

SENIORS' HOUSING REPORT

Manitoba



Canada Mortgage and Housing Corporation

Date Released: 2008

Highlights

- The vacancy rate in Manitoba for a standard retirement home unit averaged 3.7 per cent in 2008.
- Across the Manitoba survey, the average rent for a standard unit was \$1,868 per month. A standard two bedroom unit rented for \$2,430 in Manitoba .
- There were 1,698 units that were counted in the Manitoba survey, which represents 19 structures.

Figure 1

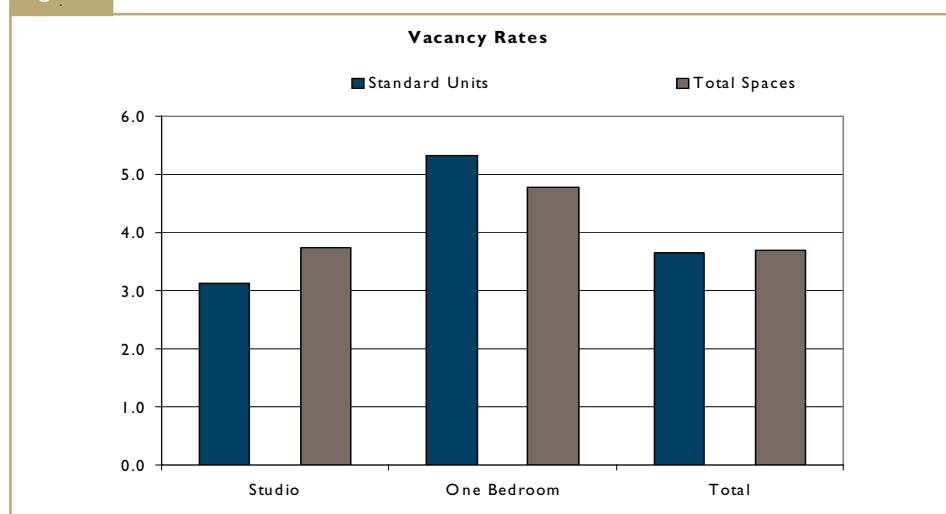


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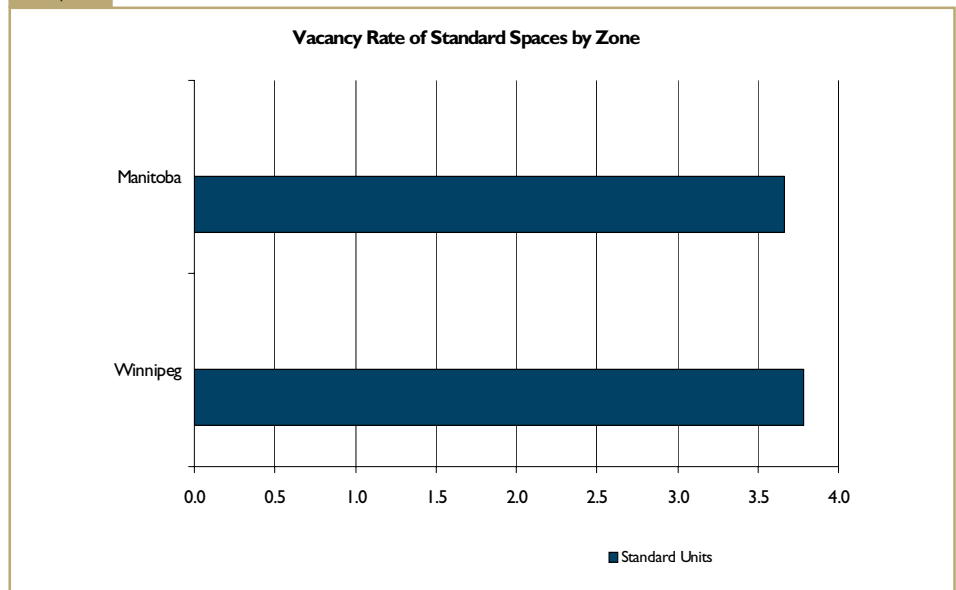
Vacancy Rates

Vacancy Rate for Standard Retirement Homes Vary in Manitoba

The vacancy rate in Manitoba for a standard retirement home unit averaged 3.7 per cent in 2008. The Census Metropolitan Area (CMA) of Winnipeg recorded a marginally higher vacancy rate of 3.8 per cent. The vacancy rate in rural areas was 0.0 per cent.

