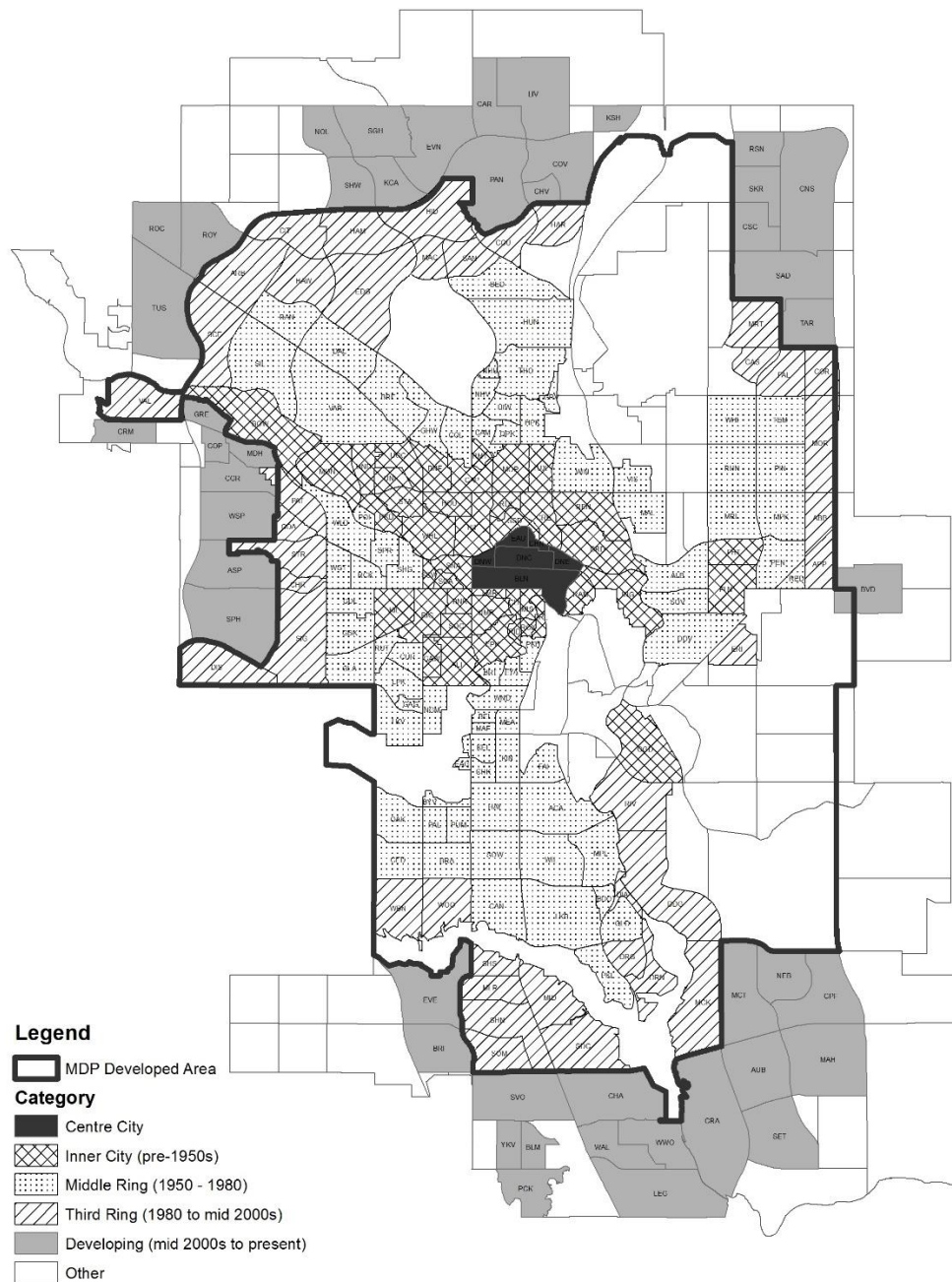


A preliminary trend analysis of housing, population, and building permits using a decade of build out approach is shown in a series of charts below. Data shows present-day breakdowns, 10-15 year trends, or 50 year trends. This work provides an overview of several trends, and more in-depth analysis will form a part of Deliverable 1 of the Established Area Growth and Change Strategy work.

