

SENIORS' HOUSING REPORT

Atlantic Region



CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2010

Highlights

- The overall vacancy rate for standard spaces in retirement homes across Atlantic Canada was 10.7 per cent in the winter of 2010 up from 10.2 per cent, a year earlier.
- The overall average rent for a standard retirement home space was \$2,232 in the Atlantic Region.
- In Atlantic Canada, there were 136 residences surveyed containing a total of 5,931 spaces and 5,416 residents.

Figure 1

Vacancy Rates of Standard Spaces by Unit Type



Source: CMHC

*Two bedroom vacancy rates were not reported in 2009.

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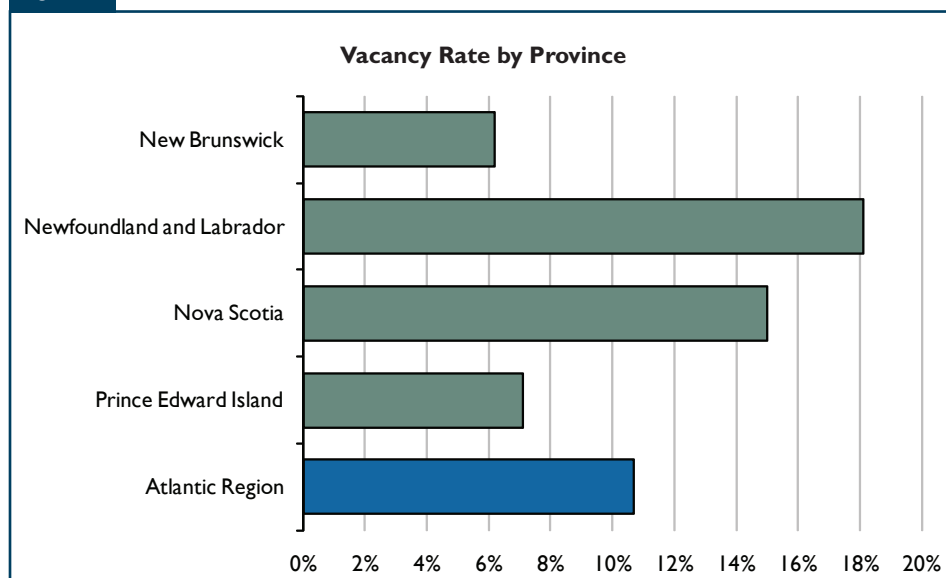
Introduction

The National Senior's Housing Survey is an annual survey conducted by Canada Mortgage and Housing Corporation. In Atlantic Canada, the 2010 survey included 136 structures that fit the established criteria and where management was willing to participate in the survey. These 136 structures contained 5,931 spaces.

There are three criteria for the survey. First, the majority of the residents in the facility must be 65 years of age or older. Second, the residence must offer an on-site meal plan or on-site medical services. The survey however excluded facilities in which heavy care (heavy care is 1.5 hours of care or more per day) was mandatory. For this reason, nursing homes and long term care facilities were not included in the survey. Third, residences must contain at least ten spaces.

A standard space is a space that is occupied by a resident who receives a standard level of care (as opposed to heavy care) of less than 1.5 hours

Figure 2



Source: CMHC

per day. A non-standard space includes spaces that provide heavy care, spaces offering respite (temporary/short term) accommodation and spaces that offer below market rents or subsidized rents.

New Brunswick Continues to Record Lowest Vacancy Rate

The overall vacancy rate for standard spaces in retirement homes across Atlantic Canada stood at 10.7 per cent in 2010, a slight increase over the vacancy rate of 10.2 per cent in 2009. New Brunswick recorded the lowest vacancy rate at 6.2 per cent, marginally lower than last year's vacancy rate of 6.4 per cent.

Newfoundland and Labrador recorded the highest vacancy rate for the second consecutive year, 18.1 per cent, down from 18.9 per cent in 2009. The largest year-over-year increase in vacancy rates was recorded in Nova Scotia where vacancy rates more than

doubled from 7.3 per cent in 2009 to 15 per cent this year. In Prince Edward Island the vacancy rate for standard spaces in retirement homes declined 2.2 percentage points to 7.1 per cent in 2010.