In Manitoba, The vacancy rate for units consisting of one bedroom and a den was zero, the lowest of all bedroom types. The highest vacancy among standard units was for one bedroom units at 5.3 per cent. Winnipeg recorded the same vacancy rate for one bedroom plus den units, but a 5.7 per cent vacancy rate for one bedroom units, the highest of any unit type in the city.

Figure 2



The vacancy rate also varied substantially by price range, with no vacant units with rents below \$1,500 and a vacancy rate of 5.8% for units in the \$2,000-\$2,599 range.

A standard retirement home unit offers additional services not pro-

vided in a traditional rental structure such as meals, housekeeping and laundry. A standard retirement unit excludes seniors' residences which provide high levels of care, defined as more than 1.5 hours of care per day.

This report provides information collected in the pilot of CMHC's new national Seniors' Housing Survey. We would like hear from you to ensure that the information collected and reported on meets your needs. If you would like to provide feedback on the information in this report, or on the survey itself, please contact

Seniors_Housing_Survey@cmhc.ca

Average Rents

Average Rent of a Standard Unit

While vacancy rates at the provincial level largely tracked those in the City, average rents did not. Across the Manitoba survey, the average rent for a standard unit was \$1,868 per month. A standard two bedroom unit rented for \$2,430 in Manitoba .

In Winnipeg, the average rent for all units was \$1,979, whereas in centres outside of Winnipeg the average was significantly lower at \$1,098. In Winnipeg, the average one bedroom rent was \$1,964 while two bedroom units averaged \$2,467.

Not surprisingly, average rents were higher in the larger units. People renting units of less than 400 square feet could expect to pay an average of \$1,678, while units with more than 1,000 square feet averaged \$3,371 in rent.

Figure 3

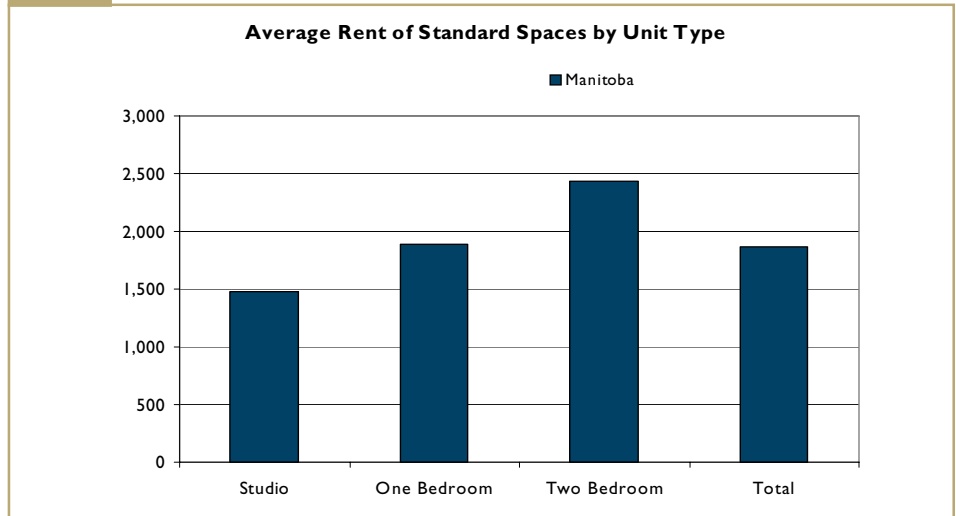
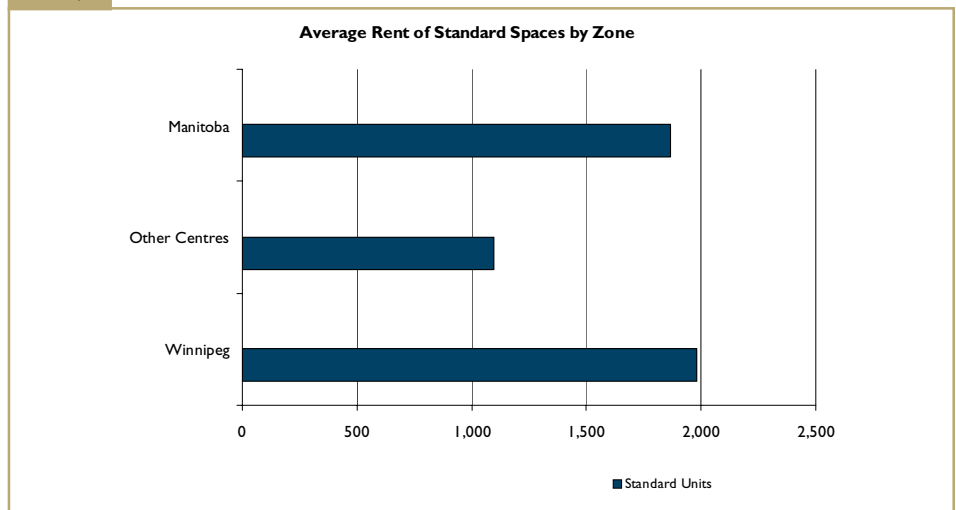