The following map shows 205 communities within the Developed Area of the MDP that have been categorized by similar type determined primarily by the decade of construction. See page 6 of this attachment for a list and number of communities within each category.

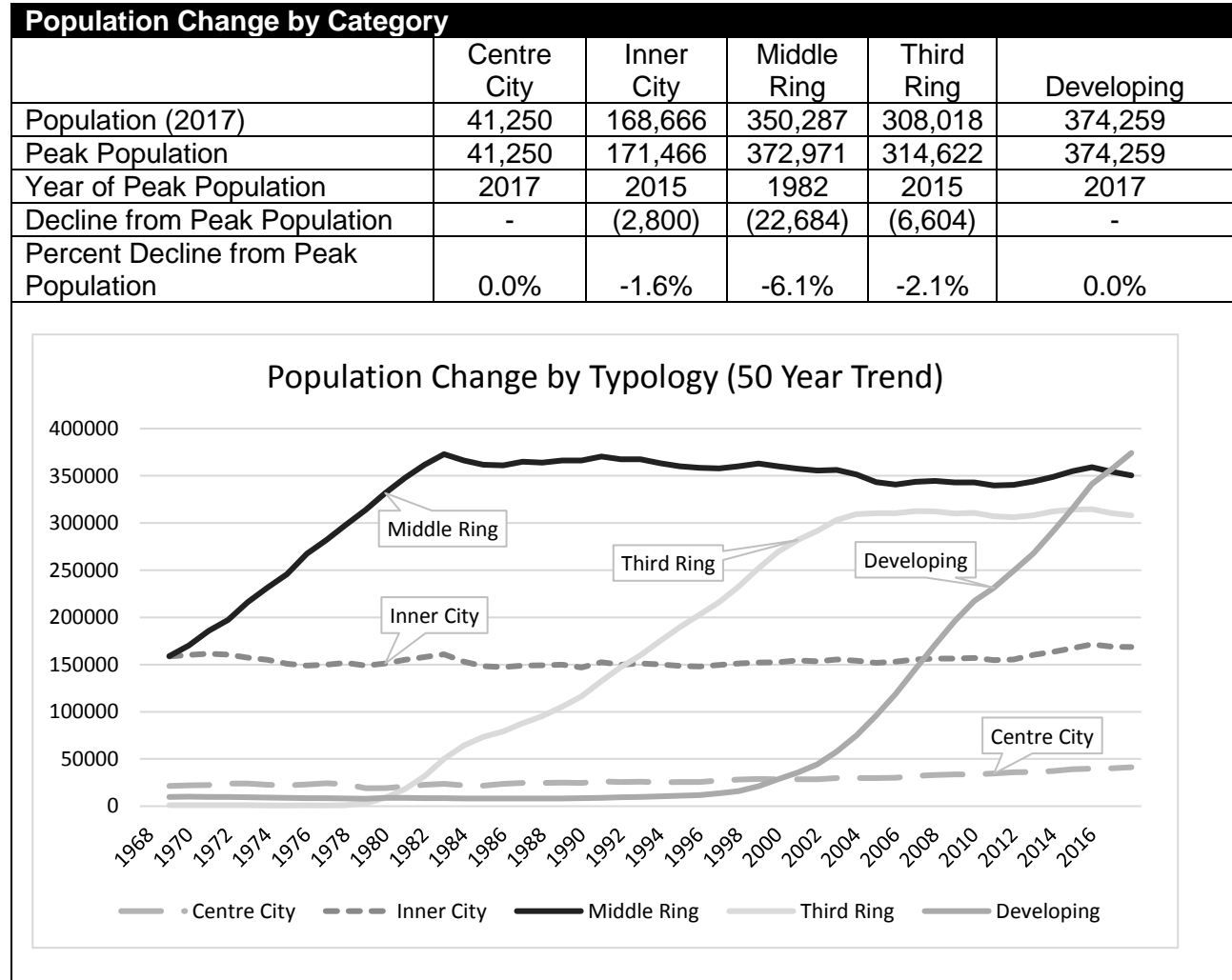


Preliminary Trend Analysis for the Established Area

Population Analysis

While population in the Centre City and Developing Areas continue to climb, populations in the Inner City, Middle Ring and Third Ring are declining. Notably, in Middle Ring suburbs (typically built between 1950 and 1980), population has dropped over 6% from its peak. This is largely due to natural life-cycling of communities with aging populations.

