



RETIREMENT HOMES REPORT

Ontario

Canada Mortgage and Housing Corporation
2004 Annual Survey

Vacancy Rate in Ontario Decreases to 13.2%

• Canada Mortgage and Housing Corporation's (CMHC) 2004 Retirement Homes Survey captured a total of 37,691 retirement home beds in Ontario, with 4,989 being vacant and available for rent. The overall vacancy rate for Ontario is 13.2 per cent, down marginally from 13.6 per cent in 2003.

• The vacancy rate edged upwards for semi-private and

private bed types, but decreased for ward and suite categories.

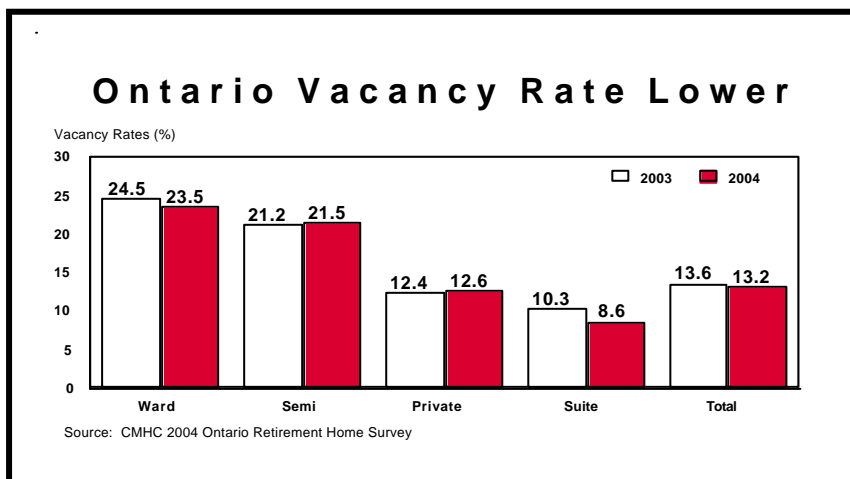
Despite a decline in supply of both private and semi-private beds, the vacancy rate for private beds increased to 12.6 per cent from 12.4 per cent in 2003, while for semi-private beds, the vacancy rate increased to 21.5 per cent from 21.2 per cent. On the other hand, although the supply of suites increased, the vacancy rate decreased to 8.6 per cent

HIGHLIGHTS

- Ontario vacancy rate down marginally to 13.2%
- Demand highest for suites
- Ottawa most improved market, vacancy rate at 9.8%
- Hamilton City has highest vacancy rate at 24.0%

from 10.3 per cent last year.

• The supply of private beds dipped by 100 units compared to 2003, while the supply of semi-private beds dropped by 464 units. The number of ward beds also declined this year. In contrast, the number of suites increased by 898 units. New projects and the conversion of other types of units to suites pushed the supply of suites higher this year. Private beds



