

SENIORS' HOUSING REPORT

Manitoba



CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2010

Highlights

- The overall vacancy rate for standard units in retirement homes across Manitoba stood at 7.9 per cent in 2010 compared to 7.8 per cent in 2009.
- The overall, average rent for a standard retirement home unit was \$2,112 in Manitoba in 2010.
- In Manitoba in 2010, there were 32 facilities surveyed containing a total of 3,321 units and housing 3,471 residents.

Figure 1

Manitoba Vacancy Rates of Standard Spaces by Unit Type

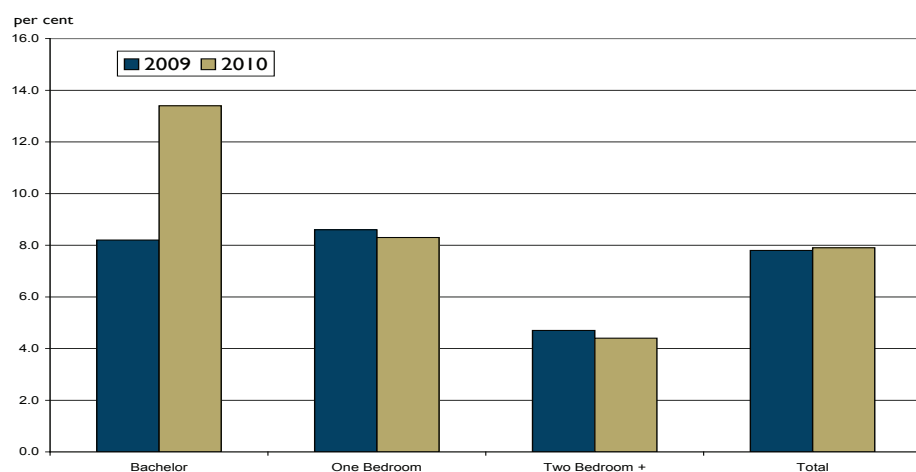
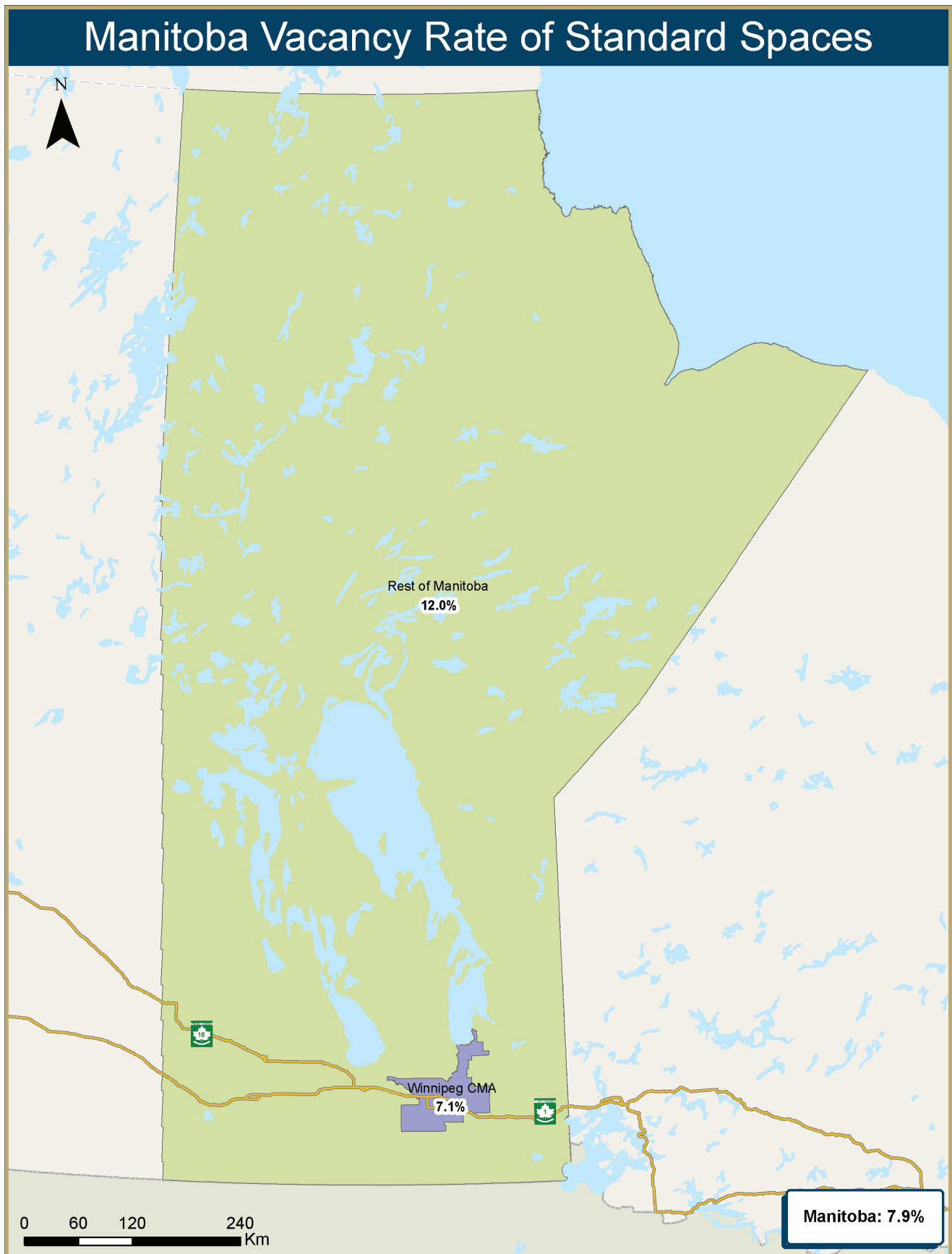


