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THUNDER BAY HOME STARTS DIP, SUDBURY UP

Demand for new single-detached homes in Thunder Bay Census Metropolitan Area (CMA) has subsided. The resale market is satisfying detached home demand and employment growth is not generating sufficient additional demand to warrant more new homes.

Single-detached starts represent the bulk of the new housing activity in the North. The 50 single home starts in the fourth quarter were 25.4 per cent behind the previous year's fourth quarter, but nearly on par with the five-year fourth-quarter-average.

Total starts in Thunder Bay for 2005 trailed 2004 by 25.7 per cent.

fourth Quarter 2005

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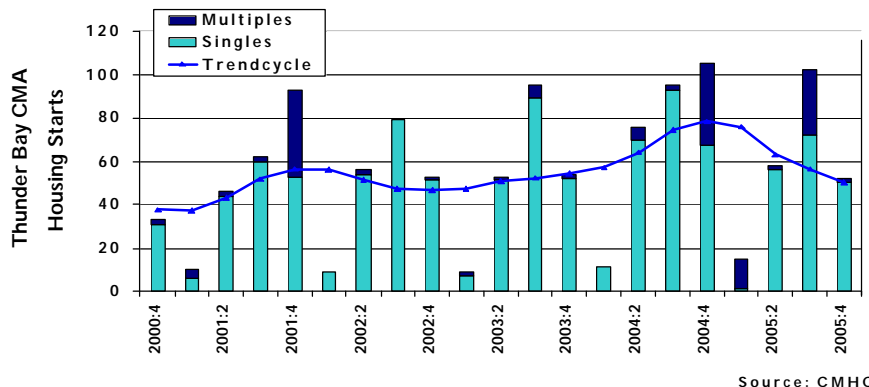
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Within the city limits, McIntyre ward had the most starts in 2005 with 52, followed by Red River ward with 43 and Neebing with 42 single-detached starts. Outside the city limits, starts fell to 29 units, down from 50 last year. This accounted for 16 per cent of the CMA activity.

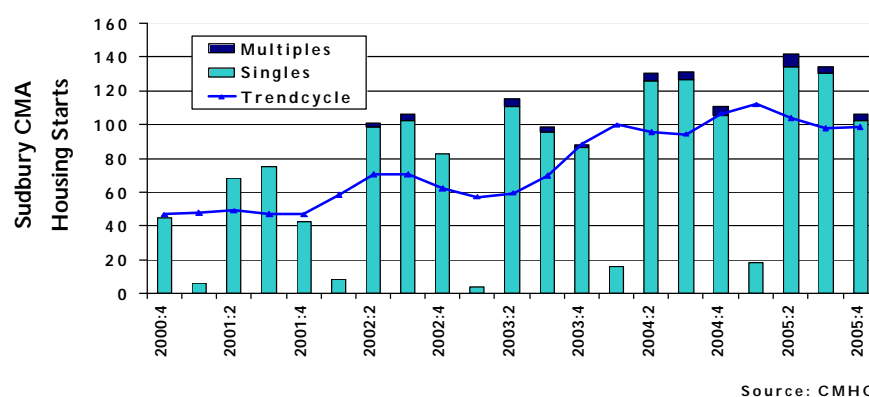
In Greater Sudbury, single-detached housing starts rose for the sixth straight year. A reasonably strong mining sector and low mortgage rates helped buoy the market for new construction. Limited availability of resale homes in move-up price ranges is enhancing conditions for building single-family homes. Migration to Sudbury has become a more important housing demand factor with most in-migrants coming from the hinterlands of Northeastern Ontario.

The bulk of the Greater Sudbury singles starts were in Sudbury City (154) but 90 were started in Valley East and 52 in Nickel Centre. Walden and Rayside-Balfour saw 42 and 38 respectively.

Thunder Bay Starts Soften



Strong Sudbury Starts



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In addition to Greater Sudbury, the other three largest centres in the Northeast are receiving in-migrants. North Bay and Sault Ste. Marie made noteworthy gains in housing starts in 2005. In North Bay, a medium density waterfront housing development kicked off in the fourth quarter. Single-detached starts reached their highest level since 1991. Sault Ste. Marie home construction activity tailed off in the fourth quarter but single-detached starts recorded their second highest level in the last eight years. Lastly, Timmins' starts nearly doubled to 34 units, the highest number of single-detached units built since 1999.