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HOME TO CANADIAN
Canada

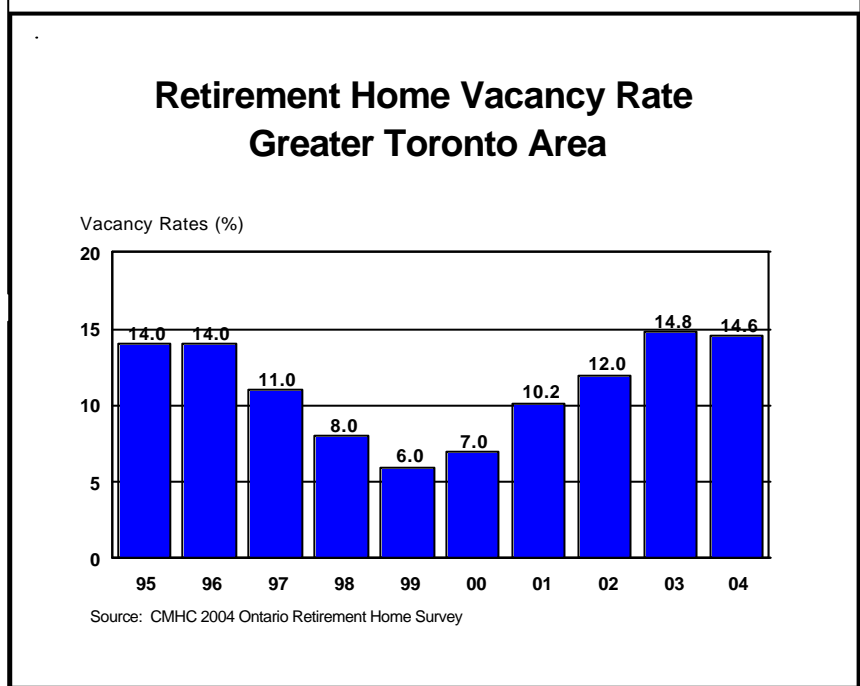
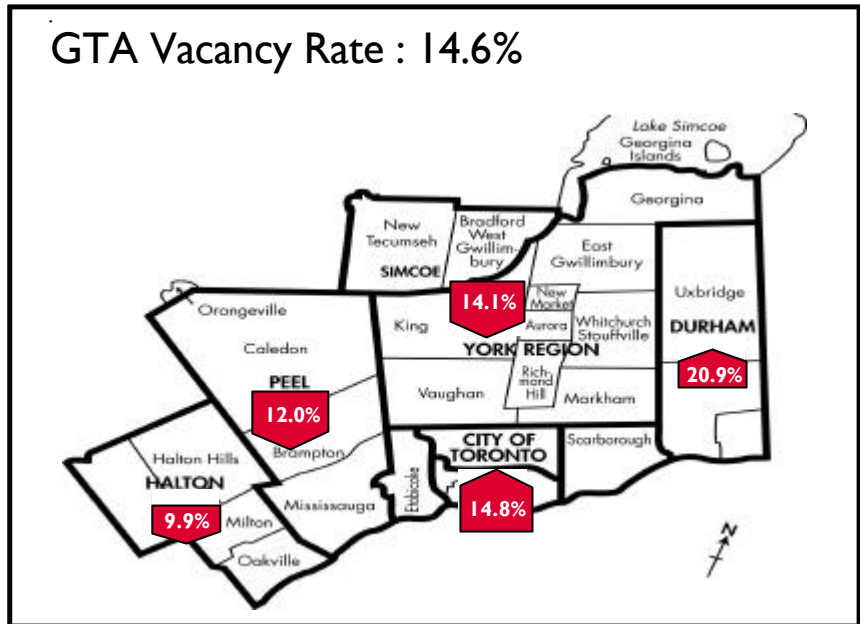
account for 69 per cent of Ontario's bed supply, down from 71 per cent in 2002. Similarly, the per cent of ward and semi-private beds have also decreased. In contrast, suites now account for 17 per cent of Ontario's bed supply, up from 12 per cent in 2002.

- The vacancy rates for private and suite beds at 12.6 and 8.6 per cent respectively, continue to remain well below the rates for ward and semi-private units, indicating that demand for single occupancy rooms is relatively stronger than the demand for shared accommodation.

- The average per diem rate for a private bed in Ontario is \$73, compared to \$71 last year. For suites, the average per diem rose one per cent to \$105 from \$104 last year.

- The capture rate, defined as the total number of retirement home residents in our sample divided by the total number of persons aged 75 and over, is estimated to be 4.6 per cent in Ontario in 2004. This means that approximately five of every 100 Ontario residents aged 75 and over occupy a bed in a private retirement home. The capture rate has been declining slowly since 2002. The capture rate varies widely across the major municipalities in Ontario from a high of 11.7 in Greater Ottawa to a low of 2.6 in the City of Toronto.

- Couples represent just over four per cent of the total population of retirement home residents in Ontario.



- The Retirement Home market can be best described as highly localized. Market conditions can vary significantly by region within Ontario.

- Only two retirement home markets in Ontario, Haldimand Norfolk and Frontenac County have a vacancy rate of 5 per cent or less. Eleven markets have a vacancy rate

between 6 and 10 per cent, while twelve markets have a vacancy rate between 11 and 15 per cent. Eight markets have a vacancy rate between 16 and 20 per cent, while at the highest end, five markets have a vacancy rate above 20 per cent, one of which is Durham Region.

