A Historical Analysis of Residential Development Densities in Winnipeg



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Table of Contents

1.0 Introduction 1

2.0 Historical Evolution of Density in Winnipeg 3

3.0 Development Trends in Era 1 (1900 - 1946) 4

4.0 Development Trends in Era 2 (1947 – 1970) 6

5.0 Development Trends in Era 3 (1971 – 2009) 10

6.0 Development Trends in Era 4 (2010 and into the future) 14

7.0 Conclusion 23

8.0 Bibliography 25

9.0 Appendices 27

1.0 Introduction

As Winnipeg continues to experience population growth and thus an increased need in household formations, the question of where to locate this growth becomes a key part of the urban growth dynamic.

With the introduction of the planning policy document, *OurWinnipeg*, the City of Winnipeg has positioned itself with a need to densify its existing land footprint and is considering policies that would steer growth in a sustainable manner.

This report examines the City of Winnipeg's past, present and future residential development vision through the following lens:

- History of Growth in Winnipeg – High density development, in and outside of the downtown, has always been a part of the urban fabric of Winnipeg. Its location, era and typology are critical to understand and are important context to assess the current City vision for high density development;
- How Corridors influenced Growth – Corridor expansion has always been accompanied by high density development. It is a misnomer that Winnipeg developed in concentric circles with high density decanting to lower density in an orderly, phased fashion from downtown outward. Rather, growth has occurred around corridors throughout various parts of the city over the last century;
- Time Line of Growth – Different eras in time responded to the corresponding market demand and resulted in putting current development policies in place;
- Density Levels in Previous Eras – Until recently, the City of Winnipeg utilized the opportunities afforded through high density development in a very purposeful way if the market conditions directed such development. Density levels had been high, throughout each era in specific locations and corresponded to market conditions and external forces such as municipal development policies and tax incentives;
- The Evolution of Municipal Policy which regulated Residential Development – City policy has always supported high density development. During early periods of growth, more effort was concentrated into defining and supporting high density development through an urban structure, that set out where high density development should go. The *OurWinnipeg* plan revisits these earlier efforts and recreates an urban structure to help support high density development.

Three criteria are employed in this report to review and analyze the historical accommodation of residential development throughout the noted eras within the City of Winnipeg:

1) **Density** – The evolution of density in a historical context in Winnipeg and the resulting densities from municipal policies and market forces.
2) **Market** – The conditions that drove residential development.
3) **Public Policies** - Municipal rules and regulations on residential development that helped to accommodate density within the city.

In addition, the following questions will be explored:

- What constituted urban (higher density) development vs suburban (lower density) development?
- How was higher density residential development planned for and actually developed?
- How has public policy informed and shaped the development of higher density residential projects?
- Has the City of Winnipeg historically approved urban standard (high density) development outside of the downtown core?
    - If so, where has it been accommodated?
    - What were the characteristics of those locations?
    - Why have those locations stayed consistent over time?

As the following information will show, Winnipeg is composed of many neighbourhoods with varying higher density levels, not just exclusive to the downtown region. What this illustrates is that Winnipeg has embraced development with significant density levels in various neighbourhoods for many decades.

This report explores the current environment, such as Major Redevelopment Sites, where high density residential development is warranted to accommodate growth, yet is not materializing in a way that will do so. Although there is a desire to develop high density growth in appropriate locations following approved public policy, there is a substantial shortfall in high density development. The implications associated with this shortfall are also explored in this document.

2.0 Historical Evolution of Density in Winnipeg

Throughout Winnipeg's history of development, the City of Winnipeg and the development industry have been aligned to support high density development when it is feasible. A key consideration in Winnipeg's history has always been a desire to grow its population and jobs base. The ability to capture high density development has been seen as very desirable by both the City of Winnipeg and development industry. The City has encouraged developing as much residential high density as the market would allow in appropriate locations.

Winnipeg growth patterns over the last 100+ years indicate a series of developmental eras:

Development Trends in Era 1
Era 1 is defined as the time period of 1900 to 1946. This era was characterized by the growth of Winnipeg following a strong grid pattern and accommodated the development of apartment buildings. Apartment living was considered a luxury with modern heating and central location to the downtown.

Development Trends in Era 2
Era 2 is defined as the time period of 1947 to 1970. This era accommodated periods of vigorous mid to high density residential development in response to market conditions and public policy decisions, largely related to transportation.

Development Trends in Era 3
Era 3 is defined as the time period of 1971 to 2009. This era was characterized by slow growth and public policy favouring suburban single-family neighbourhood development. There was limited high density growth with the exception of limited development through government incentives such as the introduction of the MURB (Multi-Unit Residential Building) tax incentive program. Most other multi-family units built during this time are best characterized as low-density, auto-oriented suburban multi-family development, incorporated within these planned communities.

Development Trends in Era 4
Era 4 is defined as the time period of 2010 to the present day and also looks into the future. This era or recent past, present and future represents a resurgence of the conditions found in the first two eras of historical development. Conditions of growth are similar to Eras 1 and 2 and there is public policy in favor of an urban standard development (mid- to high density) within redevelopment sites and corridors, including the SWRTC.

3.0 Development Trends in Era 1 (1900 - 1946)

Density

In the late 1800's and early 1900's, Winnipeg became the leading centre of railway transportation between eastern and western Canada. With the introduction of the Canadian Pacific Rail main line through the City of Winnipeg, as well as the introduction of street railway lines (established in 1882), this helped to stimulate a period of rapid growth. Winnipeg experienced significant population growth beginning in 1881 and lasting well until after the First World War. During this time the city's population grew from 7900 people in 1881 to more than 179,000 in 1921.

By the mid 1920's, after years of war and recession, the economy started to recover and Winnipeg began to see a return to growth and prosperity as a centre for the grain trade, manufacturing, processing and wholesaling in Western Canada.

During this time, Winnipeg was characterized as a dense, compact environment that relied heavily on walking and public transportation (streetcar system). The urban form of the neighbourhoods was based on grid pattern street networks, walkable commercial character along arterial roads and relatively high densities. Most pre-automobile development to the north and south took place within approximately 5 km of downtown.

Entire streets evolved into what became known as 'apartment streets', made up entirely of apartment buildings. There were no setback requirements and buildings were largely constructed up to the street with no setback (Styliaras, 1967, p. 18).

The built environment was very dense, characterized as high density with typical density ranges of between 60 to 150 units per acre. Multi-storey apartment buildings and commercial/retail uses were integrated into the original city grid system, allowing for a mixing of uses in neighbourhoods and in proximity to the core of the city and the streetcar system.

Areas such as Broadway and Assiniboine Avenue close to the legislative building, for example, developed at around 150 units per acre (see **Appendix 7** – Comparative Density Analysis - Assiniboine Avenue, West of Carlton).

Market

Apartments were in demand to accommodate a growing market for residences that had modern heating and were close to the central business district.

> *"The high and increasing cost of fuel, the inconvenience of giving personal attention to the furnace, and the annoyance and even danger to health resulting from even a temporary breakdown of the heating system of the residences, have driven many against their will to seek the increasingly popular apartment block."* (Styliaras, 1967, pg. 22)

During this time, apartment buildings often replaced the existing lower density housing stock. The demolishing of existing housing stock and construction of large apartment buildings was common.

In many cases, one single lot, originally occupied by a single family home, was torn down and an apartment building was constructed in its place. In other cases, two or more such lots were assembled for the construction of a larger multi-family building (Styliaras, 1967, p. 18).

Multi-family development was in response to market demand and economic cycles. In 1929, 27 blocks were constructed in one year (Styliaras, 1967, pg. 47). After that, the Great Depression saw little to no development until a second development boom occurred in 1943 when airfield and army barracks were established in Winnipeg.

Public Policy

There was limited public policy at this time to guide development. However, it is clear that there was a permissive approach to multi-family development and density as evident by the built environment of the time.

Winnipeg City Council passed by-laws regulating the use of lands in certain areas which were amended from time to time until in 1950 when the entire city zoning by-law was rewritten (City of Winnipeg, Outline History of Planning, 1970, p. 12).

Redevelopment areas were also introduced during this time with the expectation that areas which were considered 'blighted' would be demolished and replaced with planned communities (MMPC Report on Residential Areas, 1947, p. 35).

The National Housing Act of 1944 introduced the concept of density minimums for redevelopment areas of 120 persons per acre or 60 units per acre (Styliaras, 1967, p. 88).

Towards the end of this era, population, planning, transportation and transit studies were commissioned to address a common approach to planning and development for the broader Winnipeg Metro Region. The concept of a Metro government began to emerge in 1943.

4.0 Development Trends in Era 2 (1947 – 1970)

Density

This era was characterized by the expansion of key circulation corridors such as Portage Avenue (west), Main Street (north), Henderson Highway in East Kildonan, St. Mary's Road and St. Anne's Road in St. Vital, and Pembina Highway in Fort Garry.

High density apartment buildings were located universally along these corridors to take advantage of access to transportation including the growing use of cars combined with public transit.

The Park Towers located at 2300 Portage Avenue was the first high rise apartment building constructed in Winnipeg after the Second World War. This building was constructed in 1955. It was the catalyst for a series of towers being constructed west to east, towards the downtown (Styliaras, 1967, p. 71).

Density along this section of the Portage Avenue corridor developed as high density residential with a mean density of over 70 units per acre. (See **Appendix 7** – Comparative Density Analysis – Portage Avenue at Mount Royal).

In addition to residential tower development, dense 3-storey apartment building 'hubs' (multiple buildings on one site along a corridor) were common. They were developed post-war to address demand in a 'hurried and inexpensive manner.'

> *"They can be seen almost everywhere in the city, especially lined up along the thorough- fares like Main Street North, Corydon Avenue, Marion Street, and St. Mary's Road in St. Boniface."* (Styliaras, 1967, p. 62)

It was, however, high-rise apartment buildings that dominated this era with the development of numerous high density towers on the expanding corridors. In the 1960s, the Courts of St. James multi-family building complex was a good example of this high density development. The Courts of St. James consists of one 16 and two 15-storey apartment towers containing 715 suites. It has a density of 185 units per acre situated on 3.9 acres and is immediately adjacent to a single-family neighbourhood, making it one of the densest developments outside of the downtown to this day. (See **Appendix 7** – Comparative Density Analysis – Courts of St. James).

High density corridor apartment development also extended into secondary corridors, which included Grant Avenue. Grant Avenue was built on former railway lands and Metis community known as 'Rooster Town.' The City of Winnipeg purchased the land, and offered it to developers, allocating for different uses including high density, multi-family development projects. Development along Grant Avenue was intensive with 12 buildings being constructed in a five year period and eventually realizing a density of 86 units per acre. (See **Appendix 7** – Comparative Density Analysis – Grant Avenue Area).

Market

During this period Winnipeg experienced its highest post-war rate of population growth at 3.11% per annum in 1956. Following this peak, Winnipeg entered a slower growth period that defined the city for several decades and resulted in public policy with a strong emphasis on supporting low density, large lot suburban development until 2010 with the introduction of *OurWinnipeg*, the city's new municipal development plan.

The suburbs were developed as the corridors and services expanded. The form of these suburban developments were represented as mostly single-family detached neighbourhoods, without any multi-family buildings, located at the fringe of the municipality with much of the typologies being very similar in use and type. Street patterns were represented by circuitous routes and cul de sacs to discourage through traffic and provide more of a sense of exclusive neighbourhood and to maximize buildable lots within the new subdivisions. The new designs of the winding streets catered more towards the automobile rather than pedestrians or transit users. Lot sizes were much bigger and therefore attributed to lower densities.

For example, in St James, a series of suburbs were developed including Woodhaven, Sturgeon Creek, Kirkfield Park and Crestview, without the inclusion of any multi-family buildings. During this period, Winnipeg's suburbs grew 133%.

The post-war era signaled the first time in Winnipeg that there was a concerted effort to address housing shortages in the city and to plan for development along circulation corridors. It also was the era where new construction methods and modern elevator systems led to the ability to construct much larger and higher buildings than in the pre-1947 era.

High density tower development (from 1947 to 1970) and new suburban development closely followed the expansion of corridors. As an alternate to the single-family suburban home, apartment towers offered an option to residents who could not afford or want to live in a single-family home but wanted to live outside of the downtown in modern housing. The key to high density development of this era was its location in proximity to public transportation.

Unicity, the amalgamation of the ring communities around the City of Winnipeg had not happened yet and until then, differential tax rates were applied to development, leading to pockets of high density development in adjacent municipalities. For example, it was more economical to develop in St. James than most other parts of the city and it was the Town of St. James that pushed through the western development of Portage Avenue. In response, several high rise apartments cropped up along 'the strip' in the 1950s.

Public Policy

This era was characterized by the advancement of public policy related to planning and development, with the following policy and regulations implemented:

- Metro Planning Commission – 1949
- Comprehensive Zoning By-law – 1950
- Adoption of the *Greater Winnipeg Metro Plan* – 1955
- The Metro Corporation of Greater Winnipeg – 1960

The Greater Winnipeg Metro Plan

The *Greater Winnipeg Metro Plan* was a comprehensive plan that was based on a series of background studies on planning, transportation, transit, zoning, neighbourhoods, residential areas, and the central business district. The outcome of the process and resulting plan was a very concerted attempt to create balance through a mix of both suburban and urban development. The plan set out massive new areas for growth that are still being developed to this day. It also set out expectations on infill and redevelopment areas including the specific identification of available lands for infill.

The *Greater Winnipeg Metro Plan* also acknowledged that density plays a key role in creating the necessary balance and ensuring the provision of housing for all income levels including ownership and rental choices in proximity to employment or public transportation.

Market Analysis Study, 1947

During this time, the Metro planners also determined future land use based on studying demand and assigning corresponding supply in the 1947 *Market Analysis Study*. This methodology to plan for growth continues to be used by the City of Winnipeg in the assignment of high-density development.

Excerpts from the Market Analysis Study are as follows:

> *"There is extensive opportunity for expansion within three to four miles of the downtown section. However, before development take place some consideration should be given to the possibilities of replotting or re-subdividing these areas to produce a more economical and amenable street pattern."*
>
> (MMPC Market Study, 1947, p. 25.)

> *"Given the proper environment that some 630,000 square feet of apartment space may be needed in the next five years in downtown Winnipeg. For example, this could be translated to mean four twenty-storey apartment blocks or eight ten-storey blocks. This assumes that for a builder to realize a profit, downtown high-rise accommodation is most probable."*
>
> (MMPC Market Study, 1947, p. 27)

The study and additional corresponding studies go on to recommend that the concentration of the forecasted required apartment units be located in the Broadway/Assiniboine Avenue area. The implication of this direction has resulted in a density of between 150 to 171 units per acre in the area. (See **Appendix 7** – Comparative Density Analysis – Assiniboine East and West of Carlton).

The Metro Zoning Regulation Study

The 1947 *Metro Zoning Regulation Study* provided specific direction on how density was to be accommodated:

> *"Graduation of height, area, and use restrictions to avoid drastic changes in the character of development at district boundaries, by zoning for two-family or multiple-family use areas adjacent to single-family residential districts, providing a gradual change to commercial or industrial districts."*
>
> (Metro Zoning Regulation Study, 1947, p. 25)

During this time, the City also recommended the formal establishment of a high density residential category called R4 Multiple Family. It anticipated and encouraged 6-storey buildings, 75 foot height restrictions with a lot area of 400 square feet consistent with the current zoning by-law RMF-L zoning district.

Density targets were established in this study, directing that 20% of all new development should be R4 in the central area. It is critically important to note that assigning density to the downtown was, in fact, assigning density to much of the built city of the day. It proposed a sweeping redevelopment of the urban structure existing at that time (MMPC Report on Zoning, 1947, p. 24).