In terms of unit types, ward and semi-private rooms were the only unit type to record a decline in vacancy rates in 2010 (down 6.1 percentage points). However, ward and semi-private rooms remained in the least demand, posting the highest vacancy rate of all unit types at 23 per cent in 2010. Bachelor and two bedroom units recorded the lowest vacancy rates at 6.1 and 9.6 per cent, respectively.

In comparing vacancy rates to rent range, standard spaces in the highest rent ranges tend to have below average vacancy rates. Spaces renting from \$2,000 to \$2,499 and \$2,500+ both recorded average vacancy rates of 7.4 per cent in 2010, up from six and 3.9 per cent, respectively.

Vacancy Rates (%) of Standard Spaces		
	2009	2010
Newfoundland & Labrador	18.9 ^a	18.1 ^a
Prince Edward Island	9.3 ^a	7.1 ^a
Nova Scotia	7.3 ^b	15.0 ^a
New Brunswick	6.4 ^c	6.2 ^b
Quebec	7.9 ^a	8.4 ^a
Ontario	13.3 ^a	16.4 ^a
Manitoba	7.8 ^a	7.9 ^a
Saskatchewan	3.4 ^a	6.2 ^a
Alberta	5.9 ^a	12.2 ^a
British Columbia	7.5 ^a	10.4 ^a
Canada	9.2 ^a	10.8 ^a

Conversely, spaces renting for less than \$1,500 and from \$1,500 to \$1,999 posted average vacancy rates above the regional average at 17.3 and 14.5 per cent, respectively.

New Brunswick Home to Largest Number of Spaces

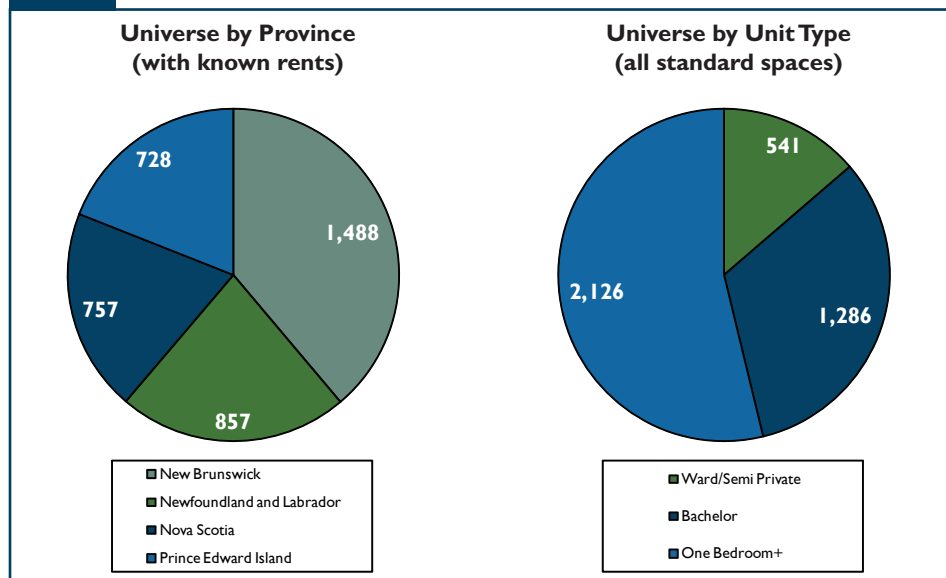
In the Atlantic Region in 2010 there were 136 retirement home structures surveyed containing a total of 5,931 spaces and housing 5,416 residents. Of these spaces, 3,953 or 66 per cent were standard spaces. CMHC was able to collect data on nearly all of the standard spaces (3,830 of 3,953). The largest number of standard spaces with reported information was in New Brunswick (1,488 spaces or 39 per cent). Newfoundland and Labrador reported a percentage share of 22 per cent while Nova Scotia and Prince Edward Island reported percentage shares of 20 and 19 per cent, respectively.

Ward and semi-private units continue to be the least common type of standard space, recording 14 per cent of the total retirement home stock. Bachelor units made up 32 per cent of the total stock while larger units, including one bedroom and two bedroom units combined, made up 54 per cent of the total retirement stock.

In terms of average rent, 23 per cent of all standard spaces rented for less than \$1,850 per month. One-quarter of spaces recorded rents between \$1,850 and \$2,099 while just over 50 per cent of units recorded rents more than \$2,100.

