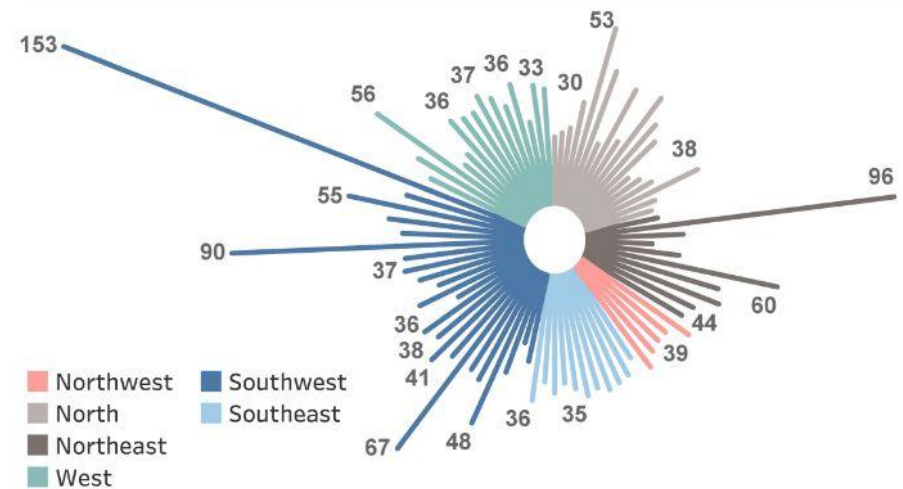

Figure 17 Developing Area Planned Density.

Examples of areas that exceed EMRB density targets include Heritage Valley Town Centre (153 du/nrha), Cashman (90 du/nrha) in the south and Clareview Town Centre (96 du/nrha) in the north. Neighbourhoods in the Southwest sector tend to have higher planned density than other sectors (Figure 17).

KEY PERFORMANCE INDICATORS

In addition to the above reports, the Growth Monitoring Report tracked a list of measures and indicators to support Corporate/Branch Performance Measures, EMRB Key Performance Indicators (KPI), and World Council on City Data (WCCD) KPI. The following table highlights key measures/indicators during the 2011-2020 period. The measures for 2016 are used as a mid-point check depending on the availability of data (StatsCan Census).

Measure/Indicator	2011[4]	2016	2020[5]
CMA[6] Population	1,205,371	1,364,285	1,473,800
Edmonton Population	844,981	964,334	1,014,000
CMA Employment Rate [7]	69.0%	65.8%	59.8%
Edmonton Employment Rate	68.3%	65.5%	59.4%

CMA Total Private Dwellings	482,249	537,634	548,000
Edmonton Total Private Dwellings	348,672	387,950	447,229
CMA Gross Population Density (people/km^2)	123.0	140.0	156.0
Edmonton Gross Population Density (people/km^2)	1,186.8	1,360.9	1,480.3[8]
CMA Avg. Household Size	2.5	2.6	2.6
Edmonton Avg.Household Size	2.5	2.5	2.6
CMA Median Age	36.5	36.3	
Edmonton Median Age	36.0	35.7	
Edmonton Residential Housing Diversity[9]	0.63	0.64	0.64

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[4] 2011, 2016 and 2020 Edmonton population data are sourced from the Government of Alberta Treasury Board and Finance's (ATBF) Population Estimates. Population data for the Edmonton Census Metropolitan Area (CMA) is sourced from Statistics Canada. The 2011 and 2016 housing, population density, household size, and median age information are from Statistics Canada Federal Censuses.

[5] The housing, land use data for 2020 is taken from the Growth Monitoring Program, Geodemographic Projection Program (2020 estimates).

[6] The Edmonton CMA includes the twenty-four municipalities within the Capital Region as well as Alexander First Nation, Enoch Cree Nation and Paul First Nation.

[7] The employment rate refers to the number of persons employed as a percentage of the total population 15 years of age and over. The data was obtained from Statistics Canada's Labour Force Survey.

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[8] To ensure comparability across the specified years, land annexed in 2019 was excluded from this calculation.

[9] Edmonton Residential Housing Diversity is measured by the Simpson's Diversity Index, a measure of diversity that takes into account the number of housing types present, as well as the relative abundance of each type. As housing type richness and evenness increase, the diversity increases.

GROWTH SUMMARY

CityWide Economy and Demography

Edmonton has changed significantly over the past decade and is expected to continue to change as it grows. The rapid population growth in the past decade (particularly before 2015) contributed to a changing population profile, led to added building stock, changed our boundaries, and substantially influenced the shape of our communities.

