

Updating our Growth Plan

**Growth Plan Review Discussion Paper #1:
Background and Context**

March 2025



Land Acknowledgement

The City of Regina acknowledges we are on the traditional lands of the Treaty 4 Territory, a Treaty signed with 35 First Nations across Southern Saskatchewan and parts of Alberta and Manitoba, and the original lands of the Cree, Saulteaux, Dakota, Nakota, Lakota, and the homeland of the Métis. The City of Regina owes its strength and vibrancy to these lands and the diverse Indigenous Peoples whose ancestors' footsteps have marked this territory as well as settlers from around the world who continue to be welcomed here and call Regina home.



Table of Contents

1 Introduction	4
2 Current Trends	6
Population Growth	6
Dwelling Characteristics	9
Residential Building Permit Activity	9
Housing Affordability	11
Economic Base	12
3 Forecasted Growth	15
Population.....	15
Housing	17
Employment	19
4 Phasing and Targeting Growth	22
Reviewing Growth Targets and Identifying New Growth Areas.....	24
5 Closing and How to Stay Engaged	27
6 Glossary	28

READER NOTES:

- **Black bolded** text in this document refers to a term, word or concept that is defined in the “Glossary” at the end of this Discussion Paper.
- Blue underlined text in this document is a web link readers can click to redirect them to a webpage providing more information or context regarding a topic or concept.

1 Introduction

The City of Regina (City) is reviewing the [Growth Plan](#) and related policies from *Design Regina: The Official Community Plan (OCP)*, the City’s principal planning policy, guiding long-term growth, development and change in our city.

The Growth Plan is an important policy tool identifying and phasing future growth, including **new neighbourhoods, new employment areas and intensification** (or ‘infill and redevelopment’) opportunities in mature areas of the city like the Downtown. The Growth Plan also helps the City plan for future infrastructure investments required to enable sustainable growth.

Since the introduction of the Growth Plan in 2013, social, economic and development conditions have changed within the city and more broadly. Considering these changes, the City recently completed a [Population, Housing and Employment Forecast and Urban Land Needs Study](#) (Growth Study) projecting growth to the year 2051. Overall, the Growth Plan Review aims to update the current plan by identifying suitable lands to accommodate forecasted growth, including new neighbourhoods along the city’s periphery and existing lands within mature areas of the city.

The purpose of this Discussion Paper is to provide background information on current growth trends, long-term growth projections, the City’s intensification target and greenfield neighbourhood development. This information is intended to inform interested residents, stakeholders and Indigenous Rightsholders during engagement touchpoints throughout the Growth Plan Review.



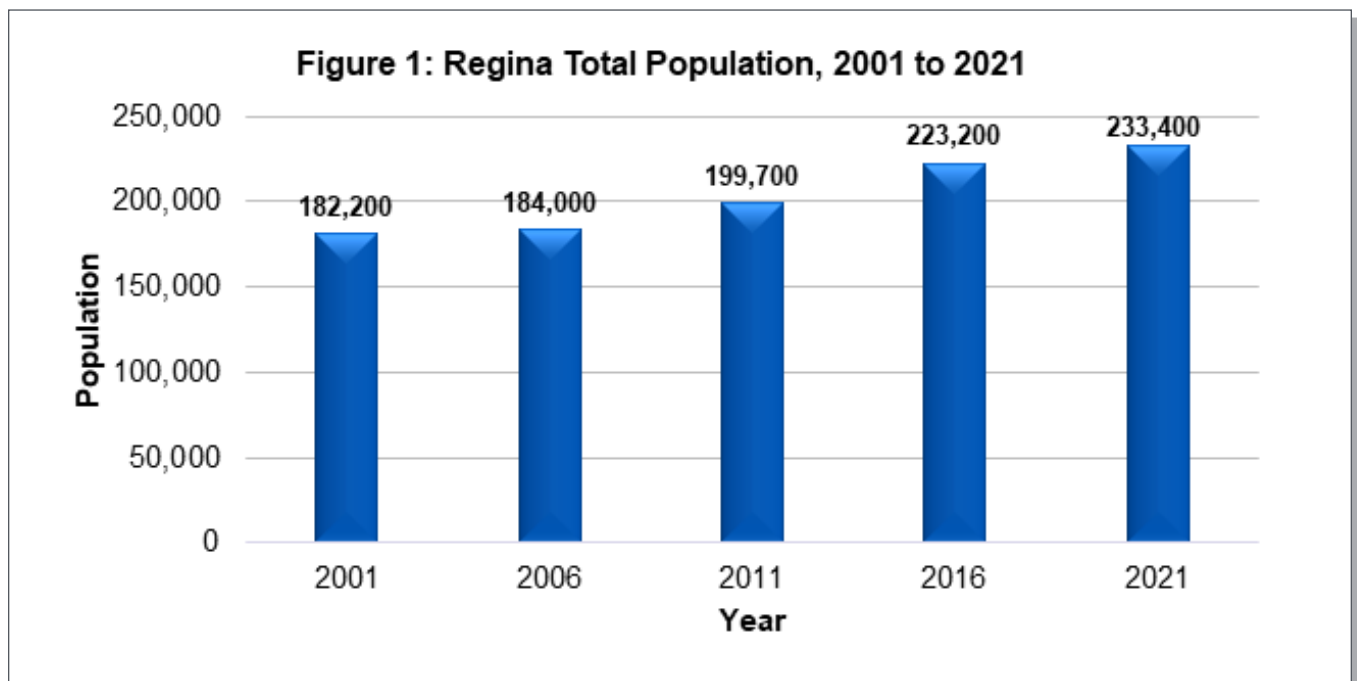


2 Current Trends

The Growth Plan Review will expand the City’s current plan to facilitate and accommodate anticipated long-term growth in population, housing and employment. This will be further explored in the next section of this Discussion Paper. Before looking into the future, this section examines current and historical data trends, providing a snapshot of Regina’s population growth, dwelling characteristics, residential building permit activity, housing affordability and the broader local economic base.

Population Growth

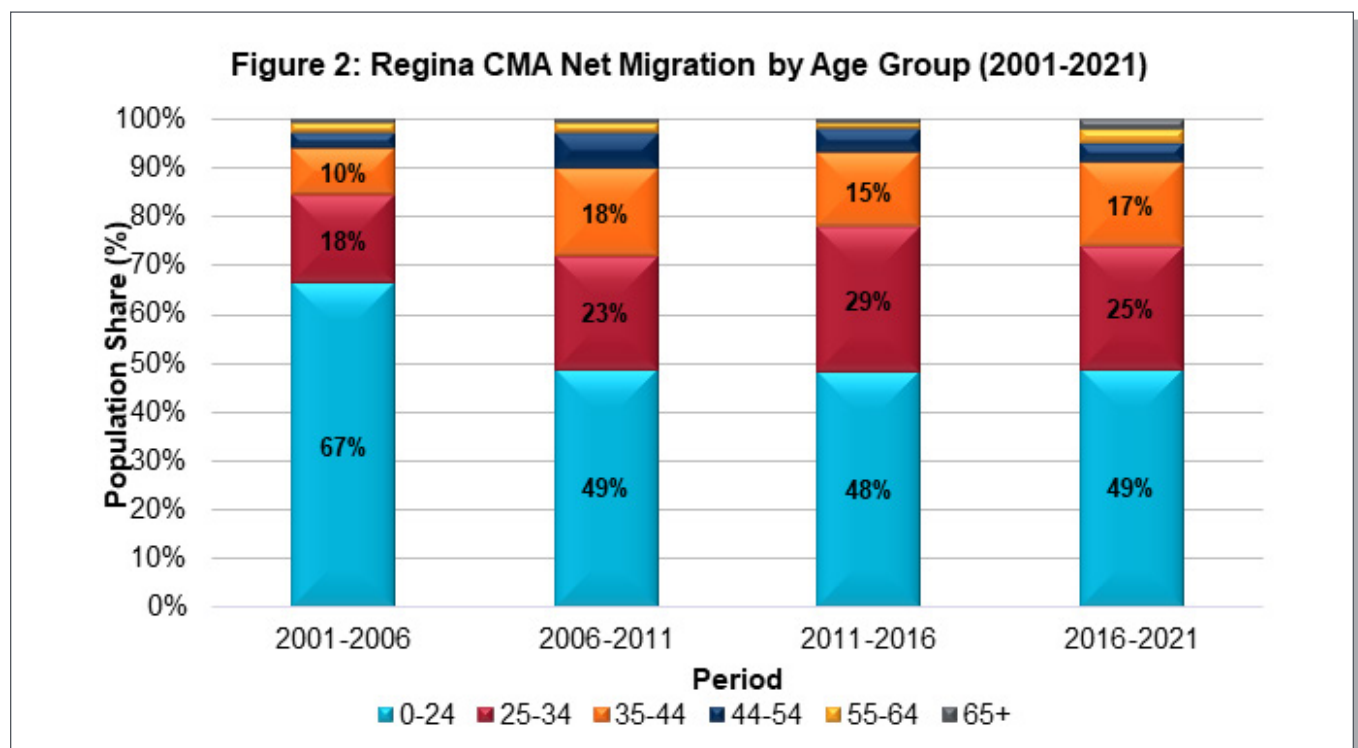
Between the 2001 and 2021 censuses, Regina grew from 182,100 to 233,400¹, an increase of approximately 51,200 people, reflecting an average annual growth rate of approximately 1.2 per cent. By comparison, Saskatchewan’s population grew at an average rate of 0.8 per cent annually during the same period.



Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

1 Population adjusted by 3.1 per cent to account for net census undercount.

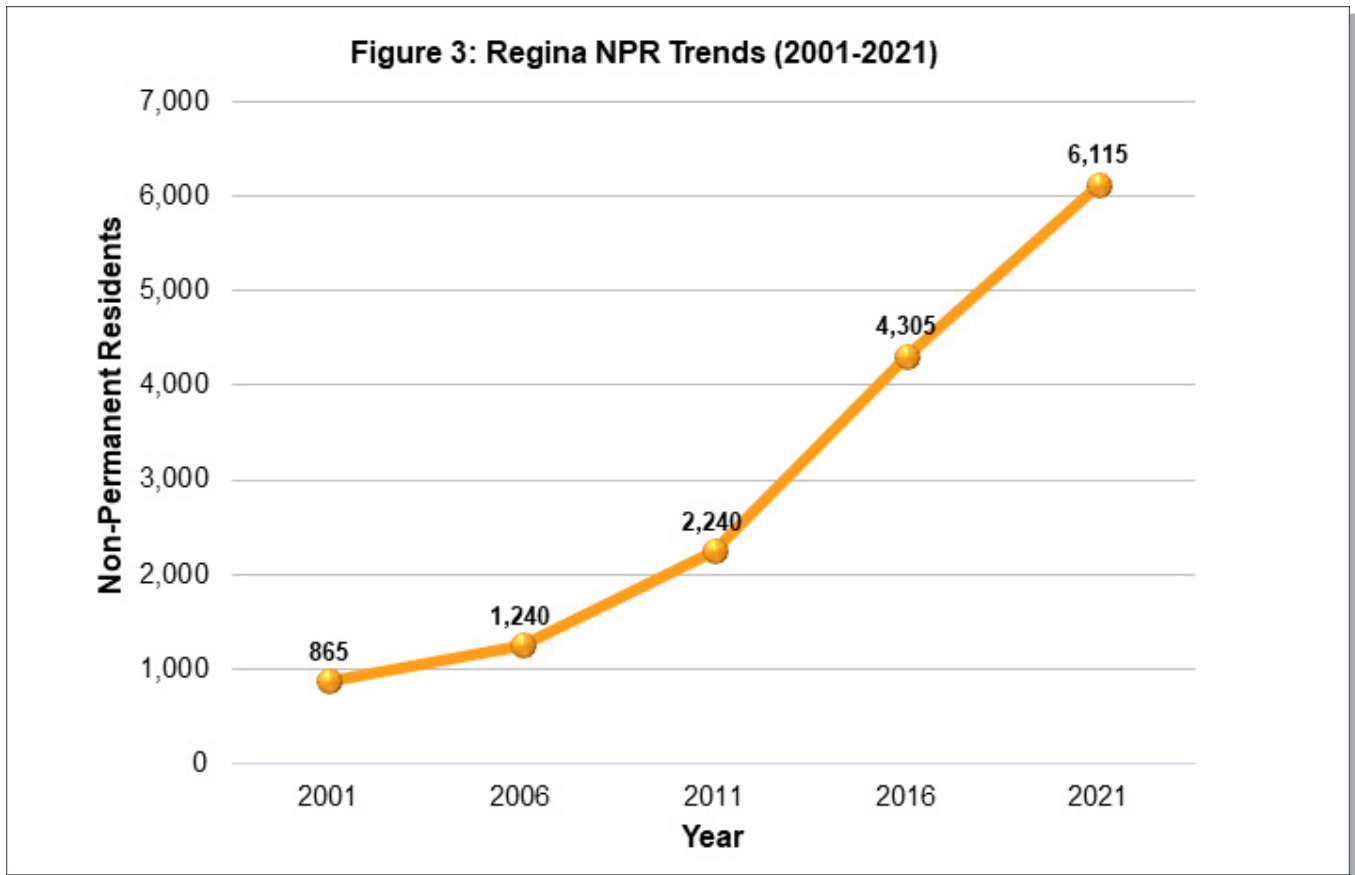
Population growth can be segmented into two distinct categories: natural increases (local births minus deaths) and net migration. Similar to the national trend, population growth in Saskatchewan and Regina is heavily driven by **net migration**. Looking specifically at net migration, Figure 2 shows that people under the age of 44 accounted for over 90 per cent of total net migration in the **Regina Census Metropolitan Area** (Regina CMA) between 2001 and 2021.



Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

Two relatively recent demographic trends expected to impact long-term population growth and housing needs are **non-permanent residents (NPR)** and **multi-generational households**.

Figure 3 provides an overview of past NPR trends for Regina from 2001 to 2021. Over this period, the number of NPRs in Regina grew by approximately 607 per cent. Regina's growing NPR population is expected to continue, influencing housing demand and occupancy patterns, specifically within the rental housing market due to this segment of the population's non-permanency.



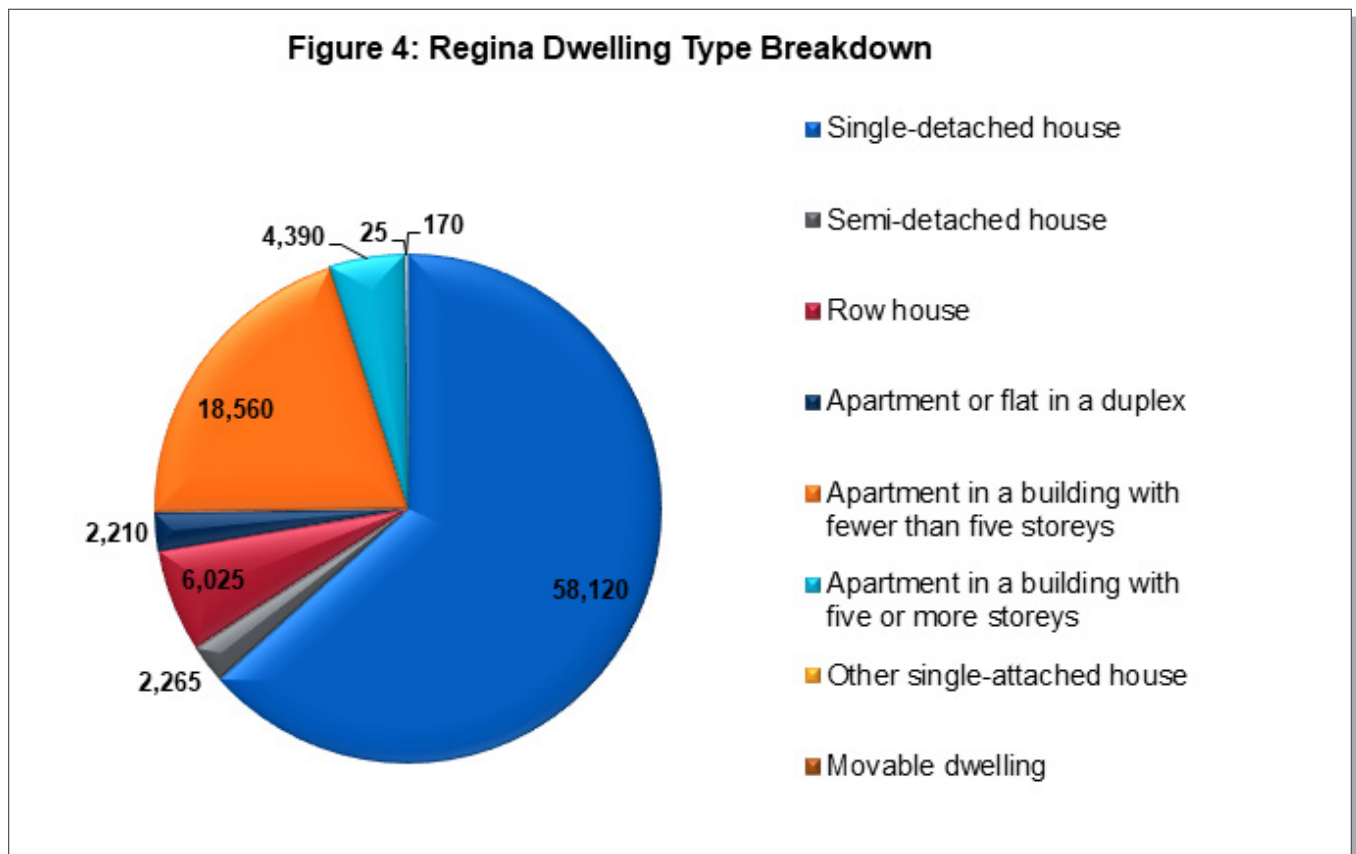
Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

Over the last decade, Regina has seen a 20 per cent increase in the percentage of multi-generational households. In comparison, the percentage of multi-generational households in Saskatchewan and Canada increased by 6 per cent and 9 per cent, respectively.

Several factors contribute to Regina’s rising number of multi-generational households, including affordability, cultural preferences and socio-economic trends. Looking ahead, Regina is expected to see a continued increase in the share of multi-generational households. These households typically have higher household sizes (or 'people-per-unit') than non-multi-generational households, which puts upward pressure on Regina’s overall average household size.

Dwelling Characteristics

Per the 2021 Census, Regina has approximately 92,130 occupied private dwellings, with an average household size (or ‘people-per-unit’) of 2.53 persons². Single-detached houses remain the most prevalent housing type in the city, followed by apartment units in buildings with fewer than five storeys and row houses.