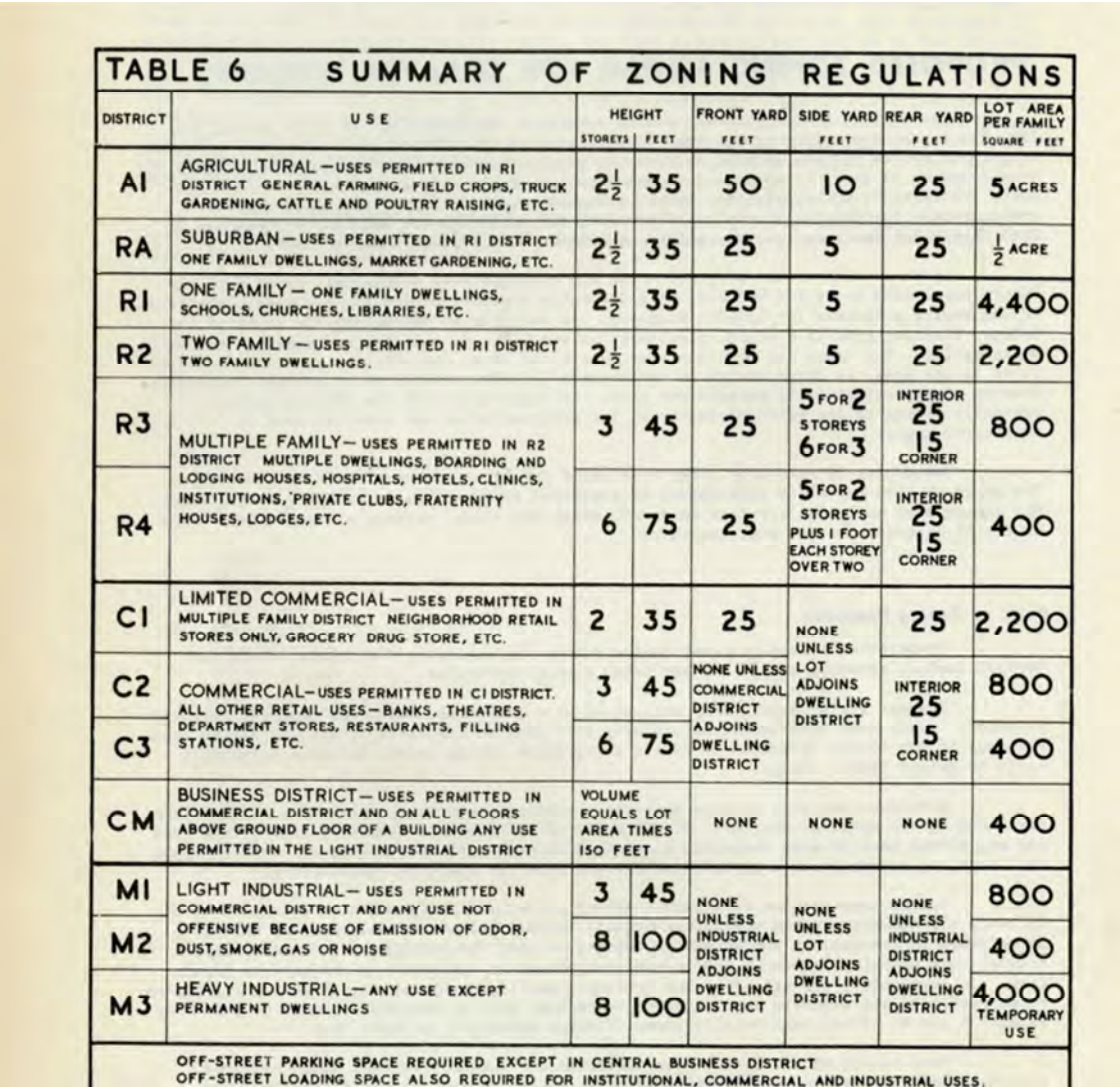

TABLE 6 SUMMARY OF ZONING REGULATIONS

DISTRICT	USE	HEIGHT STOREYS	HEIGHT FEET	FRONT YARD FEET	SIDE YARD FEET	REAR YARD FEET	LOT AREA PER FAMILY SQUARE FEET
A1	AGRICULTURAL — USES PERMITTED IN R1 DISTRICT GENERAL FARMING, FIELD CROPS, TRUCK GARDENING, CATTLE AND POULTRY RAISING, ETC.	2½	35	50	10	25	5 ACRES
RA	SUBURBAN — USES PERMITTED IN R1 DISTRICT ONE FAMILY DWELLINGS, MARKET GARDENING, ETC.	2½	35	25	5	25	½ ACRE
R1	ONE FAMILY — ONE FAMILY DWELLINGS, SCHOOLS, CHURCHES, LIBRARIES, ETC.	2½	35	25	5	25	4,400
R2	TWO FAMILY — USES PERMITTED IN R1 DISTRICT TWO FAMILY DWELLINGS.	2½	35	25	5	25	2,200
R3	MULTIPLE FAMILY — USES PERMITTED IN R2 DISTRICT MULTIPLE DWELLINGS, BOARDING AND LODGING HOUSES, HOSPITALS, HOTELS, CLINICS, INSTITUTIONS, PRIVATE CLUBS, FRATERNITY HOUSES, LODGES, ETC.	3	45	25	5 FOR 2 STOREYS 6 FOR 3	INTERIOR 25 15 CORNER	800
R4		6	75	25	5 FOR 2 STOREYS PLUS 1 FOOT EACH STOREY OVER TWO	INTERIOR 25 15 CORNER	400
C1	LIMITED COMMERCIAL — USES PERMITTED IN MULTIPLE FAMILY DISTRICT NEIGHBORHOOD RETAIL STORES ONLY, GROCERY DRUG STORE, ETC.	2	35	25	NONE UNLESS LOT ADJOINS DWELLING DISTRICT	25	2,200
C2	COMMERCIAL — USES PERMITTED IN C1 DISTRICT. ALL OTHER RETAIL USES — BANKS, THEATRES, DEPARTMENT STORES, RESTAURANTS, FILLING STATIONS, ETC.	3	45	NONE UNLESS COMMERCIAL DISTRICT ADJOINS DWELLING DISTRICT		INTERIOR 25 15 CORNER	800
C3		6	75				400
CM	BUSINESS DISTRICT — USES PERMITTED IN COMMERCIAL DISTRICT AND ON ALL FLOORS ABOVE GROUND FLOOR OF A BUILDING ANY USE PERMITTED IN THE LIGHT INDUSTRIAL DISTRICT	VOLUME EQUALS LOT AREA TIMES 150 FEET		NONE	NONE	NONE	400
M1	LIGHT INDUSTRIAL — USES PERMITTED IN COMMERCIAL DISTRICT AND ANY USE NOT OFFENSIVE BECAUSE OF EMISSION OF ODOR, DUST, SMOKE, GAS OR NOISE	3	45	NONE UNLESS INDUSTRIAL DISTRICT ADJOINS DWELLING DISTRICT	NONE UNLESS LOT ADJOINS DWELLING DISTRICT	NONE UNLESS INDUSTRIAL DISTRICT ADJOINS DWELLING DISTRICT	800
M2		8	100				400
M3	HEAVY INDUSTRIAL — ANY USE EXCEPT PERMANENT DWELLINGS	8	100				4,000 TEMPORARY USE

OFF-STREET PARKING SPACE REQUIRED EXCEPT IN CENTRAL BUSINESS DISTRICT
OFF-STREET LOADING SPACE ALSO REQUIRED FOR INSTITUTIONAL, COMMERCIAL AND INDUSTRIAL USES.

Zoning Table from MMPC Report on Zoning, 1947.

Incentives were provided to developers through *The National Housing Act* for areas designated as 'redevelopment zones'. For a project to qualify for assistance under the Act several requirements had to be met, the most restrictive being that a substantial part of the area under consideration must either have been in use as a housing area before redevelopment or be designed for use for housing after redevelopment, or both. These areas strongly encouraged mid- to high density development.

5.0 Development Trends in Era 3 (1971 – 2009)

Density

This era is best characterized by suburban expansion and the decline in urban standard multi-family development and its' associated high densities. It is during this era that there is a significant shift from high-density corridor tower development to low density suburban multi-family (rental and condo) development.

Throughout this era, existing population shifted from older neighbourhoods to new suburbs such as Waverley Heights, Linden Woods, South Tuxedo, Whyte Ridge and Richmond West, culminating with the Waverley West (2005) development. Suburban expansion was fueled by a surge of supply of developable land brought on through the formation of Unicity. On January 1, 1972, the municipal government of Unicity was formed, amalgamating 12 distinct municipalities into the City of Winnipeg. While united under one Council, former municipalities maintained their identity and competed with each other to capture suburban growth, with the south end of the City prevailing as the most popular.

This era is characterized almost universally by single-family development. That being said, suburban subdivision planning started to integrate multi-family apartment buildings into their developments along interior streets or in centres adjacent to small suburban shopping centres. A few examples include Moray Village in St James or Southdale shopping centre and Fort Richmond Plaza.

According to housing and population research conducted by NDLea Consulting in 2003 in anticipation of the Waverley West suburban expansion, up until the early 1990s, most multi-family development had been multi storied higher density development. Since the early 1990s, the trend reflects a lower density, bungalow or small apartment style development. A majority of these projects have been built in newer communities due mostly to the availability of suitable development sites. Suburban multi-family assumed 80% of the multi-family construction in Winnipeg post 1980s, moving all multi-family growth away from 'older Winnipeg' and firmly entrenching it in suburbs (NDLea, 2003, p. 28).

High density apartment development during this era was largely contingent on key government programs or subsidies such as the Winnipeg Core Area Initiative (1981-1992) and the Multiple Unit Residential Building (MURB) Program (1980s), which incorporated tax shelters for investors in rental housing. These programs resulted in sporadic and limited mid- to high-density development (NDLea, 2003, p. 23).

Two examples of the above mentioned programs include the University Crescent multi-family buildings which consist of 394 units situated on 3.9 acres of land resulting in a density of 101 units per acre and a MURB sponsored rental tower such as Colony Square. (See **Appendix 7** – Comparative Density Analysis – 77 University Crescent and Colony Square).

It was, however, the approval of Waverley West (2005) that signaled a new approach in suburban or 'new communities' planning by requiring detailed secondary plans that demonstrate a broad spectrum of housing choices, a return on investment for new infrastructure, access to transit and community active transportation systems and a higher than typical density (7-10 units per acre). In the case of Waverley West, it required 20% or approximately 2,000 units to be multi-family development.

Market

A critical factor of this era was the lack of growth, with less than a 1% population growth rate between the years 1986 and 2009. Low population growth did not translate into a drop in housing starts per annum, however, demonstrating that the market during this era was actually parasitic, moving existing population from one area of the city and relocating to another.

For example, from 1980 to 1989, the number of housing starts was quite robust averaging 4,286 units per year. Then, the 1990s realized a decline as very little housing growth materialized with the average of only 1,529 units per year. Housing starts picked up towards the end of this era beginning in 2003 with 2,430 housing starts. Yet by the end of this era in 2009, City of Winnipeg housing starts were still only at 2,033 units.

Towards the mid-to late 2000s, growth resumes and there is pent up housing demand but with no available land supply. Preferred serviceable suburban land supply in the southwest quadrant of the City was dwindling and it was this 'lot shortfall' that resulted in the largest designation of suburban land in Winnipeg history, to be known as the Waverley West development. A key element in the developer argument to the designation of Waverley West in Plan Winnipeg 2020 was a dramatic overall lot shortage in the City, but more specifically in the southwest quadrant, which included Fort Garry. Since the early 1990s, the south end of Winnipeg captured close to 70% of the overall growth in the housing market and this shortage presented a very serious market issue.

> *"Southwest Winnipeg and Fort Garry in particular, has a very limited amount of residential land remaining. This report estimates that the home building industry will have absorbed the remaining supply within approximately 12 months and full build out will occur in about 2.5 years."*
>
> (NDLea, 2003, p. 52)

As part of the market analysis for Waverley West, housing demand was expected to pick up between 2004 to 2024 with the following anticipated starts: This analysis predicted that there would be demand for 23,000 to 36,000 units (1,150 to 1,800 per year on average) with the expected demand for multiple family dwellings in the range of 14,000 to 17,000 units (700 to 850 per year on average).

Between the years 2004 to 2009, the average overall housing starts of 2,711 units were significantly above the previously forecasted starts of 1,150 – 1,800. Of those starts, the multi-family unit share was actually 931 units, again, above the forecasted 700 to 850 per year on average.

During the 1990s and up to the early 2000s, single-family homes made up approximately 80% of the market but by the end of this era, from 2003 to 2009, that market share fell to 66% (see **Appendix 3**).

Also, throughout the decade of the 2000s, Winnipeg began to experience increased condominium development. This type of home ownership model was a result of the response to market conditions. Baby boomers began to downsize during this period and immigration to Winnipeg began to increase, and the condominium usually afforded a smaller, less expensive option.

Of interest, however, is the overall reluctance of the market to embrace 'old Winnipeg' during this period for urban condominium development such as was seen in other cities. Rather, condo development remained mostly aligned to the suburban model of development. Exceptions to this alignment were few, but notable ones included Waterfront Drive in the east Exchange District and Osborne Village.

Public Policy

Public policy supported the expansion of suburbs through the City of Winnipeg's official plans during this period, those being *Plan Winnipeg* (1993) and *Plan Winnipeg to 2020* (2000). While both plans acknowledged the need for urban revitalization, there was very little policy or designation of land to support anything but continued suburban growth and development. Both official plans focused on general economic development and jobs creation as a means to bolster revitalization.

Plan Winnipeg 2020 was a 'carry over' from Plan Winnipeg (1993) with no significant studies done to inform the plan. The Plan's maps or policy plates did not delineate types of growth, directing all growth to Neighbourhood Policy Areas. These areas were poorly defined suburban growth areas. Other areas such as infill areas, corridors or redevelopment sites were not defined, mapped, or identified in the plan. The plan did identify commercial centres such as Polo Park but did not consider them suitable for residential or mixed-use development.

As stated above, by the mid-to late 2000s, the City of Winnipeg was caught off guard by the resumed growth and therefore pent up need for housing in the city. By this point, *Plan Winnipeg* was outdated and there was no current understanding of the city's land supply or associated demand. In addition, a reframing of how development occurred in Winnipeg was front and centre with the emergence of sustainability considerations. The economic costs of this universal focus on suburban expansion started to become a relevant concern with City of Winnipeg Council and the public from an infrastructure and transportation perspective.

To get a better understanding of the potential growth projections, in 2007 the City of Winnipeg commissioned The Conference Board Population forecast. Of important note, this forecast predicted that Winnipeg would grow by 188,000 people and 87,000 housing starts between 2008 to 2030, which represented 3,800 units per year. It predicted an annual growth rate between 1.1% to 1.3% or approximately 7,525 people per year (City of Winnipeg, 2007, p. 8).

This forecast confirmed building industry assertions that the market was surging to levels consistent with the 1980s. However, at the same time, there was a clear deficit in municipal policy to accommodate this level of growth and change.

It also refuted earlier population projections completed as part of *Plan Winnipeg 2020* that suggested an average growth rate of between 2,335 and 2,650 persons per year. The 2007 Conference Board Population forecast was 49% higher than previous forecasts for the same timeframe.

As a result, in 2007 and 2008, the City of Winnipeg commissioned a series of supply demand studies to better clarify the type of growth it was experiencing and where it would be best located to address sustainability from an environmental, social and economic perspective.

Three key studies were completed:

1. Comprehensive Employment Lands Strategy
2. Residential Lands and Infill Strategy
3. Commercial Lands Strategy

These studies suggested the following:

- Winnipeg's population was growing and is expected to grow at rates more consistent with past historical growth rates;
- Winnipeg would need to accommodate upwards of 80,000 new housing units to 2030 and that the majority of these units would need to be multi-family;
- Winnipeg should re-purpose older, obsolete or underutilized industrial or institutional areas to accommodate mid- to high density levels provided there is sufficient access to public transportation;
- Existing commercial areas should be redeveloped as mixed-use to take advantage of amenities in close proximity and reliant public transportation; and
- Major corridors should once again become the focus of mid to high density development.

The conclusion of all this analysis was that Winnipeg needed to change how it accommodates growth. The outcomes from these studies were used as the basis for the City's new municipal development plan, *OurWinnipeg* (2010). The *OurWinnipeg* plan represented a substantial departure from the 3rd Era's public policy on development. The Plan was based on the abovementioned three studies and a series of informing background studies including population projections (15 studies in total).

The *OurWinnipeg* plan confirmed the study assumptions and for the first time since the *Greater Metro Winnipeg Plan* (1956) mapped how growth would be accommodated in transformative areas including infill and redevelopment sites.

Around the same time at the end of this era, the City began planning and construction of a new transportation corridor, the Southwest Rapid Transit Corridor (SWRTC), with the first phase to be a 6 km route starting at downtown and ending at Jubilee Avenue. It also began to consider Transit-Oriented Development (TOD) as a critical economic and social input to ensure the new transit corridor was a success. Transit-Oriented Development is a type if urban development designed to maximize access to public transport, and typically involves mixed-use, higher density pedestrian-*oriented infill development within a five to ten minute (400m – 800m) walk of a transit station* (City of Winnipeg, 2011, p. 6).

In October 2004, the Mayor appointed the Rapid Transit Task Force, which completed its final report in September 2005. On February 22, 2006, Council adopted the administrative report titled "Implementation Plan for Rapid Transit Task Force Recommendations" which outlined a transit improvement plan to be implemented over subsequent years. This plan included the completion of the first phase of a dedicated bus-only roadway (rapid transit way) in southwest Winnipeg.

On October 22, 2008, Council adopted the plan for the SWRTC Phase 1 in the amount of $138,000,000. Phase 1 of the SWRTC, which was commissioned in April 2012, is comprised of a 3.6 kilometer segment of separated transitway running from Queen Elizabeth Way & Stradbrook Avenue at the south end of downtown to Pembina Highway & Jubilee Avenue.

6.0 Development trends in Era 4 (2010 and into the future)

Density

New Communities

During this era, New Communities or suburban community planning continued to dominate City of Winnipeg approvals. Between 2010 and 2019, the City of Winnipeg approved 16 local area plans. Of those plans, 10 were secondary plans for New Communities or suburban expansion (Precincts E, G, I, K, Q, C, F, J, R and T) or 62% of all precincts identified in *the OurWinnipeg* plan.

Density targets for Precinct plans average between 9 to 20 units per net acre.
An example that illustrates these low suburban density targets is provided from Precinct E (2014):

> *"All land within the Precinct is divided into one of three residential policy area designations: lower density (~93 acres), medium density (~38 acres) and higher density (~30 acres). The Lower Density Policy Area allows single family and two-family homes. The Medium Density Policy Area allows for two-family dwellings and multi-family dwellings of three (3) stories or less. The Higher Density Policy Area permits low-rise apartment buildings with main floor commercial uses, in addition to those uses permitted in the Lower and Medium Density Policy Areas."*
> (City of Winnipeg Administrative Report Secondary Plan Precinct E, 2014, p. 21)

The Plan provided the potential to develop between ~1,450 to ~1,800 dwelling units at full build out.
This represents an overall density of between 9 to 11 dwelling units per acre for the Precinct as a whole.

Of the average 2,300 multi-family unit starts per year (from 2013 onwards) approximately 1,500 units are to be built or are being built in New Communities at density ranges of only between 9 and 20 units per acre (based on available information found through Precinct Plan approvals by the City of Winnipeg). The remaining 800 multi-family unit starts per year are disbursed throughout the rest of the City.

For example, in 2018, north, east and south New Communities captured 60% of all multi-family starts in the City of Winnipeg. To this point, Riel Community Committee, which includes the suburban neighbourhoods of Waverley West and Sage Creek communities, captured 813 of the total 2,323 multi-family starts for the entire City.

The lack of density development outside of the New Communities is evident with relatively ad hoc sporadic mid- to high-density development taking place by way of single multi-family buildings along corridors or limited mixed-use development in commercial centres such as Kenaston/McGillivray.

Downtown

The exception would be the downtown, during this era, which has been performing very well with a 2.2 % per annum growth rate. Between 2005 and 2016, multi-family buildings totalling 2,500 dwelling units were developed with another 1,000 units being finalized in the development process. The result of this success is evident in the accommodation of substantial increased density in the downtown.

While this is a celebrated outcome, it is important to note that this development was contingent upon substantial government intervention in the form of property tax incentives, continuing the trend of government supported development in the downtown.

Major Redevelopment Sites (MRS)

During this timeframe, three of the eleven Major Redevelopment Sites have Master Plans approved by City of Winnipeg Council to help accommodate growth and future density in the city. Their densities are described below:

- Bishop Grandin Crossing with 1387 units at 44 units per acre
- Fort Rouge Yards with 900 units at 61 units per acre
- Pallister Site with approximately 1900 units at 54 units per acre

(For further breakdown of detail see **Appendix 7** Comparative Density Analysis in Winnipeg Neighbourhoods).

Another major redevelopment site, the Parker Lands, has had its secondary plan application submitted since January of 2018 but has been on hold (laid over 'indefinitely') pending a decision by the provincial courts.

The most important consideration of density during this era relates to the development of the SWRTC Phase 2. On March 22, 2016, Council adopted the plan for the construction of the SWRTC Phase 2 in the amount of $467,300,000. The project was funded by all levels of government. Completing Phase 2 will increase the total length of the transit corridor to 11 km, with it now running from Queen Elizabeth Way & Stradbrook Avenue all the way to the University of Manitoba. Once Phase 2 is completed, anticipated in spring 2020, the Southwest Rapid Transit Corridor will operate from Downtown through the Fort Rouge Yards MRS, Parker Lands MRS and Bishop Grandin MRS, terminating at the University of Manitoba (which will eventually include the Southwood Golf Course MRS).

The SWRTC Phase 2 business case identified that a potential of 16,408 residential units could be planned for along the 2nd leg of the corridor. The business case highlights that Major Redevelopment Sites including Parker Lands, Fort Rouge Yards, Bishop Grandin Crossing and Southwood Golf Course should be developed as Transit-Oriented Development (TOD) with high enough densities to increase transit ridership (Dillon Consulting, 2013, p. 40).

The business case states that high density TOD along the SWRTC is required in order to ensure success including a substantive increase in ridership. To this point, the confirmation of the route was predicated, in part, on the build out of the Parker Lands MRS and Bishop Grandin Crossing as high density residential and mixed-use developments.

Currently the City of Winnipeg has approved 2,433 units maximum of TOD along the Southwest Rapid Transit Corridor (900 units at Fort Rouge Yards; 1,387 units at Bishop Grandin Crossing; and 146 units at 221 Stradbrook), far short of the anticipated 16,408 dwelling units identified in the SWRTC Phase 2 business case upon which all three levels of government used as a basis for funding the corridor. There are only two remaining MRS sites along the corridor that have not been approved to make up some of this shortfall; those being the Parker Lands and Southwood Golf Course.