Families with children tend to be attracted to the Developing Area. The Centre City attracts a large number of residents aged 20 to 44, while the Middle Ring suburbs house the largest share of residents aged 65 and older.



Population Age Distribution within Category (2016)					
	Centre City	Inner City	Middle Ring	Third Ring	Developing
Age 0 - 19	9%	18%	21%	25%	31%
Age 20 - 44	63%	48%	38%	33%	43%
Age 45 - 64	18%	23%	26%	31%	20%
Age 65+	10%	11%	14%	12%	6%

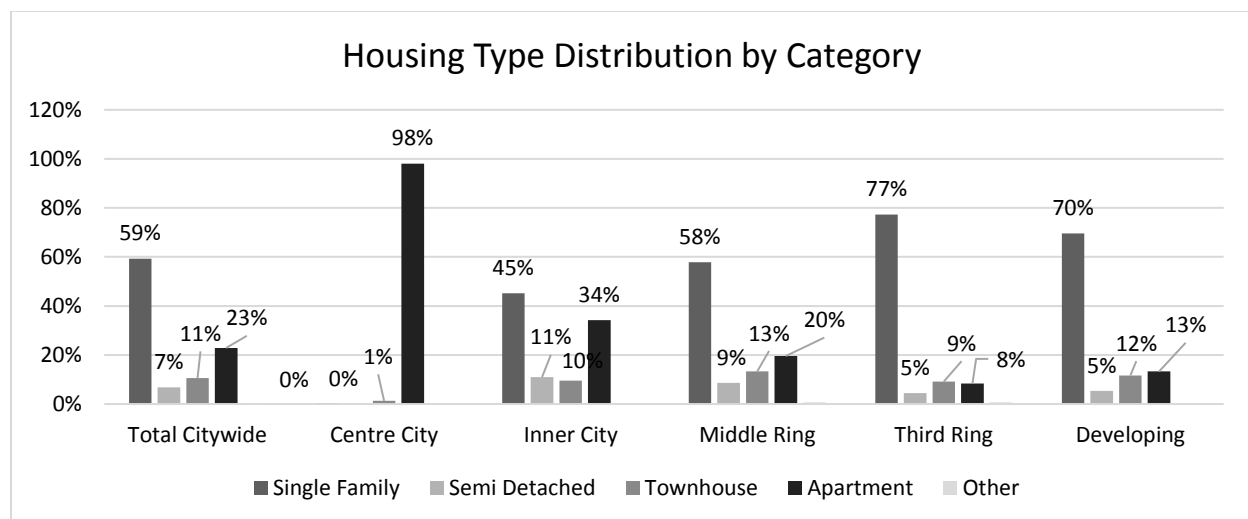
Housing Analysis

Middle Ring, Third Ring, and Developing suburbs have approximately the same amount of single detached homes (~85,000), however Middle Ring and Developing show a greater diversity of housing type. Centre City, Inner City, and Middle Ring Suburbs each have approximately 30,000 apartments. Total housing units in the Centre City and Inner City have increased gradually over time. Housing units in the Middle Ring suburbs were built quickly between 1950 and 1980, followed by a plateau and a gradual increase. Housing unit growth in the Third Ring suburbs occurred between 1980 and 2000. After 2000, growth in the Third Ring suburbs plateaued and growth occurred mainly in the Developing communities.