Multiple family starts in 2005 were negligible in Northern Ontario with

the above-noted exception in North Bay.

Vacancy rates for the four centres in the Northeast fell in 2005 which may prompt some interest in constructing rental housing in 2006.

Average prices for absorbed new single-detached units. In Thunder Bay, Sudbury, Sault Ste. Marie, and North Bay are found in Table 3. Average prices for the quarter and for 2005 are over \$200,000 in three of these markets, with Sault Ste. Marie's average absorbed single-detached housing price just shy of \$197,000.

Rising construction costs and demand for larger units with more amenities are contributing to this upward shift in price ranges. Table 4 presents new construction

absorption information by volume and by price range. The \$200,000 plus price range is the most popular in Sudbury, Sault Ste. Marie, Thunder Bay and North Bay while the \$150,000 to \$199,999 range is second most common.

Northern Ontario Resale Markets

Sudbury: *Tight*

Sudbury's resale market remains in a seller's state. Sub-district analysis of the Greater Sudbury resale market confirmed widespread strength in housing market indicators. Strength in nickel prices, improved demographics and a broadening economic base are sustaining demand in both the resale market and new residential construction market.

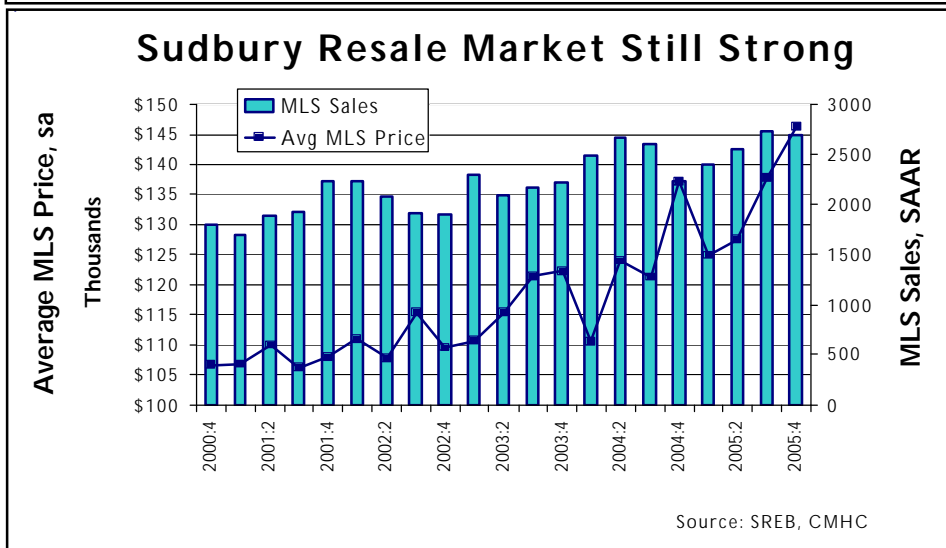
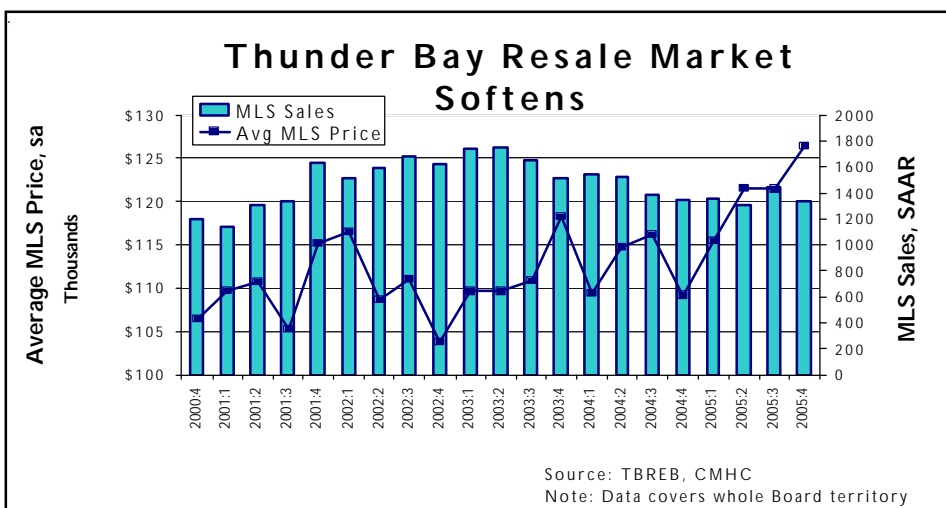
Greater Sudbury's 523 sales in the fourth quarter of 2005 were the strongest ever recorded. Annual 2005 Sudbury sales broke the 2004 record rising to 2,593, up from 2,500 last year.