Figure 4



Universe of Standard Spaces

There were 1,698 units that were counted in the Manitoba survey, which represents 19 structures. The 13 structures counted in Winnipeg accounted for 1,296 standard units.

Most of units surveyed were standard spaces by the CMHC definition. In Manitoba, the only exceptions were 66 non-market or subsidized units and ten heavy care units. Only eleven of these units were in Winnipeg. Non-market or Subsidy units are those where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

The vast majority of the structures surveyed tended to be newer. More than 800 units were in structures build since 2000 and a further 505 dated no earlier than 1980. Vacancy rates by age of the unit were highest in the 1980-1999 category at four per cent. Average rents followed no clear pattern in relation to the age of the building with highest rents in the newest structures at \$2,017, but units in building build between 1960 and 1979 had the lowest rents at \$1,063 on average.

Services and Amenities

In terms of the services offered as part of the rent, there were three services that were available in the majority of residences. More than ninety per cent of units had access to exercise facilities. A transporta-

Figure 5

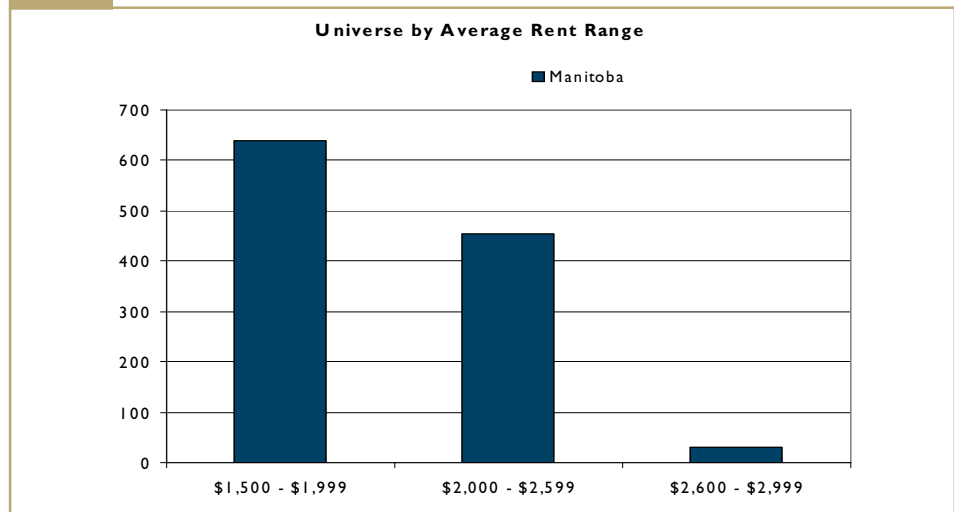
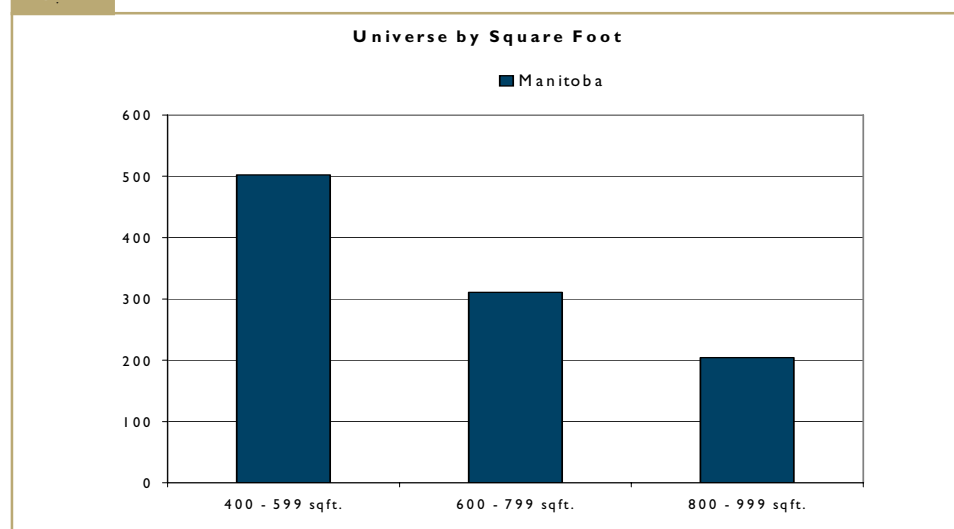


