

Housing and Zoning Update — Q1 2024

Overview

Q1 2024 zoning updates targeted transit-adjacent corridors and low-density zones. This update lists recent zoning reclassifications and new unit counts from construction permits issued between January 1, 2024 and March 31, 2024. Total permits issued in Q1 2024: 125+ units (Q1 2023: 153 units, change: -18.3%). This decline reflects market correction after record growth in 2023. However, mixed-use and conversion projects show strong growth (+17.6% and +66.7% respectively), indicating strategic densification trends. Average permit processing time: 28 days (2023 avg: 38 days, improvement: -26.3%).

Historical Permit Activity Trends (Q1 2020 - Q1 2024)

Quarterly Q1 Permit Comparison (January-March):

Q1 2020: 98 units approved (baseline quarter)
Q1 2021: 112 units approved (growth: +14.3% YoY)
Q1 2022: 128 units approved (growth: +14.3% YoY)
Q1 2023: 153 units approved (growth: +19.5% YoY, peak quarter)
Q1 2024: 125+ units approved (change: -18.3% YoY, market correction)
5-year Q1 CAGR: +6.3%

Investment Trends (Q1 Comparison):

Q1 2020: \$9.2M total investment (\$93,878/unit)
Q1 2021: \$11.1M total investment (\$99,107/unit, +5.6% cost increase)
Q1 2022: \$13.8M total investment (\$107,813/unit, +8.8% cost increase)
Q1 2023: \$17.2M total investment (\$112,418/unit, +4.3% cost increase)
Q1 2024: \$16.8M total investment (\$134,400/unit, +19.6% cost increase)
Cost per unit acceleration: 5-year average +9.3% annually

Processing Time Evolution:

Q1 2020: 58 days average (baseline)
Q1 2021: 52 days average (improvement: -10.3%)
Q1 2022: 45 days average (improvement: -13.5%)
Q1 2023: 38 days average (improvement: -15.6%)
Q1 2024: 28 days average (improvement: -26.3%)
Total efficiency gain: -51.7% since 2020

Zoning Type Distribution Trends (Q1 Each Year):

Mixed-Use permits:
2020: 45 units → 2021: 52 units → 2022: 62 units → 2023: 68 units → 2024: 80 units
5-year growth: +77.8%, CAGR: +15.5%

Pure Residential permits:

2020: 38 units → 2021: 42 units → 2022: 48 units → 2023: 55 units → 2024: 42 units
2024 decline: -23.6% (first decline in 5 years)

Commercial-to-Residential conversions:

2020: 8 units → 2021: 11 units → 2022: 12 units → 2023: 18 units → 2024: 30 units
5-year growth: +275%, CAGR: +39.4% (fastest-growing category)

Heritage designations:

2020: 7 units → 2021: 7 units → 2022: 6 units → 2023: 12 units → 2024: 5 units
High variability: No clear trend, policy-dependent

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Table 1: New Units by District (Q1 2024 vs Q1 2023)

District_ID	Zoning_Type	Units_Q1_2024	Units_Q1_2023	YoY_Change_%	Permit_Date
D01	Mixed-Use	60	52	+15.4%	2024-02-15
D02	Res→Mixed-Use	20	15	+33.3%	15-Feb-2024
D03	Residential	NULL	25	N/A	2024/03/01
D04	Com→Residential	30	18	+66.7%	2024-01-30
D05	Residential	10	30	-66.7%	2024-03-05
D06	Heritage	5	12	-58.3%	2024-03-10

Figure 1: Permit Processing Efficiency Trends

Permit Processing Time Trends (Days)

2020: Avg 58 days (baseline)

2021: Avg 52 days (improvement -10.3%)

2022: Avg 45 days (improvement -13.5%)

2023: Avg 38 days (improvement -15.6%)

Q1 2024: Avg 28 days (improvement -26.3%)

Efficiency Gains

Total improvement -51.7% since 2020

Target 30 days (Q1 2024: 28 days)

Below target by: -6.7%

Detailed Permit Analysis with Performance Metrics

The following section provides comprehensive details for each permit issued in Q1 2024, including application numbers, developer information, project specifications, and comparative performance metrics versus Q1 2023 baselines.

PERMIT #2024-DT-00145 - Downtown Mixed-Use Development

District: D01 - Downtown

Application ID: APP-2024-00012

Developer: Urban Development Corp.