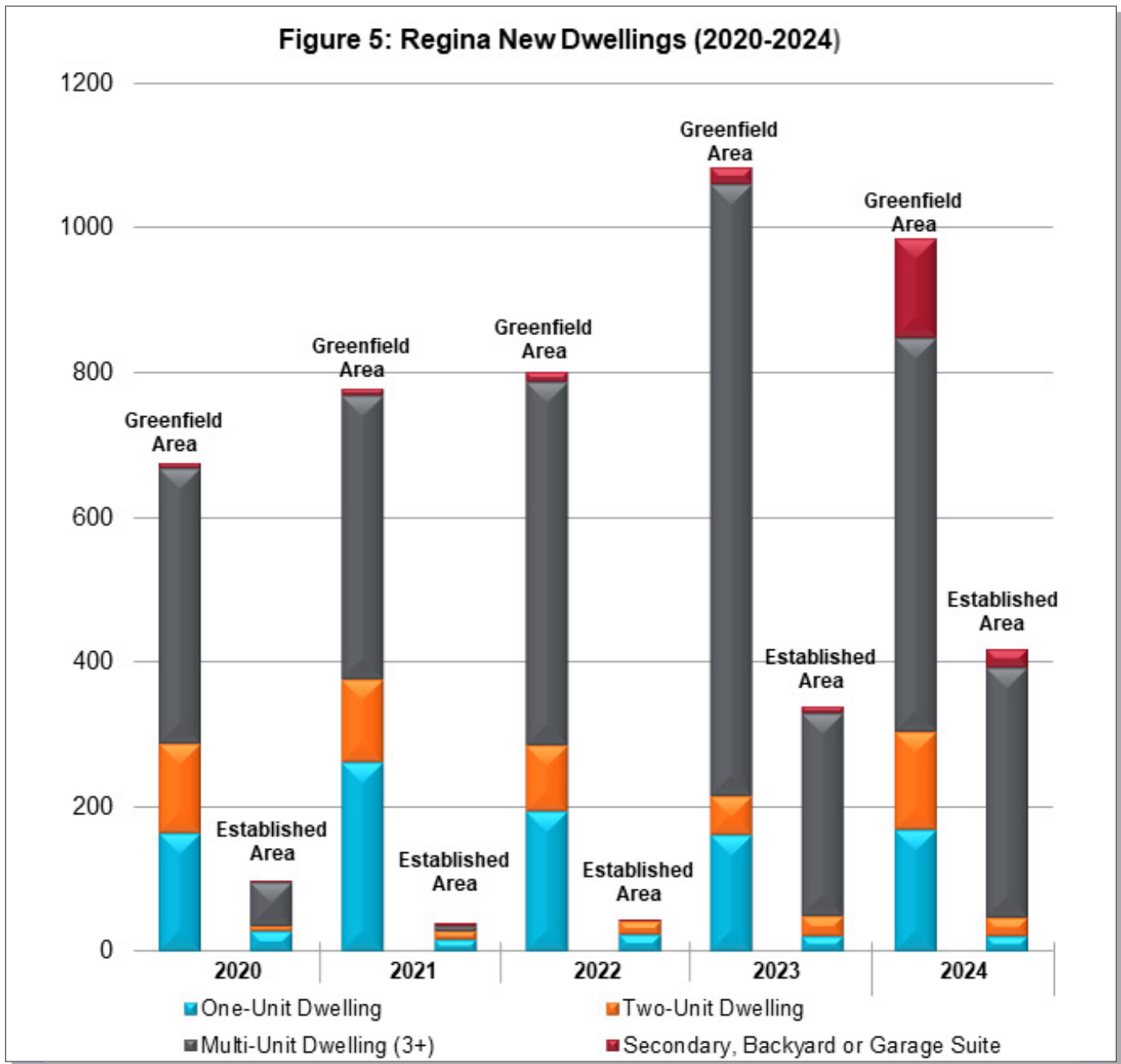


Source: Statistics Canada – Census Profile, 2021 Census of Population

Residential Building Permit Activity

Figure 5 illustrates the number, type and location of new dwelling units added to the city’s housing stock between 2020 and 2024. During this period, multi-unit dwellings such as apartments and townhouses were the predominant type of new dwelling unit constructed. However, single and two-unit dwellings still retained a sizeable share of the total dwellings constructed during this period.

² Population adjusted by 3.1 per cent to account for **net census undercount**.



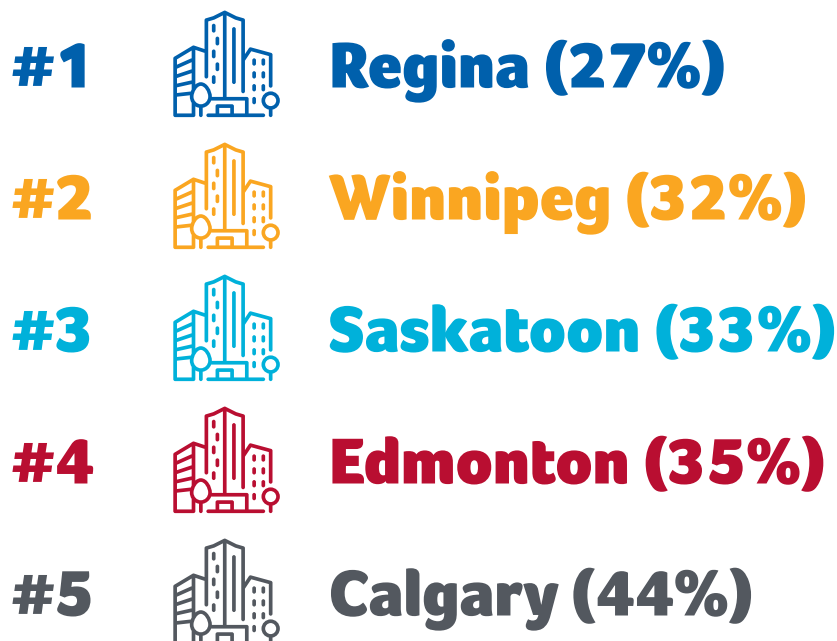
Note: the “[Established Area](#)” refers to the existing built-up area of Regina as of 2013 when the OCP was approved, the “[Greenfield Area](#)” encompasses all areas on the periphery of the city that are either under actively developing or currently undeveloped.

Housing Affordability

Looking at the homeownership market, the Royal Bank of Canada's (RBC) [June 2024 Housing Trends and Affordability Report](#) indicates Regina has the most affordable housing market across Canada's large cities as Regina has the lowest RBC Aggregate Affordability Measure at 27 per cent. The RBC Affordability Measures refer to the percentage of median pre-tax household income that would be required to cover mortgage payments, property taxes and utilities based on the benchmark price for single-detached units and condo apartments, as well as a total aggregate of prices for other housing types.

While Regina may be considered affordable relative to other jurisdictions, the RBC report concludes that tight housing supply conditions coupled with rising demand could drive up housing prices in the short term, potentially eroding affordability.

RBC Aggregate Affordability Measure in Major Prairie Province Cities



Shifting to the rental market, Regina's rental market is currently facing low vacancy rates and increased rents. According to Canadian Mortgage and Housing Corporation (CMHC) data, as of October 2024, Regina's total rental vacancy rate (RVR) is 2.7 per cent. As shown in Table 1, the lowest vacancy rates are in the two-bedroom and bachelor-unit rental types. Table 2 shows how average monthly rental prices for various apartment and rowhouse rental types have changed since 2020.

Table 1: Regina RVR (October 2020 to October 2024)

	Bachelor Unit	1-Bedroom Unit	2-Bedroom Unit	3-Bedroom + Unit	Total
October 2020	9.8%	8.2%	6.9%	3.5%	7.2%
October 2021	8.6%	8.1%	6.2%	3.3%	6.8%
October 2022	6.2%	3.2%	2.8%	1.9%	3%
October 2023	3.9%	1.6%	1.1%	0.9%	1.4%
October 2024	2.4%	3.2%	2.3%	3.7%	2.7%

Source: CMHC – Rental Market Survey

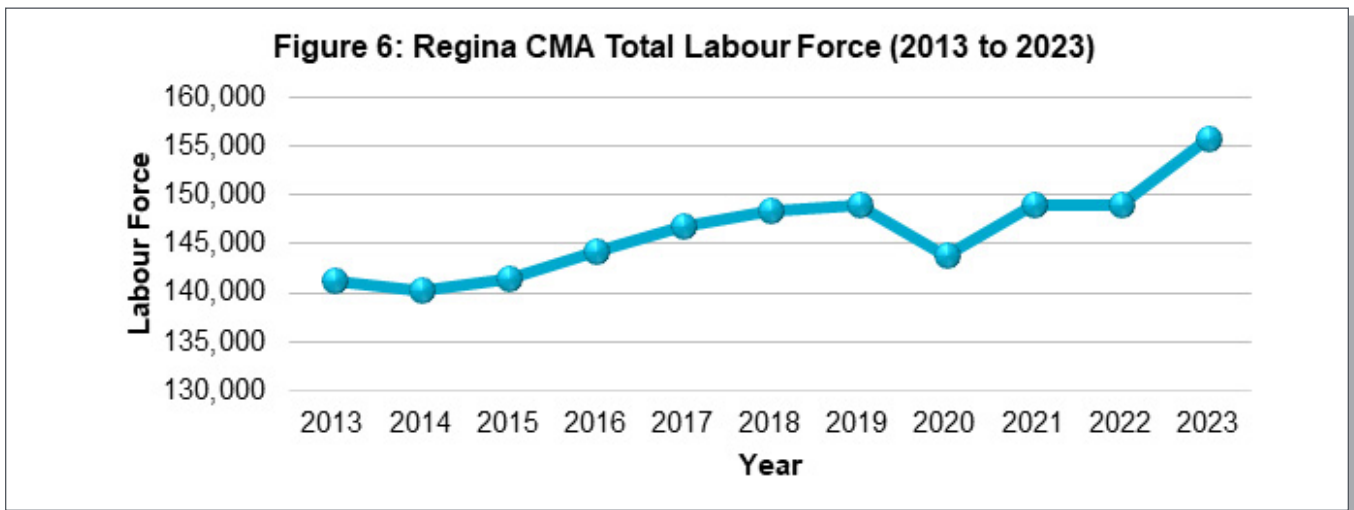
Table 2: Regina Average Monthly Rental Prices (October 2020 to October 2024)

	Bachelor Unit	1-Bedroom Unit	2-Bedroom Unit	3-Bedroom + Unit	Total
October 2020	\$757	\$952	\$1,158	\$1,391	\$1,082
October 2021	\$722	\$954	\$1,162	\$1,381	\$1,081
October 2022	\$743	\$988	\$1,191	\$1,424	\$1,114
October 2023	\$788	\$1,084	\$1,304	\$1,521	\$1,219
October 2024	\$879	\$1,185	\$1,420	\$1,728	\$1,341