Edmonton sits in a region of close to 1.5 million people (StatsCan 2020), and continued growth is expected. The City accommodates 70% of the Edmonton census metropolitan area (CMA) population, over 70% of the CMA total housing, and over 70% of the CMA employment.

As the central city within a strong city region, Edmonton's growth context is further strengthened by its connections to northern Alberta and the key role within the Edmonton-Calgary corridor, one of the most significant economic regions in the country. Anchoring the northern end of this key economic corridor, Edmonton provides jobs, homes, higher-educational opportunities, and commercial and industrial development that fuel and support economic prosperity. This presents a significant opportunity to continuously shape our city to improve livability for existing and future residents.

Greenfield Residential Growth

From 2010 to 2020, 28 new neighbourhood plans were adopted for greenfield development (Map 5), and 12 developing residential neighbourhoods were "completed." Low-density residential lot registration and building permit information show that the city had seen significant greenfield development with a booming economy supported by high oil prices in the first half of the last decade.

From 2011 to 2015, more than 90% of new dwelling units were approved in the Greenfield areas. However, the sudden drop in oil prices in 2016 significantly impacted the region's economy and residential development. From 2016 to 2020, the greenfield residential dwelling units stabilized at around 6,000 units per year.

In the past decade, more than 70% of the greenfield growth was located in the South and West sectors of the city. The rapid growth in these areas of the city were due in part to location desirability and major infrastructure improvements. The opening of Anthony Henday Drive (AHD) Southwest leg in 2006 and the development of the Edmonton International Airport area drew a significant amount of growth to the Southwest and Southeast sectors of the city. The population of both the southwest and southeast sectors tripled from 2011 to 2020.

As of 2020, the city has over 80,000 low-density planned lots available in the developing areas according to the approved plans.

This will maintain the low-density lot supply of the city beyond 2045 with an average absorption rate of 3,000 lots/year. In addition, the over 8,000 hectares of land annexed in 2019 is anticipated to provide sufficient low-density land supply for the next 50 years[10].

Infill Residential Growth

Outward expansion and urban intensification have occurred simultaneously. During the last ten years, several planning initiatives, action plans and policies nurtured inward growth, including the Infill Roadmap 2014-2016, Infill Roadmap 2018, Residential Infill Guidelines, Transit-Oriented Development (TOD) Guidelines, and specific plans and strategies such as the TOD focused Stadium Station ARP, The Capital City Downtown Plan, and the Industrial Land Development Strategy.

The implementation of planning strategies and initiatives boosted infill development in the City's central areas during the past decades, particularly from 2016 to 2020. The infill ratio surpassed the 25% growth target and reached an all-time high of 30% in 2020. The Downtown, Quarters and Oliver areas saw considerable high-rise apartment growth in the past five years.

The redevelopment activities of the City spread from the central areas to the established areas. Even though infill development in the City in the past decade was mainly concentrated in the core and mature areas of the City, there were more than 4,000 dwelling units added to established neighbourhoods. A significant number of net dwelling units were added through secondary suite development, but large-scale development in key nodes and corridors, such as the Century Park station area, saw high development activity as well.

Infill development in the City faces a mismatch between supply and demand preferences and affordability challenges, according to the Market Housing and Affordability Study[11]. A key challenge currently exists where the cost of infill single-detached home are out of reach of most homebuyers while infill apartments face limited market demand and can come at a higher cost than in developing areas.

In the past five years, small-scale infill, such as secondary suites, also saw significant growth. In 2020, more than 25% of the newly issued single-detached housing permits in Core, Mature and Established neighbourhoods included secondary suites. It is possible that an increasing number of homebuyers will choose infill with secondary suites as a way to try to ease the financial burden of homeownership, through secondary suite renting.

[10] See the City of Edmonton Annexation Application Summary :
https://www.edmonton.ca/sites/default/files/public-files/assets/PDF/Annexation-Application-Summary.pdf

[11] CR_5636 - Market Housing and Affordability Study - City of Edmonton (www.edmonton.ca/public-files/assets/document?path=PDF/Copy_of_Attachment_4_-_CR_5636_-_Market_Housing_and_Affordability_Study.pdf)

In addition to residential infill, the City also saw industrial land use intensifications in the established industrial areas during the past ten years. The shifting global industrial trend and increasing land values in the city's central areas promoted the transformation from heavy, low-density industries to high-intensity light industries or industrial businesses.