Central Ontario

Including the Greater Toronto Area

Overall GTA Vacancy Rate slips in 2004

- The vacancy rate in the Greater Toronto Area (GTA) stabilized this year at 14.6 per cent after increasing steadily since 1999. Although the vacancy rate for private beds has been steadily increasing, the increased popularity of suites kept the overall vacancy rate steady. In fact, the vacancy rate for suites declined to 9.8 per cent from 12.8 per cent last year even though the number of suites increased by over 15 per cent in the GTA. The vacancy rate for suites was the lowest of all accommodation types.
- We continue to see a subtle movement from shared accommodation beds and even private beds to suites as providers adjust to consumer preferences for larger units. Of the three new retirement homes in the GTA, with a total of 430 beds added to the survey this year, all beds were either private or suites.
- The retirement home

market in the GTA continues to experience higher per diems due to fixed costs of land and services. The amenities, services, and age of the retirement home continue to remain significant factors influencing the per diem rate. Despite a higher vacancy rate, the average per diem of private beds in the GTA saw an increase of 3 per cent to \$85. The increase in the private per diem can be attributed in part to the higher rents charged in the newer homes. For suites, the reverse occurred. Although the vacancy rate dropped this year, the average per diem for suites decreased by one per cent to \$116. The shift to suites in older retirement homes, with lower per diems, as well as lower per diems in one of the new retirement homes, exerted downward pressure on rents, offsetting the higher per diems charged in two of the new retirement homes.

City of Toronto

- Although the number of private beds at the higher end of the rent range continued to increase, demand for these units dropped significantly in 2004, as

many residents shifted their preference to suites which are larger and at a comparable price. Also, two new homes completed but not included in this year's survey are in their lease up period drawing potential residents away from the established homes. Therefore, the vacancy rate in units priced between \$100 and \$149, more than doubled this year. Overall the vacancy rate inched higher in the City of Toronto to 14.8%.

- The average per diem of private beds in the City of Toronto increased by 6 per cent to \$87. Per diems for private beds in the old City of Toronto are lower than those in North York and East York due to the aging stock in the City's core with fewer amenities. In the core, just over thirty per cent of the private beds are priced below \$60, compared to a citywide average of fifteen per cent. Per diem rate changes for private beds in the City of Toronto ranged from a high of a 19 per cent increase in Etobicoke to a one per cent decline in both East York and Scarborough. The larger rent fluctuations occur as a result of the frequent bedroom type conversions several operators undertake on an annual basis, as well as the addition to the supply or closure of retirement homes.

Central Ontario	<\$60		\$60 - \$79		\$80 - \$99		\$100 - \$119		\$120 - \$149		\$150+	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Toronto City	0.0	4.4	0.0	4.3	26.0	12.1	22.8	41.3	13.4	19.5	56.3	24.0
Etobicoke	-	-	-	-	**	**	-	0.0	-	0.0	-	0.0
North York	-	-	-	-	-	-	-	-	4.7	0.0	-	0.0
East York	-	-	-	-	-	0.0	-	-	0.0	17.6	10.0	21.1
York City	-	-	-	-	0.0	-	0.0	2.9	0.0	7.1	-	-
Scarborough	-	-	-	-	0.0	20.3	**	-	**	22.2	-	-
City of Toronto	0.0	4.4	0.0	4.3	10.5	13.7	22.1	28.6	7.3	14.1	51.1	21.2
GTA	0.0	4.4	0.0	2.4	12.3	8.0	12.9	10.1	7.5	11.7	40.9	17.3

Suburban Regions (905 Areas)

- In 2003, suburban regions surrounding the City of Toronto experienced higher vacancies due to greater supply. However this year's results reveal three of the four Regions of the Greater Toronto Area (GTA) experienced lower vacancy rates in 2004. Good quality product at competitive prices led to the absorption of units. Only Durham Region saw an increase in the overall vacancy rate this year, rising to 20.9 per cent from 19.8 per cent last year. On top of additional supply during the past few years, one new home opened this year in Durham Region. Halton Region recorded a vacancy rate of 9.9 per cent, the lowest of all areas of the GTA, down from 11.0 per cent in 2003 with still new homes set to emerge. Availability of good sites for development is a strong factor in Halton's recent success. In the four Regions, the supply of retirement home beds increased by 3.2 per cent, mostly suites.