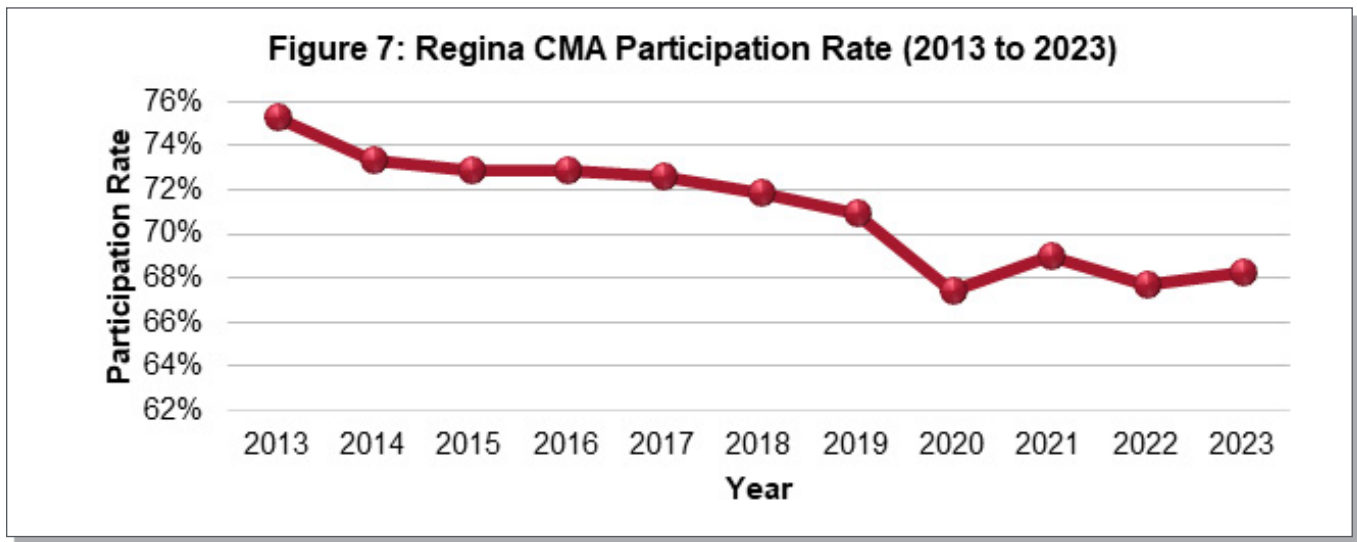
Source: CMHC – Rental Market Survey

Economic Base

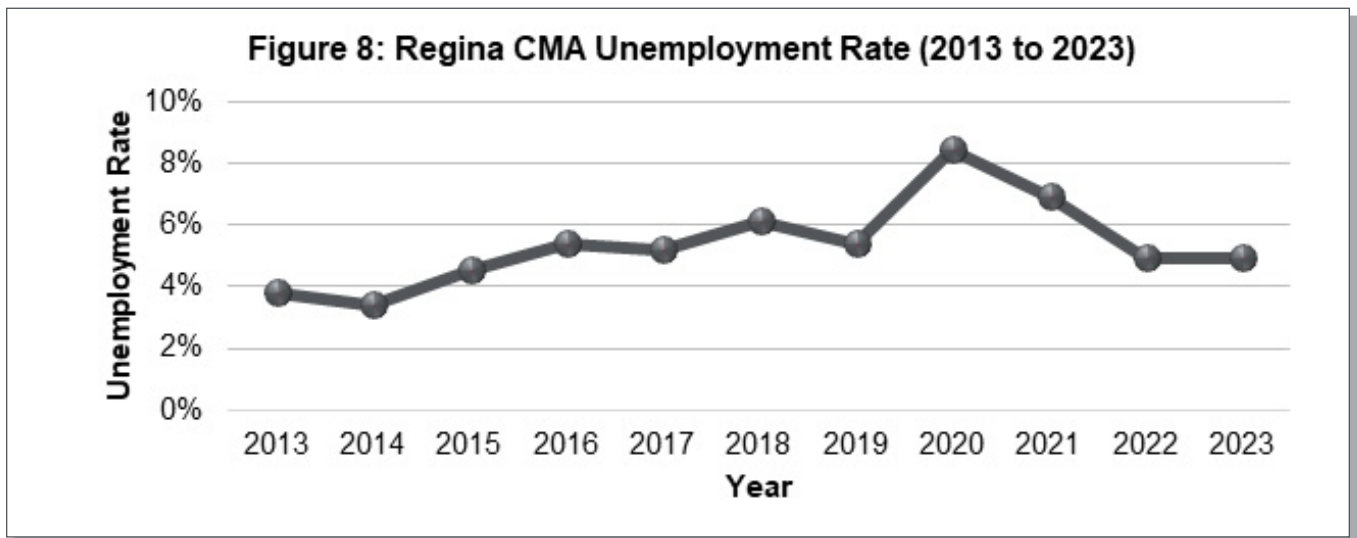
The Regina CMA has a **labour force** of approximately 155,600 with a **labour force participation rate** of 68.2 per cent and an **unemployment rate** of 4.9 per cent. Figures 6, 7 and 8 provide historical trends for each economic indicator.



Source: Statistics Canada – Table 14-10-0385-01 Labour force characteristics, annual

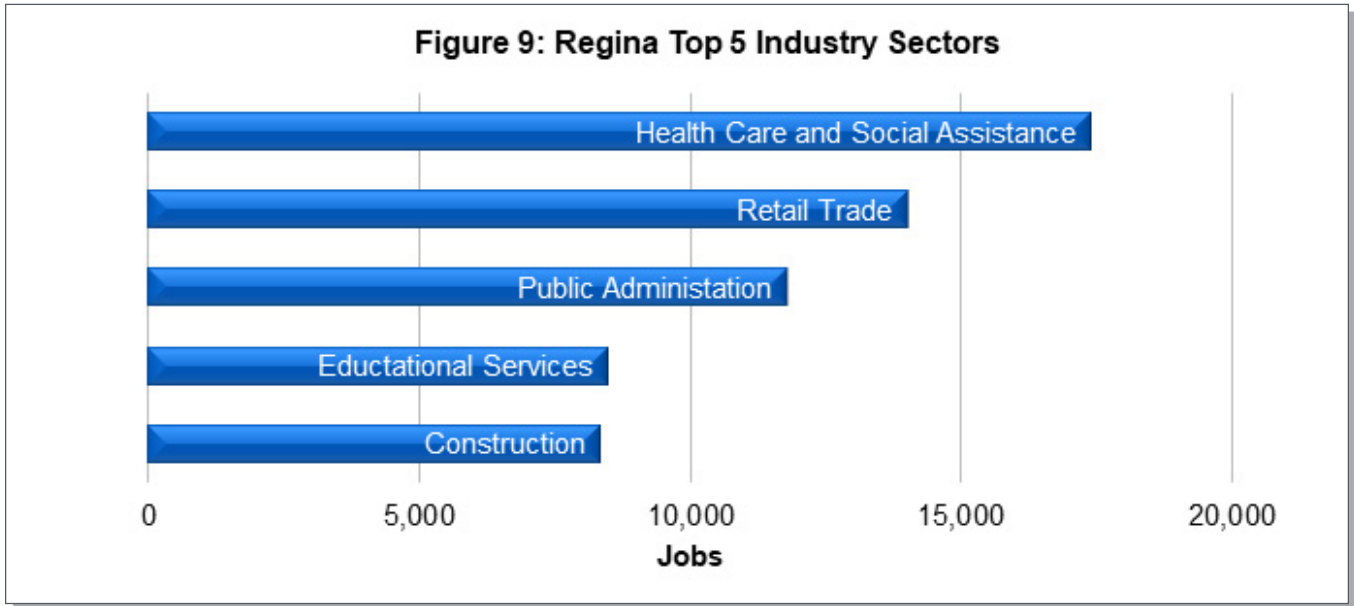


Source: Statistics Canada – Table 14-10-0385-01 Labour force characteristics, annual



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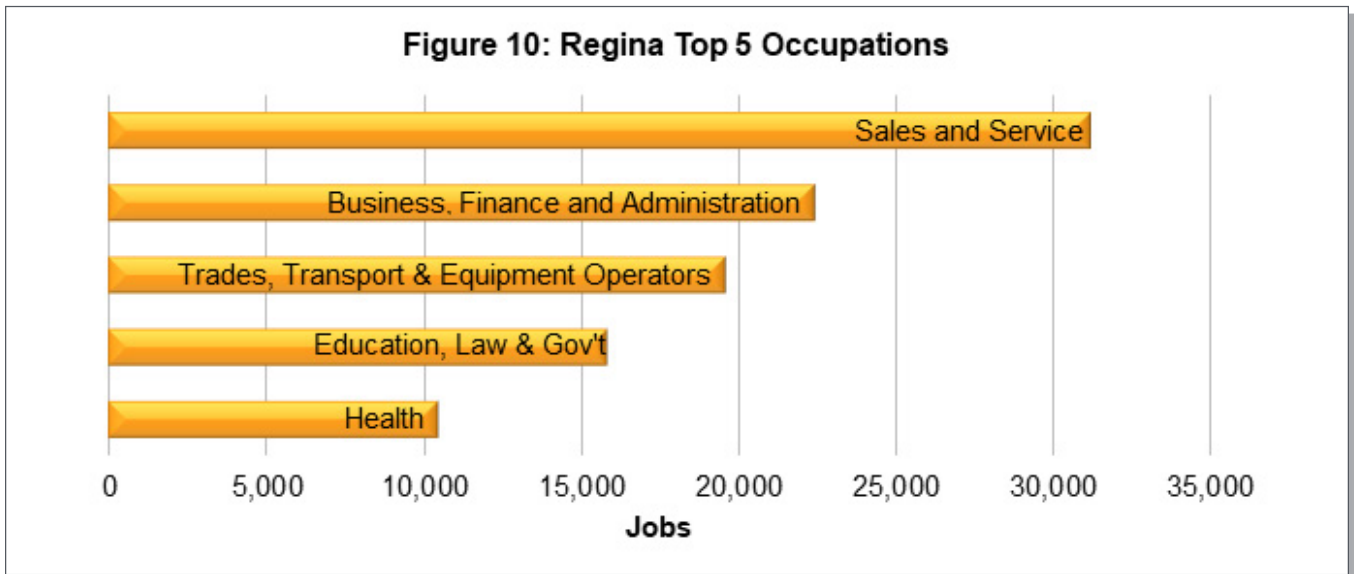
Regina's economic base has a diverse range of industry sectors. As summarized in Figure 9, the health care and social assistance sector retains the largest share of jobs in Regina, followed by the retail trade and public administration sectors, respectively. Note, "industry sector" refers to the general nature of the business carried out in an establishment where a person works.



Source: Statistics Canada – Census Profile, 2021 Census of Population

Note: The category “professional services” includes scientific and technical-related services. The category “Other services” excludes public administration employment.

Looking at occupation, sales and service occupations are the most prevalent occupations in Regina, followed by business, finance and administration occupations and trades, transport and equipment operators and related occupations. Note, “occupation” refers to the kind of work performed by persons aged 15 years and over as determined by their kind of work and the description of the main activities in their job.



Source: Statistics Canada – Census Profile, 2021 Census of Population.