FUTURE OUTLOOK

Economic and Demographic Outlook

Edmonton's population growth and its composition have been and will continue to be, impacted by economic conditions. As a result of back-to-back recessions in 2015 and 2016, Edmonton saw its population growth slow, assumed to be largely impacted by negative net inter-provincial migration based on regional population growth data.

Edmonton's economy is currently recovering from the economic impacts of the COVID-19 pandemic. According to the Office of the Chief Economist of the City of Edmonton, public health measures introduced to slow the virus' spread resulted in an estimated 10 percent economic contraction in 2020, exceeding the combined extent of the back-to-back contraction in 2015 and 2016.

By 2022, Edmonton's economic output is projected to recover to pre-pandemic levels. However, over the long term, growth rates are expected to be more moderate and labour market conditions are not anticipated to recover to pre-pandemic levels which pose a risk to future population growth. As a result, Edmonton's population growth projections are now lower than compared to pre-pandemic projections.

Population growth in recent years has been supported by natural increases (i.e., births minus deaths) and net international migration. These two components are expected to continue to be the strongest contributors to overall population growth over the next 10 years.

Even though future population growth rates have been lowered, Edmonton's population is still expected to be relatively younger compared to the rest of the country with labour availability to support future economic growth.

The Growth Monitoring Program Renewal

In 2020, Council approved The City Plan. Integrating land use and transportation, this Municipal Development Plan speaks to a city whose growth is more diverse, compact, and efficient. In February 2021, a series of initiatives were summarized for Council by the Urban Planning and Economy Department addressing the implementation of the plan: District Planning, Edmonton's City
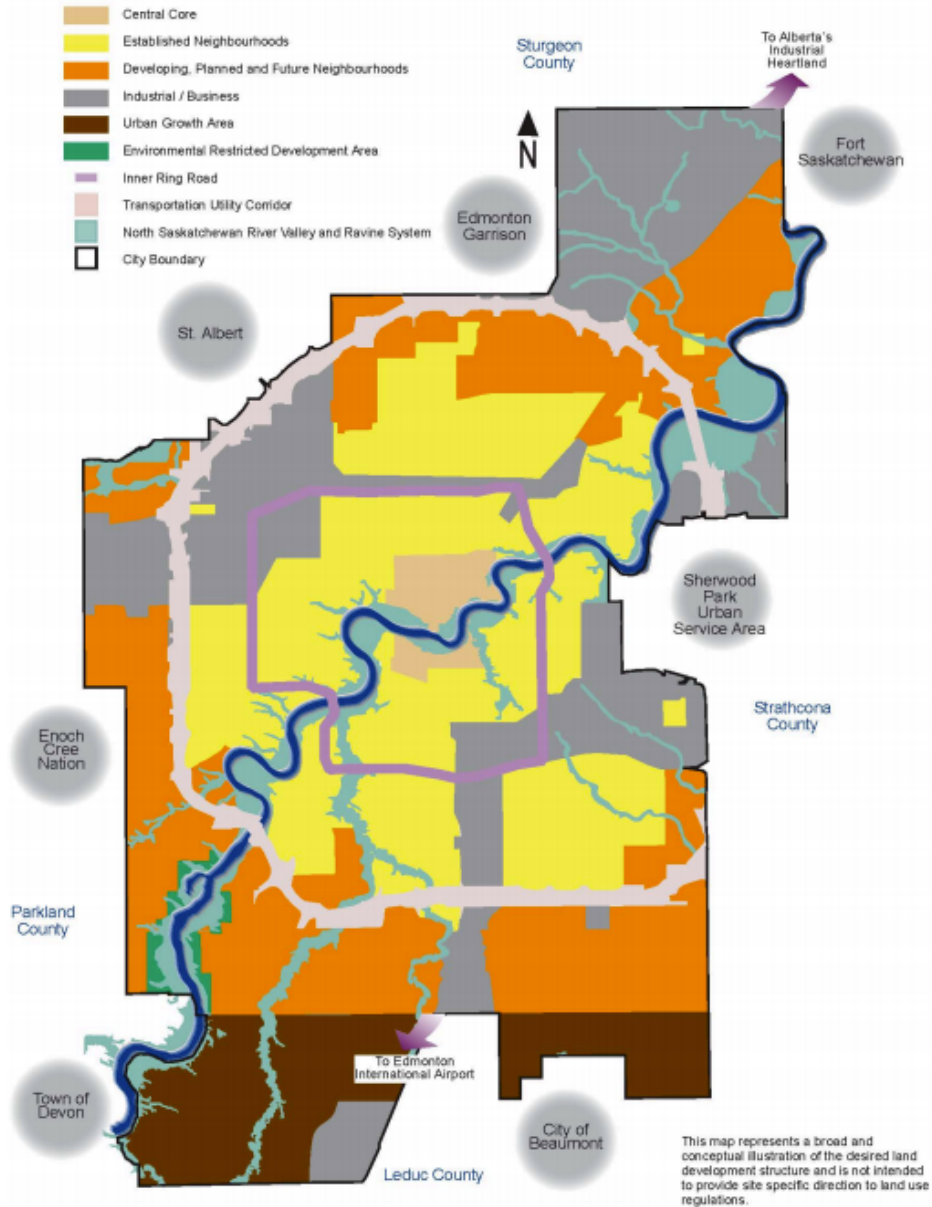
Planning Framework Modernization, Zoning Bylaw Renewal, Future Transportation Investments Prioritization, Mass Transit Guidelines and Strategies, and Growth Management Framework.