For its part, in 2019, Winnipeg Transit recognized that in order to maximize the benefits of the new transitway infrastructure, it had to develop a new type of service model that will mitigate the operational challenges currently experienced by them and its users and accommodate the future population of southwest Winnipeg. In its proposed new Winnipeg Transit Master Plan, Phase Two: Proposed Network Design, the new service model would provide more efficient, fast, and reliable transit service for passengers and be more flexible than the current system to meet the changing need of southwest Winnipeg over time.

The Plan introduced the new Blue Line, a "spine and feeder" service model for southwest Winnipeg. The spine and feeder model consists of two basic components: (1) high frequency corridors (spine) that form the core of the service; and (2) local routes that provide passengers with simple connections to the spine routes (feeders). The 'spine' will include construction of 7 transit stations including stations to support Parker Lands MRS, Fort Rouge Yards MRS, Bishop Grandin Crossing MRS and Southwood Lands MRS. Transit stations fall within the 800 metre TOD radius where mid- to high-density development can take place to support the rapid transit corridor through increased ridership.

The City announced that the new Blue Line will increase operating costs and that these increased costs will be partially offset by increased ridership. However, no evidence is given as to how increased ridership will be accomplished except in the SWRTC business case that identifies new residential development. According to the City of Edmonton, of the total increase in ridership growth, 23% to 32% of that growth will need to be made up by new transit users.

Market

This era is characterized by resurgences in growth in Winnipeg and the Metro Region with growth resuming to a mean average of 1.2 % per annum.

From 2010 to 2018, average total housing starts were 4,339 units per annum. Of these starts, 2,361 units (or 54%) were now multi-family, compared to single-family.

Interesting trends can be seen when comparing the 1990s, 2000s and the current decade. There is a distinct increase in total housing starts over the decades with the 1990s averaging 1,529 starts annually, the 2000s averaging 2,331 starts annually and the years 2010 to 2018 averaging 4,339 starts annually. The 2000s had on average 52% more starts than the 1990s and 2010 to 2018 has seen an average 86% more starts than the 2000s, or almost 200% more starts annually than the 1990s (see **Appendices 3, 4 and 5**).

Decade over decade, one can also see a shift in the split between single-family and multi-family starts, with multi-family starts increasing as a percentage of the total. Multi-family starts in the 1990s averaged 23% of total housing starts. In the 2000s, this increased to an average of 30% and from 2010 to 2018 multi-family starts have increased to an average percentage of 54% of total starts, surpassing single-family starts. Notably, the percentage of multi-family starts only seems to be increasing as multi-family starts in 2017 and 2018 were now 60% and 65% of total housing starts, respectively.

In 2012, multi-family starts, although increasing over previous years, were still below those of single-family starts at 48% of total starts. By 2013, multi-family housing begins to surpass single family starts, representing 53% of total housing starts. Multi-family starts as a percentage of total starts have not fallen below this level during the period of 2013 to 2018. As noted above, by 2018, multi-family starts increased to 65% of total housing starts.

Another change to previous thoughts was the anticipated population in Winnipeg. The 2007 annual population growth forecast of 7,525 people per year was revised just five years later in 2012 to 9,000 people per year. This revision in population growth equated to an adjustment from 87,000 required housing units to 100,000 housing units by the year 2031. The forecast was further revised in 2018 projecting a requirement of 117,900 new dwelling units to the year 2049.

Using a ratio of 60% multi-family and 40% single family starts, approximately 70,750 multi-family units will need to be built in Winnipeg over the projected forecast which equates to an average of 2,358 multi-family units per year.

In 2018, the Manitoba Building Industry started to raise a significant concern with the lack of proper integrated mid- and long-range planning (including infrastructure requirements) that is aligned to market demand. In a series of studies, the industry sets out a scenario that concludes that regardless of the capacity in new communities, significant intensification is required in other areas of the City.

> *"Depending on the investment in regional enabling infrastructure, new communities will support between 31,000 and 80,000 new housing units, this leaves 38,000 to 87,000 units that will need to be built within established communities."*
>
> (UDI. Plan for Growth, 2018)

The Building Industry's Plan for Growth states:

"If all available land developed in a way similar to the way land has been developed in the last decade, we can accommodate:

- *Approximately 80,000 units (200,000 people) in new and recent communities*
- *37,900 housing units (to accommodate 94,750 people) would be needed in other areas of the City to support a population of one million people.*

However, key infrastructure investments are required to make full use of the land identified for new communities in OurWinnipeg. Regional enabling infrastructure includes major transportation, water, sewer and land drainage systems that are beyond the scale of local area servicing. Regional enabling infrastructure plans are not yet in place for large areas of the City of Winnipeg, reducing the land available for development.

Without new infrastructure:

- *Removing the areas constrained by undeveloped regional enabling infrastructure new and recent communities have capacity for approximately 31,000 units (77,500 people)*
- *86,900 units (217,250 people) would need to be developed in established areas of the City to support a population of one million."*

(UDI. Plan for Growth, 2018)

Public Policy

In 2011, the City of Winnipeg adopted *OurWinnipeg* as its development plan. *OurWinnipeg* provides a twenty-five (25) year blueprint for guiding growth and development in the City. It positions Winnipeg for strong and sustainable growth with three key areas of focus: a City that works; a sustainable City; and quality of life.

Based on an urban structure approach, the plan provides a vision for the arrangement of land uses within the City. The urban structure is made up of a series of areas including transformative areas, areas of stability, other, and special districts. These areas are outlined below.

Transformative Areas

These are areas that provide the best opportunity for growth and change:

- Downtown – Winnipeg's downtown is the entertainment, cultural, and economic heart of the City and a window to the world and offers one of the best opportunities to create complete, mixed-use, higher-density communities in a manner that promotes sustainable practices;
- Centres and Corridors – Encourage a more compact urban form that offers a variety of options for housing, employment, amenities and transportation;
- Major Redevelopment Sites – Capitalize on major transformation opportunities for vacant and underused sites to create attractively designed complete communities with significant residential and employment densities;
- New Communities – Play an important role in the accommodating projected population growth and will aim to achieve a high standard of sustainability from the onset.

Areas of stability

These are areas that will accommodate moderate growth and change that fits with the existing form and character of its location:

- Mature Communities – Present some of the best opportunities to accommodate infill development and maximize the use of existing infrastructure, to increase housing choice and maximize the use of existing infrastructure. They represent some of the most "complete" communities in Winnipeg and for the most part, were developed prior to the 1950s;
- Recent Communities – Are areas of the City that were planned between the 1950s and the late1990s. They are primarily residential areas and contain a mix of low- and medium-density housing with nearby retail amenities. They can also accommodate some infill development to increase housing choice and maximize the use of existing infrastructure.

Detailed policy on how the *OurWinnipeg* plan's urban structure will be interpreted and implemented is found in the *OurWinnipeg – Complete Communities Direction Strategy*. It was adopted as a City-wide secondary plan in 2010.

The following further describes transformative areas (a more detailed breakdown of the *OurWinnipeg* Policy framework is found in **Appendix 2**).

Regional Mixed-Use Corridors:

The *Complete Communities Direction* Strategy revisits the relevance and ability of corridors to serve growth needs in the City of Winnipeg. The Strategy renews key corridors in the City as logical and coherent places to accommodate mid- and high-density development. Key corridors including Portage Ave, Pembina Hwy, Henderson Hwy, St Mary's and St Anne's Roads are once again tasked to grow, similar to the earlier development patterns of the 1950s, 1960s, 1970s and 1980s.

Complete Communities describes corridors as important to serve as city routes, connecting neighbourhoods and transporting people, goods and services. It identifies that corridors should be planned in 'segments' with the highest density being located at key intersections. As of 2019, there have been no corridor plans completed. (See xx for complete description of corridor policy)

Rapid Transit Corridor:

A new corridor is introduced in the *OurWinnipeg – Complete Communities Direction Strategy* called the Rapid Transit Corridor. The Rapid Transit Corridor policy framework is an important continuation of Winnipeg's tradition of accommodating growth along corridors. Winnipeg's SWRTC marks a historical moment in Winnipeg's evolution (also refer to **Section 6**: Density and Market).

The rapid transit corridor policy framework relies in part on the concept of Transit-Oriented Development, nodal development near transit stations and the fast, efficient links between nodes of development where transit can travel at a higher rate and make fewer stops than on mixed modal roadways.

The City identifies key characteristics of Corridors and TOD:

- Nodal rather than linear development;
- Medium to high-density development that is greater than the community average;
- A mix of uses;
- Compact, high quality pedestrian-oriented environment;
- An active, defined centre;
- Innovative parking strategies;
- Rapid Transit Stations.

Major Redevelopment Sites (MRS):

The *OurWinnipeg – Complete Communities* plan identifies 11 sites deemed undevelopable or underutilized for their original land use, including industrial. Of the 11 sites, 4 sites are located along the SWRTC.

Like previous eras, major redevelopment sites are designated for mid- to high-density to accommodate substantial growth. Similar to early eras, MRS sites are identified as 'important'.

Unlike previous eras, the *OurWinnipeg – Complete Communities* strategy does not set *minimum* density targets. Rather, it relies on a strong policy framework that serves as instructions for developers and city administration to meet city policy related MRS sites. The outcome of these instructions and how they are interpreted form a plan, often referred to as a secondary plan, local area plan or master plan.

The strategy does have in place extensive policy to guide TOD for sites found along the new Rapid Transit Corridor designation.

Similar to the past practice of developing MRS sites, such as Grant Avenue, the City is once again identified as an important participant in the redevelopment process. In *OurWinnipeg – Complete Communities Strategy,* the City of Winnipeg is identified as a facilitator, responsible to remove barriers such as inadequate infrastructure capacity, issues of land assembly and contamination:

> *"Despite their location within existing urban communities, the development of Major Redevelopment Sites may be hampered to varying extents by a number of impediments that reduce or preclude economic viability. This can include inadequate infrastructure capacity, issues of land assembly and contamination. Given its interest in the redevelopment of these sites, the City will work to help reduce these barriers."*
>
> (City of Winnipeg. Complete Communities, p. 67)

The *OurWinnipeg* Plan suggests using minimum densities as a method to ensure that densities are high enough to justify redevelopment:

> "*Given their location within existing communities, specifically their ability to capitalize on existing infrastructure and services,* ***the City must maximize the potential of Major Redevelopment Sites****.* ***Densities must be high*** *enough to justify investment in infrastructure upgrades, potential remediation initiatives and to establish a critical mass that can support neighbourhood retail and vibrant, people-oriented places.* ***These densities must be*** *designed in a way that creates attractive communities where modes of active transportation and public transit are competitive with the private automobile."*
>
> (City of Winnipeg. Complete Communities, p. 66)

Transit-Oriented Development Policy (TOD):

Following the approval of the *OurWinnipeg* plan and *Complete Communities Strategy*, the City of Winnipeg adopted a Transit-Oriented Development (TOD) policy and Handbook (2012). TOD supports this city-building vision. It is a concept designed to maximize access to public transport, and typically involves mixed-use, higher density pedestrian-oriented infill development within a five- to ten-minute (400 m to 800 m) walk of a transit station.

The TOD Handbook sets out TOD – Typologies, which outlines the type of TOD that is appropriate depending on the function and form of the land uses and transportation network.

These TOD Typologies are as follows:

Urban Centre – 50 to 150 units/acre - Urban centres have the highest density and greatest mix of uses within a TOD, located nearest the transit station.

Urban Neighbourhood – 40 to 100 units/acre - The next ring of development, urban neighbourhoods have the same land uses as the urban centre, but at a slightly lower density.

Town Centre – High Density – 35 to 100 units/acre – High Density Town Centres serve as a transition between the higher density urban centres and neighbourhoods and the lower density, primarily residential uses. These are generally aligned with the Regional and Community Mixed-Use Centres, and Major Redevelopment Sites identified in the Complete Communities Direction Strategy.

Neighbourhood – Medium Density – 20 to 50 units/acre - Primarily residential, with some neighbourhood serving retail and local office uses, medium density suburban development scales down the density in a TOD to begin the transition to the adjacent, non-TOD land uses.

Neighbourhood – Low Density – 10 to 20 units/acre - The low density neighbourhood land use type provides a transition to the adjacent non-TOD land uses. The residential and neighbourhood retail land uses are likely the same as those located outside the TOD.

High-Frequency Transit Corridor – 25 to 60 units/acre - The high frequency transit corridor has supporting land uses that are linear in nature rather than extending out from the core. The highest density is located along the corridor, and density is scaled back in the blocks behind the corridor. These are generally located along Regional Mixed Use Corridors and Winnipeg Transit's designated Transit Quality Corridors as identified in the *Sustainable Transportation Direction Strategy* and the *Transportation Master Plan*.

(City of Winnipeg. Transit-Oriented Development Handbook, 2011, p.37)

All major redevelopment sites located along the SWRTC align to the TOD Typologies of Urban Neighbourhood or Town Centre given the following characteristics:

- Transit frequency – 5 – 15 minutes at peak hours. The Blue Line (SWRTC) will be the spine to feeder routes. Bus frequency will be 6 to 8 minutes according to *Winnipeg Transit Master Plan* (November 2019)
- Their ability to accommodate high-density residential development

Planning for all MRS sites along the corridor include:

- A mix of uses: Horizontal and vertical mixed-use helps create an 18 hour activity zone. Retail spaces should articulate corners to help define a comfortable pedestrian zone.
- Active defined centre: Public amenities creates a dynamic area for a variety of users. Art installations, farmer's market and programmed events activate these spaces all year around.
- Good access to other regional and sub regional centres through roads and active transportation, in addition to the corridor itself
- Compact, high quality, pedestrian-oriented environment: Amenities such as lighting, signage, and street trees frame the pedestrian zone and separate vehicular traffic.
- Urban parks and open space: Landscaped areas offer visual relief in higher density neighbourhoods. Public space can be used as green infrastructure solutions.
- Innovative parking strategies: On-street parking, minimum surface parking, and some structured parking integrated into development.

The Urban Neighbourhood typology supports 3 to 12 storeys at 40 – 100 net units per acre. It should include mid-rise residential, condos, ground-related units, and mixed-use structures, with ground floor retail or office use required and a minimum ground floor height of 4.8 metres.

A Town Centre typology supports 2 to 20 storeys at 35 to 100 units per net acre. It includes mid-rise to low-density residential with mixed-use structures and a minimum ground floor height of 4.8 metres.

2019 Planning Policy Directives

In 2017, the City of Winnipeg launched its statutory review of the *OurWinnipeg* plan. Current background work and analysis on growth, residential development and public policy have been consistent with the findings of the development industry, in that there continues to be substantial liability to the City and its inability to accommodate residential demand.

The City has produced scenarios for consideration as part of their review process and has concluded that densities must increase overall within the city to meet demand. However the City is not clear on where new residential densities or the type of density (low, mid or high) will be accommodated but are working through the process with the objective of completing the revised Plan in 2020.

The City of Winnipeg made a presentation on this review to the Urban Development Institute of Manitoba (UDI) on November 20, 2019 entitled "*OurWinnipeg*, Residential Growth Study".
Information from the presentation can be found in **Appendix 6**.

7.0 Conclusion

The objective of this report was to examine the City of Winnipeg's past, present and future residential development vision with the following questions in mind:

- What constituted urban (higher density) development vs suburban (lower density) development?
- How was higher density residential development planned for and actually developed?
- How has public policy informed and shaped the development of higher density residential projects?
- Has the City of Winnipeg historically approved urban standard (high density) development outside of the downtown core?
    - If so, where has it actually been accommodated?
    - What were the characteristics of those locations?
    - Why have those locations stayed consistent over time?

The report concludes that high density residential development outside of the downtown has been largely coveted and celebrated until recent years by the approving authority (City of Winnipeg) and the developers of high density residential development.

Winnipeg's history with the development of housing for its citizens has been difficult with cycles of slow growth and sluggish market conditions. It has characteristically been the City itself that has championed high density residential development, recognizing it as an imperative to a healthy, functioning city that offers options for those not wanting or able to live in or afford a single-family home.

It has characteristically been the development industry that has not reacted to the City's desire to spur on high density residential development outside of the downtown, specifically along corridors.

In recent years, this relationship has shifted with the development industry acknowledging growth and demographic demands and championing for high density residential development due to increased market demand. Although the City of Winnipeg has an approved policy framework that supports high density residential development and identifies locations for it in its official development plan (OurWinnipeg), the current City environment does not support high density residential development in a way that is meeting market demands or in alignment with suitable locations for it.

While not explored in detail in this report, there are serious conclusions that can and should be drawn related to the current environment:

- The city will not be able to accommodate the vision as put forth in the City's Official Development Plan, OurWinnipeg;
- The historical alignment between corridors and high density development has been distorted, resulting in a lag in development, and growing concerns that the City will not be able to accommodate growth without spilling into the Capital Region and encroaching with redevelopment into existing mature communities and job-creating lands;

- The city and other levels of government will not receive a positive return on investment for major public capital expenditures such as the rapid transit corridor.

Historical View of High Density Residential Development:
High density development has historically located along transportation corridors in Winnipeg. As evident by the findings in this report, there is a strong relationship between the expansion of a corridor and high density residential development, largely to take advantage of transit that is frequent, easily accessible and convenient.

The report findings suggest that the City of Winnipeg has, over the last 100 years, desired, encouraged and supported high density residential development that is outside of the Downtown:

- High density development has logically followed the expansion of transportation corridors. Corridors have traditionally been arterial roadway systems but now include Winnipeg's rapid transit corridor system;
- Since 1947, criteria used to locate and enable high density residential development by approving authorities (City of Winnipeg and Province of Manitoba) and the developer/investor are:
    - public policy;
    - market support;
    - appropriate location;
    - serviceability; and
    - municipal revenue returns.
- Decisions to support and develop high density development have always been the purview of the City of Winnipeg, Province of Manitoba and the developer/investor (unless the development is entirely government sponsored such as public housing);
- Over the last 100 years, approving authorities have relied on Official Development Plans (like Metro Plan 1956, Plan Winnipeg, Plan Winnipeg 2020 and OurWinnipeg) to guide the type of residential development and set the locations for this development.
    - In fact, City Council (an approving authority) has since the 1950s relied on public policy found in the City's Official Development Plan to guide other land use decisions such as re-zonings.
- Developer/investors have overwhelmingly respected the City's approved locations for high density development by following the City's development plan. The Developer/Investor interface with the City approving authority has been collaborative, and there has been alignment provided there is a demand for high density development.

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9.0 Appendices

1. Plan Winnipeg 2020 (key policies excerpts)
2. OurWinnipeg - Complete Communities (excerpts)
3. Canadian Housing Observer, Housing Market Indicators, Winnipeg, 1990-2016
4. Housing Starts by Dwelling Type and Census Subdivision 2017
5. Housing Starts by Dwelling Type and Census Subdivision 2018
6. City of Winnipeg presentation to UDI: OurWinnipeg Residential Growth Study 2019
7. Comparative Density Analysis in Winnipeg Neighbourhoods

Appendix 1

Plan Winnipeg 2020

Key policies included:

3A-01 Promote Orderly Development

The City shall promote orderly development through land use designations on Policy Plate A by:

i. considering the "Neighbourhood" designation to signify areas of local identity with mutually supportive uses generally including a residential mix together with a variety of educational, recreational, institutional, commercial, and possibly industrial uses, at a scale and density compatible with each other;
ii. considering the Rural designation to signify areas primarily devoted to agricultural uses and related support functions until such time that these lands are required to be redesignated for future development;
iii. considering the identification of areas of Regional Commercial and Mixed-Use Concentration to signify the general desired locations for large scale commercial development attracting customers city-wide and beyond, with the intent to direct future development of that nature to those general locations;
iv. considering the Major Open Space designation to signify distinctive areas of city-wide importance that provide opportunities for passive nature- oriented activities and/or a variety of active recreational facilities; and
v. identifying those areas of the city that are governed by secondary plans, and promoting the use of secondary plans, where warranted, to provide greater clarity in the interpretation of policy designations.