Average prices jumped 9.4 per cent for the year. Fourth quarter prices cooled somewhat after an extremely hot third quarter.

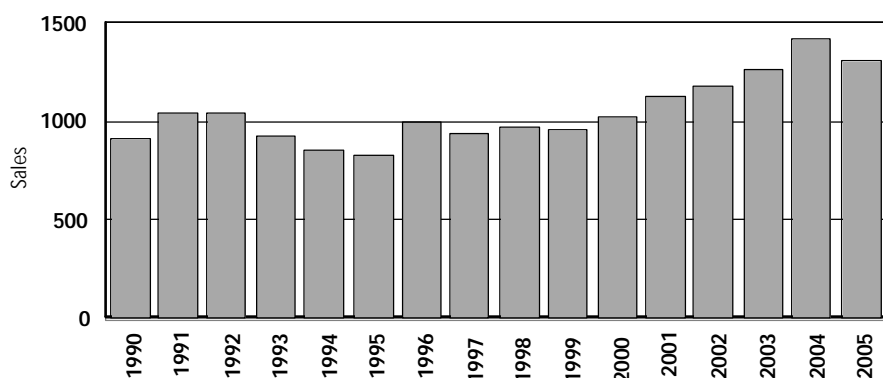
Thunder Bay: *Balanced*

According to Canadian Real Estate Association data, Thunder Bay sales slipped for the second consecutive year.

Average prices were surprisingly strong in the fourth quarter, up 10.1 per cent to \$117,883 compared to the fourth quarter of 2004. Slightly improving employment levels and lower demand support a continued balanced market classification in Thunder Bay.



North Bay Sales Lower This Year



Source: MLS® Sales from the North Bay Real Estate Board.

* MLS® is a registered trademark of the Canadian Real Estate Association.

North Bay Sales Dip

After establishing a record for resales in 2004, the North Bay market slowed slightly 2005. Sales fell 7.8 per cent from last year. The 228 sales in the fourth quarter were four per cent off last year's fourth quarter. New listings remain an issue in North Bay. With demand being still relatively strong and supply not having responded or risen, prices are up 6.7 per cent over 2004.