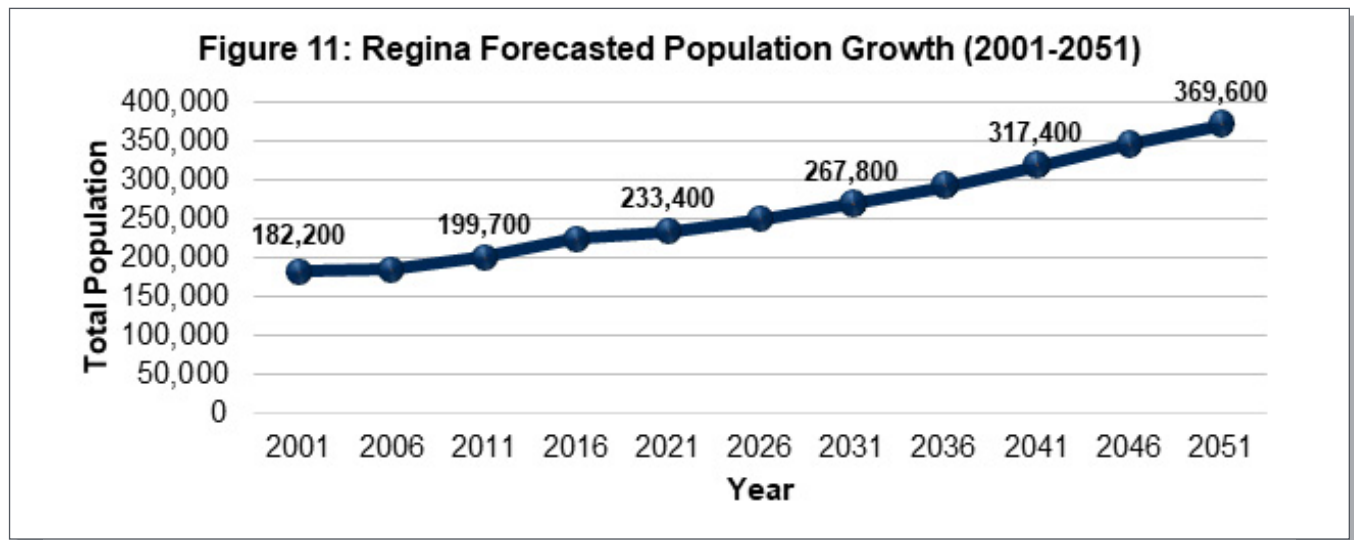
3 Forecasted Growth

The Growth Study mentioned in Section 1 of this Discussion Paper forecasts population, housing and employment growth over the next three decades to the year 2051. A key objective of the Growth Plan Review is to ensure the Growth Plan identifies enough land to accommodate this growth.

Note, the Growth Study uses 2021 as a baseline year to align with the most recent Statistics Canada Census. As such, the year 2021 serves as the starting year for each forecast.

Population

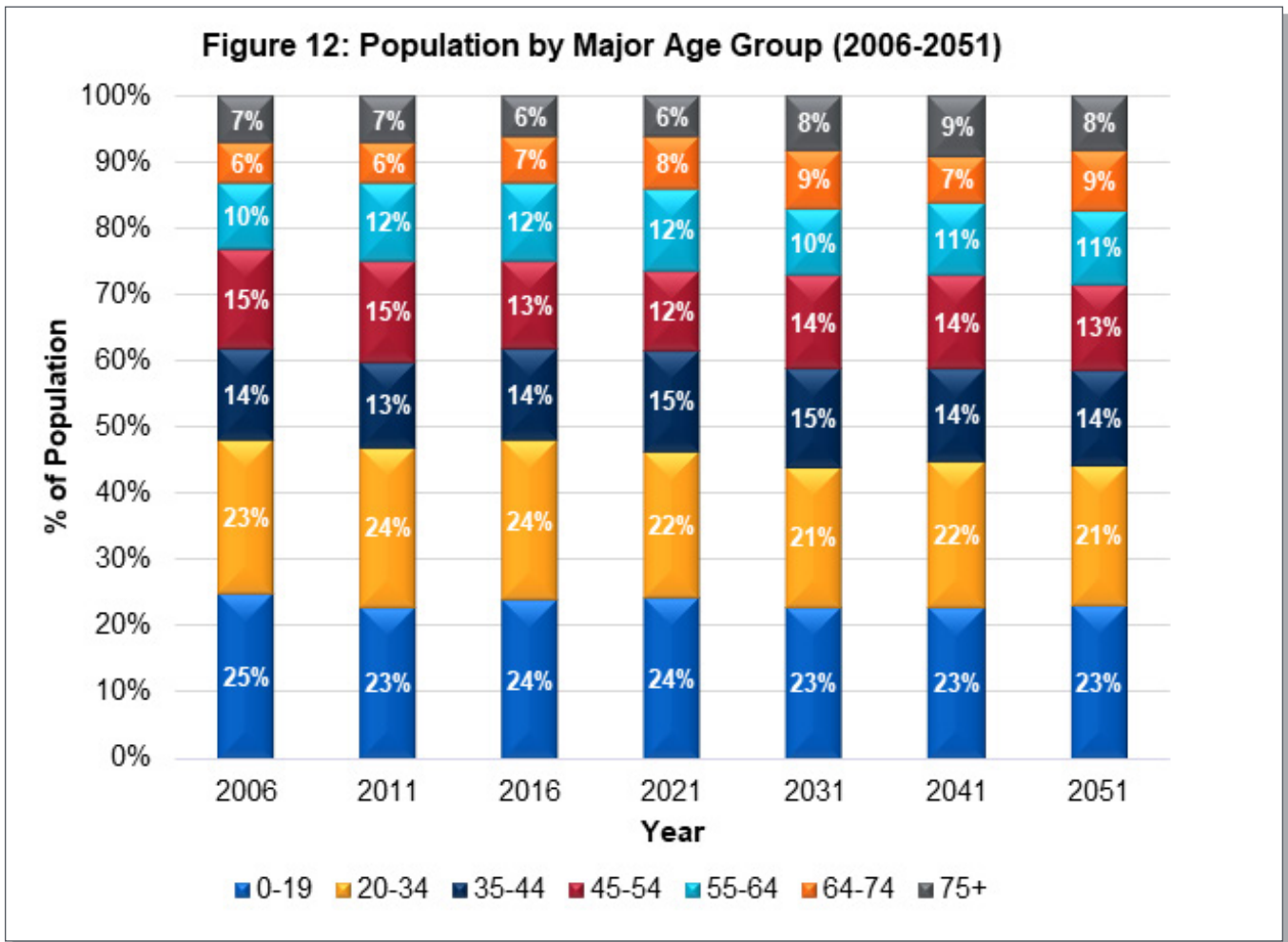
Between 2021 and 2051, the population of Regina is forecast to grow at an annual rate of approximately 1.5 per cent (4,540 people). At this rate, the population is expected to reach 369,600 by 2051, representing an increase of approximately 136,200 people from 2021 to 2051.



Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

Note: Census data is used for the years 2001, 2006, 2011, 2016 and 2021.

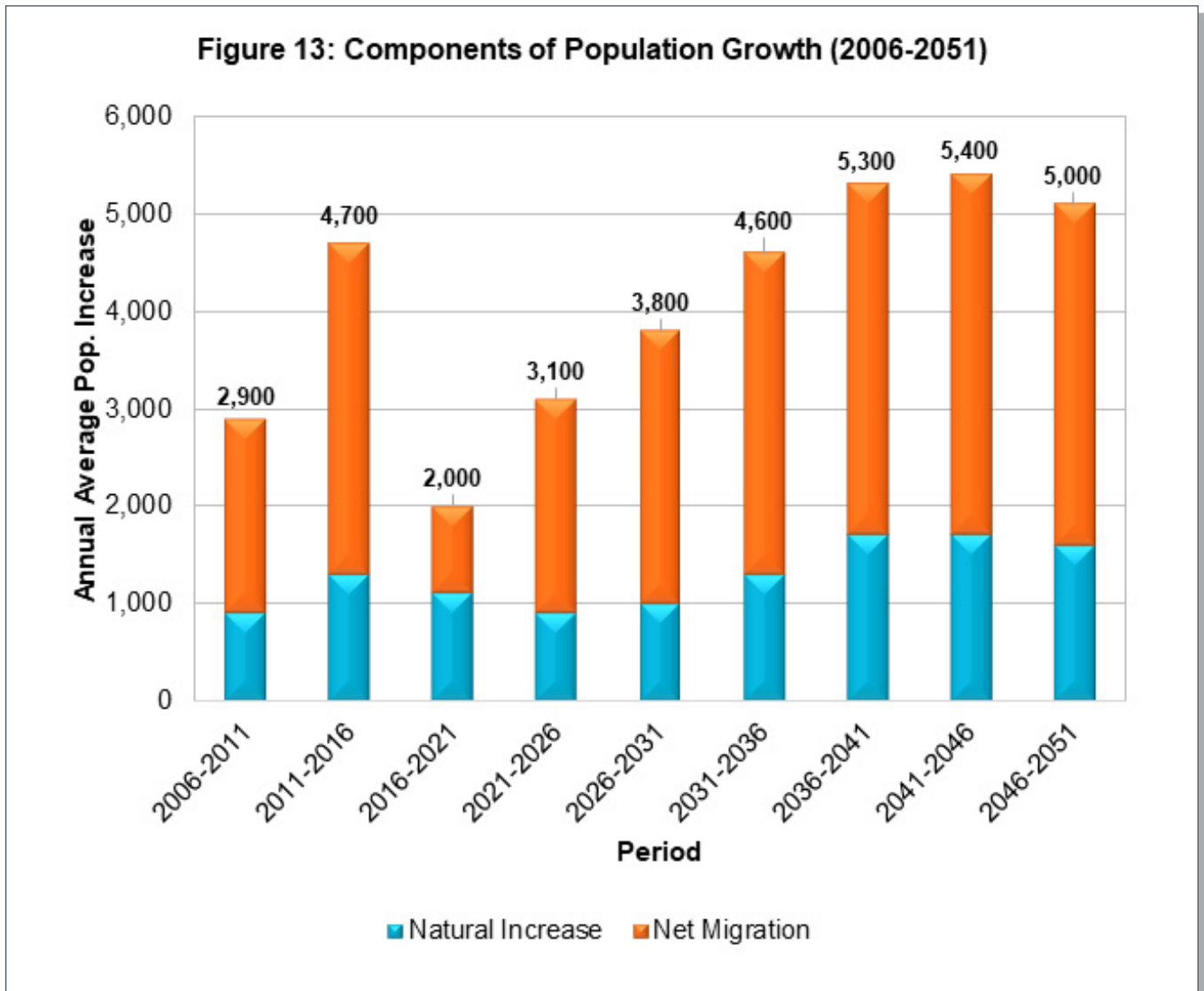
Figure 12 summarizes forecasted population growth by major age group. Over the forecast period, Regina’s population base is expected to age steadily. For instance, the percentage of population in the 0-19 and 20-44 age groups is expected to decline. Whereas the percentage of population over 65 years of age is projected to increase from 14 per cent in 2021 to 17 per cent in 2051.



Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

Note: Census data is used for the years 2006, 2011, 2016 and 2021.

Looking at the components of population growth discussed in Section 2, net migration is expected to be the primary driver of Regina’s forecasted population growth. This trend is anticipated due to a projected decline in natural population growth, resulting from the aging of the current population.