Figure 6



tion service (84.4 per cent of units) and a 24 hour call bell (in 64.8 per cent of units) were the other common services. Relatively few units had access to a registered nurse (14.7 per cent) or furnished suites (5.9 per cent), and none of the structures surveyed had a swimming pool.

Care should be taken in the interpretation of these numbers. While

there are substantially more than 19 structures in the province that cater in some fashion to retired individuals, the CMHC Retirement Home Survey used very strict criteria for inclusion in the survey to provide useful comparisons among the surveyed units. Future surveys may include more of the total universe as they can be accommodated into the survey without losing meaning in the results.

I.1 – Vacancy Rate (%) of Standard Spaces by Zone and Unit Type**Manitoba**

Centre	Studio	One Bedroom	One Bedroom and Den	Two Bedroom	Total
Winnipeg	3.1 d	5.7 c	**	**	3.8 c
Other Centres	**	**	n/u	**	**
Manitoba	3.1 d	5.3 c	**	**	3.7 c

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Data suppressed to protect confidentiality or data is not statistically reliable

n/u: No units exist in universe for this category n/s: No units exist in the sample for this category n/a: Not applicable

I.2 – Vacancy Rate (%) by Zone and Unit Type**Manitoba**

Centre	Studio	One Bedroom	One Bedroom and Den	Two Bedroom	Total
Winnipeg	3.9 d	4.7 c	**	**	3.7 c
Standard Units	3.1 d	5.7 c	**	**	3.8 c
Non-standard Units	**	**	n/u	**	**
Other Centres	**	**	n/u	**	**
Standard Units	**	**	n/u	**	**
Non-standard Units	**	**	n/u	n/u	**
Manitoba	3.7 d	4.8 c	**	**	3.7 c
Standard Units	3.1 d	5.3 c	**	**	3.7 c
Non-standard Units	**	**	n/u	**	**

The following letter codes are used to indicate the reliability of the estimates:

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1.3 – Total Vacancy Rate (%) by Zone and Rent Range (\$)¹

Manitoba

Centre	\$1,000 - \$1,499	\$1,500 - \$1,999	\$2,000 - \$2,599	\$2,600 - \$2,999	\$3,000+	Total
Winnipeg	**	2.9 b	5.8 d	**	**	3.7 c
Other Centres	**	n/u	n/u	n/u	n/u	**
Manitoba	**	2.9 c	5.8 d	**	**	3.7 c

¹ Figures, excluding totals, include only those units where the rent of the unit is known.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

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n/u: No units exist in universe for this category n/s: No units exist in the sample for this category n/a: Not applicable

2.1 – Average Rent (\$) of Standard Spaces by Zone and Unit Type

Manitoba

Centre	Studio	One Bedroom	One Bedroom and Den	Two Bedroom	Total
Winnipeg	1,610 a	1,964 a	**	2,467 a	1,979 a
Other Centres	**	**	n/u	**	1,098 b
Manitoba	1,480 a	1,888 a	**	2,430 a	1,868 a