Promote Vibrant Neighbourhoods

The City shall promote vibrant neighbourhoods by encouraging and accommodating within new and existing developments a variety of compatible mixed uses including:

i. low-intensity residential uses;
ii. low-intensity ancillary uses such as local commercial, educational, recreational, religious, and institutional uses at a scale and density compatible with, and necessary to support, low-intensity residential development, and in recognition of traffic flows related to these uses;
iii. high-intensity residential development and ancillary uses on sites adjacent to major traffic or transit corridors; and
iv. light industrial development at industrial park standards as a buffer, where appropriate, between residential development, major traffic arteries or railways, or other incompatible uses.

3A-02 Promote Compact Urban Form

The City shall promote compact urban form in support of sustainability by:

i. approving new residential, commercial, and industrial subdivisions only where there is a reasonable relationship between the supply of land and the projected demand and when a full range of municipal infrastructure can be provided in an environmentally-sound, economical, and timely manner;
ii. evaluating residential, commercial, and industrial development proposals using benefit-cost analysis to measure long-term revenues, expenditures, and impacts on existing developments within a life-cycle costing framework;
iii. encouraging infilling of vacant lands and the revitalization of existing neighbourhoods to maximize the use of existing infrastructure; and
iv. supporting new development, which is adjacent to, and compatible with, existing development and which is designed to minimize the spatial use of land.

Appendix 2

OurWinnipeg – Complete Communities

Regional Mixed Use Corridors

Because travel within Winnipeg is almost entirely accommodated along these Corridors, they should be designed to maximize transportation options. While continuing to accommodate automobile traffic, they should enable efficient, effective public transit and safe convenient options for active transportation.

Corridors also serve the additional purpose of accommodating a mix of uses, functioning as vibrant urban places for Winnipeggers to live, work and play. Given their prominence in daily life, Corridors are ideal for transformative change. Through their residential, employment and commercial intensification, people will be able to access a greater number of goods and services with one trip.

By expanding the number and range of amenities and housing options within existing neighbourhoods, intensifying mixed use development along Corridors will help to complete communities.

Key relevant policies guiding development along Regional Mixed Use Corridors include:

- Develop Corridors as focal points, characterized by a mix of uses, higher density developments, opportunities for gathering and other social interaction and a high level of accessibility through multiple modes of transportation.
- Promote the highest levels of intensification at significant intersections. Between each centre, lower intensities of commercial, residential and mixed use development are appropriate. (Transformative Areas – Centres and Corridors – Corridors Direction 1).
- Where appropriate develop corridors in accordance with transit oriented principle (Transformative Areas – Centres and Corridors – Corridors Direction 2).
- Support a range of housing opportunities in terms of type, tenure, unit size (Transformative Areas – Centres and Corridors).
- Support active uses (such as retail and services) at street level and office and housing on the upper levels of multi-storey developments (Transformative Areas –Centres and Corridors).
- Encourage urban design and/form-based strategies that help define the character of Centres and Corridors through clarifying the massing and height of buildings, setbacks, appropriate open space areas and appropriate parking design and locations (Transformative Areas – Centres and Corridors).
- Encourage the tallest buildings and highest densities close to major transit stops and stations (Transformative Areas – Centres and Corridors).
- Promote high quality plazas, parks and streetscapes as focal points and networks that are connected to the greater community (Transformative Areas – Centres and Corridors).

- Promote innovative parking strategies and high intensity developments, including locating parking lots to the rear of developments, encouraging the development of underground parking structures and encouraging the preservation and/or planting of trees and other types of vegetation within and around surface parking lot (Transformative Areas – Centres and Corridors).
- Ensure multi-modal connectivity (Transformative Areas – Centres and Corridors).
- Support development in accordance with Universal Design and Crime Prevention Through Environmental Design (CPTED) policies (Transformative Areas – Centres and Corridors).

    - *In order to maximize the development potential of both the Major Redevelopment Sites and the viability of the transit system, these lands should be developed in accordance with the principles of Transit Oriented Development.*
    - *Promote Development of Major Redevelopment Sites with Proactive and Collaborative Planning Process*
    - *Support rapid transit and high-frequency transit service by encouraging higher density residential and higher intensity commercial and mixed-uses within the centre of the development. These will be focused on major transit stops.*
    - *Create strong, multi-modal and active transportation linkages from each Major Redevelopment Site to the Downtown, other Major Redevelopment Sites, Centres, Corridors, Parks and major attractions and employment areas.*
    - *Work with landowners and other stakeholders to establish local goals and objectives for each Major Redevelopment Site while taking into account its relationship to: OurWinnipeg, Sustainable Transportation Direction Strategy, Downtown, Redevelopment Areas, Corridors, and other Centres. This could include minimum and maximum density and employment targets.*
    - *Capitalize on the Proximity of Major Redevelopment Sites to Rapid Transit and High Frequency Transit*
    - *Promote development in accordance with Transit Oriented Development principles.*
    - *Facilitate Redevelopment through Incentives, Partnerships and the Removal of Barriers*
    - *Facilitate the redevelopment of major redevelopment sites by prioritizing infrastructure renewal.*
    - *Working with other levels of government, investigate strategies to promote the redevelopment of brownfields.*
    - *Major Redevelopment Sites will provide for Complete Communities with Significant Levels of Mixed-use, High-density Development, with Strong Urban Design and Attractive Parks, Places and Open Spaces*
    - *Provide a mix of employment, high-density housing, retail and service uses within Major Redevelopment Sites in a way that compliments the needs of adjacent communities.*
    - *Support active uses (such as retail and services) on the ground floor and offices and housing on the upper floors of multi-storey developments.*
    - *Promote the use of minimum density standards for new development.*
    - *Promote high-quality plazas, parks and streetscapes as focal points and networks that are connected to the greater community.*
    - Incorporate pedestrian elements like street trees, street furniture, wide sidewalks, bicycle parking and public art in new development.
    - Encourage the transition of development towards the outer edges of major development sites that is sensitive to the scale, massing, height, form and character of the surrounding area.

- Mitigate any negative impacts new development
- *In order to maximize the development potential of both the Major Redevelopment Sites and the viability of the transit system, these lands should be developed in accordance with the principles of Transit Oriented Development.*
- *Promote Development of Major Redevelopment Sites with Proactive and Collaborative Planning Process*
- *Support rapid transit and high-frequency transit service by encouraging higher density residential and higher intensity commercial and mixed-uses within the centre of the development. These will be focused on major transit stops.*
- *Create strong, multi-modal and active transportation linkages from each Major Redevelopment Site to the Downtown, other Major Redevelopment Sites, Centres, Corridors, Parks and major attractions and employment areas.*
- *Work with landowners and other stakeholders to establish local goals and objectives for each Major Redevelopment Site while taking into account its relationship to: OurWinnipeg, Sustainable Transportation Direction Strategy, Downtown, Redevelopment Areas, Corridors, and other Centres. This could include minimum and maximum density and employment targets.*
- *Capitalize on the Proximity of Major Redevelopment Sites to Rapid Transit and High Frequency Transit*
- *Promote development in accordance with Transit Oriented Development principles.*

Rapid Transit Corridor:

- *Promote transit oriented development (tod) to accommodate growth and change at centres along rapid transit corridors through integrated land use, transportation and infrastructure planning.*
- *Successful infill development at centres along rapid transit corridors is dependent on integrated land use, transportation and infrastructure planning. Economically sustainable and viable rapid transit is dependent on sufficient ridership, which in turn is determined almost exclusively from the land use characteristics of the areas they connect.*
- *Conversely, the dense, mixed-use, pedestrian-oriented urban form that characterizes TOD can not occur without the presence of transit and connections with other transportation modes and networks. TOD cannot occur without the proper infrastructure and servicing in place to enable higher density development. Capitalizing on strategic opportunities for infill development and redevelopment along rapid transit corridors requires an integrated and proactive approach.*
- *As directed through the Sustainable Transportation Direction Strategy, support an integrated land use and transportation planning process along Rapid Transit Corridors.*
- *Identify and capitalize on development and redevelopment opportunities through corridor level planning & analysis.*
- *PROMOTE TRANSIT-SUPPORTIVE LAND USE AND URBAN FORM AT CENTRES ALONG RAPID TRANSIT CORRIDORS.*
- *The type and quality of transit service that can be supported in a community is largely determined by the surrounding land use and urban form.*
- *Transit supportive land uses and urban form is required for infill development to support transit ridership. Ultimately, new development adjacent to rapid transit requires creating or*

reinforcing a high quality urban design within a transit supportive, pedestrian-oriented urban form.

- *Promote transit supportive development, land use and urban form consistent with TOD principles at centres along Rapid Transit Corridors by creating a Winnipeg TOD Handbook.*
- *Promote minimum density standards for development at centres along Rapid Transit Corridors.*
- *Promote high quality pedestrian-oriented environments, particularly in public spaces, such as sidewalks and transit stations.*

Major Redevelopment Sites:

OurWinnipeg – Complete Communities states:

Major redevelopment sites will provide transformative opportunities for the development of complete communities with significant residential and employment densities and attractive urban design, capitalizing on vacant or underutilized sites within the existing urban fabric.

Areas that once thrived under particular land uses in the past may not be needed for those purposes today. Some of these underused sites have significant strategic value, since they can capitalize on existing infrastructure through intensification.

These Major Redevelopment Sites are either located within or adjacent to existing communities, and this proximity makes them highly valuable. While in many cases, there are challenges to their redevelopment, such as the potential requirement for infrastructure upgrades, fractured land ownership and possible contamination, Major Redevelopment Sites present large-scale opportunities to enhance Winnipeg's urban fabric by repurposing obsolete land uses as new developments.

Major Redevelopment Sites are advantageous, because they can draw on existing and nearby infrastructure. They can utilize existing roads, underground pipes and sewers. They can connect with nearby schools, community centres, libraries and other city amenities. They are prime locations for intensification, given their proximity to public transit and their ability to plug into the existing street network. In some cases, their redevelopment can have the added benefit of cleaning up derelict parcels of land, contributing to both the cleanliness and safety of adjacent neighbourhoods. They also provide a significant boost to the city's tax base by optimizing parcels of land that currently under-perform.

Characteristics of Major Redevelopment Sites

- Large, functionally obsolete or under-utilized lands, such as former industrial areas.
- Located within the existing urban framework, often along rail lines, major corridors or rapid transit corridors and adjacent to existing communities.
- Often serviced by some level of existing infrastructure.
- Present opportunities for transformative and strategic mixed use infill and intensification.
- May present challenges to redevelopment, such as inadequate infrastructure capacity and contamination.
- Site area typically 15 acres or more.

Given their importance, it is imperative that the City maximize the potential of Major Redevelopment Sites. Their redevelopment will promote complete communities with significant residential densities in a walkable, well-designed environment, embodying the principles of sustainability and, when adjacent to high frequency transit, Transit Oriented Development.

Redevelopment of Major Redevelopment Sites cannot be guided by one single approach. Each is unique, differing in the character of adjacent areas, existing physical and social contexts and market opportunities for redevelopment. The City will collaborate with all stakeholders through a front-end approach to planning developments. Redevelopment should be guided by a set of proactive planning tools.

Key policies include:

- *In order to maximize the development potential of both the Major Redevelopment Sites and the viability of the transit system, these lands should be developed in accordance with the principles of Transit Oriented Development.*

- *Promote Development of Major Redevelopment Sites with Proactive and Collaborative Planning Process*
- *Support rapid transit and high-frequency transit service by encouraging higher density residential and higher intensity commercial and mixed-uses within the centre of the development. These will be focused on major transit stops.*
- *Create strong, multi-modal and active transportation linkages from each Major Redevelopment Site to the Downtown, other Major Redevelopment Sites, Centres, Corridors, Parks and major attractions and employment areas.*
- *Work with landowners and other stakeholders to establish local goals and objectives for each Major Redevelopment Site while taking into account its relationship to: OurWinnipeg, Sustainable Transportation Direction Strategy, Downtown, Redevelopment Areas, Corridors, and other Centres. This could include minimum and maximum density and employment targets.*
- *Capitalize on the Proximity of Major Redevelopment Sites to Rapid Transit and High Frequency Transit*
- *Promote development in accordance with Transit Oriented Development principles.*
- *Facilitate Redevelopment through Incentives, Partnerships and the Removal of Barriers*
- *Facilitate the redevelopment of major redevelopment sites by prioritizing infrastructure renewal.*
- *Working with other levels of government, investigate strategies to promote the redevelopment of brownfields.*
- *Major Redevelopment Sites will provide for Complete Communities with Significant Levels of Mixed-use, High-density Development, with Strong Urban Design and Attractive Parks, Places and Open Spaces*
- *Provide a mix of employment, high-density housing, retail and service uses within Major Redevelopment Sites in a way that compliments the needs of adjacent communities.*
- *Support active uses (such as retail and services) on the ground floor and offices and housing on the upper floors of multi-storey developments.*
- *Promote the use of minimum density standards for new development.*
- *Promote high-quality plazas, parks and streetscapes as focal points and networks that are connected to the greater community.*

- Incorporate pedestrian elements like street trees, street furniture, wide sidewalks, bicycle parking and public art in new development.
- Encourage the transition of development towards the outer edges of major development sites that is sensitive to the scale, massing, height, form and character of the surrounding area.
- Mitigate any negative impacts new development may have on neighbouring streets, parks and properties.
- Development should be sensitive to conserving historically significant features and resources.
- Support a range of different types, tenures and unit sizes in housing opportunities.
- Promote development in accordance with Universal Design and Crime Prevention Through Environmental Design (CPTED) policies.
- Encourage green design and construction by incorporating environmentally friendly design and construction principles.
- Encourage the development of recreation and community service facilities in these areas in a manner that respects the desired form and character of Major Redevelopment Sites.

Appendix 3

Canadian Housing Observer, Housing Market Indicators (1990-2016)

CANADIAN HOUSING OBSERVER

Housing Market Indicators, Winnipeg

1990-2016

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Construction																											
Starts, total	2,147	1,349	1,620	1,540	1,529	1,104	1,135	1,518	1,575	1,772	1,317	1,473	1,821	2,430	2,489	2,586	2,777	3,371	3,009	2,033	3,244	3,331	4,065	4,705	4,248	4,400	4,054
Single-detached	1,905	1,006	1,261	1,210	1,201	840	838	1,192	1,190	1,204	1,210	1,238	1,528	1,641	1,882	1,756	1,737	1,870	1,930	1,505	1,921	2,002	2,129	2,218	1,877	1,649	1,858
Multiple	242	343	359	330	328	264	297	326	385	568	107	235	293	789	607	830	1,040	1,501	1,079	528	1,323	1,329	1,936	2,487	2,371	2,751	2,196
Semi-detached	32	0	4	24	2	8	54	86	62	48	14	34	24	48	50	34	94	16	34	38	42	38	118	114	130	294	208
Row	6	0	10	24	105	49	61	22	46	9	27	32	9	36	32	104	51	93	113	87	140	333	188	449	427	382	353
Apartment	204	343	345	282	221	207	182	218	277	511	66	169	260	705	525	692	895	1,392	932	403	1,141	958	1,630	1,924	1,814	2,075	1,635
Starts by intended market, total	2,147	1,349	1,620	1,540	1,529	1,104	1,135	1,518	1,575	1,772	1,317	1,473	1,821	2,430	2,489	2,586	2,777	3,371	3,009	2,033	3,244	3,331	4,065	4,705	4,248	4,400	4,054
Homeownership - freehold	1,910	1,006	1,263	1,230	1,203	840	836	1,183	1,132	1,158	1,170	1,204	1,502	1,615	1,861	1,758	1,755	1,846	1,943	1,510	1,921	2,006	2,186	2,314	1,997	1,898	2,046
Rental	109	137	119	113	66	0	98	179	223	304	66	76	179	411	397	474	619	803	322	383	807	812	844	808	655	1,651	1,191
Homeownership - condominium	0	144	132	188	223	264	201	156	220	310	81	109	140	404	231	354	403	722	720	140	516	513	1,035	1,583	1,596	851	817
Other (co-op and unknown)	128	62	106	9	37	0	0	0	0	0	0	84	0	0	0	0	0	0	24	0	0	0	0	0	0	0	0
Completions, total	2,970	1,436	1,520	1,627	1,572	1,265	678	1,750	1,531	1,485	1,487	1,542	1,585	1,949	2,468	2,475	2,618	2,590	3,543	2,670	2,388	3,179	3,258	3,891	3,464	4,182	4,594
Residential Building Permits[4]	1,941	1,564	1,808	1,705	1,734	1,228	1,204	1,558	1,811	1,456	1,342	1,576	1,750	2,733	2,938	2,723	3,729	3,849	3,457	2,370	3,898	3,909	4,616	4,470	5,428	4,197	4,563
Residential Building Permits($) (thousands)[4]	169	113	149	151	149	106	112	141	152	143	153	160	199	268	342	329	440	493	542	372	582	591	782	769	948	775	833
Available Supply																											
Newly completed and unabsorbed homes[1]	NA	NA	207	284	275	285	146	180	246	175	215	168	108	144	223	204	229	285	429	274	311	259	351	484	482	815	595
Single- and semi-detached	NA	NA	131	215	231	253	119	152	164	143	199	157	94	133	183	186	203	204	287	169	197	192	225	304	255	299	244
Row and apartment	NA	NA	76	69	44	32	27	28	82	32	16	11	14	11	40	18	26	81	142	105	114	67	126	180	227	516	351
Rental vacancy rate (%)[2]	6.4	6.6	6.1	5.9	5.6	5.4	6.0	5.9	4.0	3.0	2.0	1.4	1.2	1.3	1.1	1.7	1.3	1.5	1.0	1.1	0.8	1.1	1.7	2.5	2.5	2.9	2.8
Rental availability rate (%)[2]	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	1.8	2.5	2.0	1.8	1.4	2.0	1.4	1.6	2.5	4.0	3.4	5.5	4.2
Vacancy Rate (Standard Spaces) in Seniors' Rental[8]	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	8.3	7.1	7.8	5.0	4.6	3.5	4.1	2.2
Vacancy Rate of Rented Condominium Apartments	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	1.8	1.3	1.5	2.6	**	1.8
Housing Costs																											
New Housing Price Index (% change)[4]	1.9	-0.1	-0.1	3.6	3.4	1.5	0.9	1.4	0.8	1.6	2.8	1.8	2.6	3.7	6.7	8.5	9.5	11.8	10.2	2.5	4.8	4.8	4.2	4.9	1.6	1.1	1.9
Teranet - National Bank House Price Index (% change)[7]	NA	1.3	1.1	0.9	0.7	-0.7	0.8	0.7	1.5	3.1	3.0	4.3	7.1	10.2	11.0	10.1	11.9	17.4	8.8	7.1	4.8	8.7	3.9	3.4	1.5	-1.1	3.4
Consumer Price Index (% change)[4]	4.6	5.2	1.5	2.7	1.4	2.7	2.1	2.1	1.4	2.0	2.5	2.9	1.5	1.8	1.9	2.6	1.9	2.1	2.3	0.6	0.8	2.9	1.6	2.2	1.9	1.3	1.3
Owned accommodation costs (% change)[4]	4.5	6.0	0.4	0.0	1.5	3.4	0.9	0.0	0.8	1.8	2.9	1.3	-0.1	0.9	2.1	3.4	3.4	5.5	5.2	2.1	-0.3	3.3	2.8	2.9	2.5	1.8	2.4
Rental accommodation costs (% change)[4]	2.5	3.2	2.9	1.8	0.9	1.1	1.0	0.9	0.9	0.9	1.2	1.7	2.5	2.0	1.6	1.6	1.8	1.8	2.0	2.6	2.7	2.0	2.3	1.8	1.7	1.7	1.2
Average rent ($)[2]																											
Bachelor	309	318	324	326	328	334	329	331	338	337	339	357	378	379	388	405	420	451	464	447	488	524	527	578	586	613	634
One-bedroom	419	427	436	437	442	446	441	446	453	456	473	476	490	508	519	539	557	578	602	615	649	678	704	750	782	813	836
Two-bedroom	531	539	553	557	559	561	567	568	574	582	588	605	622	645	664	683	709	740	769	809	837	875	911	969	1,016	1,045	1,068
3+ bedroom	614	637	654	664	655	665	655	665	671	677	729	706	724	779	785	795	839	874	920	946	1,056	1,050	1,027	1,180	1,191	1,230	1,327
Demand Influences																											
Population on July 1 (thousands)[3,5]	665.8	671.2	673.4	675.9	677.7	680.3	684.1	683.8	684.7	688.2	692.5	695.9	700.0	704.3	710.3	713.1	715.9	719.1	723.3	729.3	736.4	746.1	759.4	770.5	783.0	794.7	811.9
Labour force participation rate (%)[3]	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	69.8	70.9	70.0	70.4	68.9	69.6	70.5	70.5	70.1	70.3	69.2	69.7	69.2	67.8	69.2	68.6
Employment (% change)[4]	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	2.5	-0.2	1.6	-0.5	2.0	1.9	1.1	-0.6	0.9	-0.3	3.1	0.6	-0.2	3.3	0.1
Unemployment rate (%)[3]	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	5.2	5.2	5.2	5.5	4.8	4.6	4.7	4.3	5.4	5.8	5.9	5.5	5.9	5.8	6	6.6
Net migration[4,6]	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	1,392	1,687	3,251	274	1,229	5,454	6,641	8,210	8,956	10,852	10,720	8,108	9,564	8,656	14,027