Housing Type Totals by Category					
	Centre City	Inner City	Middle Ring	Third Ring	Developing
Single Detached	133	38,798	86,695	84,241	87,870
Semi-Detached	7	9,403	12,857	4,907	6,756
Townhouse	395	8,217	19,950	9,987	14,755
Apartment	30,212	29,363	29,395	9,149	16,756

Centre City and Third Ring Suburbs tend to be the most homogenous in terms of housing type distribution, with 98% of units in the Centre City being apartments and 77% of units in the Third Ring being Single Detached Dwellings.

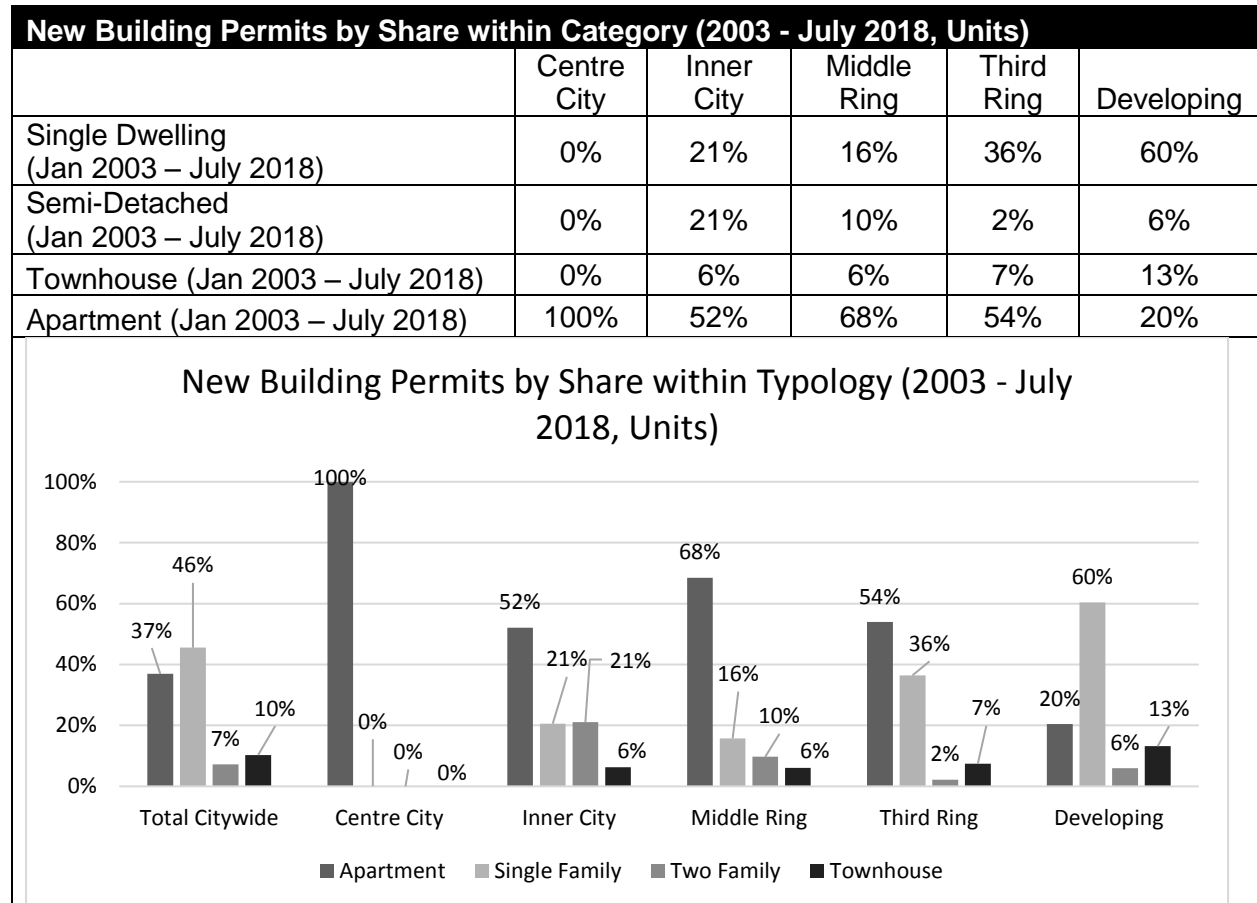
Housing Type Distribution Share by Category					
	Centre City	Inner City	Middle Ring	Third Ring	Developing
Single Detached	0%	45%	58%	77%	70%
Semi-Detached	0%	11%	9%	5%	5%
Townhouse	1%	10%	13%	9%	12%
Apartment	98%	34%	20%	8%	13%