The Growth Management Framework replaces the monitoring mandate articulated in the Growth Coordination Strategy and will inform budgets and decisions that help catalyze priority growth areas as per The City Plan. As a result, new and existing growth monitoring and analytical products will be needed to track and measure the progress of key growth management performance indicators at various City Plan defined geographies: city-wide, development pattern areas, districts, nodes and corridors. Growth monitoring renewal will align with the implementation of the Growth Management Framework through ongoing dialogue and review of program deliverables.
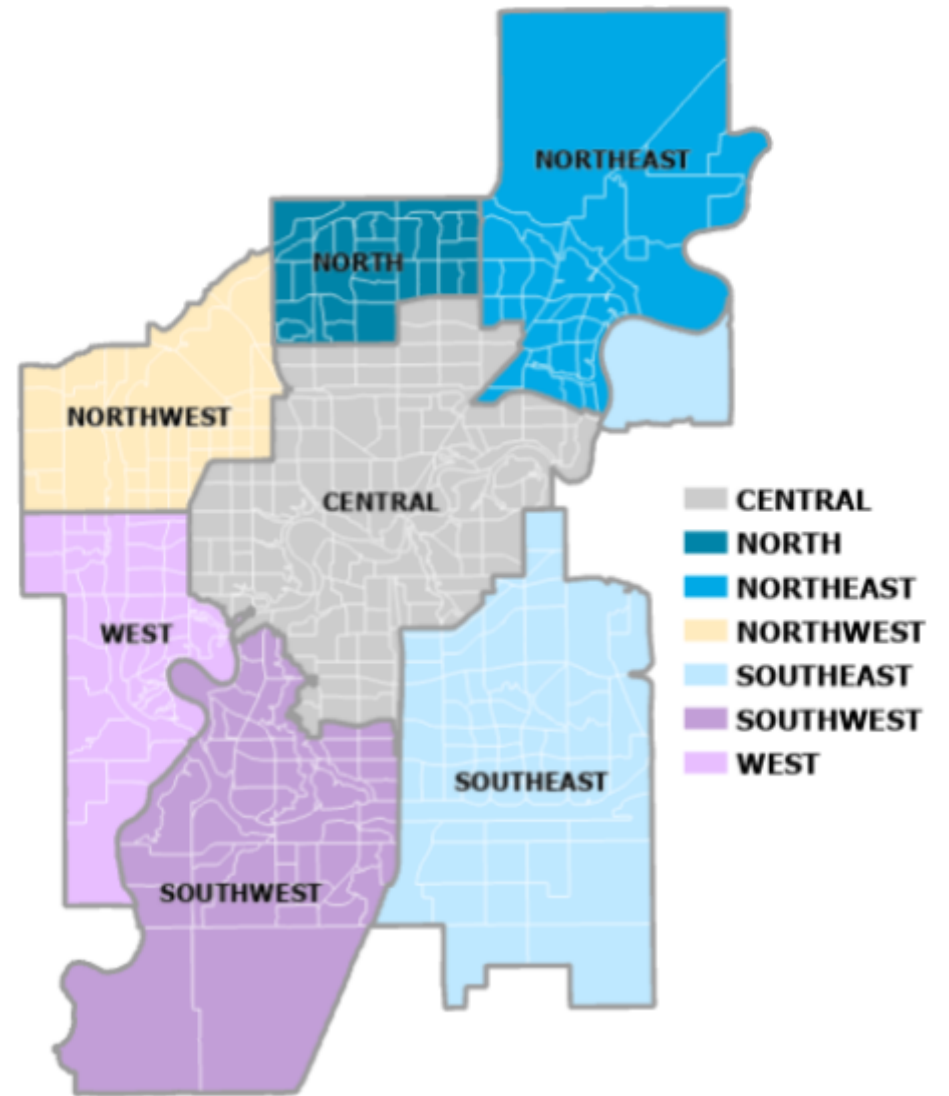
Apart from the support functions prescribed by The City Plan implementation projects, reimagining the Growth Monitoring Program allows for revisiting and expanding, over time, the scope of monitoring initiatives of value in characterizing Edmonton's urban growth. The program includes addressing ad hoc requests from internal and external partners on urban development and other planning-related analysis related to housing typology and density, population and employment, land use and zoning, etc.