Other Central Ontario Areas

- Of the large markets outside the GTA, the vacancy rate in Hamilton/Wentworth continued to climb, increasing to 19.7 per cent in 2004. Except for semi-private beds, all bed types showed an increase in vacancy rates, with the suite vacancy rate jumping to 23.3 per cent as the supply of suites more than doubled due to the addition of a new home to the survey this year. The Niagara Region vacancy rate jumped to 14.3 per cent in 2004 from 8.4 per cent last year, with higher vacancy rates in all bed

types. This was the highest vacancy rate for the Niagara Region since 1996, with fifty per cent of the homes having an increased vacancy rate. Simcoe County's vacancy rate reversed trend, increasing to 10.7 per cent from 8.9 per cent last year, with higher vacancies in all bed types but wards. The vacancy rate in Peterborough County rose marginally to 15.3 per cent.

Capture Rates Lower in the City of Toronto and GTA

- As in 2003, the capture rate is lower in the GTA than in the rest of Central Ontario with the exception of Victoria/Haliburton. The capture rate is 3.2 in the GTA and 2.6 in the City of Toronto. Although 28 per cent of retirement home residents in Ontario are located in the GTA, the GTA is home to 40 per cent of the population aged 75 and over which explains the lower capture rate. Seniors in the GTA have a wider variety of housing options than those aged 75 and over in many other parts of the province, including long-term care facilities, seniors apartment, and home care. Of the new long-term care beds developed in Ontario, 57 per cent are located in the GTA. In fact, the number of new long-term care beds in the GTA is greater than the total number of retirement home beds currently available in the GTA.

Supply

- Although 430 new beds were added to the Greater Toronto Area this year, two homes with 188 beds were

closed temporarily due to renovations, and two homes were closed permanently and thus excluded from this year's survey. As a result of the shift in bed type and the change in surveyed homes, the supply of retirement home beds in the Greater Toronto Area increased by 69 beds, with only suites increasing in number.

Looking ahead, based on the most current market information, 16 new retirement homes in Central Ontario are either under construction or undergoing major renovations or have been in operation for less than one year and were, therefore, not included in this year's survey.

City of Toronto

Sunshine Residence
Amica at Bayview
Queen's Residence
Harold and Grace Baker Centre
Kensington Place

Durham Region

Lynde Creek Manor

Halton Region

Sunrise of Burlington
Heritage Place
Delmanor Glen Abbey

Peel Region

The Regency Retirement Home

York Region

Rouge Valley Retirement Home

Simcoe County

Grove Park Home
Innisfil Beach Gardens

Hamilton-Wentworth

The Court at Rushdale
Hamilton Retirement Residence

Niagara Region

Stamford Estates

Eastern Ontario

Including Ottawa

Vacancy Rate falls as new supply absorbed

- The new supply of 214 beds in private retirement homes in the Greater Ottawa Area introduced into the market in 2003 continued to be absorbed throughout 2003 and into 2004. As a result, the overall vacancy rate in the Greater Ottawa Area fell from the peak of 17.3 per cent recorded last year to 9.8 per cent in 2004. This year's vacancy rate was the lowest in the last five years. Demand for retirement home beds in the Greater Ottawa Area increased by 10 per cent this year. Currently, there are fewer beds in the lease-up stage competing with the current supply of beds in the Greater Ottawa Area.

- Despite the increased demand for retirement home

accommodation in the Greater Ottawa Area, the average per diems edged down in all bed categories except suites in 2004. Many operators responded to the additional supply of beds and either kept their per diems unchanged or lowered them. As a result of the competitive pressures, per diems decreased and the vacancy rate dropped.

- The vacancy rate in the Greater Ottawa Area decreased for all bed types this year. Since private beds made up the majority of the new units in 2003, the vacancy rate for private beds fell from 17.3 per cent in 2003 to 9.2 per cent this year as beds were absorbed. Private beds make up 72 per cent of all beds in the Greater Ottawa Area.

- Without the addition of any new homes to the supply of retirement home beds in the

Greater Ottawa Area in 2004, the number of both semi-private and private beds decreased in 2004. The supply of semi-private beds has been falling since 2001. In response to specific demand, there has been a subtle shift from semi-private beds to private beds, and from private beds to suites. As a result, the supply of suite units increased by 23 per cent.

- All areas of the Greater Ottawa Area experienced lower vacancy rates this year. The Outer West area continues to record the highest vacancy rates, with the overall vacancy rate decreasing to 17.3 per cent from 19.6 per cent last year. The vacancy rate for private beds in this area decreased to 11.9 per cent as demand strengthened for beds priced below \$80. Central Ottawa recorded the lowest vacancy rate of all areas at 7.0 per cent, a significant drop from 18.8 per cent in 2003. Two of the homes added to the survey in 2003 were located in Central Ottawa. With the largest number of retirement home beds located in the Inner West area, the vacancy rate fell to 7.2 per cent from 16.4 per cent last year. In this area, the vacancy rate for both private beds and suites declined, decreasing to 8.0 per cent and 5.4 per cent respectively.