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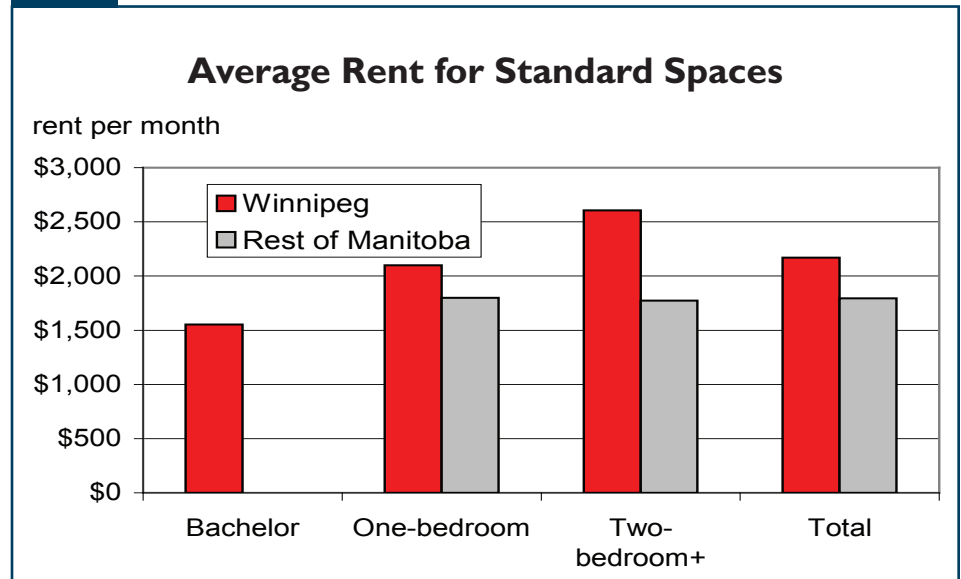
Vacancy Rates

Vacancies edge higher

The vacancy rate in senior's rental residences in the province of Manitoba stood at 7.9 per cent in April 2010, up marginally from 7.8 per cent in April 2009. The seniors' survey targeted only private and non-profit retirement structures where the majority of residents are 65 years of age or older and have access to additional services not offered in traditional rental structures such as meal service, housekeeping and laundry, and 24-hour call bell service. The total number of such structures surveyed across the province in 2010 was 32.

In the Winnipeg Census Metropolitan Area (CMA), the average vacancy rate for standard retirement spaces was 7.1 per cent, down from 8.3 per cent a year prior. The rest of the province had a higher incidence of vacancies than the Winnipeg CMA in 2010, at 12.0 per cent.