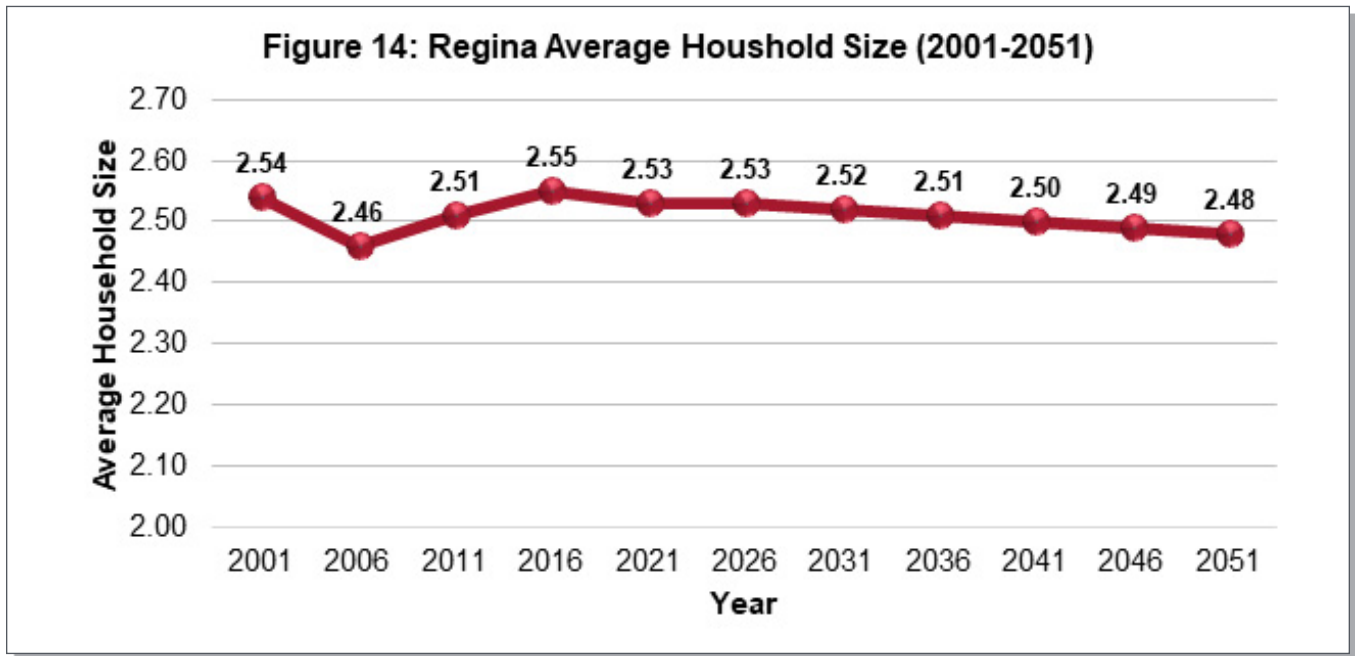


Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

Note: Census data is used for the years 2006, 2011, 2016 and 2021.

Housing

As illustrated in Figure 14, between 2021 and 2051, Regina’s average household size (or ‘people-per-unit’) is expected to decline. Although non-permanent residents and multi-generational households typically increase average household size, this effect is counterbalanced by the aging population. This is due to the tendency of people to live in smaller household sizes when they grow older and/or when their children move away.



Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

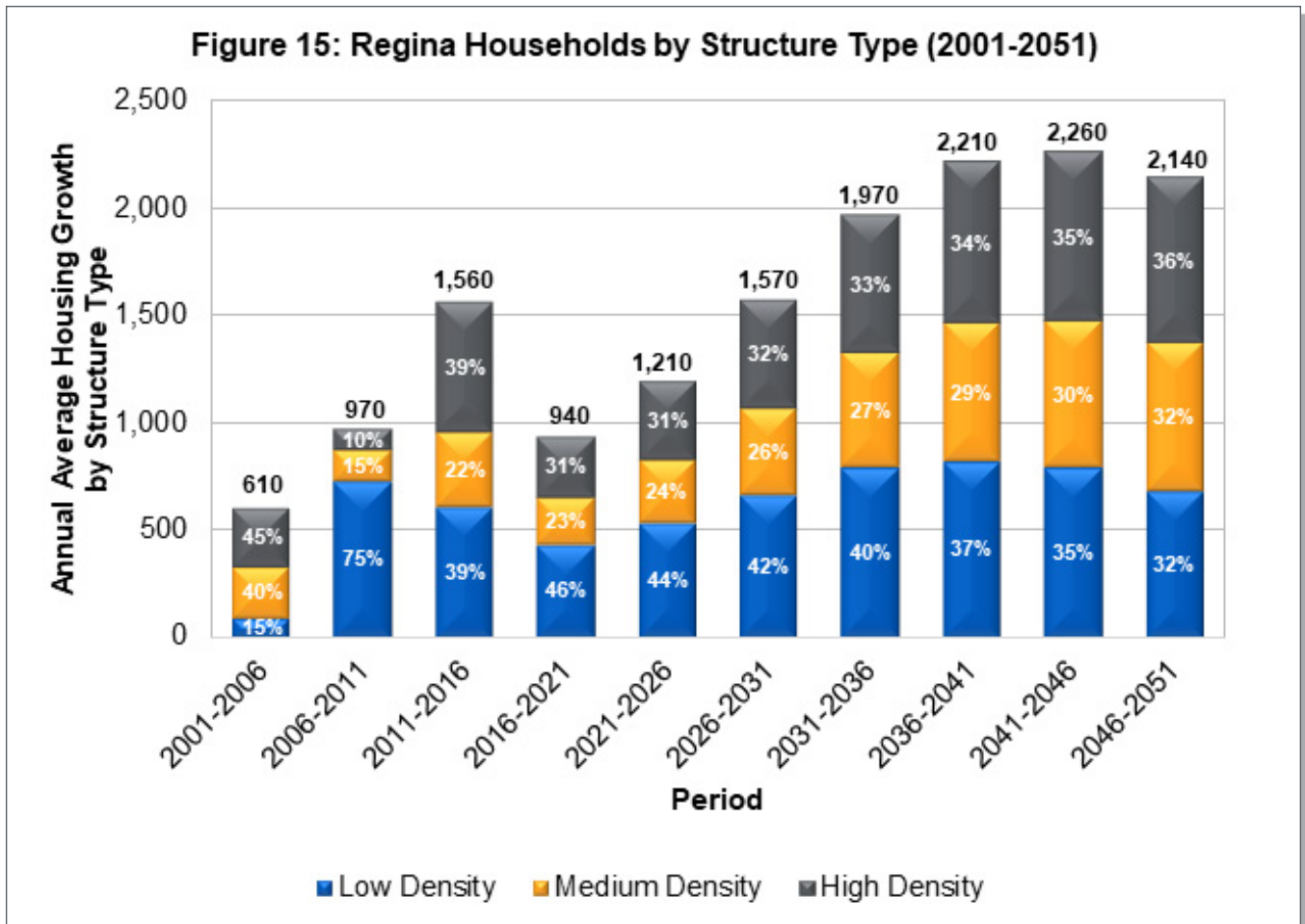
Note: Census data is used for the years 2006, 2011, 2016 and 2021.

Note: Population adjusted by 3.1 per cent to account for net census undercounting.

Figure 15 summarizes Regina’s forecasted average annual new housing units by housing structure type in five-year intervals between 2021 and 2051. Overall, total housing units in Regina are projected to increase by approximately 56,860 over this period. Of these, it is anticipated that:

- 37 per cent will be low-density units (single- and semi-detached dwellings).
- 28 per cent will be medium-density units (townhouses and rowhouses).
- 35 per cent will be high-density units (apartments and secondary units).

While medium- and high-density units are expected to be the predominant type of new housing from 2021 to 2051, low-density units are still forecast to account for a significant share of projected housing growth. Low-density housing in Regina may be particularly appealing to potential new residents from other cities where living in or owning a low-density housing unit is less affordable compared to Regina.

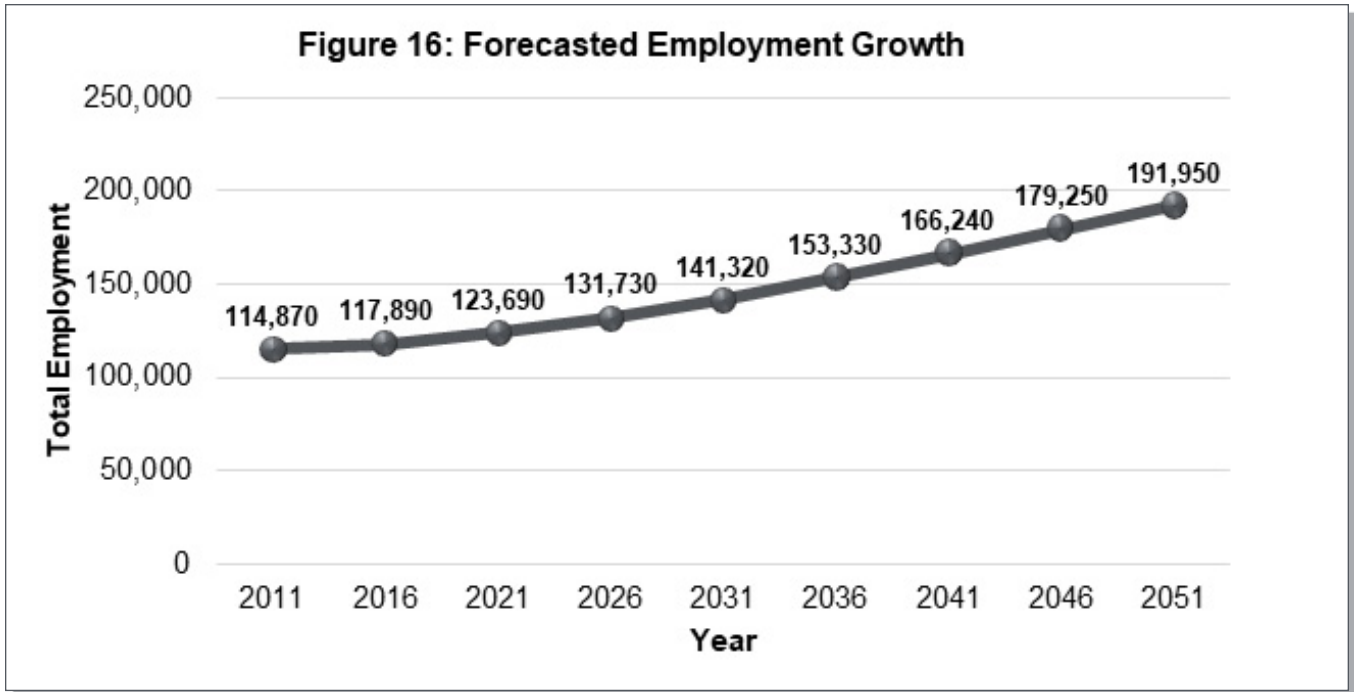


Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

Note: Census data is used for the 2001-2006, 2006-2011, 2011-2016 and 2016-2021 periods

Employment

By 2051, Regina's employment base is forecast to reach 191,900, an increase of 68,200 jobs from 2021. This equates to an annual employment growth rate of 1.5 per cent between 2021 and 2051, significantly higher than the 0.7 per cent annual growth rate observed between 2011 and 2021. This growth is expected to be primarily driven by new jobs in **service providing employment sectors**. Additionally, new jobs are also anticipated within the industrial sector, particularly in small-scale utilities, construction and manufacturing industries.