Table 1A: Housing Activity Summary for Thunder Bay CMA

| | OWNERSHIP | | | | | RENTAL | | GRAND **TOTAL |
|------------------------------------|-----------|-------|--------|-------------|--------|--------|--------|------------------|
| | FREEHOLD | | | CONDOMINIUM | | ROW | APT | |
| | *SINGLE | *SEMI | ROW | ROW | APT | | | |
| STARTS | | | | | | | | |
| Q4 2005 | 50 | 2 | 0 | 0 | 0 | 0 | 0 | 52 |
| Q4 2004 | 67 | 2 | 5 | 0 | 31 | 0 | 0 | 105 |
| % Change | -25.4 | 0.0 | -100.0 | NA | -100.0 | NA | NA | -50.5 |
| Year-to-date 2005 | 179 | 4 | 0 | 0 | 44 | 0 | 0 | 227 |
| Year-to-date 2004 | 241 | 10 | 5 | 0 | 31 | 0 | 0 | 287 |
| % Change | -25.7 | -60.0 | -100.0 | NA | 41.9 | NA | NA | -20.9 |
| UNDER CONSTRUCTION | | | | | | | | |
| December 2005 | 89 | 4 | 5 | 0 | 30 | 0 | 14 | 142 |
| December 2004 | 121 | 6 | 5 | 0 | 31 | 0 | 0 | 163 |
| COMPLETIONS | | | | | | | | |
| Q4 2005 | 74 | 0 | 0 | 0 | 32 | 0 | 0 | 106 |
| Q4 2004 | 85 | 0 | 0 | 0 | 0 | 0 | 0 | 85 |
| % Change | -12.9 | NA | NA | NA | NA | NA | NA | 24.7 |
| Year-to-date 2005 | 211 | 6 | 0 | 0 | 32 | 0 | 0 | 249 |
| Year-to-date 2004 | 217 | 6 | 0 | 0 | 0 | 0 | 0 | 223 |
| % Change | -2.8 | 0.0 | NA | NA | NA | NA | NA | 11.7 |
| COMPLETE & NOT ABSORBED | | | | | | | | |
| December 2005 | 1 | 0 | 0 | 0 | 5 | 0 | 0 | 6 |
| December 2004 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 3 |
| ABSORPTIONS | | | | | | | | |
| Q4 2005 | 74 | 0 | 0 | 0 | 27 | 0 | 0 | 101 |
| Q4 2004 | 86 | 0 | 0 | 0 | 0 | 0 | 0 | 86 |
| % Change | -14.0 | NA | NA | NA | NA | NA | NA | 17.4 |
| Year-to-date 2005 | 213 | 6 | 0 | 0 | 27 | 0 | 0 | 246 |
| Year-to-date 2004 | 216 | 7 | 0 | 0 | 0 | 0 | 6 | 223 |
| % Change | -1.4 | -14.3 | NA | NA | NA | NA | -100.0 | 10.3 |

*Includes all market types

**Year-over-year change greater than 200 per cent

Source: CMHC

Table 1B: Housing Activity Summary for Sudbury CMA

| | OWNERSHIP | | | | | RENTAL | | GRAND TOTAL |
|------------------------------------|-----------|-------|-----|-------------|-----|--------|-----|-------------|
| | FREEHOLD | | | CONDOMINIUM | | ROW | APT | |
| | SINGLE | SEMI | ROW | ROW | APT | | | |
| STARTS | | | | | | | | |
| Q4 2005 | 102 | 4 | 0 | 0 | 0 | 0 | 0 | 106 |
| Q4 2004 | 105 | 2 | 0 | 0 | 0 | 4 | 0 | 111 |
| % Change | -2.9 | 100.0 | NA | NA | NA | -100.0 | NA | -4.5 |
| Year-to-date 2005 | 384 | 12 | 4 | 0 | 0 | 0 | 0 | 400 |
| Year-to-date 2004 | 374 | 10 | 0 | 0 | 0 | 4 | 0 | 388 |
| % Change | 2.7 | 20.0 | NA | NA | NA | -100.0 | NA | 3.1 |
| UNDER CONSTRUCTION | | | | | | | | |
| December 2005 | 134 | 10 | 0 | 0 | 0 | 4 | 0 | 148 |
| December 2004 | 129 | 4 | 0 | 0 | 0 | 4 | 0 | 137 |
| COMPLETIONS | | | | | | | | |
| Q4 2005 | 120 | 2 | 0 | 0 | 0 | 0 | 0 | 122 |
| Q4 2004 | 127 | 4 | 0 | 0 | 0 | 0 | 0 | 131 |
| % Change | -5.5 | -50.0 | NA | NA | NA | NA | NA | -6.9 |
| Year-to-date 2005 | 378 | 6 | 0 | 0 | 0 | 4 | 0 | 388 |
| Year-to-date 2004 | 338 | 6 | 0 | 0 | 0 | 0 | 0 | 344 |
| % Change | 11.8 | 0.0 | NA | NA | NA | NA | NA | 12.8 |
| COMPLETE & NOT ABSORBED | | | | | | | | |
| December 2005 | 10 | 0 | 0 | 0 | 0 | 0 | 0 | 10 |
| December 2004 | 8 | 0 | 0 | 0 | 0 | 0 | 0 | 8 |
| ABSORPTIONS | | | | | | | | |
| Q4 2005 | 127 | 2 | 0 | 0 | 0 | 0 | 0 | 129 |
| Q4 2004 | 123 | 4 | 0 | 0 | 0 | 0 | 0 | 127 |
| % Change | 3.3 | -50.0 | NA | NA | NA | NA | NA | 1.6 |
| Year-to-date 2005 | 376 | 6 | 0 | 0 | 0 | 4 | 0 | 386 |
| Year-to-date 2004 | 336 | 6 | 0 | 0 | 0 | 0 | 0 | 342 |
| % Change | 11.9 | 0.0 | NA | NA | NA | NA | NA | 12.9 |