Figure 2



Source: CMHC

Vacancy rates in Manitoba's retirement structures were highest in the smallest units, with bachelor suites across the province recording 13.4 per cent of units vacant at the time of the survey. Units with increasing bedroom counts were in greater demand, as vacancy rates for one and two or more bedroom units were 8.3 and 4.4 per cent, respectively.

Rents

Highest monthly rent found in Winnipeg CMA

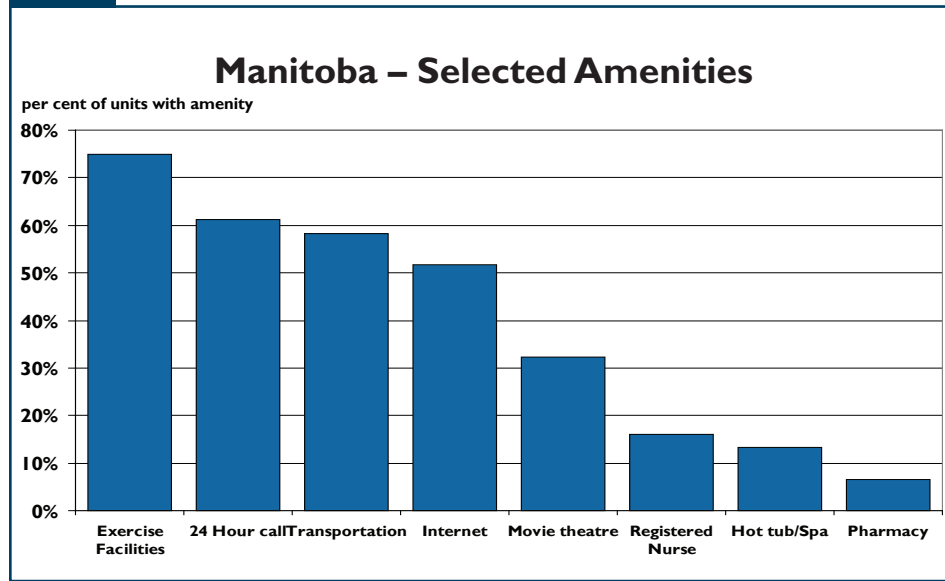
The average rent charged for seniors units of various sizes was also surveyed. Not surprisingly, larger units within the Winnipeg CMA recorded the highest rent levels. On a province-wide basis, the average rent for all unit types was \$2,112, but was subject to a substantial degree of variation. The highest rents were recorded in units with two or more bedrooms in Winnipeg at \$2,607 per month. The lowest monthly rents were in bachelor units inside the City, which reported an average rent of \$1,553.

The largest share of seniors units (40.8 per cent) rented for between \$2,000 and \$2,499 per month, followed by units in the \$1,500 to \$1,999 range (28 per cent). More than one-fifth of all units commanded rents of more than \$2,500 per month.

Vacancy Rates (%) of Standard Spaces

| | 2009 | 2010 |
|---------------------------|--------------|---------------|
| Newfoundland and 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 |

Figure 3



Source: CMHC

Highest vacancy rate in highest rent ranges

The highest vacancy rates in Manitoba were recorded in those units with the highest rents. Units renting for more than \$2,500 per month recorded a vacancy rate of 16.3 per cent at the time of the survey. By contrast, those units commanding rents of less than \$1,000 per month had a 3.2 per cent vacancy rate, while those with rents between \$1,000 and \$1,499 had only two per cent of the units vacant at the time of the survey.

Vacancies lowest in newer buildings

Newer buildings (those opened after 2000) attracted tenants at the greatest rate. The average vacancy rate for a unit opened after 2000 was 6.9 per cent in Manitoba. This compares to 7.9 per cent for the whole universe in Manitoba and 14.6 per cent for units opened from 1990 to 1999.