[1] Homeowner and Condominium housing units for which construction has been completed but which have not been sold
[2] In privately initiated apartment structures with at least 3 units
[3] Statistics Canada (CANSIM)
[4] CMHC, adapted from Statistics Canada (CANSIM)
[5] Data prior to 1996 are based on 1996 Census Boundaries; Data subsequent to 1995 are based on 2001 Census Boundaries
[6] Data prior to 1997 are based on 1996 Census Boundaries; Data subsequent to 1996 are based on 2001 Census Boundaries
[7] Teranet – National Bank House Price Index™
[8] CMHC Seniors' Housing Survey. Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

** Data suppressed to protect confidentiality or data not statistically reliable
N/A: Not applicable
Source: CMHC (Starts and Completions Survey, Market Absorption Survey, Rental Market Survey, Seniors' Housing Survey, Secondary Rental Market); Statistics Canada (CANSIM)

Last Updated: July 2017

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Appendix 4

Housing Starts by Dwelling Type and Census Subdivision for Centres 10,000+

Logements mis en chantier selon le type de logements et la subdivision de recensement, centres de 10 000 habitants et plus
2017

Province	Centre	Census Subdivision *Subdivision de recensement*	Singles *Individuels*	Semis *Jumelés*	Row *En bande*	Apartment and Other *Appartements et autres*	Total
Man./*Man.*	Winnipeg	Taché (RM)	47	--	4	24	75
Man./*Man.*	Winnipeg	Ritchot (RM)	61	--	--	14	75
Man./*Man.*	Winnipeg	Macdonald (RM)	111	2	--	--	113
Man./*Man.*	Winnipeg	St. François Xavier (RM)	4	--	--	--	4
Man./*Man.*	Winnipeg	Winnipeg (CY)	1,832	394	571	2,226	5,023
Man./*Man.*	Winnipeg	Headingley (RM)	31	--	42	24	97
Man./*Man.*	Winnipeg	Springfield (RM)	76	16	3	21	116
Man./*Man.*	Winnipeg	East St. Paul (RM)	42	--	--	8	50
Man./*Man.*	Winnipeg	West St. Paul (RM)	25	--	--	--	25
Man./*Man.*	Winnipeg	St. Clements (RM)	42	--	--	--	42
Man./*Man.*	Winnipeg	First Nations (Winnipeg) (R)	--	--	--	--	--
Man./*Man.*	Winnipeg	Rosser (RM)	1	--	--	--	1
Man./*Man.*	**Winnipeg**	**Total**	**2,272**	**412**	**620**	**2,317**	**5,621**
Man./*Man.*	Brandon	Oakland-Wawanesa (MU)	4	--	--	--	4
Man./*Man.*	Brandon	Whitehead (RM)	3	--	--	--	3
Man./*Man.*	Brandon	Cornwallis (RM)	14	--	--	--	14
Man./*Man.*	Brandon	Brandon (CY)	67	14	40	128	249
Man./*Man.*	Brandon	Elton (RM)	3	--	--	--	3
Man./*Man.*	**Brandon**	**Total**	**91**	**14**	**40**	**128**	**273**
Man./*Man.*	Hanover RM	Hanover (RM)	188	30	--	--	218
Man./*Man.*	**Hanover RM**	**Total**	**188**	**30**	**--**	**--**	**218**
Man./*Man.*	St. Andrews RM	St. Andrews (RM)	21	--	--	--	21
Man./*Man.*	**St. Andrews RM**	**Total**	**21**	**--**	**--**	**--**	**21**
Man./*Man.*	Portage la Prairie	Portage la Prairie (CY)	17	4	4	--	25
Man./*Man.*	**Portage la Prairie**	**Total**	**17**	**4**	**4**	**--**	**25**
Man./*Man.*	Steinbach	Steinbach (CY)	88	36	8	125	257
Man./*Man.*	**Steinbach**	**Total**	**88**	**36**	**8**	**125**	**257**
Man./*Man.*	Thompson	Thompson (CY)	--	--	--	--	--
Man./*Man.*	**Thompson**	**Total**	**--**	**--**	**--**	**--**	**--**
Man./*Man.*	Winkler	Stanley (RM)	22	4	--	--	26
Man./*Man.*	Winkler	Winkler (CY)	78	8	4	12	102
Man./*Man.*	Winkler	Morden (CY)	30	4	8	24	66
Man./*Man.*	**Winkler**	**Total**	**130**	**16**	**12**	**36**	**194**
Man./*Man.*	**Total**	**Total**	**2,807**	**512**	**684**	**2,606**	**6,609**
Canada (10,000+)	**Total**	**Total**	**63,490**	**11,373**	**27,146**	**100,365**	**202,374**

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Source: CMHC (Starts and Completions Survey) / *Source: SCHL (mises en chantier et des achèvements)*

Appendix 5

Housing Starts by Dwelling Type and Census Subdivision for Centres 10,000+

Logements mis en chantier selon le type de logements et la subdivision de recensement, centres de 10 000 habitants et plus
2018

Province	Centre	Census Subdivision Subdivision de recensement	Singles Individuels	Semis Jumelés	Row En bande	Apartment and Other Appartements et autres	Total
Man./Man.	Winnipeg	Taché (RM)	41	--	4	--	45
Man./Man.	Winnipeg	Ritchot (RM)	64	--	4	--	68
Man./Man.	Winnipeg	Macdonald (RM)	99	--	--	10	109
Man./Man.	Winnipeg	St. François Xavier (RM)	8	--	--	--	8
Man./Man.	Winnipeg	Winnipeg (CY)	1,449	188	483	2,746	4,866
Man./Man.	Winnipeg	Headingley (RM)	31	--	--	--	31
Man./Man.	Winnipeg	Springfield (RM)	47	18	--	--	65
Man./Man.	Winnipeg	East St. Paul (RM)	41	--	11	--	52
Man./Man.	Winnipeg	West St. Paul (RM)	52	--	46	--	98
Man./Man.	Winnipeg	St. Clements (RM)	42	--	--	--	42
Man./Man.	Winnipeg	First Nations (Winnipeg) (R)	--	--	--	--	--
Man./Man.	Winnipeg	Rosser (RM)	--	--	--	--	--
Man./Man.	**Winnipeg**	**Total**	**1,874**	**206**	**548**	**2,756**	**5,384**
Man./Man.	Brandon	Oakland-Wawanesa (MU)	4	--	--	--	4
Man./Man.	Brandon	Whitehead (RM)	3	--	--	--	3
Man./Man.	Brandon	Cornwallis (RM)	12	--	--	--	12
Man./Man.	Brandon	Brandon (CY)	71	26	115	96	308
Man./Man.	Brandon	Elton (RM)	4	--	--	--	4
Man./Man.	**Brandon**	**Total**	**94**	**26**	**115**	**96**	**331**
Man./Man.	Hanover RM	Hanover (RM)	94	34	--	1	129
Man./Man.	**Hanover RM**	**Total**	**94**	**34**	**--**	**1**	**129**
Man./Man.	St. Andrews RM	St. Andrews (RM)	35	--	--	--	35
Man./Man.	**St. Andrews RM**	**Total**	**35**	**--**	**--**	**--**	**35**
Man./Man.	Selkirk CY	Selkirk CY	24	--	6	--	30
Man./Man.	**Selkirk CY**	**Total**	**24**	**--**	**6**	**--**	**30**
Man./Man.	Portage la Prairie	Portage la Prairie (CY)	15	2	4	187	208
Man./Man.	**Portage la Prairie**	**Total**	**15**	**2**	**4**	**187**	**208**
Man./Man.	Steinbach	Steinbach (CY)	41	22	25	92	180
Man./Man.	**Steinbach**	**Total**	**41**	**22**	**25**	**92**	**180**
Man./Man.	Thompson	Thompson (CY)	--	--	--	--	--
Man./Man.	**Thompson**	**Total**	**--**	**--**	**--**	**--**	**--**
Man./Man.	Winkler	Stanley (RM)	21	--	--	--	21
Man./Man.	Winkler	Winkler (CY)	55	10	3	24	92
Man./Man.	Winkler	Morden (CY)	13	2	8	--	23
Man./Man.	**Winkler**	**Total**	**89**	**12**	**11**	**24**	**136**
Man./Man.	**Total**	**Total**	**2,266**	**302**	**709**	**3,156**	**6,433**
Canada (10,000+)	**Total**	**Total**	**54,220**	**10,116**	**22,558**	**109,818**	**196,712**

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Source: CMHC (Starts and Completions Survey) / Source: SCHL (mises en chantier et des achèvements)

Appendix 6

Excerpts from the City of Winnipeg presentation to Urban Development Institute of Manitoba (UDI): "*OurWinnipeg*, Residential Growth Study", November 20, 2019.

Slide 6 : Residential Growth Study

Residential Growth Study

Winnipeg's population is expected to grow by 200,000 people over the next 20 years. How can it grow in the best way possible?



Why scenarios?

Growth scenarios will be used to:

- Calibrate land use and development policies in Complete Communities.
- Ensure forecasted housing growth can be accommodated in a more reliable, predictable way.
- Provide a basis for more predictable and efficient Capital project planning.
- Communicate the competing trade-offs and objectives inherent in the different ways the city can grow.
- Provide land use and development assumptions for other City of Winnipeg long-range planning exercises.

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8

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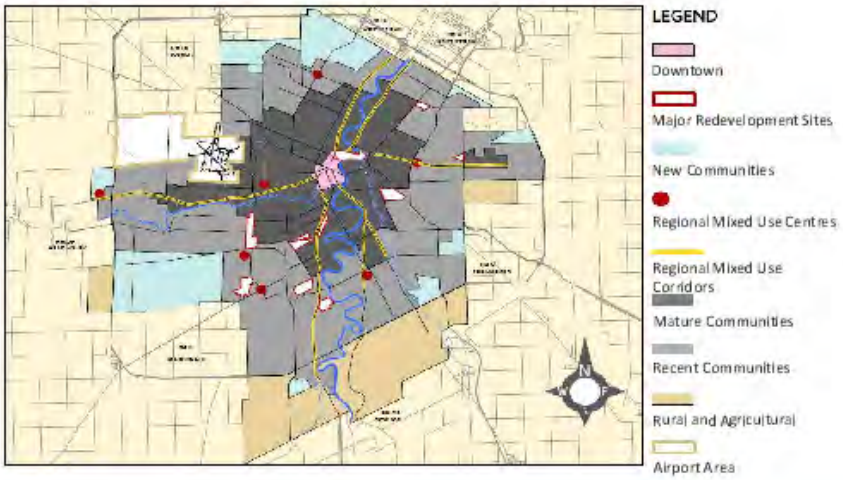
Slide 8: Urban Structure Basis

Basis for scenarios

Urban Structure

The Urban Structure map is located in the Complete Communities Direction Strategy and provides a framework for how the city will grow over time.



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8

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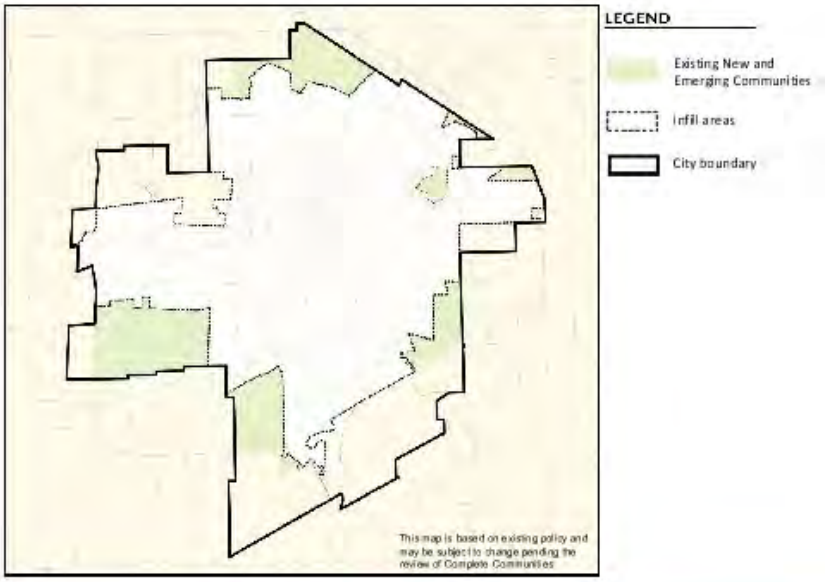
Slide 10: Urban Structure map

Basis for scenarios

Urban Structure

Greenfield areas refer to large undeveloped land areas intended for future urban development, generally located at the city's periphery. In the Urban Structure, this refers to New Communities as well as a subset of Recent Communities called Emerging Communities. For the purpose of this work, **all other urban lands are considered Infill**.



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10

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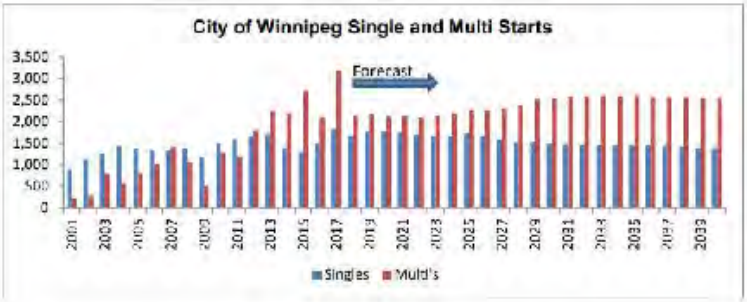
Slide 11: Population and Housing Forecast

Basis for scenarios

Population and housing forecast



Source: CMHC and Conference Board of Canada Long-term Population, Housing, and Economic Forecast via City of Winnipeg Community Trends Report 2019

This work is based on the most recent population and housing forecast commissioned by the City of Winnipeg.

This forecast predicts that Winnipeg will welcome 200,000 people over the next 20 years. This is driven by international migration.

This translates to approximately 38,100 single family homes, 8,200 row houses, and 44,380 apartments over 20 years.

Annually, this works out to an average of 1,700 singles, 400 rows, and 2,000 apartment units.

The Residential Growth Study considers how these units should be best distributed.

Slide 12: Growth Trends

Scenario considerations

Growth trends

More multifamily units

The last decade has seen a substantial shift in the types of residential units that have been built in the City of Winnipeg. For much of the last generation, the market has traditionally provided more single family than multifamily units year-over-year. However, that is starting to change. Over the last five years, single family dwellings have comprised only one third of all new units.



Source: CMHC via City of Winnipeg Community Trends Report 2019

Greater greenfield densities

Greenfield development has become much more dense than suburbs planned even just ten years ago, largely due to the increase in new multifamily units.

Bridgwater Forest, the first phase of the Waverley West area, began building in 2007. This area is approximately 8 units per net acre (roughly equivalent to Amber Trails or South River Heights), but more recent developments are planned to densities between 12 and 15 units per net acre (i.e. between The Maples and Wolseley).

Slide 15: Benefits of Infill Development

Scenario considerations

Benefits of infill development

Infill helps reduce our environmental footprint by:

- **Best** supporting **sustainable modes of transportation**, thereby lessening road deterioration and **need** for expansions, congestion, and CO2 emissions.
- **preserving greenfield land for agricultural and future residential purposes.**



Infill improves the existing housing stock, while **more people** better supports retail and community amenities.





Infill development provides **greater housing options**

By using existing pipes, roads, community centres, and other City assets, **infill development lessens the need for new infrastructure** the City must then maintain in perpetuity.



15

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Slide 17: Responding to Public Feedback

Planning for 20 years of growth

Responding to public feedback

During Phase 1 of the OurWinnipeg review, we heard that Winnipeggers want to:

- Maximize existing infrastructure and services by accommodating growth in existing communities through context-sensitive infill and mixed use development.
- Ensure all neighbourhoods provide a range of housing types.
- Increase the range of transportation options, such as walking, cycling, and Transit, to meet daily needs.

All three scenarios provide opportunities to achieve these objectives, to varying degrees.

The scenarios are intended to assess the extent to which the City should promote infill development, and therefore, determine which scenario is most appropriate.