Contact: John Wilson (j.wilson@urbandevelopment.com)

Phone: (403) 555-2234, Cell: 403.555.2235

Units Approved: 60 residential units (Q1 2023 similar project: 52 units, +15.4%)

Filed: 2024-01-12, Approved: 2024-02-15

Processing Time: 34 days (Q1 2023 avg: 38 days, improvement: -10.5%)

Estimated Completion: Q4 2024

Construction Value: \$8,500,000 (\$141,667/unit vs Q1 2023 avg: \$125,000/unit, +13.3%)

Property Address: 789 Main Street, Calgary AB T2P 1J9

Lot Numbers: LOT-2024-DT-456, LOT-2024-DT-457

Floor Area Ratio (FAR): 3.2 (Q1 2023 district avg: 2.8, densification: +14.3%)

Parking spaces: 45 (0.75/unit, Q1 2023: 1.0/unit, reduction: -25%)

PERMIT #2024-RV-00167 - Riverside Mixed-Use Conversion

District: D02 - Riverside

Application Number: APP-2024-00023

Developer: Riverside Properties LLC

Representative: Sarah Johnson (s.johnson@riversideprops.ca)

Office: 403-555-3345, Mobile: +1-403-555-3346

Units: 20 (Q1 2023 similar conversion: 15 units, growth: +33.3%)

Application Date: Jan 28, 2024, Approval Date: 15-Feb-2024

Processing Timeline: 18 days (Q1 2023 avg: 38 days, exceptional: -52.6%)

Expected Build-out: Summer 2024

Budget: \$2,800,000 (\$140,000/unit vs Q1 2023 conversions: \$118,000/unit, +18.6%)

Location: 234 River Drive, Calgary, AB T2C-4K8

Parcel ID: PARCEL-RV-789-2024

Previous use: Office building (occupied 1985-2023, 39 years)

Conversion type: Commercial→Residential (fastest-growing category, +66.7% YoY)

Sustainability rating: LEED Gold (Q1 2023 avg: LEED Silver)

PERMIT #2024-NG-00198 - Northgate Residential

District: D03 - Northgate

App ID: APP-2024-00034

Builder: Northern Homes Inc.

Contact Person: Michael Brown (m.brown@northernhomes.com)

Phone: (403) 555-4456 ext 201, Fax: 403.555.4457

Units: Data pending verification (NULL)

Q1 2023 reference: District approved 25 units

Submission: 2024/02/20, Issued: 2024/03/01

Days to Process: 9 (Q1 2023 avg: 38 days, exceptional: -76.3%)

Fast-track approval: Met all pre-submission requirements

Construction Start: Q2 2024

Site: 567 North Avenue, Calgary AB T3K 2M5

Land Registration: LR-2024-NG-123

Project Cost: TBD (estimated \$3.5M based on Q1 2023 district avg)

PERMIT #2024-SR-00134 - Southridge Commercial to Residential

District: D04 - Southridge

Permit Reference: APP-2024-00008

Developer: South Ridge Developments
Project Manager: Patricia Lee (patricia.lee@southridgedev.ca)
Direct Line: 403-555-5567, Emergency: 1-888-DEV-HELP (1-888-338-4357)
New Units: 30 (Q1 2023 similar projects: 18 units, growth: +66.7%)
Filed Date: 2024-01-05, Approved: 2024-01-30
Processing: 25 days (Q1 2023 avg: 38 days, improvement: -34.2%)
Occupancy Target: Fall 2024
Investment: \$4,200,000 (\$140,000/unit vs Q1 2023: \$122,000/unit, +14.8%)
Address: 890 South Ridge Road, Calgary, AB T2X-6N7
Title Number: TITLE-SR-2024-456
Conversion trend: Commercial→Residential category showing strongest growth (+66.7%)
Previous building: Retail center (built 1998, 26 years old)
Adaptive reuse bonus: \$200k municipal incentive (promoting conversions)

PERMIT #2024-WF-00201 - Westfield Residential

District: D05 - Westfield
Application: APP-2024-00045
Developer: West Field Builders Ltd.
Contact: Robert Chen (r_chen@westfieldbuilders.com)
Phone: +1 (403) 555-6678, Alt: 403.555.6679
Units Authorized: 10 (Q1 2023 district total: 30 units, decline: -66.7%)
Submitted: 2024/02/18, Granted: 2024-03-05
Review Period: 15 days (Q1 2023 avg: 38 days, improvement: -60.5%)
Move-in Date: Early 2025
Value: \$1,450,000 (\$145,000/unit vs Q1 2023 district: \$115,000/unit, +26.1%)
Property: 345 West Field Lane, Calgary AB T3H 5P2
Certificate Number: CERT-WF-2024-789
Market trend: Westfield seeing dramatic unit count decline but cost increases
Lot size: 0.8 acres (Q1 2023 district avg: 1.2 acres, densification: -33%)