*Includes all market types

**Year-over-year change greater than 200 per cent

Source: CMHC

Table 2A: Starts by Area and by Intended Market - Current Quarter

| Sub Market Area | SINGLES | | | MULTIPLES | | | TOTAL | | |
|--------------------|---------|---------|----------|-----------|---------|----------|---------|---------|----------|
| | Q4 2004 | Q4 2005 | % change | Q4 2004 | Q4 2005 | % change | Q4 2004 | Q4 2005 | % change |
| North Bay | 44 | 44 | 0.0 | 2 | 49 | ** | 46 | 93 | 102.2 |
| Sault Ste. Marie | 31 | 20 | -35.5 | 4 | 2 | -50.0 | 35 | 22 | -37.1 |
| Timmins | 7 | 7 | 0.0 | 0 | 0 | NA | 7 | 7 | 0.0 |
| Elliot Lake | 0 | 2 | NA | 0 | 0 | NA | 0 | 2 | NA |
| Haileybury | 3 | 9 | 200.0 | 0 | 0 | NA | 3 | 9 | 200.0 |
| Kenora | 18 | 14 | -22.2 | 0 | 33 | NA | 18 | 47 | 161.1 |
| Fort Frances | 2 | 0 | -100.0 | 0 | 0 | NA | 2 | 0 | -100.0 |
| Dryden | 2 | 0 | -100.0 | 0 | 0 | NA | 2 | 0 | -100.0 |

Table 2B: Starts by Area and by Intended Market - Year-to-Date

| Sub Market Area | SINGLES | | | MULTIPLES | | | TOTAL | | |
|------------------|----------|----------|----------|-----------|----------|----------|----------|----------|----------|
| | YTD 2004 | YTD 2005 | % change | YTD 2004 | YTD 2005 | % change | YTD 2004 | YTD 2005 | % change |
| North Bay | 139 | 163 | 17.3 | 12 | 63 | ** | 151 | 226 | 49.7 |
| Sault Ste. Marie | 109 | 101 | -7.3 | 10 | 27 | 170.0 | 119 | 128 | 7.6 |
| Timmins | 20 | 34 | 70.0 | 0 | 0 | NA | 20 | 34 | 70.0 |
| Elliot Lake | 0 | 5 | NA | 0 | 0 | NA | 0 | 5 | NA |
| Haileybury | 13 | 29 | 123.1 | 0 | 0 | NA | 13 | 29 | 123.1 |
| Kenora | 34 | 23 | -32.4 | 2 | 33 | ** | 36 | 56 | 55.6 |
| Fort Frances | 5 | 3 | -40.0 | 0 | 0 | NA | 5 | 3 | -40.0 |
| Dryden | 8 | 6 | -25.0 | 0 | 0 | NA | 8 | 6 | -25.0 |

Table 3: Average Price of Completed and Absorbed Single-Detached Dwellings (\$)

| Sub Market Area | Q4 2004 | Q4 2005 | % Change | YTD 2004 | YTD 2005 | % Change |
|------------------|---------|---------|----------|----------|----------|----------|
| Sudbury | 211,561 | 247,366 | 16.9 | 208,283 | 236,530 | 13.6 |
| Thunder Bay | 209,640 | 226,311 | 8.0 | 213,231 | 222,587 | 4.4 |
| North Bay | 237,044 | 236,651 | -0.2 | 215,716 | 245,246 | 13.7 |
| Sault Ste. Marie | 186,393 | 197,414 | 5.9 | 185,009 | 197,251 | 6.6 |