Residential Building Permits Analysis

Over the period 2002-2018, the majority of new residential building permits were for apartment units, except for in the Developing Area where Single Dwelling units are the majority. The overall majority of new Building Permits are captured in the Developing Areas.

In terms of Building Permit value, the Developing Areas have captured most of the total construction value (71.9%), unsurprising due to the amount of new construction. However, the Inner City has made impressive gains in total values, capturing 12.5% of the total.



New Residential Building Permit Estimated Construction Valued by Category (2003 - July 2018)					
	Centre City	Inner City	Middle Ring	Third Ring	Developing
\$ Billions, Jan 2003 – July 2018	\$3.68	\$6.30	\$2.59	\$1.59	\$36.27
(% of citywide share)	(7.3%)	(12.5%)	(5.1%)	(3.2%)	(71.9%)

Summary

The Inner City captures a disproportionately high share of total construction value in relation to total share of dwelling unit growth, likely because the new units being built are of high value. Population growth remains strong in Developing Areas, and disproportionately low in in Middle Ring and Third Ring communities.

Summary Share of Citywide Totals (2003 – 2017)					
	Centre City	Inner City	Middle Ring	Third Ring	Developing
Estimated Residential Building Permit Construction Value share of total (2003 – 2017)	7.3%	12.5%	5.1%	3.2%	71.9%
Population Change, share of total (2003 – 2017)	3.5%	4.5%	-0.3%	-0.4%	92.8%
Dwelling Unit Change, share of total (2003 – 2017)	5.9%	4.0%	4.7%	5.4%	80.0%

Communities by Category (as shown on the map on page 1 of this attachment):

Centre City (6)	Inner City (42)	Middle Ring (74)	Third Ring (40)	Developing (43)	Other (0)
BELTLINE	ALTADORE	ACADIA	ABBESDALE	ASPEN WOODS	NONE
CHINATOWN	BANFF TRAIL	ALBERT PARK/RADISSON HEIGHTS	APPLEWOOD PARK	AUBURN BAY	
DOWNTOWN COMMERCIAL CORE	BANKVIEW	BAYVIEW	ARBOUR LAKE	BELMONT	
DOWNTOWN EAST VILLAGE	BOWNESS	BEDDINGTON HEIGHTS	CASTLERIDGE	BELVEDERE	
DOWNTOWN WEST END	BRIDGELAND/RIVERSIDE	BEL-AIRE	CHRISTIE PARK	BRIDLEWOOD	
EAU CLAIRE	CAPITOL HILL	BONAVISTA DOWNS	CITADEL	CANADA OLYMPIC PARK	
	CLIFF BUNGALOW	BRAESIDE	COACH HILL	CARRINGTON	
	CRESCENT HEIGHTS	BRENTWOOD	CORAL SPRINGS	CHAPARRAL	
	ELBOW PARK	BRITANNIA	COUNTRY HILLS	CITYSCAPE	
	ERLTON	CAMBRIAN HEIGHTS	DEER RIDGE	COPPERFIELD	
	FOREST HEIGHTS	CANYON MEADOWS	DEER RUN	CORNERSTONE	
	FOREST LAWN	CEDARBRAE	DIAMOND COVE	COUGAR RIDGE	
	GARRISON WOODS	CHARLESWOOD	DISCOVERY RIDGE	COUNTRY HILLS VILLAGE	
	HILLHURST	CHINOOK PARK	DOUGLASDALE/GLEN	COVENTRY HILLS	
	HOUNSFIELD HEIGHTS/BRIAR HILL	COLLINGWOOD	EDGEMONT	CRANSTON	
	INGLEWOOD	CURRIE BARRACKS	ERIN WOODS	CRESTMONT	
	KILLARNEY/GLENGARRRY	DALHOUSIE	FALCONRIDGE	EVANSTON	
	LOWER MOUNT ROYAL	DOVER	HAMPTONS	EVERGREEN	
	MISSION	EAGLE RIDGE	HARVEST HILLS	GREENWOOD/GREEN BRIAR	
	MONTGOMERY	ELBOYA	HAWKWOOD	KEYSTONE HILLS	
	MOUNT PLEASANT	FAIRVIEW	HIDDEN VALLEY	KINCORA	
	OGDEN	GARRISON GREEN	MACEWAN GLEN	LEGACY	
	PARKDALE	GLAMORGAN	MARTINDALE	LIVINGSTON	
	RAMSAY	GLENBROOK	MCKENZIE LAKE	MAHOGANY	
	RENFREW	GLENDALE	MIDNAPORE	MCKENZIE TOWNE	
RICHMOND	GREENVIEW	MILLRISE	MEDICINE HILL		
RIDEAU PARK	HAYSBORO	MONTEREY PARK	NEW BRIGHTON		
ROSEDALE	HIGHLAND PARK	PATTERSON	NOLAN HILL		
ROSEMONT	HIGHWOOD	RIVERBEND	PANORAMA HILLS		