- The private per diem rate in the Greater Ottawa Area decreased by one per cent to \$72. Within the Greater Ottawa Area, the private per diem rate ranged from a high of \$81 in the Inner West to a low of \$47 in the Outer East. The high average per diem rates in Central Ottawa and the Inner West are due to the

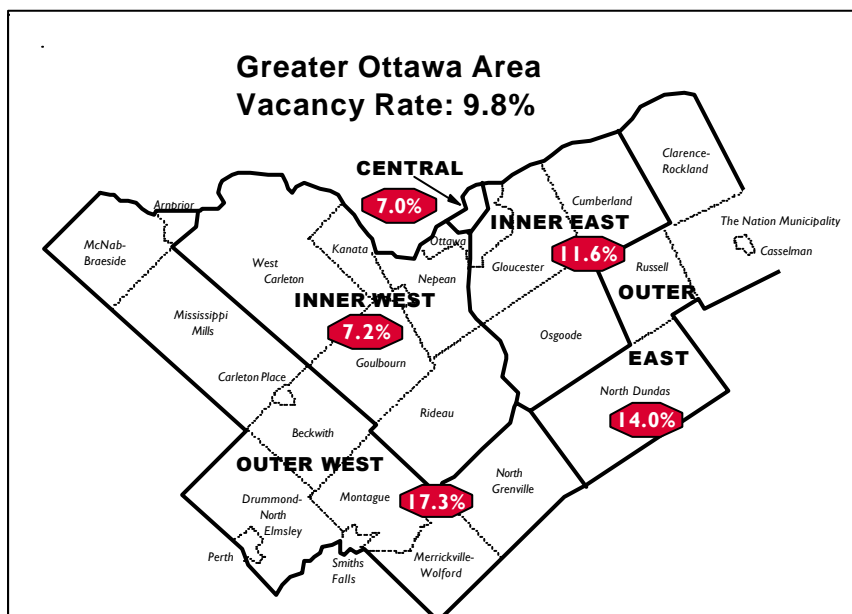


Table 2: Vacancy Rate by Rent Range - Suites

Eastern Ontario	<\$60		\$60 - \$79		\$80 - \$99		\$100 - \$119		\$120 - \$149		\$150+	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Central Ottawa	-	-	-	-	-	0.0	4.7	1.6	8.1	12.3	9.9	0.9
Inner East	-	-	-	0.0	5.9	0.0	0.0	6.1	27.3	17.4	-	-
Inner West	-	-	-	14.3	15.7	6.0	10.6	6.1	15.2	1.1	0.0	12.5
Outer East	0.0	-	-	-	0.0	0.0	100.0	-	-	-	-	-
Outer West	100.0	50.0	-	27.0	-	0.0	0.0	0.0	-	22.2	-	-
Greater Ottawa	80.0	50.0	-	21.4	14.9	5.3	6.0	3.3	12.9	8.1	9.8	2.4

fact that many of the homes in these areas are newer, and thus can command higher per diems.

- Prescott-Russell, the only other large retirement home market in Eastern Ontario, continued a trend of increasing vacancy rates, with a slight increase in the vacancy rate to 15.6 per cent from 15.1 per cent in 2003.

- Outside of the Greater Ottawa Area, per diem rates for private beds ranged from a high of \$76 in Kingston to a low of \$47 in Prescott-Russell. Private bed average per diems increased in most areas outside of the Greater Ottawa Area.

Higher Capture Rates Continue in the Greater Ottawa Area

- In contrast to the declining capture rate in the City of Toronto, the capture rate in the Greater Ottawa Area continues to increase. The capture rate stood at 11.7 in 2004, up from 10.8 in 2003 and 8.1 in 2002. The higher capture rate is the result of the large retirement home market relative to the population 75 and over. Although the population aged 75 and older in the Greater Ottawa Area represents only 6 per cent of the Ontario population in this age group, the Greater Ottawa