Almost all (92.6 per cent) of the spaces surveyed offered three meals per day and were included in the reported rents. A large majority

Figure 3



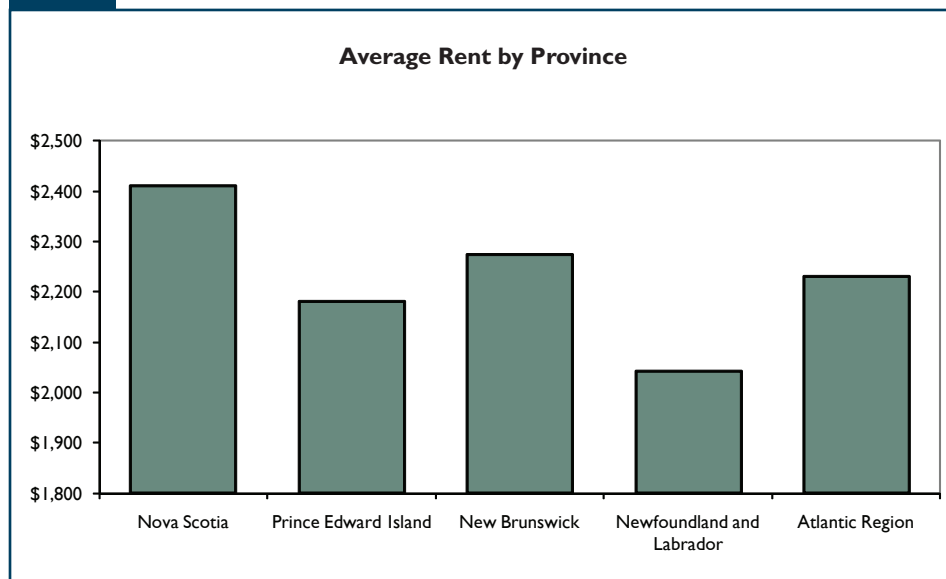
Source: CMHC

(84.5 per cent) of spaces surveyed were provided with a 24-hour call bell service while on-site medical services were provided for 30 per cent of the spaces surveyed. Over a quarter (26.2 per cent) of spaces surveyed had a registered nurse on site.

Average Rents Highest in Nova Scotia, Lowest in Newfoundland and Labrador

The average rent for a standard retirement home space in Atlantic Canada in 2010 was \$2,232. Nova

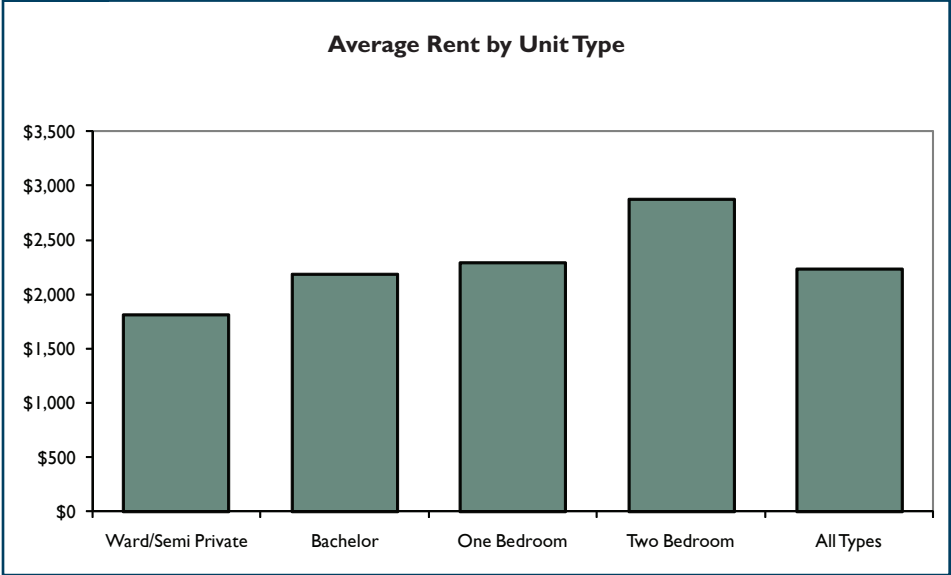
Figure 4



Source: CMHC

Scotia and New Brunswick recorded the highest average rents of \$2,412 and \$2,275, respectively. Spaces in Newfoundland and Labrador and Prince Edward Island reported average rents of \$2,042 and \$2,181, respectively. Two bedroom units captured the highest rent, \$2,875, while bachelor and one bedroom units captured average rents of \$2,187 and \$2,288, respectively. Ward and semi-private spaces captured average rents of \$1,811.