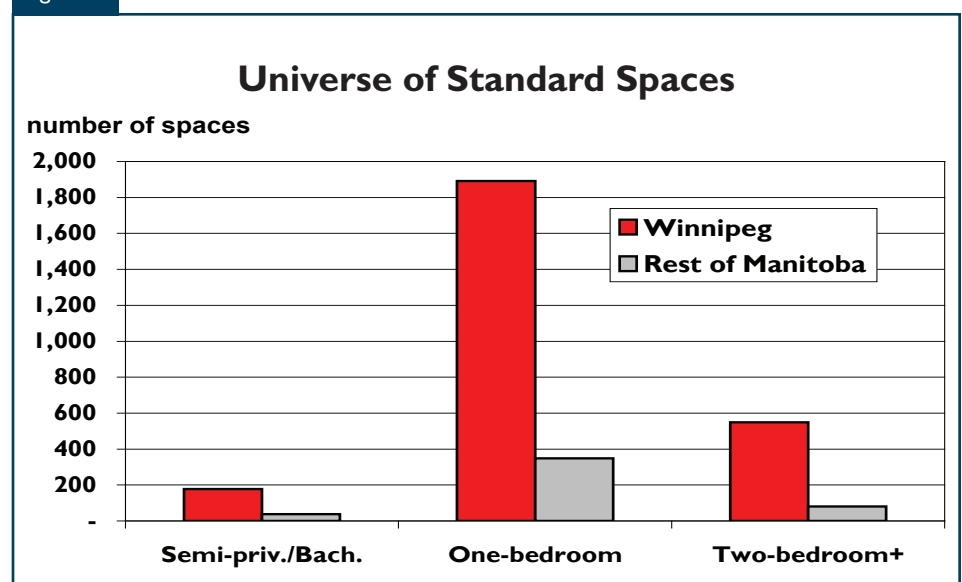
Services and amenities vary

The services available within seniors' facilities vary across the province. All facilities surveyed offered some form of meal plan, although the level of provision varied substantially. Across the province, only 9.4 per cent of structures had optional meal

programs, almost exclusively confined to structures with fewer than 49 units. The majority of units (51.6 per cent) had three daily meals included with rent and a further 39 per cent included two meals per day.

Select medical services had varying degrees of provision. While a 24-hour call bell was available in 61 per

Figure 4



Source: CMHC

cent of units, on-site medical services or registered nurses were present in only 13 and 16 per cent of units, respectively.

The most frequently available amenities were access to an exercise facility, available to nearly three quarters of all units. This was followed by transportation services (58 per cent) and internet (52 per cent). Among the services with a low incidence of provision were a movie

theatre (32 per cent), a spa or hot tub (13 per cent), and a pharmacy (6.5 per cent).

Universe

Survey coverage

There were 3,086 standard retirement senior's spaces surveyed by CMHC in 2010, with 3,321 surveyed when non-standard spaces were included.

The vast majority of the units had one-bedroom and the difference was pronounced both within the Winnipeg CMA and the remainder of the province. Of the total seniors' spaces, 85.8 per cent were located within the Winnipeg CMA.

The 3,321 surveyed units housed 3,473 residents, just over four per cent of Manitoba's population 75 years of age or older.

TABLES INCLUDED IN THE MANITOBA SENIORS' HOUSING REPORT

Standard Tables

- 1.1 Vacancy Rate (%) of Standard Spaces by Zone and Unit Type
- 1.2 Vacancy Rate 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

- O2 Building Structure Makeup (%)
- O3 Ancillary Services, Cable and Telephone and Optional Costs
- O4 Vacancy Rates (%) of Standard Spaces by Date Residence Opened
- O5 Average Rents (\$) of Standard Spaces by Date Residence Opened
- O6.1 Vacancy Rates (%) of Standard Spaces by Unit Size (square feet)
- O6.2 Average Rents (\$) of Standard Spaces by Unit Size (square feet)

I.1 Vacancy Rate (%) of Standard Spaces by Unit Type Manitoba

| Centre | Semi Private | | Bachelor | | One Bedroom | | Two Bedroom + | | Total | |
|------------------|--------------|------|--------------|---------------|--------------|--------------|---------------|--------------|--------------|--------------|
| | 2009 | 2010 | 2009 | 2010 | 2009 | 2010 | 2009 | 2010 | 2009 | 2010 |
| Winnipeg CMA | -- | -- | 5.9 a | 12.3 a | 9.6 a | 7.4 a | 5.5 a | 4.6 a | 8.3 a | 7.1 a |
| Rest of Manitoba | -- | -- | 18.4 a | ** | 5.2 a | 13.2 a | 1.1 a | 3.7 a | 6.3 a | 12.0 a |
| Manitoba | -- | -- | 8.2 a | 13.4 a | 8.6 a | 8.3 a | 4.7 a | 4.4 a | 7.8 a | 7.9 a |