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17

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Appendix 7

Comparative Density Analysis in Winnipeg Neighbourhoods

Comparative Density Analysis in Winnipeg Neighbourhoods

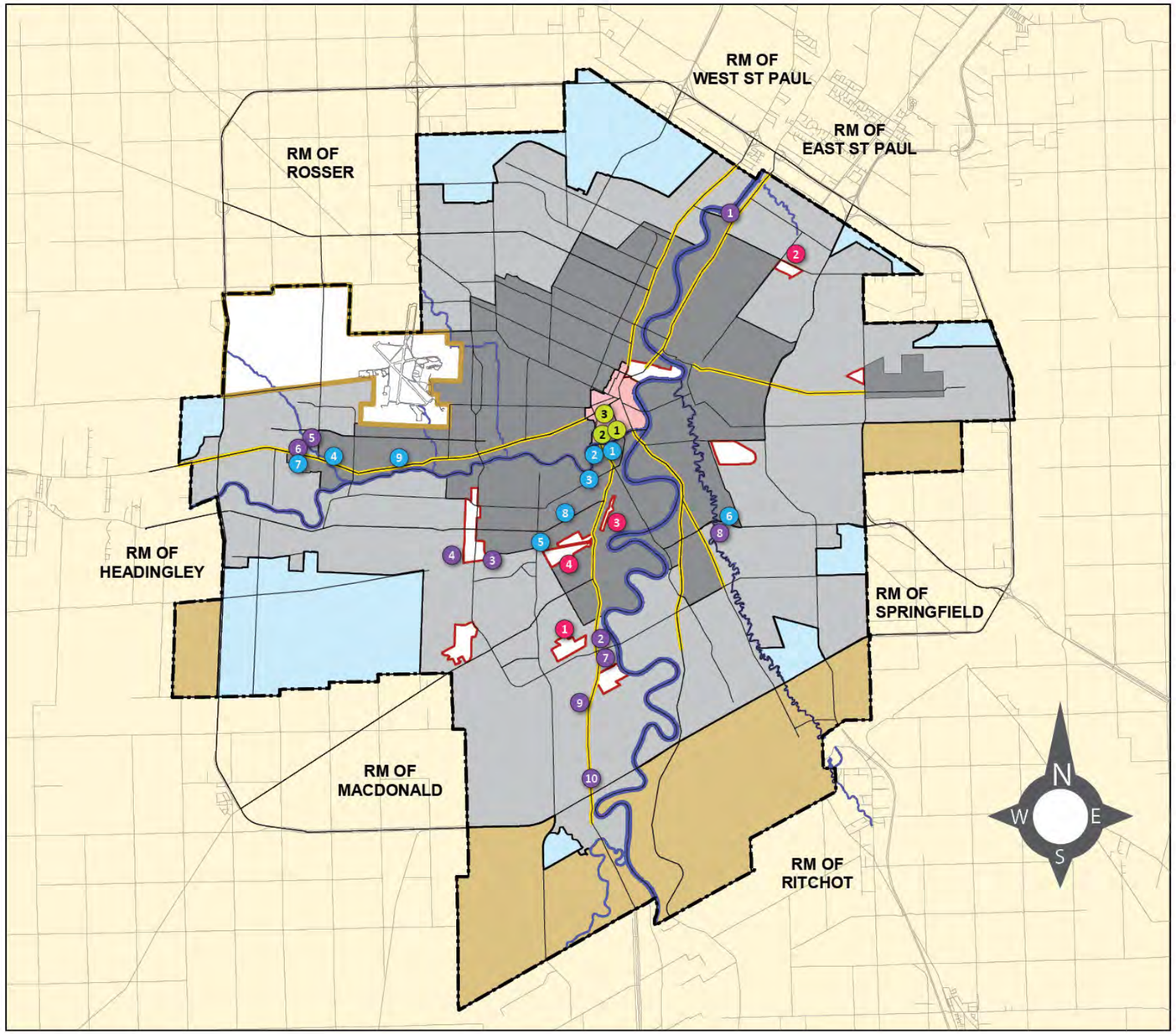
Building Information Location	Total Units	Lot Area Acres	Density Units/Acre*
Taylor at Portsmouth	928	33.8	27
Pembina South	954	25.2	38
Taylor at Beaverbrook	387	7.7	50
Bishop Grandin Crossing MRS	1,387	31.6	44
1310 Archibald	210	4.6	46
Valhalla Drive	1,444	29.5	49
Bison Drive at Pembina	525	10.0	52
Palliser MRS	1,900	35.0	54
Fort Rouge Yards MRS	900	14.8	61
Parker/Fulton Grove MRS**	1,918	30.8	62
Sturgeon at Hallonquist	664	10.7	62
Wellington Crescent	925	14.4	64
Pembina Highway at Plaza	1,076	16.2	67
Portage at Mount Royal	1,215	16.5	73
Taylor at Cambridge	481	6.2	78
Osborne Village East	984	12.3	80
Osborne Village West	2,482	29.5	84
Grant Avenue	938	10.9	86
Westwood at Portage	308	3.4	91
77 University Crescent	394	3.9	101
Alpine and Niakwa	638	4.9	130
Assiniboine West of Carlton	1,159	7.7	150
Assiniboine East of Carlton	1,187	7.0	171
529 Country Club Blvd	107	0.6	178
Courts of St. James	715	3.9	185
Colony Square	360	1.9	190

Notes

*** Units/acre are Net of City ROW's and Greenspace dedication.**

**** Parker/Fulton Grove Density is based on all building typologies in the development:**

- **Net Low Density Mixed Housing Area is 15 units/acre**
- **Net Density of Multi-Family is 96 units/acre**



Urban Structure
Taken from figure 02a of Complete Communities

0 2 4 6 8 10
Kilometers

LEGEND

- Downtown
- Rural and Agricultural
- Mature Communities
- Major Redevelopment Sites (MRS)
- Recent Communities
- Regional Mixed Use Corridor
- New Communities
- Airport Area

DENSITY STUDY AREAS

Downtown

1. Assiniboine (East of Carlton)
2. Assiniboine (West of Carlton)
3. Colony Square

Mature Communities

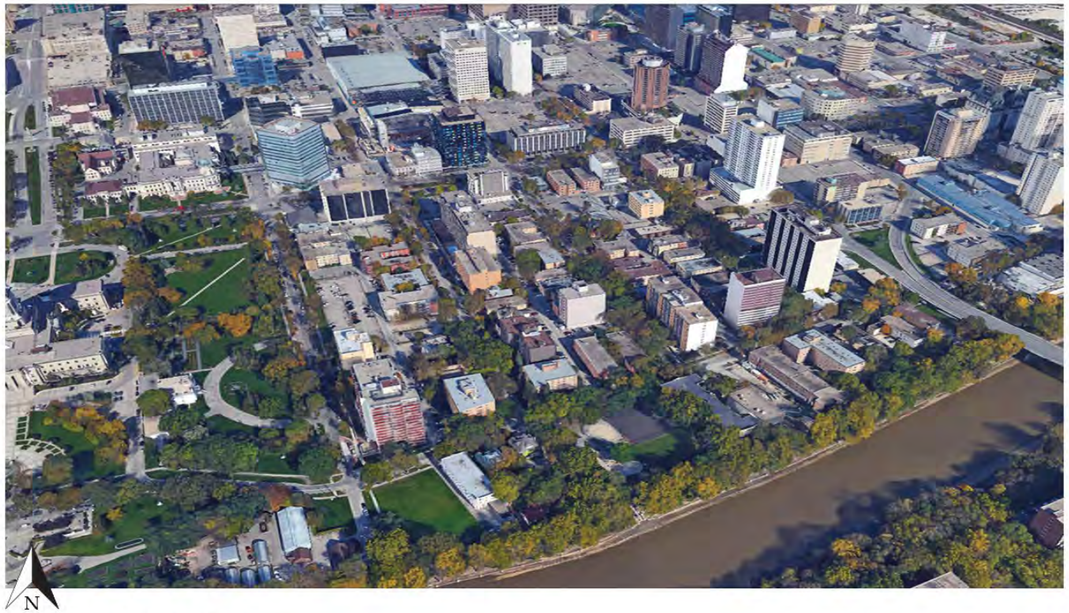
1. Osborne Village - East
2. Osborne Village - West
3. Wellington Crescent
4. Courts of St. James
5. Taylor Ave. at Cambridge
6. 1310 Archibald St
7. 529 Country Club Blvd.
8. Grant Ave.
9. Portage Ave. at Mount Royal

Recent Communities

1. Valhalla Drive
2. Pembina Hwy. at Plaza Dr.
3. Taylor Ave. at Beaverbrook
4. Taylor Ave. at Portsmouth
5. Sturgeon Rd. at Hallonquist
6. Westwood Rd. at Portage
7. 77 University Crescent
8. Alpine Ave. & Niakwa
9. Bison Dr. at Pembina
10. Pembina Hwy South

MRS

1. Bishop Grandin Crossing
2. Palliser
3. the Yards at Fort Rouge
4. Fulton Grove at Parker Lands



Assiniboine Area - Aerial View



Assiniboine Area - Lot Densities

KEY

DWELLING UNITS PER ACRE
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



ASSINIBOINE AVENUE EAST OF CARLTON

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	4	64	16,976	0.39	0.16	164	406
2	3	24	12,068	0.28	0.11	87	214
3	3	18	7,242	0.17	0.07	108	268
4	4	30	10,864	0.25	0.10	120	297
5	3	15	6,036	0.14	0.06	108	267
6	10	122	28,571	0.66	0.27	186	460
7	3	18	6,031	0.14	0.06	130	321
8	6	32	12,064	0.28	0.11	116	286
9	3	18	6,035	0.14	0.06	130	321
10	3	24	9,053	0.21	0.08	115	285
11	3	18	8,450	0.19	0.08	93	229
12	3	18	6,761	0.16	0.06	116	287
13	17	105	19,010	0.44	0.18	241	595
14	6	45	16,860	0.39	0.16	116	287
15	3	18	6,056	0.14	0.06	129	320
16	3	24	12,113	0.28	0.11	86	213
17	3	12	6,057	0.14	0.06	86	213
18	3	15	6,057	0.14	0.06	108	267
19	3	12	6,057	0.14	0.06	86	213
20	3	18	6,057	0.14	0.06	129	320
21	22	254	24,223	0.56	0.23	457	1129
22	4	21	4,788	0.11	0.04	191	472
23	26	253	24,227	0.56	0.23	455	1124
24	3	6	16,860	0.39	0.16	16	38
25	3	3	24,227	0.56	0.23	5	13
TOTAL SITE	**1187**		**302,743**	**6.95**	**2.81**	**171**	**422**

ASSINIBOINE AVENUE EAST OF CARLTON DENSITY INFORMATION

Downtown 1



Assiniboine Area - Aerial View



Assiniboine Area - Lot Densities

KEY

- 300+
- 250-299
- 175-249
- 120-174
- 90-119
- 70-89
- 50-69
- 30-49
- 1-29

DWELLING UNITS PER ACRE



ASSINIBOINE AVENUE WEST OF CARLTON

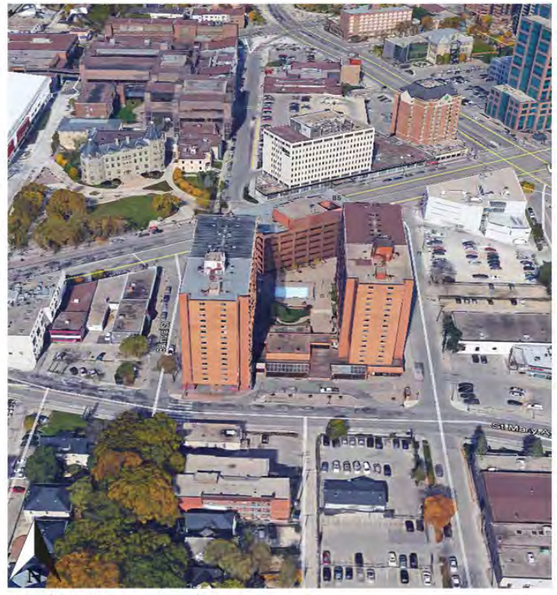
Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	4	12	6,029	0.14	0.06	87	214
2	4	32	9,045	0.21	0.08	154	381
3	4	32	9,045	0.21	0.08	154	381
4	8	61	12,065	0.28	0.11	220	544
5	3	1	4,978	0.11	0.05	9	22
6	16	157	20,229	0.46	0.19	338	835
7	4	32	16,888	0.39	0.16	83	204
8	3	36	12,064	0.28	0.11	130	321
9	4	32	12,065	0.28	0.11	116	285
10	3	1	6,033	0.14	0.06	7	18
11	3	1	6,033	0.14	0.06	7	18
12	3	18	6,033	0.14	0.06	130	321
13	3	11	7,240	0.17	0.07	66	164
14	6	45	15,604	0.36	0.14	126	310
15	12	176	36,136	0.83	0.34	212	524
16	7	67	18,060	0.41	0.17	162	399
17	3	1	6,018	0.14	0.06	7	18
18	3	18	6,018	0.14	0.06	130	322
19	3	1	6,018	0.14	0.06	7	18
20	3	18	6,018	0.14	0.06	130	322
21	9	96	18,048	0.41	0.17	232	573
22	5	96	12,266	0.28	0.11	341	842
23	4	18	9,034	0.21	0.08	87	214
24	3	28	15,053	0.35	0.14	81	200
25	4	40	15,050	0.35	0.14	116	286
26	3	18	6,018	0.14	0.06	130	322
27	3	18	6,018	0.14	0.06	130	322
28	3	1	6,018	0.14	0.06	7	18
29	3	10	6,017	0.14	0.06	72	179
30	10	34	6,016	0.14	0.06	246	608
31	3	48	14,906	0.34	0.14	140	347
TOTAL SITE	**1159**		**336,063**	**7.71**	**3.12**	**150**	**371**

ASSINIBOINE AVENUE
WEST OF CARLTON
DENSITY INFORMATION

Downtown 2

COLONY SQUARE AT PORTAGE AVE

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	15	360	82,538	1.89	0.77	190	469
TOTAL SITE		**360**	**82,538**	**1.89**	**0.77**	**190**	**469**



Colony Square - Aerial View

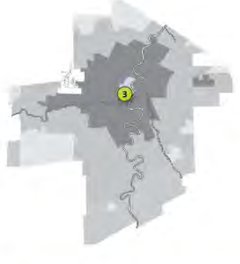


Colony Square - Lot Density

KEY

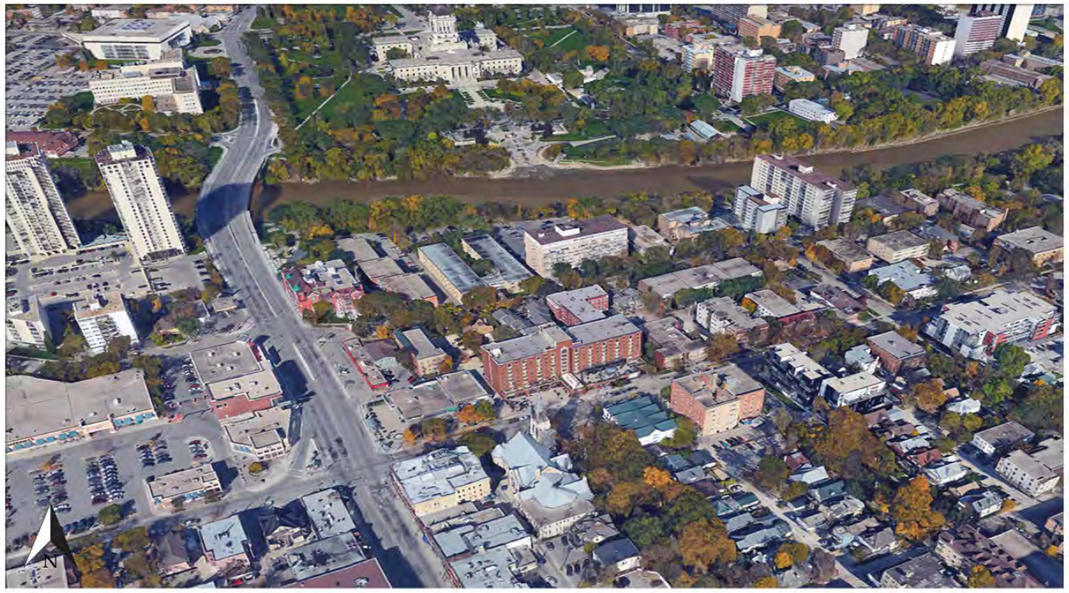
- 300+
- 250-299
- 175-249
- 120-174
- 90-119
- 70-89
- 50-69
- 30-49
- 1-29

DWELLING UNITS PER ACRE



COLONY SQUARE AT PORTAGE AVENUE DENSITY INFORMATION

Downtown 3



Osborne Village East - Aerial View



Osborne Village East - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



OSBORNE VILLAGE EAST

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	3&4	37	26,585	0.61	0.25	61	150
2	2.5	19	10,229	0.23	0.10	81	200
3	3	30	12,909	0.30	0.12	101	250
4	3	20	9,585	0.22	0.09	91	225
5	12	112	41,210	0.95	0.38	118	293
6	3	21	11,829	0.27	0.11	77	191
7	8	23	16,000	0.37	0.15	63	155
8	5	40	26,352	0.60	0.24	66	163
9	4	40	27,252	0.63	0.25	64	158
10	3	25	22,712	0.52	0.21	48	118
11	10	99	56,628	1.30	0.53	76	188
12	3	25	12,826	0.29	0.12	85	210
13	3	60	56,628	1.30	0.53	46	114
14	2	14	11,128	0.26	0.10	55	135
15	3	66	56,628	1.30	0.53	51	125
16	3	18	14,076	0.32	0.13	56	138
17	6	37	21,246	0.49	0.20	76	187
18	7	108	26,465	0.61	0.25	178	439
19	3	16	12,029	0.28	0.11	58	143
20	4	48	14,255	0.33	0.13	147	362
21	4	32	8,602	0.20	0.08	162	400
22	4	32	9,108	0.21	0.08	153	378
23	4	30	13,189	0.30	0.12	99	245
24	4	32	17,015	0.39	0.16	82	202
TOTAL SITE	**984**		**534,486**	**12.27**	**4.97**	**80**	**198**

OSBORNE VILLAGE EAST DENSITY INFORMATION



Osborne Village West - Aerial View



Osborne Village West - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



OSBORNE VILLAGE WEST

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	1 - 2	1 per house	6602 - 20800	0.15 - 0.47	0.06 - 0.19	≤ 6	≤ 17
Sub-Total		**25**	**286,818**	**6.58**	**2.66**	**4**	**9**
2	4	48	20,692	0.48	0.19	101	250
3	9	144	27,525	0.63	0.26	228	563
4	11	120	27,525	0.63	0.26	190	469
5	12	120	65,340	1.50	0.61	80	198
6	16	128	25,700	0.59	0.24	217	536
7	6	90	43,560	1.00	0.40	90	222
8	12	181	105,221	2.42	0.98	75	185
9	1.5	1	18,557	0.43	0.17	2	6
10	2&3	19	13,000	0.30	0.12	64	157
11	12	142	73,579	1.69	0.68	84	208
12	12	118	36,615	0.84	0.34	140	347
13	15	111	34,228	0.79	0.32	141	349
14	1.5	1	19,588	0.45	0.18	2	5
15	2	4	11,052	0.25	0.10	16	39
16	2	4	11,052	0.25	0.10	16	39
17	2.5	1	15,602	0.36	0.14	3	7
18	9	34	14,755	0.34	0.14	100	248
19	2	1	7,451	0.17	0.07	6	14
20	2	2	7,257	0.17	0.07	12	30
21	2.5	6	9,868	0.23	0.09	26	65
22	2	3	7,460	0.17	0.07	18	43
23	7	24	14,232	0.33	0.13	73	182
24	8	31	15,782	0.36	0.15	86	211
25	29	230	56,628	1.30	0.53	177	437
26	26	208	87,120	2.00	0.81	104	257
27	25	200	43,440	1.00	0.40	201	496
28	3	32	77,362	1.78	0.72	18	45
29	29	304	77,362	1.78	0.72	171	423
30	15	150	30,392	0.70	0.28	215	531
TOTAL SITE	**2482**		**1,284,763**	**29.49**	**11.94**	**84**	**208**