PERMIT #2024-OT-00223 - Oldtown Heritage

District: D06 - Oldtown
Application ID: APP-2024-00056
Developer: Heritage Restoration Group
Lead: Elizabeth Martinez (e.martinez@heritagerestoration.ca)
Office Phone: (403) 555-7789, Mobile: 403-555-7790
Heritage Hotline: 1-800-HISTORY (1-800-447-8679)
Approved Units: 5 (Q1 2023: 12 units, decline: -58.3%)
Application Received: 2024-02-25, Permit Issued: 2024-03-10
Days: 13 (Q1 2023 heritage avg: 52 days, improvement: -75%)
Completion: Late 2024
Budget: \$875,000 (\$175,000/unit vs Q1 2023 heritage: \$158,000/unit, +10.8%)
Historic Address: 123 Heritage Street, Calgary, AB T2S-3R4
Heritage Designation: HD-OT-1892-045 (building age: 132 years)
Trend: Heritage district showing consistent unit count decline (-58.3%)
Heritage compliance cost: +35% premium over standard residential
Restoration requirements: 85% original facade preservation mandatory

Figure 2: Zoning Type Growth Patterns

Zoning Type Growth Rates (2023-2024)

Mixed-Use: 80 units Q1'24 vs 68 units Q1'23

■ Growth: +17.6%

Residential: 42 units Q1'24 vs 55 units Q1'23

■ Decline: -23.6%

Commercial: Residential 30 units Q1'24 vs 18 Q1'23

■ Growth: +66.7%

Heritage: 5 units Q1'24 vs 12 units Q1'23

■ Decline: -58.3%

Trend: Conversions outpacing new residential

Comprehensive Housing Trend Analysis and Strategic Insights

DISTRICT-LEVEL DEVELOPMENT PATTERNS (Q1 2024 vs Q1 2023):

High-Growth Districts:

D04 Southridge: +66.7% units (18→30), leading growth
- Driving factor: Commercial-to-residential conversions
- Investment: \$4.2M (+14.8% per-unit cost)
- Trend: Urban core repurposing, retail decline adaptation

D02 Riverside: +33.3% units (15→20)
- Conversion projects showing strong performance
- Processing time: 18 days (exceptional -52.6% vs district avg)
- Premium pricing: \$140k/unit (+18.6% vs 2023)

D01 Downtown: +15.4% units (52→60)
- Steady densification continuing
- FAR increasing: 3.2 vs 2.8 in 2023 (+14.3%)
- Parking reduction trend: 0.75 spaces/unit vs 1.0 in 2023

Declining Districts:

D05 Westfield: -66.7% units (30→10), steepest decline
- Market saturation or policy constraints indicated
- Cost per unit surging: +26.1% despite lower volume
- Lot sizes shrinking: -33% (densification despite unit decline)

D06 Oldtown: -58.3% units (12→5)
- Heritage restrictions limiting development
- Cost premium: +35% over standard residential
- Processing improved despite constraints: -75% timeline

D03 Northgate: NULL data (est. decline from 25 units)
- Data collection issues or development pause
- Fastest processing: 9 days (-76.3%), fast-track eligible

ZONING TYPE PERFORMANCE TRENDS:

Commercial-to-Residential Conversions (STRONGEST CATEGORY):

Q1 2020: 8 units → Q1 2024: 30 units
5-year growth: +275%, CAGR: +39.4%
Q1 2023→2024: +66.7% (18→30 units)
Average cost: \$140,000/unit
Market drivers:
- Retail decline accelerating post-pandemic
- Municipal adaptive reuse incentives (\$200k bonuses)
- Faster processing (25 days vs 38 day avg, -34%)
Strategic importance: Addressing housing shortage via existing structures

Mixed-Use Development (STEADY GROWTH):

Q1 2020: 45 units → Q1 2024: 80 units
5-year growth: +77.8%, CAGR: +15.5%
Q1 2023→2024: +17.6% (68→80 units)
Average cost: \$141,667/unit (highest category)
Characteristics:
- Ground-floor commercial mandates
- Premium locations (downtown, transit corridors)
- Longer processing: 34 days (above avg but improving)

Pure Residential (DECLINING):

Q1 2020: 38 units → Q1 2024: 42 units
Q1 2023→2024: -23.6% (55→42 units)
First decline in 5-year period
Average cost: \$145,000/unit
Trend explanation:
- Land scarcity pushing toward densification
- Policy preference for mixed-use zoning
- Competition from conversion projects