Figure 5



Source: CMHC

TABLES INCLUDED IN THE ATLANTIC REGION SENIORS' HOUSING REPORT

Standard Tables

- 1.1 Vacancy Rates (%) of Standard Spaces by Zone and Unit Type
- 1.2 Vacancy Rates of Standard Spaces (%) by Zone and Rent Range (\$)
- 2.1 Universe of Standard Spaces by Zone and Unit Type
- 2.3 Universe of Standard Spaces by Zone and Rent Range (\$)
- 2.4 Proportion (%) of Structures where Select Services are Available By Structure Size and Zone
- 2.5 Proportion (%) of Structures with Access to Selected Amenities By Structure Size and Zone
- 2.6 Universe, Number of Residents Living in Universe and Capture Rate (%) by Zone
- 3.1 Average Rent (\$) of Standard Spaces by Zone and Unit Type

Optional Tables

- O1 Proportion (%) of Furnished Units by Zone
- O2 Proportion (%) of Units With Typical Meal Plan by Zone

I.1 Vacancy Rates (%) of Standard Spaces by Unit Type Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Newfoundland and Labrador	43.1 a	33.5 a	--	--	9.6 b	12.5 a	**	**	18.9 a	18.1 a
Prince Edward Island	17.2 a	10.8 a	4.2 b	5.9 a	**	++	--	--	9.3 a	7.1 a
Nova Scotia	--	38.1 a	6.6 b	8.6 a	8.4 b	17.7 a	**	16.2 a	7.3 b	15.0 a
New Brunswick	--	++	5.4 d	5.1 d	5.3 d	6.2 c	++	++	6.4 c	6.2 b
Atlantic Region	29.1 a	23.0 a	5.3 b	6.1 b	7.5 b	10.6 a	++	9.6 c	10.2 a	10.7 a

I.2 Vacancy Rates (%) of Standard Spaces by Rent Range (\$) Atlantic Region

Province	Less than \$1,500		\$1,500 - \$1,999		\$2,000 - \$2,499		\$2,500 and more		Total where rents are known	
	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010
Newfoundland and Labrador	**	**	26.7 a	22.5 a	6.3 c	14.2 a	4.2 c	8.5 a	18.9 a	18.3 a
Prince Edward Island	--	--	12.0 a	7.0 a	10.4 a	1.6 a	0.6 a	**	9.3 a	5.7 a
Nova Scotia	**	19.6 d	9.1 c	14.7 c	**	10.5 a	5.8 d	16.1 a	6.3 b	14.3 a
New Brunswick	5.7 d	14.4 a	**	**	5.9 d	5.9 c	4.8 b	++	6.4 c	5.9 b
Atlantic Region	9.3 c	17.3 a	17.7 a	14.5 a	6.0 c	7.4 b	3.9 b	7.4 b	10.1 a	10.3 a

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

** Suppressed to protect confidentiality ++ Not statistically reliable -- No units exist in universe for this category

2.1 Universe of Standard Spaces by Unit Type

Atlantic Region

Province	Ward/Semi Private	Bachelor	One Bedroom +	Total
Newfoundland and Labrador	238 ^a	--	627 ^a	865 ^a
Prince Edward Island	235 ^a	481 ^a	39 ^a	755 ^a
Nova Scotia	21 ^a	267 ^a	498 ^a	786 ^a
New Brunswick	++	538 ^b	962 ^a	1,547 ^a
Atlantic Region	541 ^a	1,286 ^a	2,126 ^a	3,953 ^a

2.3 Universe of Standard Spaces and Rent Range (\$)

Atlantic Region

Province	Less than \$1,850	\$1,850 - \$2,099	\$2,100 +	Total spaces where rents are known
	% of Total ¹	% of Total ¹	% of Total ¹	
Newfoundland and Labrador	50.1% ^a	17.3% ^a	32.8% ^a	857
Prince Edward Island	9.9% ^a	57.3% ^a	32.8% ^a	728
Nova Scotia	21.1% ^a	6.1% ^a	72.8% ^a	757
New Brunswick	15.5% ^a	23.4% ^a	61.1% ^a	1,488
Atlantic Region	23.3% ^a	25.1% ^a	51.7% ^a	3,830

¹ % is based on those spaces where the rent is known.