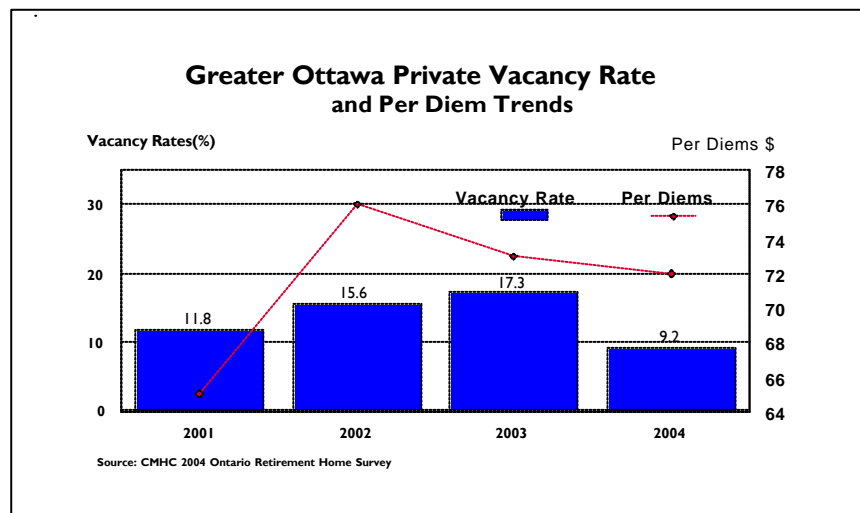
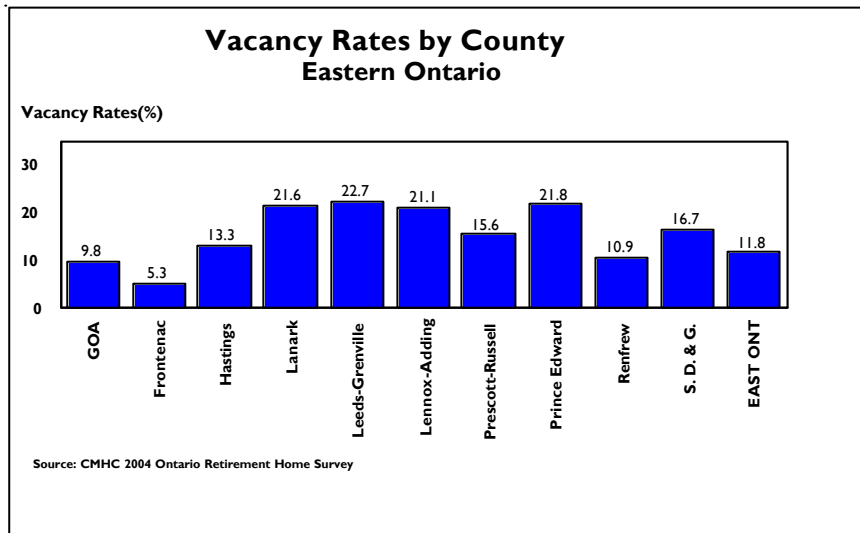
Area has 15 per cent of the retirement home residents.

New Supply

- Based on market information to date, one facility was in operation for less than one year and not included in this year's survey.

Greater Ottawa Area

The Court at Barrhaven



Western Ontario Including Guelph, Kitchener, London, and Windsor

Vacancy Rate Un- changed in Western Ontario

- The average vacancy rate for retirement home beds in Western Ontario was 12.0 per cent in 2004, unchanged from 2003. In major centres, the vacancy rate in Middlesex County remained unchanged, while the other major markets of Guelph, Kitchener, and Windsor saw their demand weaken in 2004.

- In 2004, although one new home was added to the survey, a total of nine less homes were surveyed, in most cases due to closings or reclassifications. With the shift to different bed types to meet local demand, and fewer homes surveyed, the bed count in Western Ontario decreased. Only the number of suites increased.