The first series of renewed growth monitoring products aligned to the City Plan will be published in the first quarter of 2022. The program renewal will be completed at the end of 2022, however, the evolution of Growth Monitoring will continue with the continued implementation of the City Plan.

Map 1 - The Way We Grow Neighbourhood Typology

Central Core
Established Neighbourhoods
Developing, Planned and Future Neighbourhoods
Industrial / Business
Urban Growth Area
Environmental Restricted Development Area
Inner Ring Road
Transportation Utility Corridor
North Saskatchewan River Valley and Ravine System
City Boundary

This map represents a broad and conceptual illustration of the desired land development structure and is not intended to provide site specific direction to land use regulations.

Map 2 - City Sectors[12]

CENTRAL
NORTH
NORTHEAST
NORTHWEST
SOUTHEAST
SOUTHWEST
WEST

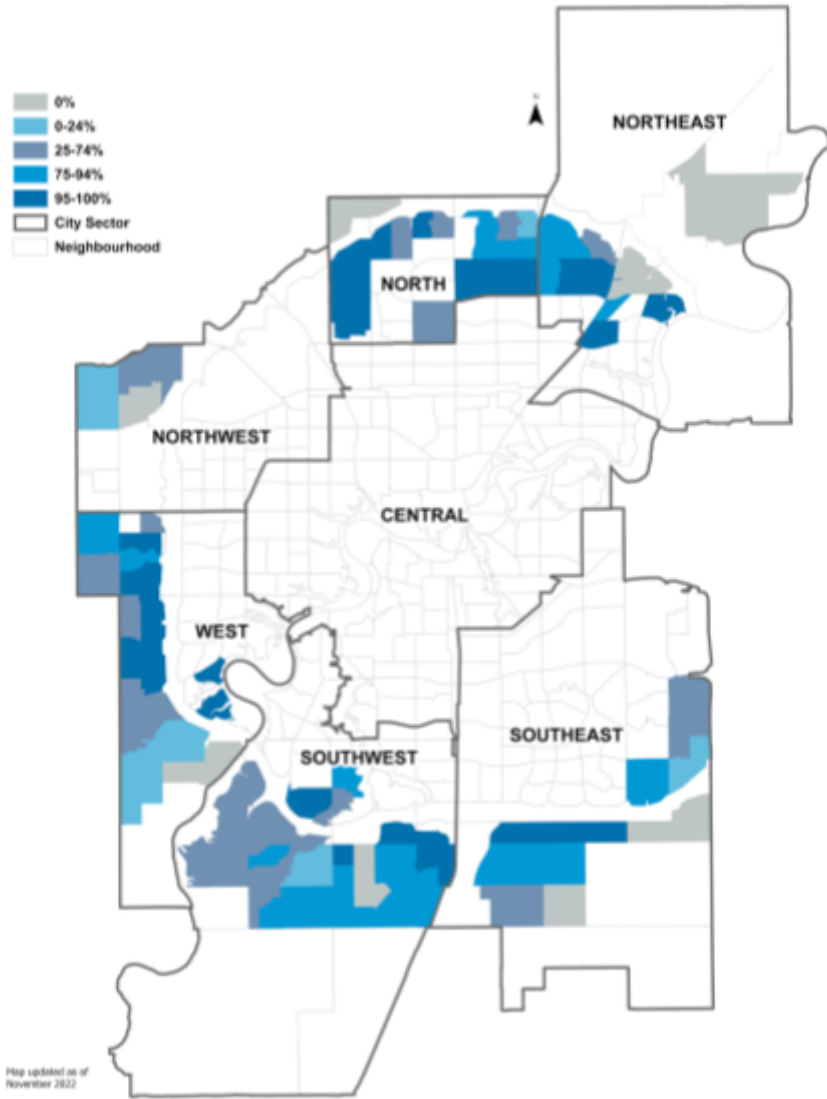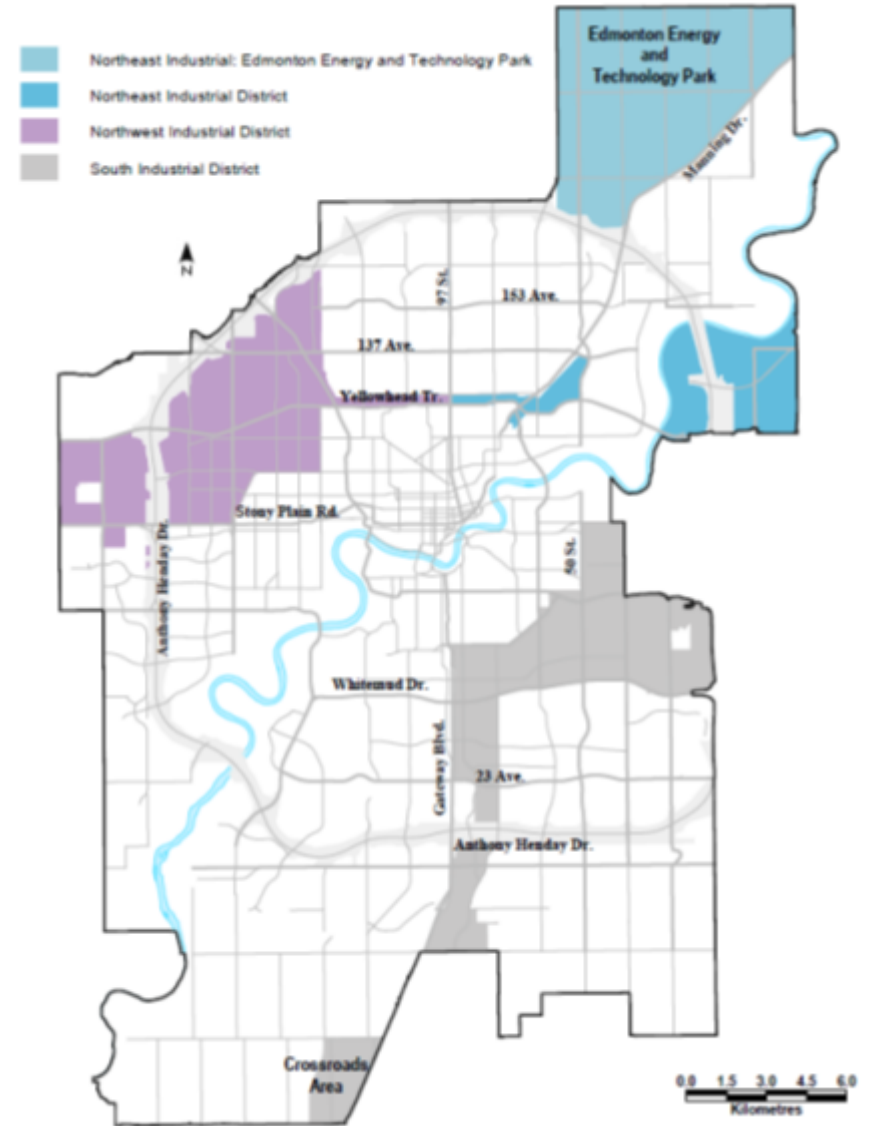[12] The map was remade for the Growth Coordination Strategy Map 1: Sectors Map to include the annexed area in 2019.

Map 3 - Neighbourhood Completion Rate 2020

Legend:
- 0%
- 0-24%
- 25-74%
- 75-94%
- 95-100%
- City Sector
- Neighbourhood

NORTHEAST

NORTH

NORTHWEST

CENTRAL

WEST

SOUTHWEST

SOUTHEAST

Map updated as of
November 2022

Map 4 - Edmonton Industrial Districts

Legend:
- Northeast Industrial: Edmonton Energy and Technology Park
- Northeast Industrial District
- Northwest Industrial District
- South Industrial District

Edmonton Energy and Technology Park

Manning Dr.

153 Ave.

97 St.

127 Ave.

Yellowhead Tr.

Stony Plain Rd.

Anthony Henday Dr.

Whitemud Dr.

Gateway Blvd.

50 St.

23 Ave.

Anthony Henday Dr.

Crossroads Area

0.0 1.5 3.0 4.5 6.0
Kilometres

Map 5 - NSPs/NASPs Approved from 2010 to 2020