Preliminary Trend Analysis for the Established Area

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ATTACHMENT 2

Centre City (6)	Inner City (42)	Middle Ring (74)	Third Ring (40)	Developing (43)	Other (0)
	ROXBORO	HUNTINGTON HILLS	SANDSTONE VALLEY	PINE CREEK	
	SCARBORO	KELVIN GROVE	SCENIC ACRES	REDSTONE	
	SCARBORO/ SUNALTA WEST	KINGSLAND	SHAWNEE SLOPES	ROCKY RIDGE	
	SOUTH CALGARY	LAKE BONA VISTA	SHAWNESSY	ROYAL OAK	
	ST. ANDREWS HEIGHTS	LAKEVIEW	SIGNAL HILL	SADDLE RIDGE	
	SUNALTA	LINCOLN PARK	SOMERSET	SAGE HILL	
	SUNNYSIDE	MAPLE RIDGE	STRATHCONA PARK	SETON	
	TUXEDO PARK	MARLBOROUGH	SUNDANCE	SHERWOOD	
	UNIVERSITY DISTRICT	MARLBOROUGH PARK	VALLEY RIDGE	SILVERADO	
	UNIVERSITY HEIGHTS	MAYFAIR	WOODBINE	SKYVIEW RANCH	
	UNIVERSITY OF CALGARY	MAYLAND HEIGHTS	WOODLANDS	SPRINGBANK HILL	
	UPPER MOUNT ROYAL	MEADOWLARK PARK		TARADALE	
	WEST HILLHURST	NORTH GLENMORE PARK		TUSCANY	
		NORTH HAVEN		WALDEN	
		NORTH HAVEN UPPER		WEST SPRINGS	
		OAKRIDGE		WOLF WILLOW	
		PALLISER		YORKVILLE	
		PARKHILL			
		PARKLAND			
		PENBROOKE MEADOWS			
		PINERIDGE			
		POINT MCKAY			
		PUMP HILL			
		QUEENS PARK VILLAGE			
		QUEENSLAND			
		RANCLANDS			
		RED CARPET			
		ROSSCARROCK			
		RUNDLE			
		RUTLAND PARK			
		SHAGANAPPI			
		SILVER SPRINGS			
		SOUTHVIEW			
		SOUTHWOOD			
		SPRUCE CLIFF			
		TEMPLE			
		THORNCLIFFE			

Preliminary Trend Analysis for the Established Area

Centre City (6)	Inner City (42)	Middle Ring (74)	Third Ring (40)	Developing (43)	Other (0)
		VARSITY VISTA HEIGHTS WESTGATE WHITEHORN WILDWOOD WILLOW PARK WINDSOR PARK WINSTON HEIGHTS/MOUNT VIEW			