Table 4: Completed and Absorbed Single-Detached Units by Price Range

| AREA | PRICE RANGES | | | | | | |
|----------------------------|--------------|-----------|-----------------|-----------|------------|-----------|-------|
| | <\$149,999 | | \$150-\$199,999 | | \$200,000+ | | TOTAL |
| | Units | Share (%) | Units | Share (%) | Units | Share (%) | |
| Sudbury CMA | | | | | | | |
| Q4 2005 | 4 | 3.1 | 45 | 35.4 | 78 | 61.4 | 127 |
| Q4 2004 | 15 | 12.2 | 65 | 52.8 | 43 | 35.0 | 123 |
| YTD 2005 | 18 | 4.8 | 138 | 36.7 | 220 | 58.5 | 376 |
| YTD 2004 | 37 | 11.0 | 172 | 51.2 | 127 | 37.8 | 336 |
| Thunder Bay CMA | | | | | | | |
| Q4 2005 | 1 | 1.4 | 25 | 33.8 | 48 | 64.9 | 74 |
| Q4 2004 | 3 | 3.5 | 37 | 43.0 | 46 | 53.5 | 86 |
| YTD 2005 | 9 | 4.2 | 69 | 32.4 | 135 | 63.4 | 213 |
| YTD 2004 | 13 | 6.0 | 80 | 37.0 | 123 | 56.9 | 216 |
| Sault Ste. Marie CA | | | | | | | |
| Q4 2005 | 5 | 17.2 | 11 | 37.9 | 13 | 44.8 | 29 |
| Q4 2004 | 3 | 10.7 | 16 | 57.1 | 9 | 32.1 | 28 |
| YTD 2005 | 14 | 13.1 | 44 | 41.1 | 49 | 45.8 | 107 |
| YTD 2004 | 33 | 22.4 | 61 | 41.5 | 53 | 36.1 | 147 |
| North Bay CA | | | | | | | |
| Q4 2005 | 0 | 0.0 | 14 | 28.6 | 35 | 71.4 | 49 |
| Q4 2004 | 2 | 4.7 | 12 | 27.9 | 29 | 67.4 | 43 |
| YTD 2005 | 1 | 0.8 | 31 | 23.8 | 98 | 75.4 | 130 |
| YTD 2004 | 18 | 15.7 | 36 | 31.3 | 61 | 53.0 | 115 |

Source: CMHC

Note: N/A may appear where CMHC data suppression rules apply

Table 5: Resale Housing Activity for Northern Ontario

| | Number of Sales | Yr/Yr % | Number of New Listings | Sales-to-New Listings | Average Price (\$) | Yr/Yr % |
|---------------------------|-----------------|---------|------------------------|-----------------------|--------------------|---------|
| Thunder Bay CMA | | | | | | |
| Q4 2004 | 261 | -14.4 | 473 | 55.2 | 107,070 | -4.3 |
| Q4 2005 | 259 | -0.8 | 493 | 52.5 | 124,433 | 16.2 |
| YTD 2004 | 1,447 | -12.9 | 2,616 | | 112,405 | 0.4 |
| YTD 2005 | 1,358 | -6.2 | 2,788 | | 121,183 | 7.8 |
| Sudbury CMA | | | | | | |
| Q4 2004 | 437 | 3.1 | 640 | 68.3 | 127,281 | 0.1 |
| Q4 2005 | 523 | 19.7 | 726 | 72.0 | 133,955 | 5.2 |
| YTD 2004 | 2,500 | 14.1 | 3,906 | | 122,866 | 4.7 |
| YTD 2005 | 2,593 | 3.7 | 3,993 | | 134,440 | 9.4 |
| Sault Ste Marie CA | | | | | | |
| Q4 2004 | 216 | 24.9 | 306 | 70.6 | 94,870 | 7.3 |
| Q4 2005 | 278 | 28.7 | 332 | 83.7 | 92,875 | -2.1 |
| YTD 2004 | 1,095 | 14.2 | 1,858 | | 96,308 | 2.6 |
| YTD 2005 | 1,292 | 18.0 | 2,162 | | 96,303 | 0.0 |
| North Bay CA | | | | | | |
| Q4 2004 | 238 | 8.7 | 289 | 82.4 | 132,210 | 3.9 |
| Q4 2005 | 228 | -4.2 | 288 | 79.2 | 146,143 | 10.5 |
| YTD 2004 | 1,427 | 12.6 | 1,956 | | 136,831 | 7.6 |
| YTD 2005 | 1,316 | -7.8 | 1,975 | | 146,066 | 6.7 |
| Timmins CA | | | | | | |
| Q4 2004 | 207 | 31.0 | 283 | 73.1 | 92,215 | 9.9 |
| Q4 2005 | 192 | -7.2 | 272 | 70.6 | 90,524 | -1.8 |
| YTD 2004 | 1,068 | 25.9 | 1,893 | | 88,101 | 5.1 |
| YTD 2005 | 972 | -9.0 | 1,710 | | 88,224 | 0.1 |