The following letter codes are used to indicate the reliability of the estimates (cv = coefficient of variation):

a – Excellent ($0 \leq cv \leq 2.5$), b – Very good ($2.5 < cv \leq 5$), c – Good ($5 < cv \leq 7.5$)

d – Fair (Use with Caution) ($7.5 < cv \leq 10$)

** Data suppressed to protect confidentiality or data is not statistically reliable

n/u: No units exist in universe for this category n/s: No units exist in the sample for this category n/a: Not applicable

2.2 – Average Rent (\$) by Zone and Unit Type

Manitoba

Centre	Studio	One Bedroom	One Bedroom and Den	Two Bedroom	Total
Winnipeg					
Heavy Care	n/u	n/u	n/u	n/u	n/u
Standard Units	1,610 ^a	1,964 ^a	**	2,467 ^a	1,979 ^a
Other Centres					
Heavy Care	**	n/u	n/u	n/u	**
Standard Units	**	**	n/u	**	1,098 ^b
Manitoba					
Heavy Care	**	n/u	n/u	n/u	**
Standard Units	1,480 ^a	1,888 ^a	**	2,430 ^a	1,868 ^a

The following letter codes are used to indicate the reliability of the estimates (cv = coefficient of variation):

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2.3 – Average Rent (\$) of Standard Spaces by Zone and Unit Size¹

Manitoba

Centre	less than 120 sqft.	120 - 399 sqft.	400 - 599 sqft.	600 - 799 sqft.	800 - 999 sqft.	1,000 or more sqft.	Total	Avg. Price / Sqft.
Winnipeg	n/u	**	1,974 ^a	2,121 ^a	2,459 ^a	**	1,979 ^a	3.46 ^a
Other Centres	n/u	**	**	**	**	n/u	1,098 ^b	3.23 ^c
Manitoba	n/u	1,471 ^a	1,892 ^a	2,106 ^a	2,450 ^a	**	1,868 ^a	3.44 ^a

¹ Figures, excluding totals, include only those units where the size of the unit is known.

The following letter codes are used to indicate the reliability of the estimates (cv = coefficient of variation):

a – Excellent ($0 \leq cv \leq 2.5$), b – Very good ($2.5 < cv \leq 5$), c – Good ($5 < cv \leq 7.5$)

d – Fair (Use with Caution) ($7.5 < cv \leq 10$)

** Data suppressed to protect confidentiality or data is not statistically reliable

n/u: No units exist in universe for this category n/s: No units exist in the sample for this category n/a: Not applicable

3.1 – Universe of Standard Spaces Zone and Unit Type

Manitoba

Centre	Studio	One Bedroom	One Bedroom and Den	Two Bedroom	Total
Winnipeg	224 a	800 a	**	200 a	1,296 a
Other Centres	**	**	n/u	**	**
Manitoba	**	855 a	**	204 a	**

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Data suppressed to protect confidentiality or data is not statistically reliable

n/u: No units exist in universe for this category n/s: No units exist in the sample for this category n/a: Not applicable

3.2 – Total Universe by Zone and Unit Type

Manitoba

Centre	Studio	One Bedroom	One Bedroom and Den	Two Bedroom	Total
Winnipeg	254 ^a	880 ^a	**	202 ^a	1,408 ^a
Standard Units	224 ^a	800 ^a	**	200 ^a	1,296 ^a
Respite	n/u	n/u	n/u	n/u	n/u
Non-Market rent or Subsidy Unit	**	6 ^a	n/u	**	11 ^a
Heavy Care	n/u	n/u	n/u	n/u	n/u
Other and Unknown	**	**	n/u	n/u	**
Other Centres	**	**	n/u	**	290 ^a
Standard Units	**	**	n/u	**	**
Respite	n/u	n/u	n/u	n/u	n/u
Non-Market rent or Subsidy Unit	**	**	n/u	n/u	**
Heavy Care	**	n/u	n/u	n/u	**
Other and Unknown	n/u	**	n/u	**	**
Manitoba	**	963^a	**	212^a	1,698^a
Standard Units	**	855 ^a	**	204 ^a	**
Respite	n/u	n/u	n/u	n/u	n/u
Non-Market rent or Subsidy Unit	53 ^a	11 ^a	n/u	**	66 ^a
Heavy Care	**	n/u	n/u	n/u	**
Other and Unknown	**	**	n/u	**	**