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2.4 Proportion (%) of Structures where Select Services are Available¹ by Structure Size Atlantic Region

Province	Meals					On-Site Medical Services	Registered Nurse onsite	24-hour call bell
	Optional	# included in rent						
		1	2	3				
Newfoundland and Labrador	0.0 b	0.0 b	0.0 b	100.0 a	3.9 d	7.3 a	63.4	
10 -49	0.0 b	0.0 b	0.0 b	100.0 a	2.8 c	4.9 a	53.2 a	
50 - 89	0.0 c	0.0 c	0.0 c	100.0 a	0.0 c	7.6 a	92.4 a	
90 or more	**	**	**	**	**	**	**	
Prince Edward island	0.0 c	0.0 c	0.0 c	100.0 a	++	61.9 a	100.0 a	
10 -49	0.0 c	0.0 c	0.0 c	100.0 a	++	56.8 a	100.0 a	
50 - 89	**	**	**	**	**	**	**	
90 or more	--	--	--	--	--	--	--	
Nova Scotia	0.0 a	13.8 a	17.2 a	69.0 a	79.3 a	27.6 a	100.0 a	
10 -49	0.0 a	8.3 a	8.3 a	83.3 a	75.0 a	33.3 a	100.0 a	
50 - 89	**	**	**	**	**	**	**	
90 or more	**	**	**	**	**	**	**	
New Brunswick	3.6 a	0.0 b	0.0 b	96.4 a	++	++	96.4 a	
10 -49	5.4 b	0.0 c	0.0 c	94.6 a	++	++	94.6 a	
50 - 89	**	**	**	**	**	**	**	
90 or more	++	++	++	100.0 a	++	++	100.0 a	
Atlantic Region	0.7 a	2.9 a	3.7 a	92.6 a	30.1 a	26.2 a	84.5 a	
10 -49	1.0 a	2.0 a	2.0 a	95.1 a	29.6 a	24.3 a	80.3 a	
50 - 89	0.0 c	3.9 a	11.7 a	84.4 a	24.8 d	29.3 d	96.1 a	
90 or more	++	12.2 d	++	87.8 a	++	++	100.0 a	

¹ Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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2.5 Proportion (%) of Structures with Access to Selected Amenities¹ by Structure Size Atlantic Region

Province	Pharmacy	Transportation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Newfoundland and Labrador	3.9 d	92.7 a	0.0 b	0.0 b	1.8 a	3.6 a	23.9 a
10 -49	2.8 c	95.1 a	0.0 b	0.0 b	0.0 b	0.0 b	17.4 d
50 - 89	0.0 c	92.4 a	0.0 c	0.0 c	0.0 c	7.6 a	38.1 a
90 or more	**	**	**	**	**	**	**
Prince Edward island	0.0 c	69.9 a	0.0 c	4.5 d	4.2 a	69.9 a	61.0 a
10 -49	0.0 c	67.0 a	0.0 c	5.7 d	5.3 a	61.7 a	++
50 - 89	**	**	**	**	**	**	**
90 or more	--	--	--	--	--	--	--
Nova Scotia	11.5 a	51.7 a	3.4 a	10.3 a	37.9 a	37.9 a	46.4 a
10 -49	14.3 a	45.8 a	4.2 a	12.5 a	25.0 a	25.0 a	34.8 a
50 - 89	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	**
New Brunswick	0.0 b	68.8 a	3.6 a	++	++	++	++
10 -49	0.0 c	++	0.0 c	0.0 c	++	++	++
50 - 89	**	**	**	**	**	**	**
90 or more	++	100.0 a	++	++	++	++	++
Atlantic Region	3.9 b	75.0 a	1.5 a	4.7 c	14.4 c	32.6 a	38.9 a
10 -49	4.2 b	72.6 a	1.0 a	4.0 b	11.0 d	23.6 a	30.1 a
50 - 89	0.0 c	80.5 a	0.0 c	++	++	52.7 a	64.4 a
90 or more	12.2 d	87.8 a	12.2 d	12.2 d	++	++	++

¹ Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

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2.6 Universe, Number of Residents Living in Universe and Capture Rate (%)