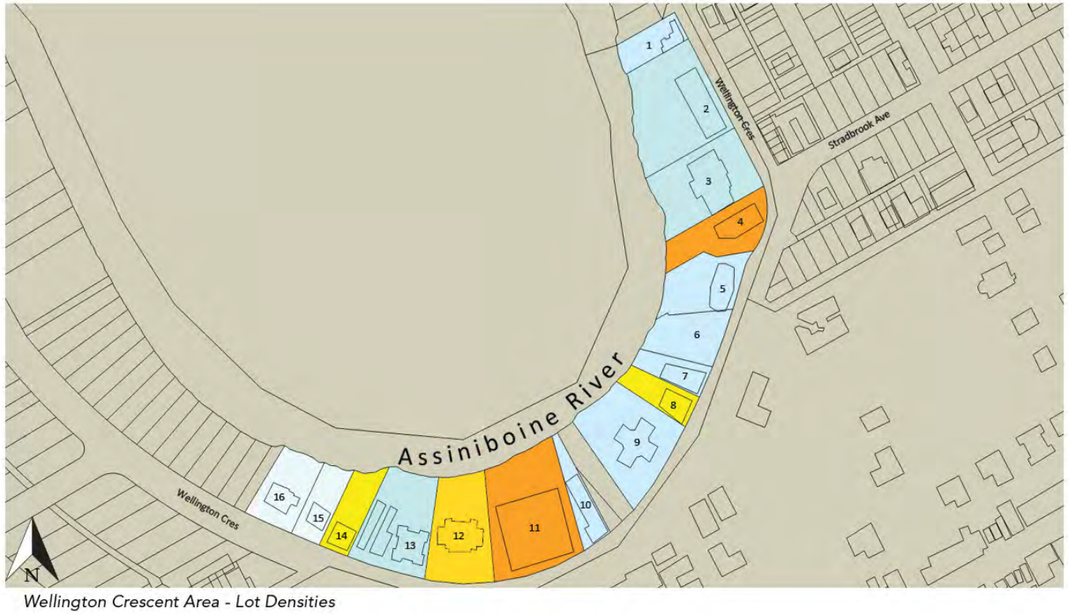
OSBORNE VILLAGE WEST
DENSITY INFORMATION



Wellington Crescent - Aerial View

WELLINGTON CRESCENT

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	14	26	19,917	0.46	0.19	57	141
2	12	93	83,710	1.92	0.78	48	120
3	11	68	64,856	1.49	0.60	46	113
4	15	75	26,614	0.61	0.25	123	303
5	13	46	39,870	0.92	0.37	50	124
6	10	52	32,942	0.76	0.31	69	170
7	9	24	18,167	0.42	0.17	58	142
8	8	33	20,286	0.47	0.19	71	175
9	12	84	70,394	1.62	0.65	52	128
10	3	20	14,925	0.34	0.14	58	144
11	17	188	60,984	1.40	0.57	134	332
12	20	102	46,258	1.06	0.43	96	237
13	6	48	43,560	1.00	0.40	48	119
14	11	51	25,363	0.58	0.24	88	216
15	3	13	22,888	0.53	0.21	25	61
16	2	2	34,645	0.80	0.32	3	6
TOTAL SITE	925		625,379	14.36	5.81	64	159



Wellington Crescent Area - Lot Densities

KEY

- 300+
- 250-299
- 175-249
- 120-174
- 90-119
- 70-89
- 50-69
- 30-49
- 1-29

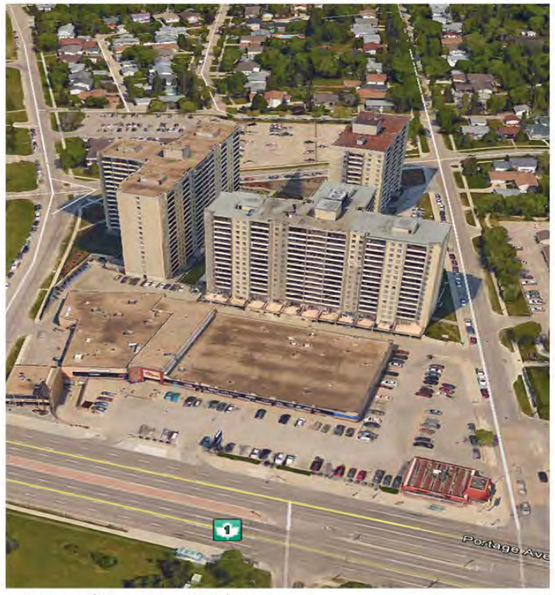
DWELLING UNITS PER ACRE



WELLINGTON CRESCENT DENSITY INFORMATION

COURTS OF ST. JAMES

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	16	317	70,081	1.61	0.65	197	487
2	15	140	44,662	1.03	0.41	137	337
3	15	258	53,618	1.23	0.50	210	518
TOTAL SITE		**715**	**168,361**	**3.87**	**1.56**	**185**	**457**



Courts of St James - Aerial View



Courts of St James - Lot Density

KEY

- 300+
- 250-299
- 175-249
- 120-174
- 90-119
- 70-89
- 50-69
- 30-49
- 1-29

DWELLING UNITS PER ACRE



COURTS OF ST. JAMES
DENSITY INFORMATION

TAYLOR AVENUE AT CAMBRIDGE STREET

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	10	100	60,984	1.40	0.57	71	177
2	10	100	65,340	1.50	0.61	67	165
3	6	110	35,464	0.81	0.33	135	334
4	9	81	40,804	0.94	0.38	86	214
5	10	90	65,340	1.50	0.61	60	148
TOTAL SITE	**481**		**267,932**	**6.15**	**2.49**	**78**	**193**



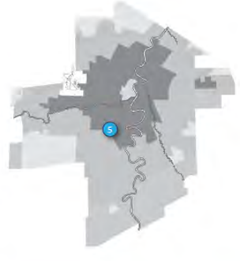
Taylor at Cambridge - Aerial View



Taylor at Cambridge - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



TAYLOR AVENUE AT CAMBRIDGE STREET DENSITY INFORMATION

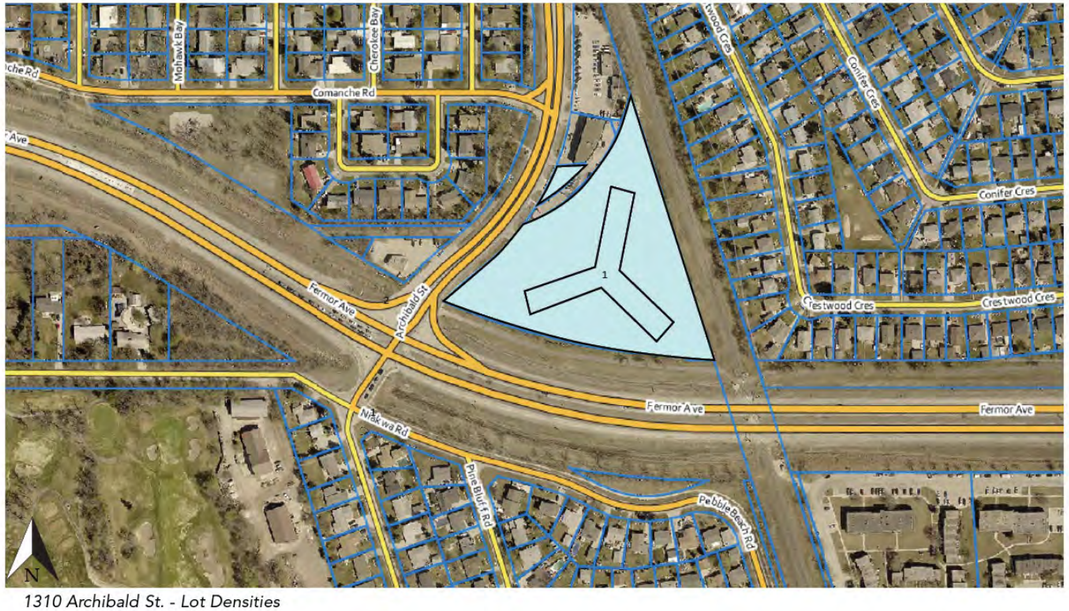
1310 ARCHIBALD STREET

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	7	210	200,376	4.60	1.86	46	113

TOTAL SITE	**210**	**200,376**	**4.60**	**1.86**	**46**	**113**



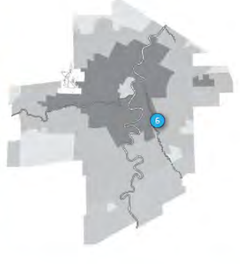
1310 Archibald St. - Aerial View



1310 Archibald St. - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



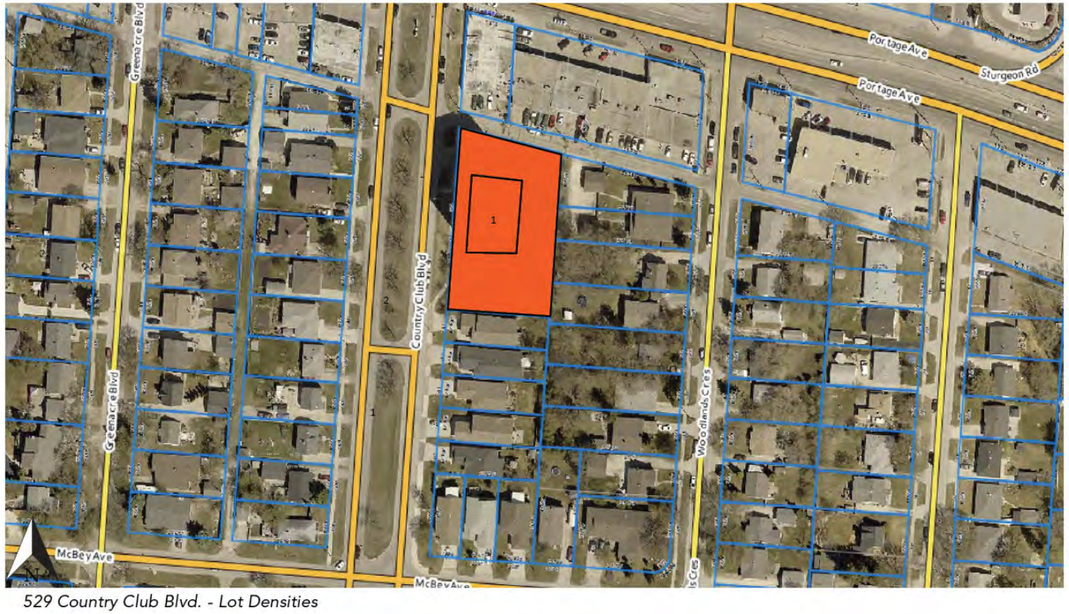
1310 Archibald Street
Density Information

529 COUNTRY CLUB BLVD

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	14	107	26,136	0.60	0.24	178	441
TOTAL SITE		**107**	**26,136**	**0.60**	**0.24**	**178**	**441**



529 Country Club Blvd. - Aerial View



529 Country Club Blvd. - Lot Densities

KEY

- 300+
- 250-299
- 175-249
- 120-174
- 90-119
- 70-89
- 50-69
- 30-49
- 1-29

DWELLING UNITS PER ACRE



529 COUNTRY CLUB BLVD DENSITY INFORMATION



Grant Avenue - Aerial View

GRANT AVENUE AREA

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	12	120	38,263	0.88	0.36	137	338
2	5	70	50,747	1.16	0.47	60	148
3	4	48	33,453	0.77	0.31	63	154
4	3	18	14,862	0.34	0.14	53	130
5	3	18	14,858	0.34	0.14	53	130
6	6	36	14,871	0.34	0.14	105	261
7	6	96	44,554	1.02	0.41	94	232
8	8	96	37,133	0.85	0.34	113	278
9	11	88	34,167	0.78	0.32	112	277
10	3	18	16,340	0.38	0.15	48	119
11	3	36	23,668	0.54	0.22	66	164
12	5	70	44,467	1.02	0.41	69	169
13	7	56	12,549	0.29	0.12	194	480
14	5	60	36,029	0.83	0.33	73	179
15	5	60	37,147	0.85	0.35	70	174
16	6	48	19,697	0.45	0.18	106	262
TOTAL SITE		**938**	**472,805**	**10.85**	**4.39**	**86**	**214**



Grant Avenue Area - Lot Densities

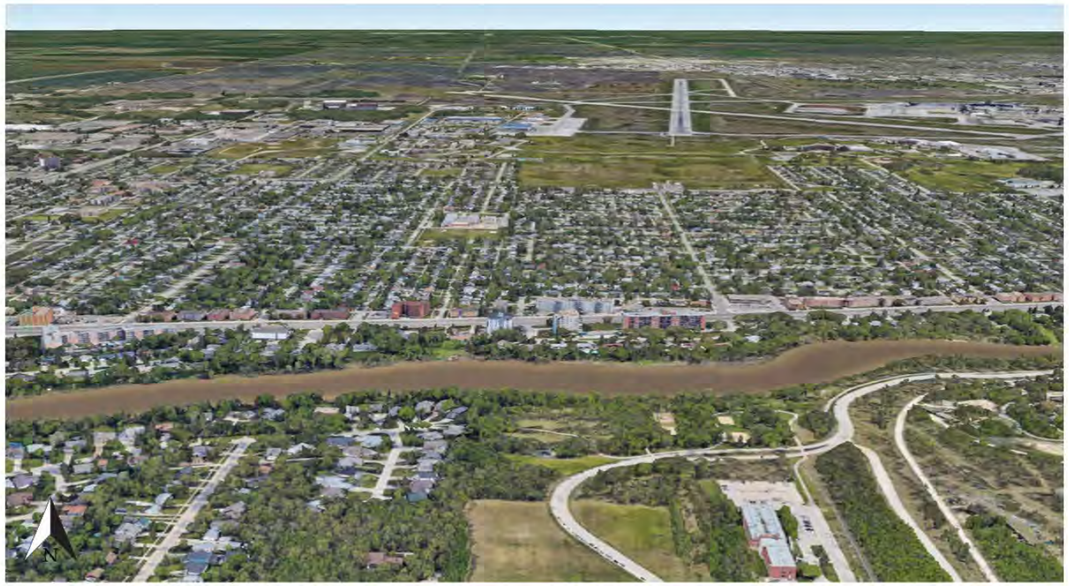
KEY

300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29

DWELLING UNITS PER ACRE



GRANT AVENUE AREA DENSITY INFORMATION



Portage Avenue at Mount Royal - Aerial View



Portage Avenue at Mount Royal - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



PORTAGE AVENUE AT MOUNT ROYAL

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	3	24	16,341	0.38	0.15	64	158
2	3	33	12,378	0.28	0.11	116	287
3	3	18	12,844	0.29	0.12	61	151
4	3&4	136	87,556	2.01	0.81	68	167
5	7	119	65,340	1.50	0.61	79	196
6	9	66	43,560	1.00	0.40	66	163
7	9	54	30,331	0.70	0.28	78	192
8	6	85	43,310	0.99	0.40	85	211
9	4	48	23,562	0.54	0.22	89	219
10	3	30	13,469	0.31	0.13	97	240
11	6	46	26,531	0.61	0.25	76	187
12	3	30	16,225	0.37	0.15	81	199
13	3	30	16221	0.37	0.15	81	199
14	3	18	10,366	0.24	0.10	76	187
15	3	15	8,964	0.21	0.08	73	180
16	3	21	12,833	0.29	0.12	71	176
17	3	18	12,522	0.29	0.12	63	155
18	5	175	117,612	2.70	1.09	65	160
19	7	168	113,256	2.60	1.05	65	160
20	6	85	37,108	0.85	0.34	100	247
TOTAL SITE	**1219**		**637,911**	**16.54**	**6.69**	**74**	**182**

PORTAGE AVENUE
AT MOUNT ROYAL
DENSITY INFORMATION



Valhalla Drive Area - Aerial View

VALHALLA DRIVE AT HENDERSON HWY

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	4 & 7	156	272,825	6.26	2.53	25	62
2	4 & 5	103	161,205	3.70	1.50	28	69
3	3	45	43,147	0.99	0.40	45	112
4	7	77	68,900	1.58	0.64	49	120
5	9	144	94,818	2.18	0.88	66	163
6	4	48	41,550	0.95	0.39	50	124
7	6	108	71,473	1.64	0.66	66	163
8	12	132	42,735	0.98	0.40	135	332
9	12	300	145,981	3.35	1.36	90	221
10	12	300	161,365	3.70	1.50	81	200
11	single/TH	19	118,136	2.71	1.10	7	17
12	single/TH	12	62,899	1.44	0.58	8	21

TOTAL SITE	1444	1,285,033	29.50	11.94	49	121



Valhalla Drive Area - Lot Densities

KEY

- 300+
- 250-299
- 175-249
- 120-174
- 90-119
- 70-89
- 50-69
- 30-49
- 1-29

DWELLING UNITS PER ACRE



VALHALLA DRIVE AT HENDERSON HWY DENSITY INFORMATION

PEMBINA HWY AT ADAMAR & PLAZA

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	14	140	209,089	4.80	1.94	58	144
2	14	140					
3	8	112	156,816	3.60	1.46	47	115
4	4	56					
5	7	98	168,153	3.86	1.56	51	125
6	7	98					
7	11	132	169,413	3.89	1.57	111	274
8	12	300					
TOTAL SITE	**1076**		**703,471**	**16.15**	**6.54**	**67**	**165**



Pembina Area - Aerial View



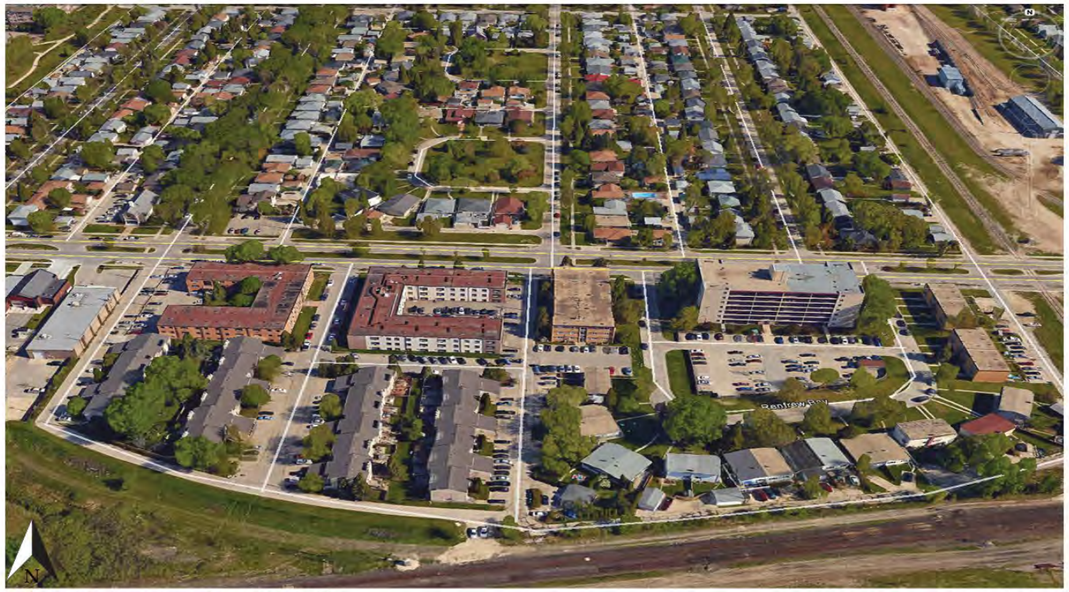
Pembina Area - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



PEMBINA HWY AT ADAMAR & PLAZA DENSITY INFORMATION



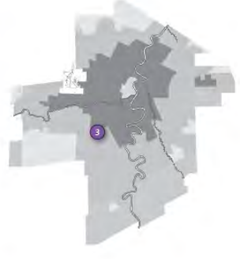
Taylor Avenue at Beaverbrook - Aerial View