I.2 Vacancy Rate (%) of Standard Spaces by Rent Range (\$) Manitoba

| Centre | Less than \$1,000 | | \$1,000 - \$1,499 | | \$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 | 2009 | 2010 |
| Manitoba | 3.4 a | 3.2 a | 3.8 a | 2.0 a | 7.4 a | 5.9 a | 7.2 a | 6.4 a | 18.7 a | 16.3 a | 7.7 a | 7.8 a |

2.1 Universe of Standard Spaces by Unit Type Manitoba

| Centre | Semi Private / Bachelor / One Bedroom | Two Bedroom + | Total |
|------------------|---------------------------------------|---------------|----------------|
| Winnipeg CMA | 2,069 a | 549 a | 2,619 a |
| Rest of Manitoba | 386 a | 81 a | 467 a |
| Manitoba | 2,455 a | 630 a | 3,086 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)

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

2.3 Universe of Standard Spaces by Rent Range (\$) Manitoba

| Centre | Less than \$1,000 | \$1,000 - \$1,499 | \$1,500 - \$1,999 | \$2,000 - \$2,499 | \$2,500 and more | Total spaces where rents are known |
|----------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|------------------------------------|
| | % of Total ¹ | % of Total ¹ | % of Total ¹ | % of Total ¹ | % of Total ¹ | |
| Manitoba | 4.1% ^a | 6.8% ^a | 28.0% ^a | 40.8% ^a | 20.2% ^a | 3,085 |

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

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

| Centre | Meals | | | | | On-Site Medical Services | Registered Nurse onsite | 24-hour call bell |
|------------|----------|--------------------|--------|--------|--------|--------------------------|-------------------------|-------------------|
| | Optional | # included in rent | | | | | | |
| | | 1 | 2 | 3 | | | | |
| Manitoba | 9.4 a | 0.0 c | 39.1 a | 51.6 a | 12.9 c | 16.1 d | 61.3 a | |
| 10 - 49 | 19.5 d | ++ | ++ | 80.5 a | ++ | ++ | ++ | |
| 50 - 89 | ++ | ++ | ++ | 19.7 d | ++ | ++ | 19.7 d | |
| 90 or more | 0.0 c | 0.0 c | 47.8 a | 52.2 a | 18.9 d | 23.7 d | 71.3 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.

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

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

| Centre | Pharmacy | Transportation Services | Swimming Pool | Hot Tub - Spa | Movie Theatre | Exercise Facilities | Internet |
|-----------------|--------------|-------------------------|---------------|---------------|---------------|---------------------|---------------|
| Manitoba | 6.5 c | 58.2 a | 0.0 c | 13.3 c | 32.4 a | 74.5 a | 51.8 a |
| 10 - 49 | ++ | ++ | ++ | ++ | ++ | ++ | ++ |
| 50 - 89 | ++ | ++ | ++ | ++ | ++ | 60.7 a | ++ |
| 90 or more | 9.6 c | 71.3 a | 0.0 c | 19.9 d | 42.8 a | 95.2 a | 71.3 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.

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

| Centre | Total Number of Spaces | Overall Vacancy Rate (%) | | Number of Residences | Number of Residents | Estimated Population Aged 75+ ¹ | Capture Rate ² (%) |
|------------------|------------------------|--------------------------|--------------|----------------------|---------------------|--|-------------------------------|
| | | 2009 | 2010 | | | | |
| Winnipeg CMA | 2,850 | 6.4 a | 6.6 a | 25 | 2,982 a | | |
| Rest of Manitoba | 471 | 6.4 a | 11.9 a | 7 | 491 a | | |
| Manitoba | 3,321 | 6.4 a | 7.3 a | 32 | 3,473 a | 83,000 | 4.2 |

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 Manitoba

| Centre | Semi Private | Bachelor | One Bedroom | Two Bedroom + | Total |
|------------------|--------------|----------------|----------------|----------------|----------------|
| Winnipeg CMA | -- | 1,553 a | 2,100 a | 2,607 a | 2,169 a |
| Rest of Manitoba | -- | ** | 1,798 a | 1,773 a | 1,795 a |
| Manitoba | -- | 1,600 a | 2,053 a | 2,500 a | 2,112 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)