Atlantic Region

Province	Total Number of Spaces	Overall Vacancy Rate		Number of Residences	Number of Residents	Estimated Population Aged 75+ ¹	Capture Rate ² (%)
		2009	2010				
Newfoundland and Labrador	2,472	14.2 a	16.9 a	55	2,080 a	33,500	6.2
Avalon Region	993	13.9 a	18.1 a	22	840 a		
Central & Eastern Region	864	15.0 a	16.0 a	19	726 a		
Labrador & Western Region	615	13.6 c	16.4 a	14	514 a		
Prince Edward Island	912	8.8 a	6.6 a	24	880 a	9,700	9.1
Kings & Prince County	357	9.6 a	10.1 a	9	330 a		
Queens	555	8.3 a	4.3 a	15	550 a		
Nova Scotia	796	8.3 b	15.2 a	29	714 a	67,800	1.1
Halifax	356	**	4.5 a	7	353 a		
Northern NS & Cape Breton	129	3.6 d	10.1 a	5	128 a		
Southern NS & Annapolis Valley	311	14.8 c	29.6 a	17	233 a		
New Brunswick	1,751	6.6 c	5.6 b	28	++	54,200	++
Northwest, Northeast & Central Region	456	8.4 c	8.6 a	10	447 a		
Southwest & Southeast Region	1,295	5.7 d	4.6 c	18	++		
Atlantic Region	5,931	10.3 a	11.8 a	136	5,416 c	165,200	3.3

¹ Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2005-2031, Scenario 3.

² The capture rate is the proportion of the population aged 75 and over living in the survey universe.

3.1 Average Rent (\$) of Standard Spaces by Unit Type

Atlantic Region

Province	Ward/Semi-Private	Bachelor	One Bedroom	Two Bedroom	Total
Newfoundland and Labrador	1,619 a	--	2,115 a	**	2,042 a
Prince Edward Island	1,914 a	2,326 a	2,100 a	--	2,181 a
Nova Scotia	**	2,066 a	2,527 a	3,110 a	2,412 a
New Brunswick	**	2,131 a	2,296 a	2,775 b	2,275 a
Atlantic Region	1,811 a	2,187 a	2,288 a	2,875 a	2,232 a

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

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O1 Proportion (%) of Furnished Units Atlantic Region		
Province	Percent	
	2009	2010
Newfoundland and Labrador	99.3 ^a	99.9 ^a
Prince Edward Island	92.8 ^a	94.3 ^a
Nova Scotia	++	9.5 ^a
New Brunswick	25.9 ^d	40.7 ^a
Atlantic Region	67.9 ^a	64.9 ^a

O2 Proportion (%) of Units With Typical Meal Plan Atlantic Region		
Province	Percent	Average Number of Meals
Newfoundland and Labrador	99.9 ^a	3.0
Prince Edward Island	94.3 ^a	3.0
Nova Scotia	91.3 ^a	2.6
New Brunswick	85.1 ^a	2.7
Atlantic Region	92.7 ^a	2.8

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

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Methodology

Canada Mortgage and Housing Corporation conducted the National Seniors' Housing Survey in February and March. This annual survey began in 2009. The survey was conducted in all centres in all ten provinces.

The survey targeted private or non-profit residences where the majority of residents are 65 years of age or older and have access to additional services not offered in traditional rental structures. Examples of such services include meal service, housekeeping and laundry. To be eligible for the survey, a residence must provide an on-site meal plan. (This eligibility requirement differs from the previous year's survey, which required either on-site meal plan or on-site medical services).

However, the survey excluded seniors' residences which provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey. As well, residences with less than 10 units were excluded in Québec, Ontario and the Prairies, and with less than 5 units were excluded in Atlantic and British Columbia Regions.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. 2009 data in this publication may differ from what was published last year, due to survey zone changes in 2010. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click [here](#).

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include: one-half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space occupied by a resident who does not receive high levels of care (i.e. the resident receives less than 1.5 hours of care per day.) Regional terms for this type of space vary across the country, and, in cases where there is no additional charge for additional care, it is possible that the standard space estimate includes some units with additional care.

Heavy Care Space: A space where the residence provides 1.5 hours or more of healthcare per day to the resident. Examples include Alzheimer, Dementia and mobility support residents.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space 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 residents pay for their space and all mandatory services. Charges for additional non-mandatory services are excluded from the rent. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space 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 residence 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.

Confidentiality

All information provided through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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