Source: Canadian Real Estate Association

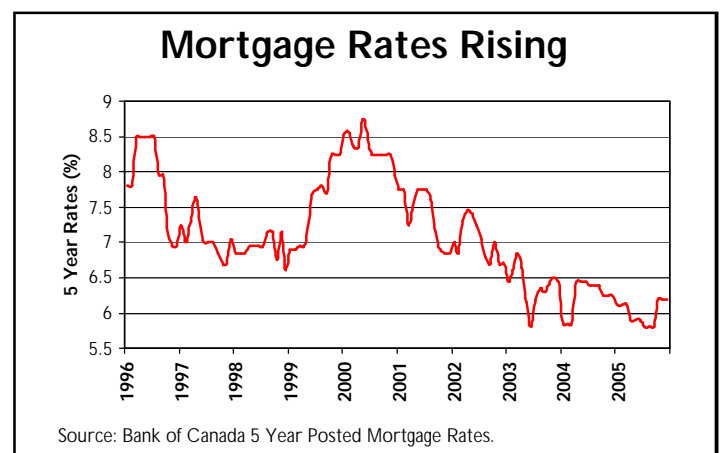
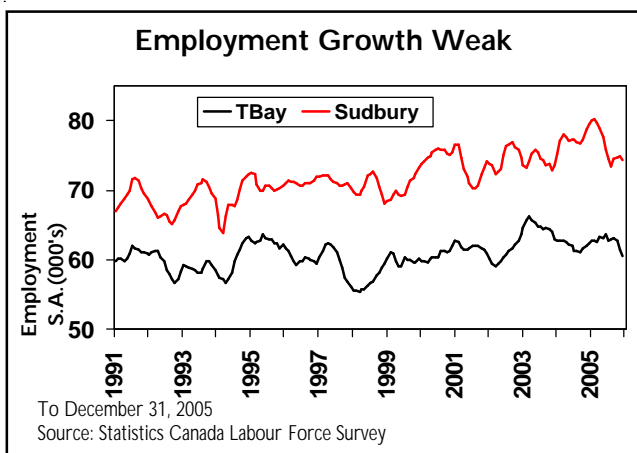
Table 6: Economic Indicators