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

| O2 Building Structure Makeup (%) | | |
|----------------------------------|----------------|------------|
| Manitoba | | |
| Centre | Concrete Frame | Wood Frame |
| Manitoba | 37.5% | 62.5% |

| O3 Ancillary Services, Cable and Telephone and Optional Costs (% of residences) | | | | | |
|---|-----------|----------------------|--------------------|--------------|-------------------------------|
| Manitoba | | | | | |
| Centre | Services | Included in Rent (%) | Tenant Arrange (%) | Optional (%) | Average Cost if Optional (\$) |
| Winnipeg CMA | Cable | 60.0% | 36.0% | 4.0% | ** |
| | Telephone | 8.0% | 88.0% | 4.0% | ** |
| Rest of Manitoba | Cable | 28.6% | 71.4% | -- | -- |
| | Telephone | -- | 100.0% | -- | -- |
| Manitoba | Cable | 53.1% | 43.8% | 3.1% | ** |
| | Telephone | 6.3% | 90.6% | 3.1% | ** |

| O4 Vacancy Rates (%) of Standard Spaces by Date Residence Opened | | | | |
|--|-------------|-------------|---------------|-------|
| Manitoba | | | | |
| Centre | Before 1990 | 1990 - 1999 | 2000 or later | Total |
| Manitoba | ** | 14.6 a | 6.9 a | 7.9 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)

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

O5 Average Rents (\$) of Standard Spaces by Date Residence Opened Manitoba

| Centre | | Before 1990 | 1990 - 1999 | 2000 or later | Total |
|----------|---------------|-------------|--------------------|--------------------|--------------------|
| Manitoba | Bachelor | ** | ** | 1,659 ^a | 1,600 ^a |
| | One Bedroom | ** | 2,125 ^a | 2,096 ^a | 2,053 ^a |
| | Two Bedroom + | ** | ** | 2,580 ^a | 2,500 ^a |
| | All | ** | 2,038 ^a | 2,189 ^a | 2,112 ^a |

O6.1 Vacancy Rates (%) of Standard Spaces by Unit Size (square feet)¹ Manitoba

| Centre | up to 375 | 376 - 500 | 501 - 625 | over 625 | Total |
|------------------|-------------------|-------------------|------------------|------------------|-------------------|
| Winnipeg CMA | 13.4 ^a | 9.0 ^a | 8.6 ^a | 3.4 ^a | 7.1 ^a |
| Rest of Manitoba | ** | 25.7 ^a | ** | 9.0 ^a | 12.7 ^a |
| Manitoba | 11.4 ^a | 15.1 ^a | 8.5 ^a | 4.5 ^a | 7.9 ^a |

¹Data is for units where the square footage was provided.

O6.2 Average Rents (\$) of Standard Spaces by Unit Size (square feet)¹ Manitoba

| Centre | | up to 375 | 376 - 500 | 501 - 625 | over 625 | Total |
|------------------|---------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Winnipeg CMA | Bachelor | 1,443 ^a | 1,842 ^a | ** | -- | 1,553 ^a |
| | One Bedroom | ** | 2,094 ^a | 2,105 ^a | 2,120 ^a | 2,100 ^a |
| | Two Bedroom + | -- | -- | ** | 2,613 ^a | 2,607 ^a |
| | All | 1,437 ^a | 2,042 ^a | 2,106 ^a | 2,416 ^a | 2,169 ^a |
| Rest of Manitoba | Bachelor | ** | ** | ** | -- | ** |
| | One Bedroom | ** | ** | ** | 1,691 ^a | 1,833 ^a |
| | Two Bedroom + | -- | -- | -- | 2,268 ^a | 2,268 ^a |
| | All | 1,035 ^a | 1,964 ^a | 2,202 ^a | 1,836 ^a | 1,886 ^a |
| Manitoba | Bachelor | 1,421 ^a | 1,888 ^a | ** | -- | 1,600 ^a |
| | One Bedroom | ** | 2,048 ^a | 2,110 ^a | 1,988 ^a | 2,060 ^a |
| | Two Bedroom + | -- | -- | ** | 2,582 ^a | 2,577 ^a |
| | All | 1,377 ^a | 2,013 ^a | 2,111 ^a | 2,305 ^a | 2,129 ^a |

¹Data is for units where the square footage was provided.

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)

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

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 provide 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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