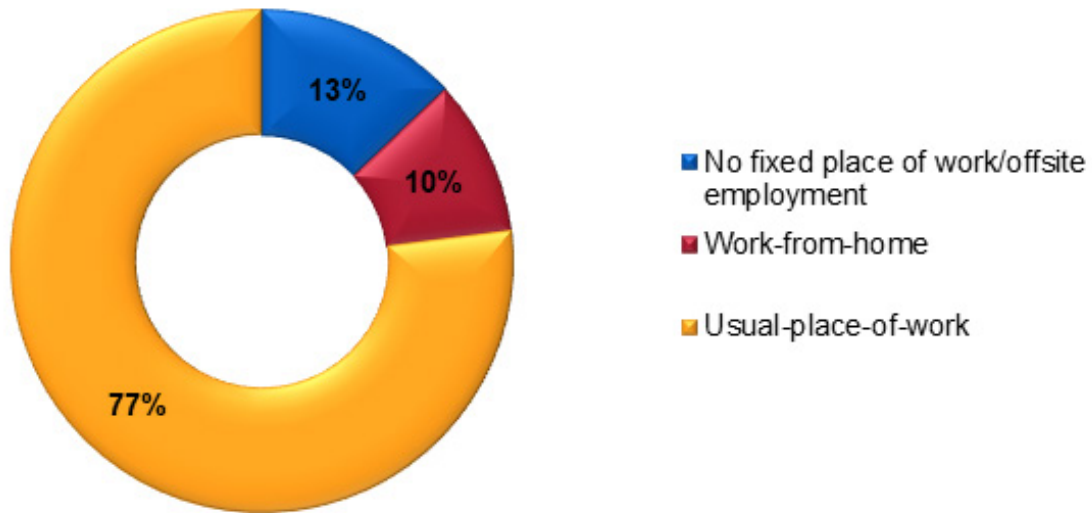


Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

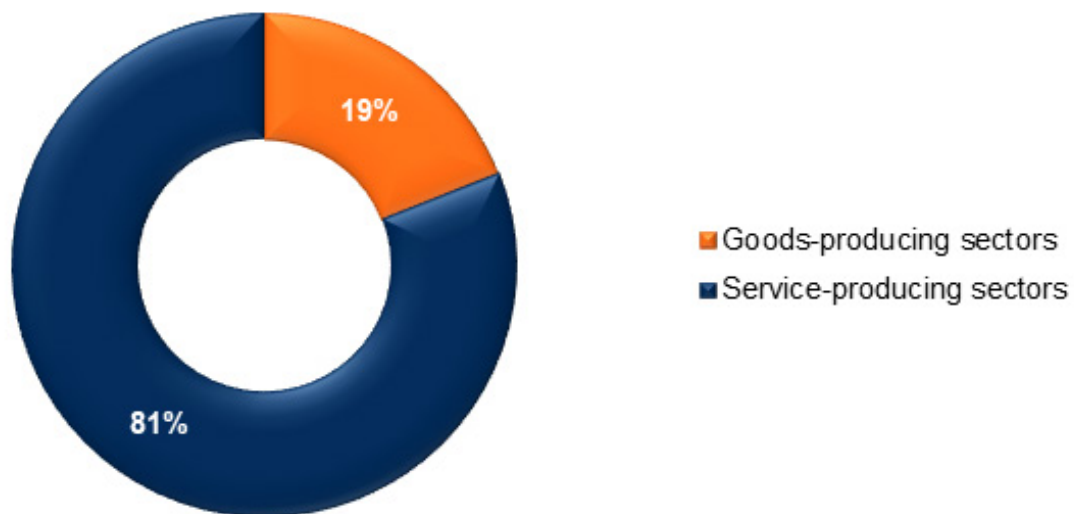
Note: Census data is used for the 2001-2006, 2006-2011, 2011-2016 and 2016-2021 periods

Of the 68,200 projected new jobs over the 2021 to 2051 period, approximately 23 per cent are associated with **work-from-home** or **offsite employment**. As shown in Figure 17, **usual-place-of-work (UPOW) employment** is expected to accommodate the majority of anticipated new employment opportunities during this period.

Figure 18 breaks down the forecasted new UPOW jobs by major employment sector. Approximately 81 per cent of these jobs are anticipated to be in service-producing sectors, while 19 per cent are expected to be in goods-producing sectors, such as utilities, construction, manufacturing and transportation and warehousing industries.

Figure 17: Regina Employment Forecast by Place of Work

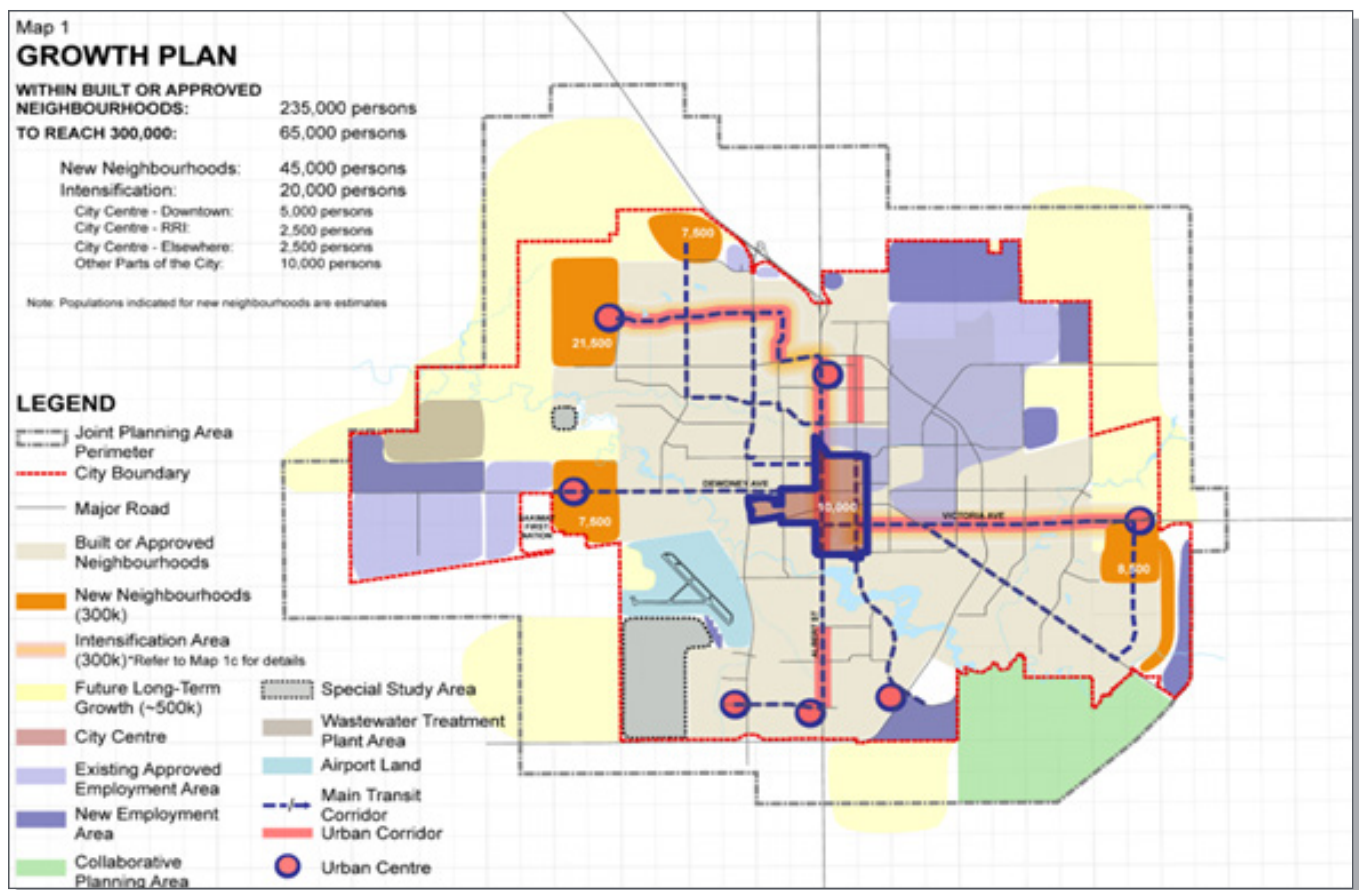
Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

Figure 18: Regina UPOW New Jobs by Major Sector

Source: Watson & Associates Economists – Population, Housing and Employment Forecast and Urban Land Needs Study (2024)

4 Phasing and Targeting Growth

Shown below, is the current [Growth Plan](#) intended to manage Regina’s residential growth to a population of 300,000 people. The plan also identifies **new employment areas** and long-term growth areas intended to accommodate a future population of approximately 500,000 people.



The Growth Plan includes policy targeting 30 per cent of new residential growth to occur through redevelopment opportunities in established neighbourhoods (i.e. Intensification) and 70 per cent to occur through the development of new neighbourhoods near the edge of the city (i.e. Greenfield Development). For simplicity, the remainder of this Discussion Paper segments growth as either Intensification or Greenfield Development.



Intensification: Evans Court

Evans Court is a mixed-density residential development located on the former Campion School site within the Hillsdale Neighbourhood.

The development is considered Intensification as it was accommodated on an existing serviced parcel within an established neighbourhood of the city.