| | Interest and Exchange Rates | | | | Inflation Rate (%) Ontario 1996=100 | Thunder Bay Labour Market | | Sudbury Labour Market | |
|--------------|-----------------------------|-------------------|------------|----------------------------|---|---------------------------|-----------------------------|---------------------------|-----------------------------|
| | P & I* Per \$100,000 | Mortgage Rate (%) | | Exch. Rate (\$US/\$Cdn) | | Employment SA** (,000) | Unemployment Rate (%) SA | Employment SA** (,000) | Unemployment Rate (%) SA |
| | | 1 Yr. Term | 5 Yr. Term | | | | | | |
| 2004 January | 642.78 | 4.3 | 6.1% | 0.755 | 1.5 | 63.5 | 7.3 | 75.2 | 9.5 |
| February | 627.97 | 4.3 | 5.8% | 0.749 | 0.8 | 63.5 | 7.7 | 76.9 | 8.7 |
| March | 622.08 | 4.3 | 5.7% | 0.763 | 1.1 | 63.5 | 7.2 | 77.7 | 8.4 |
| April | 648.75 | 4.5 | 6.2 | 0.729 | 2.3 | 63.3 | 7.0 | 77.3 | 8.4 |
| May | 669.82 | 4.6 | 6.5 | 0.733 | 2.8 | 63.1 | 7.2 | 77.1 | 9.2 |
| June | 681.99 | 4.7 | 6.7 | 0.750 | 2.4 | 62.9 | 8.2 | 77.8 | 8.9 |
| July | 672.86 | 4.6 | 6.6 | 0.752 | 2.4 | 62.2 | 8.5 | 78.1 | 8.7 |
| August | 657.75 | 4.4 | 6.3 | 0.762 | 1.5 | 62.1 | 8.7 | 78.0 | 8.3 |
| September | 657.75 | 4.8 | 6.3 | 0.793 | 1.5 | 62.1 | 8.8 | 77.5 | 8.3 |
| October | 663.77 | 4.9 | 6.4 | 0.821 | 2.1 | 62.8 | 8.4 | 78.0 | 8.0 |
| November | 657.75 | 5.0 | 6.3 | 0.843 | 2.2 | 63.3 | 8.5 | 79.2 | 7.6 |
| December | 642.78 | 4.8 | 6.1 | 0.832 | 1.9 | 63.6 | 8.2 | 79.8 | 7.4 |
| 2005 January | 642.78 | 4.8 | 6.1 | 0.806 | 1.6 | 64.0 | 8.2 | 80.0 | 7.9 |
| February | 642.78 | 4.8 | 6.1 | 0.811 | 2.2 | 64.1 | 7.9 | 79.9 | 7.9 |
| March | 654.74 | 5.1 | 6.3 | 0.827 | 2.3 | 63.8 | 7.7 | 79.0 | 8.0 |
| April | 642.78 | 4.9 | 6.1 | 0.795 | 2.3 | 64.6 | 7.6 | 78.4 | 7.4 |
| May | 636.84 | 4.9 | 6.0 | 0.797 | 1.5 | 64.5 | 7.3 | 77.4 | 7.4 |
| June | 622.08 | 4.8 | 5.7 | 0.816 | 1.9 | 65.0 | 7.7 | 76.2 | 7.5 |
| July | 627.97 | 4.9 | 5.8 | 0.817 | 1.9 | 64.2 | 7.5 | 75.1 | 8.2 |
| August | 627.97 | 5.0 | 5.8 | 0.842 | 2.7 | 64.3 | 7.2 | 74.3 | 8.4 |
| September | 627.97 | 5.0 | 5.8 | 0.860 | 3.3 | 64.0 | 6.6 | 74.9 | 8.3 |
| October | 639.81 | 5.3 | 6.0 | 0.847 | 2.5 | 63.7 | 6.5 | 75.0 | 7.6 |
| November | 648.75 | 5.6 | 6.2 | 0.857 | 2.0 | 62.7 | 6.4 | 75.2 | 7.5 |
| December | 657.75 | 5.80 | 6.30 | 0.86 | 2.13 | 62.30 | 6.30 | 74.80 | 7.30 |

* Principal and Interest Payment assumes a five year mortgage rate and 25 year amortization period.

** Seasonally Adjusted

Source: CMHC, Statistics Canada Labour Force Survey



Definitions

- 1. Starts:** refers to units where construction has advanced to a stage where full (100%) footings are in place. For multiple dwellings (semi-detached, row housing and apartments) the definition of a start applies to the structure or block of row units rather than to the project as a whole.
- 2. Under Construction:** those units which have been started but which are not complete.
- 3. Completions - Single-detached/semi-detached units:** this generally is the stage at which all proposed construction work is complete. A unit may be completed at the 90% stage where the remaining work is largely cosmetic. **Row housing/ Apartment:** completions means that 90% or more of the dwelling units within a block of row units or an apartment structure are completed and ready for occupancy
- 4. Completed and Not Absorbed:** all completed units of new construction (excluding model homes not available for sale) which have never been sold or leased.
- 5. Absorptions:** the number of completed units (excluding model homes) that have been sold or leased.
- 6. Seasonally Adjusted (SA):** Actual monthly (or quarterly) figures adjusted to remove normal seasonal variation.
- 7. Seasonally Adjust Annual Rates (SAAR):** Seasonally adjusted monthly figures multiplied by 12 (or quarterly figures multiplied by 4) to reflect annualized levels of activity.
- 8. Definitions for CMA, NHPI, CPI, and Inflation Rate** can be found in the Statistics Canada website - <http://www.statcan.ca>

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