Heritage Preservation (VOLATILE):

Q1 2023→2024: -58.3% (12→5 units)
High year-to-year variability (no clear trend)
Highest cost: \$175,000/unit (+35% heritage premium)
Constraints:
- 85% facade preservation requirements
- Limited stock of eligible buildings
- Extended approval processes (though improving: -75% to 13 days)

PROCESSING EFFICIENCY REVOLUTION:

5-year improvement: -51.7% (58 days → 28 days)
Q1 2024 performance:
- Fastest: 9 days (D03, -76.3% vs avg, fast-track)
- Average: 28 days (below 30-day target, -6.7%)
- Slowest: 34 days (D01, still -10.5% vs 2023)

Efficiency drivers:

1. Digital submission systems (implemented 2021)
2. Fast-track eligibility (pre-submission compliance)
3. Conversion project streamlining (25-day avg)
4. Staff increases (15% FTE growth 2020-2024)

COST ESCALATION ANALYSIS:

Average cost per unit:
Q1 2020: \$93,878 (baseline)
Q1 2024: \$134,400 (increase: +43.2%)
5-year CAGR: +9.3%

2024 acceleration: +19.6% YoY (vs 5-yr avg of +9.3%)

Contributing factors:

- Material costs: +15-20% since 2023
- Labor shortages: +8-12% wage pressure
- Enhanced building standards: +5% compliance costs
- Land values: +12% in core districts

District cost variance (Q1 2024):

Highest: D06 Heritage (\$175k/unit, +30% vs avg)
Lowest: D04 Conversions (\$140k/unit, +4% vs avg)
Range: \$35k spread (25% variance)

INVESTMENT TRENDS:

Total Q1 investment:
2020: \$9.2M → 2024: \$16.8M
5-year growth: +82.6%
Investment CAGR: +16.2% (outpacing unit growth of +6.3%)

Q1 2024 breakdown:
D01 Downtown: \$8.5M (50.6% of total)
D04 Southridge: \$4.2M (25.0%)
D02 Riverside: \$2.8M (16.7%)
D05 Westfield: \$1.45M (8.6%)
D06 Oldtown: \$0.875M (5.2%)
D03 Northgate: \$3.5M est. (20.8%, pending verification)

Concentration trend: Top 2 districts represent 75.6% of Q1 investment

2024 FULL-YEAR PROJECTIONS:

Based on Q1 trends and historical patterns:

Total units (FY 2024): 480-520 units
- Q1 actual: 125 units (24% of projection)
- Seasonal adjustment: Q2-Q4 typically 3x Q1 activity
- YoY vs 2023: -5% to +2% (market normalization)

Total investment: \$64M-\$72M
- Q1 actual: \$16.8M (24-26% of projection)
- Average cost: \$133k-\$138k per unit
- YoY growth: +8-15%

By zoning type (FY 2024 projected):
- Mixed-Use: 300-320 units (+12-15% YoY)
- Conversions: 110-130 units (+45-60% YoY)
- Pure Residential: 60-70 units (-25 to -30% YoY)
- Heritage: 15-20 units (flat to -15% YoY)

Processing metrics:
- Average time: 26-28 days (sustaining efficiency)
- Fast-track eligible: 45-50% of applications
- Digital submission rate: 95%+ (up from 78% in 2023)

STRATEGIC RECOMMENDATIONS:

1. Capitalize on conversion momentum:

- Expand adaptive reuse incentives beyond \$200k
- Target vacant retail/office in D01, D04, D02
- Projected impact: +30-40 additional units annually

2. Address Westfield decline:

- Investigate -66.7% unit drop root causes
- Consider zoning flexibility or incentives
- Risk: Market saturation or infrastructure constraints

3. Resolve Northgate data issues:

- NULL data hampering analysis and planning
- District showed 9-day processing (excellent efficiency)
- Opportunity: Leverage fast-track success

4. Heritage district strategy:

- 58.3% decline despite improved processing
- Balance preservation with housing needs
- Consider graduated requirements by building age

5. Cost containment focus:

- +19.6% annual cost increase unsustainable
- Target: Return to 5-year average of +9.3%
- Tools: Bulk material procurement, modular construction

6. Processing efficiency maintenance:

- Sustain 28-day average (vs 30-day target)
- Expand fast-track eligibility criteria
- Goal: 90%+ digital submissions by Q4 2024

Classification: PUBLIC RECORD

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Trend methodology: YoY comparison, CAGR, variance analysis, regression modeling

Data confidence: 94% (excluding D03 NULL unit count)

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