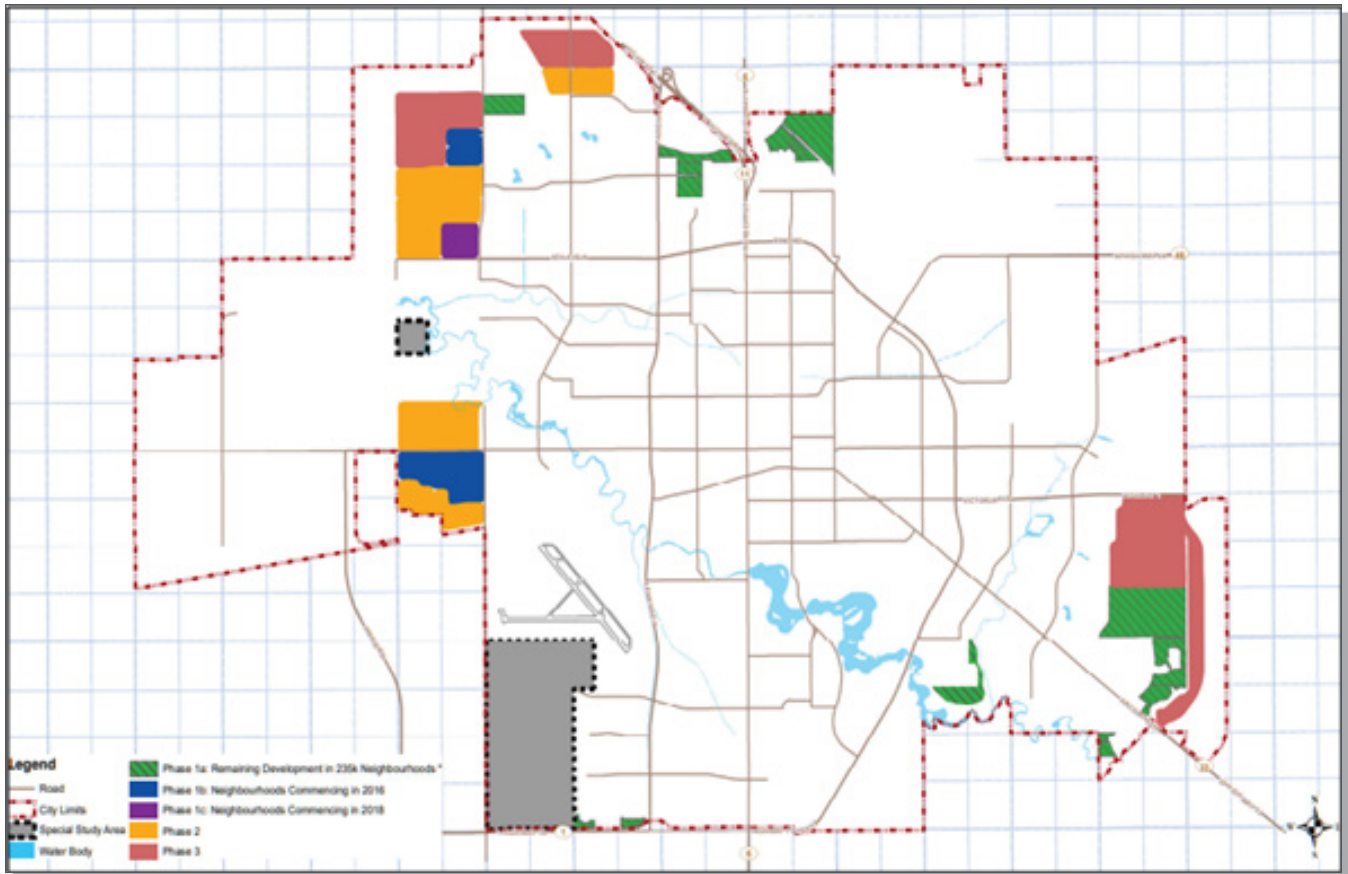
Greenfield Development: Harbor Landing

Harbor Landing is a mixed-density residential neighbourhood containing commercial businesses, schools and other complimentary land uses.

The neighbourhood is considered a Greenfield Development as it was accommodated on previously undeveloped and unserviced land located along the periphery of the city.

Shown on the next page, is the current Phasing Plan from the OCP. The Phasing Plan sequences the development of new neighbourhoods over three phases, linking to OCP policy requiring that 75 per cent of new neighbourhoods in a particular phase must be developed and subdivided before neighbourhoods in the next phase may advance. Note, the new employment areas referenced earlier are not subject to phasing, however, they still require City approval before development can proceed.

The Phasing Plan will be updated as part of the OCP Growth Plan Review, potentially changing the long-term growth pattern of future greenfield neighbourhoods in the city. For example, an updated Phasing Plan may dictate that all neighbourhoods within a specific geographic sector of the city must be developed before neighbourhoods in a different area may proceed.



Reviewing Growth Targets and Identifying New Growth Areas

To support the forecasted population, housing and employment growth outlined in Section 3, the Growth Plan Review will expand the current plan by identifying additional lands and areas to accommodate future growth through Intensification and Greenfield Development.

As noted earlier, the current OCP directs 30 per cent of new residential growth to occur through Intensification and 70 per cent to occur through Greenfield Development. For simplicity, these figures may be referred to as the Intensification Target and Greenfield Target.

In identifying lands to accommodate forecasted growth, the Growth Plan Review will first consider changes to the Intensification and Greenfield Targets. For example, if the Intensification Growth Target is increased to 40 per cent, the new Greenfield Growth Target would become 60 per cent.

Potential factors to evaluate when exploring changes to the Intensification and Greenfield Growth Targets may include:

- Progress on the current Intensification Growth Target.
- Jurisdictional best practices.
- Servicing costs and development readiness.
- Environmental impact.

While the list above is not exhaustive, it may serve as a starting point when considering modifications to the Intensification Growth Target. The graphic on the next page provides additional information and context on the above list.





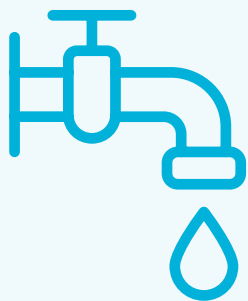
Progress on the Intensification and Greenfield Growth Targets

- Between 2019 and the end of September 2024, it is estimated that approximately 18 per cent of approved new dwellings fall within established areas, 12 per cent short of the OCP’s current Intensification Target of 30 per cent.
- Looking at 2024 alone, Regina achieved the Intensification Growth Target as 30 per cent of new dwellings were within established areas of the city.



Jurisdictional best practices

- Most major Canadian cities have an Intensification Growth Target entrenched in their key planning policies.
- While each city has their own nuances and factors influencing this target, it may be worthwhile to consider targets in the other major prairie province cities that are often compared with Regina. For instance, Calgary, Edmonton, Winnipeg and Saskatoon all have residential Intensification Growth Targets of 50 per cent.



Servicing costs and development readiness

- Recent City infrastructure studies and modelling indicate certain established areas have more current infrastructure capacity to support intensification opportunities than others.
- Given this reality, it may be worthwhile to guide intensification in the immediate and short-term to areas that can currently accommodate new development. Areas requiring infrastructure investment may be better suited for intensification over the medium- or long-term, after necessary infrastructure projects are completed.



Environmental Impact

- New development and housing in established areas, particularly those near the city’s core and in proximity to main transit routes will reduce energy consumption and associated greenhouse gas emissions through reduced travel distances to schools, employment, community amenities and destinations.

5 Closing and How to Stay Engaged

Engagement with the public, stakeholders and Indigenous Rightsholders on the OCP Growth Plan Review project will occur throughout 2025. Engagement will involve asking for feedback on potential long-term visions (or ‘scenarios’) for growth related to where and how future growth should be targeted (e.g. intensification or redevelopment of existing areas, new greenfield neighbourhoods) while considering factors like infrastructure servicing costs, market preferences and long-term sustainability. Informed by feedback received during engagement, recommendations on an updated Growth Plan and related OCP policies will be presented to City Council in fall 2025.



6 Glossary

Intensification: Construction of new buildings or additions to existing buildings on serviced land within existing built areas through building conversion, infill or redevelopment practices.

Labour Force: According to Statistics Canada, the civilian noninstitutional population 15 years of age and over, who during the survey reference week [when labour force statistics are collected], were employed or unemployed.

Labour Force Participation Rate: According to Statistics Canada, the number of labour force participants [i.e. employed] expressed as a percentage of the population aged 15 years and over.

Multi-Generational Household: A household where there is at least one person who is both the grandparent of a person in the household and the parent of another person in the household.

Net Census Undercount: The Census undercount represents the net number of permanent residents who are missed (i.e. over-coverage less under-coverage) during Census enumeration in accordance with Statistics Canada.

Net International Migration: Comprises international migrants (e.g. a family moving from the USA to Regina) less emigrants, plus net non-permanent residents.

Net Inter-Provincial Migration: Comprises in-migration (e.g. a family moving from Alberta to Regina) less out-migration (e.g. a family moving from Regina to Manitoba) from other Canadian provinces/territories.

Net Intra-Provincial Migration: Comprises in-migration (e.g. a family moving from Saskatoon to Regina) less out-migration (e.g. a family moving from Regina to Moose Jaw) from elsewhere within Saskatchewan.

Net Migration: The net total of migrants during a specific period over three broad categories: net international migration, net inter-provincial migration and net intra-provincial migration.

New Employment Areas: Lands that will accommodate a full range of employment-generating land uses primarily industrial or industrial-commercial in nature (e.g. canola processing facility).

New Neighbourhoods: Lands that are primarily undeveloped or vacant that will accommodate new residential development with supporting services and amenities. New Neighbourhoods are located on the periphery of, or adjacent to, existing areas of the city.

Non-Permanent Resident: A person from another country who has been legally granted the right to live in Canada on a temporary resident permit along with members of their family living with them. Non-permanent residents include international workers, refugees, international students and other temporary residents.

Offsite Employment: Persons who do not go to the same workplace location at the beginning of each shift, such as building and landscape contractors, travelling salespersons and independent truck drivers.

Regina Census Metropolitan Area: According to Statistics Canada, a Census Metropolitan Area (CMA) consists of one or more adjacent municipalities centred around a population centre (referred to as the “core”). A CMA must have a total population of at least 100,000 with at least 50,000 residing in the core.

Service Providing Employment Sectors: North American Industry Classification System categories related to population growth, such as retail trade, information and cultural industries, finance and insurance, real estate, rental and leasing, professional, scientific and technical services, administrative and support, arts and entertainment, accommodation and food services, and other services except for public administration.

Unemployment Rate: The number of unemployed persons expressed as a percentage of the labour force.

Usual-Place-Of-Work Employment: Persons who report to the same (usual) workplace location at the beginning of each shift.

Work-From-Home Employment: Includes persons whose job is located in the same building as their place of residence, persons who live and work on the same farm and teleworkers who from home the majority of the work week.