The following letter codes are used to indicate the reliability of the estimates (cv = coefficient of variation):

a – Excellent ($0 \leq cv \leq 2.5$), b – Very good ($2.5 < cv \leq 5$), c – Good ($5 < cv \leq 7.5$)

d – Fair (Use with Caution) ($7.5 < cv \leq 10$)

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3.3 – Total Universe By Zone and Rent Range¹

Manitoba

Centre	\$1,000 - \$1,499	\$1,500 - \$1,999	\$2,000 - \$2,599	\$2,600 - \$2,999	\$3,000+	Total
Winnipeg	**	638 a	455 a	31 a	**	1,408 a
Other Centres	**	n/u	n/u	n/u	n/u	290 a
Manitoba	**	638 a	455 a	31 a	**	1,698 a

¹ Figures, excluding totals, include only those units where the rent of the unit is known.

The following letter codes are used to indicate the reliability of the estimates (cv = coefficient of variation):

a – Excellent ($0 \leq cv \leq 2.5$), b – Very good ($2.5 < cv \leq 5$), c – Good ($5 < cv \leq 7.5$)

d – Fair (Use with Caution) ($7.5 < cv \leq 10$)

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3.4 – Number of Structures included in Survey Results

Manitoba

Centre	Number of Structures
Winnipeg	13
Other Centres	6
Manitoba	19

** Data suppressed to protect confidentiality or data is not statistically reliable

n/u: No units exist in universe for this category n/s: No units exist in the sample for this category n/a: Not applicable

3.5 – Number of Residents

Manitoba

Centre	Number of Residents
Winnipeg	1,534
Other Centres	295
Manitoba	1,829

** Data suppressed to protect confidentiality or data is not statistically reliable

n/u: No units exist in universe for this category **n/s:** No units exist in the sample for this category **n/a:** Not applicable

Methodology

Canada Mortgage and Housing Corporation conducted a pilot of the Seniors' Housing Survey in May and June. The survey was conducted in all centres in British Columbia, Alberta, Saskatchewan, Manitoba, Nova Scotia, New Brunswick, Newfoundland and Labrador, and Prince Edward Island. All eligible residences were included in the survey. As this was a pilot survey, work to ensure that all applicable structures are included in the survey universe is still ongoing.

The survey targeted only private or non-profit residences where the majority of residents are over the age of 65 and have access to additional services not offered in traditional rental structures. Examples of such services include meal service, housekeeping and laundry. However, the survey excluded seniors' residences which provide high levels of care (defined as more than 1.5 hours of care per day) to the majority of their residences. Nursing homes and long-term care facilities are examples of facilities that were not included in the survey.

The survey was conducted by a combination of telephone interviews and site visits, and information is obtained from the owner, manager, or residence administrator. The survey was conducted during May and June and results reflect market conditions at that time.

All statistics published, excluding information on new market supply, include only those facilities that have been in operation for at least one year. Results of the pilot survey are based on responding structures only.

Definitions

Standard Unit: A unit occupied by a resident who receives the standard level of care provided by the residence.

Non-standard Unit: A unit occupied by a resident who does not receive the standard level of care or who is temporarily occupying the unit. Types of Non-standard units include:

Designated Heavy Care – A unit which is designated for those individuals who require additional care. Heavy care is defined as more than 1.5 hours of care per day. Examples include Alzheimer, Dementia and mobility support patients.

Non-designated Heavy Care - A unit which is currently occupied by a person requiring heavy care but is usually used as a standard retirement unit.

Designated Respite Unit – A unit used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-Designated Respite Unit – A unit which is currently occupied by a temporary resident but is usually used as a standard retirement unit.

Non-market or Subsidy Unit – A unit where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The rent refers to the actual amount tenants pay for their unit and all mandatory services. Charges for additional non-mandatory services are excluded from the rent. For vacant units, the rent is the amount the owner is asking for the unit.

Vacancy: A unit is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Acknowledgement

The Seniors' Housing Survey could not have been conducted without the cooperation of the property owners, managers, and building administrators. CMHC acknowledges their hard work and assistance in providing timely and accurate information. As a result of their contribution, CMHC is able to provide information that benefits the entire housing industry.

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