Taylor Avenue at Beaverbrook - Lot Densities

KEY

DWELLING UNITS PER ACRE
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



TAYLOR AVENUE AT BEAVERBROOK

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	3	90	43,425	1.00	0.40	90	223
2	2	44	46,376	1.06	0.43	41	102
3	3	60	51,798	1.19	0.48	50	125
4	2	44	44,351	1.02	0.41	43	107
5	3	30	22,983	0.53	0.21	57	141
6	7	83	33,741	0.77	0.31	107	265
7	2	8	11,803	0.27	0.11	30	73
8	2	8	12,565	0.29	0.12	28	69
9 (multiple)	1	20	67,323	1.55	0.63	13	32
TOTAL SITE		**387**	**334,365**	**7.68**	**3.11**	**50**	**125**



Taylor Avenue at Portsmouth - Aerial View



Taylor Avenue at Portsmouth - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



TAYLOR AVENUE AT PORTSMOUTH

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	3	200	361,956	8.31	3.36	24	59
2	3	126	154,427	3.55	1.43	36	88
3	6	66	64,688	1.49	0.60	44	110
4	3	140	273,699	6.28	2.54	22	55
5	3	20	30,633	0.70	0.28	28	70
6	3	48	62,334	1.43	0.58	34	83
7	3	18	26,817	0.62	0.25	29	72
8	5	40	67,950	1.56	0.63	26	63
9	3	126	166,182	3.82	1.54	33	82
10	3	144	262,658	6.03	2.44	24	59
TOTAL SITE	**928**		**1,471,343**	**33.78**	**13.67**	**27**	**68**

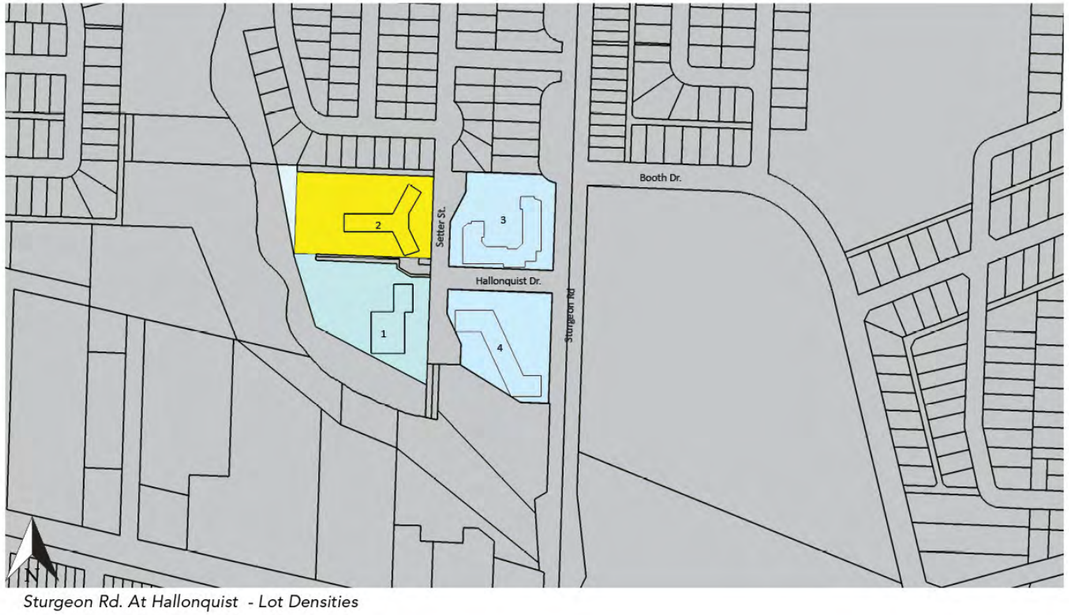
TAYLOR AVENUE AT PORTSMOUTH DENSITY INFORMATION

STURGEON RD. AT HALLONQUIST

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	14	140	126,324	2.90	1.17	48	119
2	14	252	139,392	3.20	1.29	79	195
3	4	156	100,188	2.30	0.93	68	168
4	4	116	100,188	2.30	0.93	50	125
TOTAL SITE	**664**		**466,092**	**10.70**	**4.33**	**62**	**153**



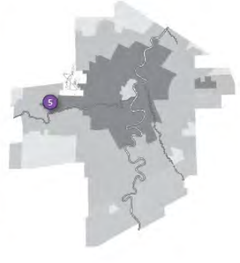
Sturgeon Rd. At Hallonquist - Aerial View



Sturgeon Rd. At Hallonquist - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



STURGEON RD. AT HALLONQUIST DENSITY INFORMATION

WESTWOOD RD. AT PORTAGE

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	14	112	74,052	1.70	0.69	66	163
2	14	196	74,052	1.70	0.69	115	285
TOTAL SITE	**308**		**148,104**	**3.40**	**1.38**	**91**	**224**



Westwood Rd. at Portage - Aerial View



Westwood Rd. at Portage - Lot Densities

KEY

- 300+
- 250-299
- 175-249
- 120-174
- 90-119
- 70-89
- 50-69
- 30-49
- 1-29

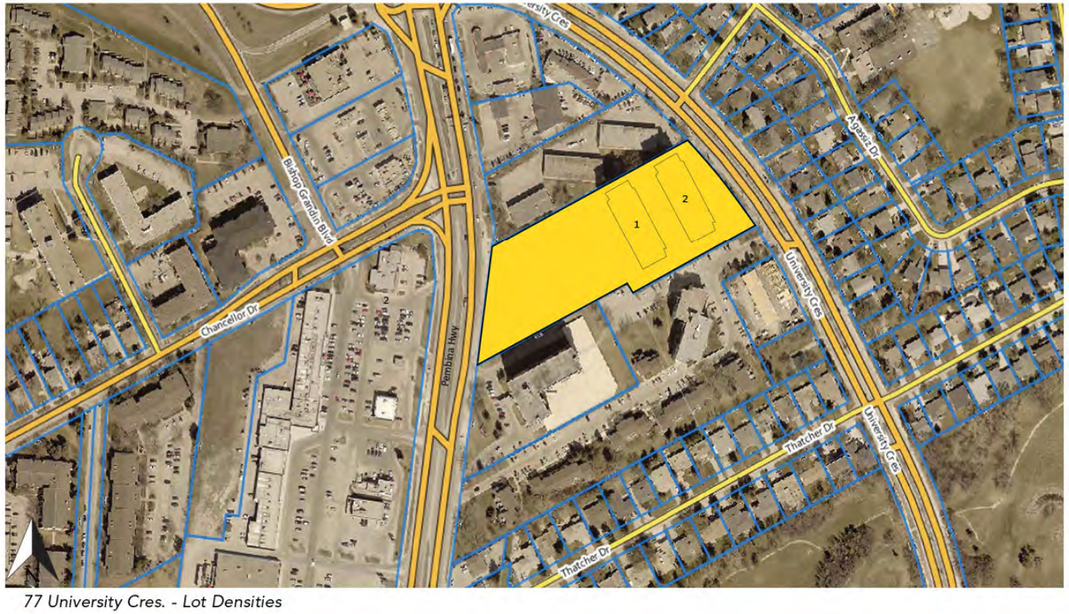
DWELLING UNITS PER ACRE



WESTWOOD RD. AT PORTAGE DENSITY INFORMATION



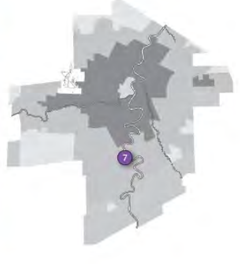
77 University Cres. - Aerial View



77 University Cres. - Lot Densities

KEY

DWELLING UNITS PER ACRE
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



77 UNIVERSITY CRESCENT

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	15	197	169,884	3.90	1.58	101	250
2	15	197					
TOTAL SITE		**394**	**169,884**	**3.90**	**1.58**	**101**	**250**

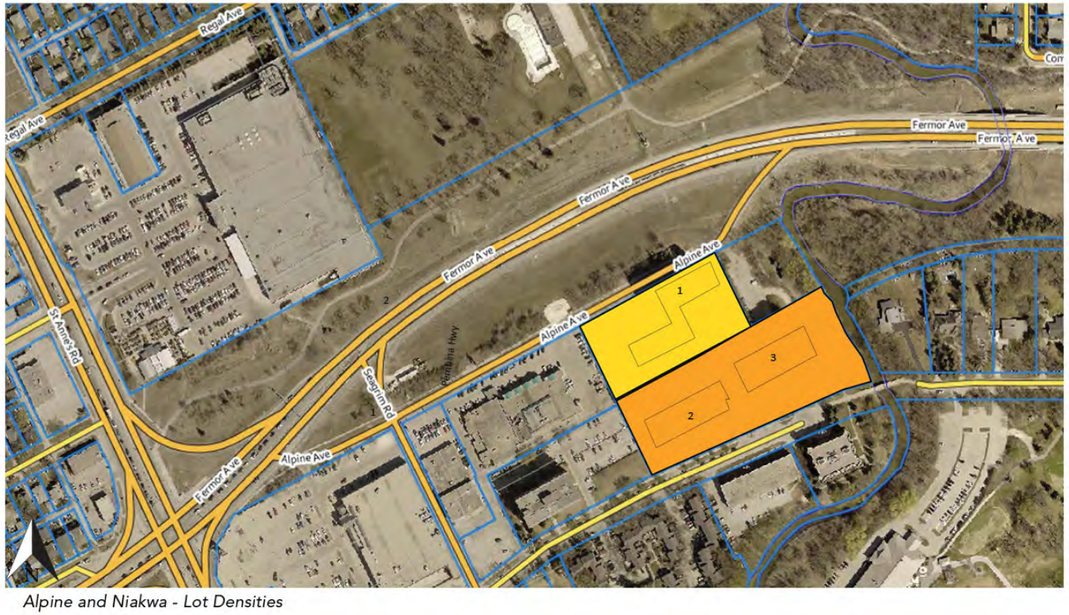
77 UNIVERSITY CRESCENT
DENSITY INFORMATION

ALPINE AND NIAKWA

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	11	186	78,408	1.80	0.73	103	255
2	16	224	135,036	3.10	1.25	146	360
3	16	228					
TOTAL SITE		**638**	**213,444**	**4.90**	**1.98**	**130**	**322**



Alpine and Niakwa - Aerial View

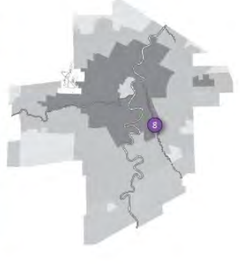


Alpine and Niakwa - Lot Densities

KEY

- 300+
- 250-299
- 175-249
- 120-174
- 90-119
- 70-89
- 50-69
- 30-49
- 1-29

DWELLING UNITS PER ACRE



ALPINE AND NIAKWA
DENSITY INFORMATION

BISON DRIVE AT PEMBINA

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	7 7	98 111	129,679	2.98	1.20	70	173
2	7	112	113,256	2.60	1.05	43	106
3	6	96	113,256	2.60	1.05	37	91
4	7 7	40 68	81,008	1.86	0.75	58	144
TOTAL SITE		**525**	**437,200**	**10.04**	**4.06**	**52**	**129**



Bison Drive at Pembina - Aerial View



Bison Drive at Pembina - Lot Densities

KEY

DWELLING UNITS PER ACRE
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



BISON DRIVE AT PEMBINA
DENSITY INFORMATION

PEMBINA HWY SOUTH

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	6	102	30,331	1.20	0.28	85	362
2	9	168	153,946	3.53	1.43	48	117
3	9	150	153,951	3.53	1.43	42	105
4	3	98	152,461	3.50	1.42	28	69
5	6	108	117,612	2.70	1.09	40	99
6	3 3	39 48	117,612	2.70	1.09	14	36
7	5	70	87,120	2.00	0.81	35	86
8	2	100	156,817	3.60	1.46	28	69
9	2	71	106,782	2.45	0.99	29	72
TOTAL SITE	**954**		**1,076,632**	**25.22**	**10.00**	**38**	**95**



Pembina Hwy South - Aerial View



Pembina Hwy South - Lot Densities

KEY

DWELLING UNITS PER ACRE
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



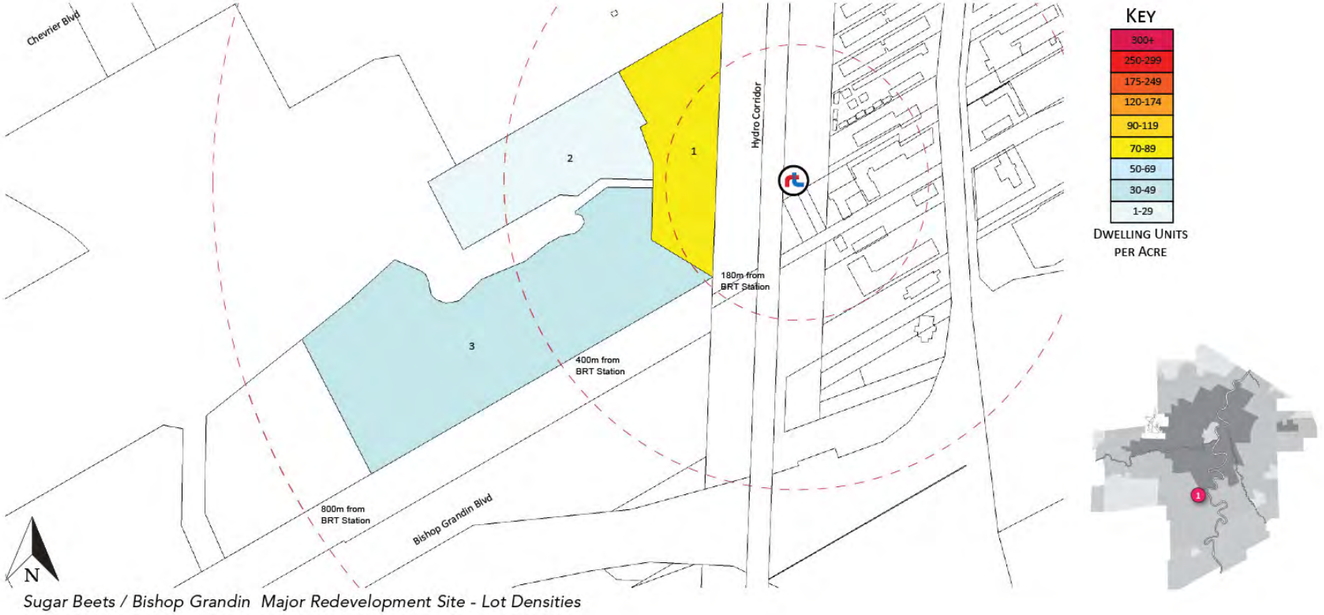
PEMBINA HWY SOUTH
DENSITY INFORMATION



Sugar Beets / Bishop Grandin Major Redevelopment Site - Aerial View

BISHOP GRANDIN CROSSING

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	≤ 22	481	297,515	6.83	2.76	70	174
2	≤ 16	118	257,875	5.92	2.40	20	49
3	≤ 10	788	821,542	18.86	7.63	42	103
TOTAL SITE		**1387**	**1,376,932**	**31.61**	**12.79**	**44**	**108**



Sugar Beets / Bishop Grandin Major Redevelopment Site - Lot Densities

BISHOP GRANDIN CROSSING MAJOR REDEVELOPMENT SITE DENSITY INFORMATION

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	15 to 20	400	217,800	5.00	2.02	80	198
2	2 to 11	1500	1,306,800	30.00	12.14	50	124
TOTAL SITE		**1900**	**1,524,600**	**35.00**	**14.16**	**54**	**134**



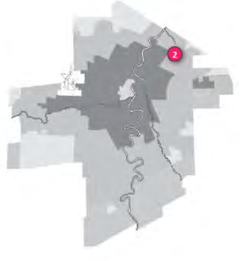
Palliser Major Redevelopment Site - Aerial View



Palliser Major Redevelopment Site - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
30-49
1-29



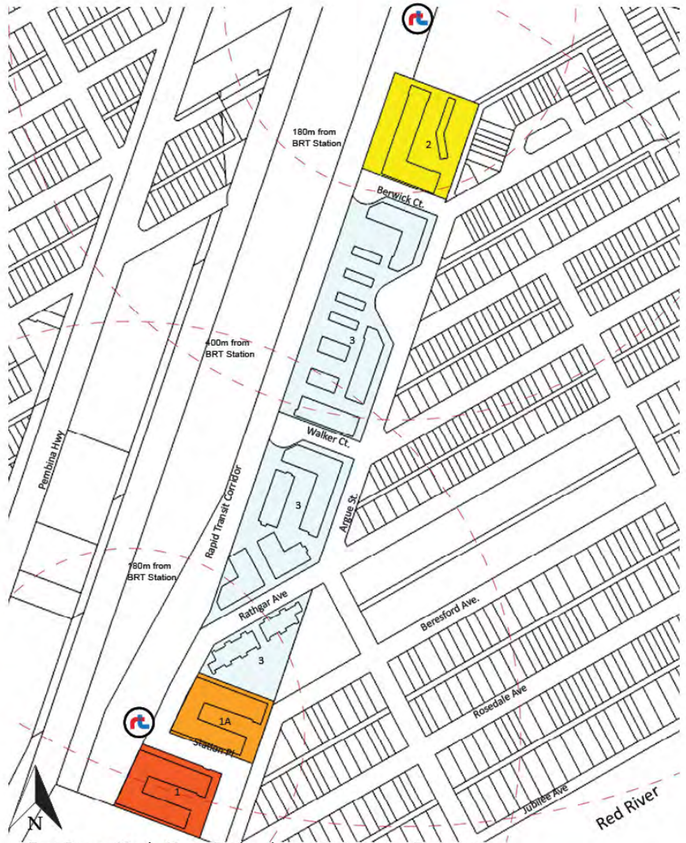
PALLISER MAJOR REDEVELOPMENT SITE DENSITY INFORMATION

FORT ROUGE YARDS

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	≤ 25	270	65,079	1.49	0.60	181	447
1A	≤ 19	230	63,990	1.47	0.59	157	387
2	≤ 10	158	97,574	2.24	0.91	71	174
3	≤ 4	242	416,651	9.56	3.87	25	63
TOTAL SITE		**900**	**643,294**	**14.77**	**5.98**	**61**	**151**



Fort Rouge Yards Major Redevelopment Site - Aerial View



Fort Rouge Yards Major Redevelopment Site - Lot Densities

KEY

DWELLING UNITS PER ACRE
300+
250-299
175-249
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FORT ROUGE YARDS MAJOR REDEVELOPMENT SITE DENSITY INFORMATION

PARKER LANDS

Building Info			Lot Area			Density	
ID	# Floors	# Units	Sq. Feet	Acres	Hectares	DU/ac	DU/ha
1	≤ 3	187	554,521	12.73	5.15	15	36
2	4 to 9	161	214,752	4.93	2.00	33	81
3	10 to 15	1570	573,252	13.16	5.33	119	295
TOTAL SITE	**1918**		**1,342,525**	**30.82**	**12.47**	**62**	**154**



Parker Lands Major Redevelopment Site - Aerial View



Parker Lands Major Redevelopment Site - Lot Densities

KEY

Dwelling Units per Acre
300+
250-299
175-249
120-174
90-119
70-89
50-69
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1-29



PARKER LANDS MAJOR REDEVELOPMENT SITE DENSITY INFORMATION