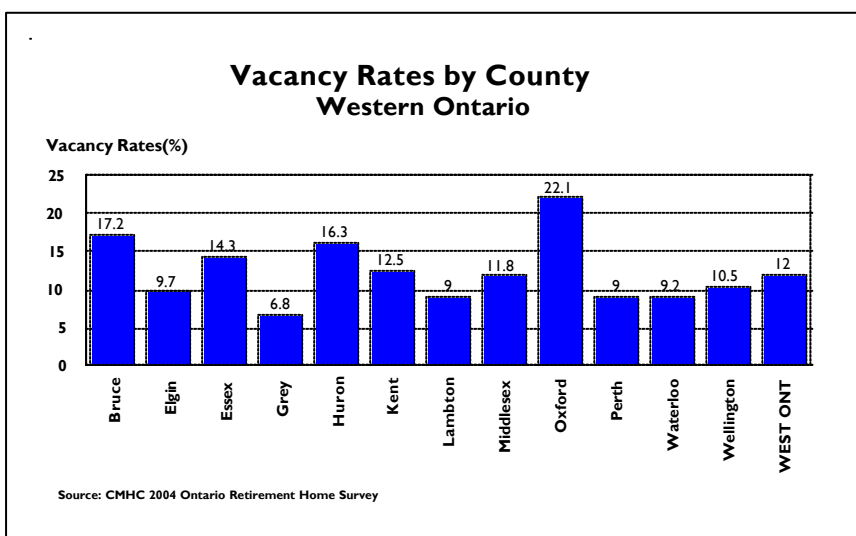
- In Guelph City, the vacancy rate increased to 5.8 per cent from 4.2 per cent in 2003, as the demand for semi-private and private beds softened. Although the vacancy rate increased, the vacancy rate in Guelph City remains the lowest in Western Ontario.

- With the exception of 2001, the market for retirement homes has been quite tight in Guelph in recent years. As a result of these tight market conditions, the average per diem for private beds rose 5 per cent to \$83 even after increasing by a substantial amount last year. This represents the highest per diems in Western Ontario. In many retirement homes in Guelph, an increase in per diems delayed absorption of unoccupied beds pushing the vacancy rate higher.

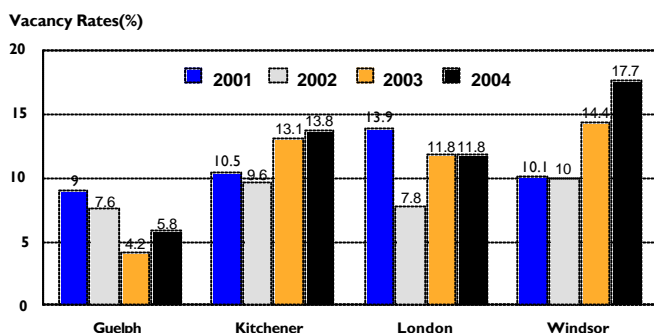
- Kitchener City's total vacancy rate increased to 13.8 per cent in 2004 from 13.1 per cent last year. The decrease in demand was centred in private beds where the vacancy rate increased to 17.1 per cent, while the vacancy rates for semi-private and suite accommodation decreased. The increase in vacancy rates for private beds occurred in units priced between \$80 and \$99. On the other hand, the overall vacancy rate in Cambridge City fell to 7.7 per cent in 2004 where product priced between \$80 and \$99 experienced greater absorption of beds this past year.

- Due to the decreased demand for private beds in Kitchener, there was little upward pressure on price and the per diem rate for private units slipped one per cent to \$77. On the other hand, with the demand increasing for both semi-private and suites, the average per diem rate increased. For semis, the average per diem jumped 18 per cent to \$58, while the rate for suites increased by 6 per cent to \$139.

- The vacancy rate for all bed types in Middlesex County, which includes London City, remained unchanged at 11.8 per cent in 2004. The market for suites in Middlesex County is solid. Despite the inclusion of a new retirement home in London City with suites, the vacancy rate decreased to 6.4 per cent from 8.5 per cent last year. On the other hand, new private beds at the high end of the Middlesex market were added this past year and are



Vacancy Trends Western Ontario's Largest Markets



Source: CMHC 2004 Ontario Retirement Home Survey

taking longer to absorb. Consequently, the vacancy rate rose to 14.4 per cent.

- In Middlesex County, average per diems increased for semi-private, private, and suite accommodation. The opening of a new retirement home in London, with higher than average per diems for private beds and suites, impacted the increase in per diems for those bed types. The average per diems for private beds moved higher by 4 per cent to \$77 reflecting increased absorptions of higher end product. As demand increased for both semi-private and suites, the average per diems rose by 5 per cent to \$62 and \$97 respectively. A majority of retirement homes in Middlesex County increased their per diems for private beds.

- Windsor City's vacancy rate continued to trend upward, rising to 17.7 per cent from 14.4 per cent in 2003, and 10.0 per cent in 2002. Due to an increased supply of private beds in Windsor City, the vacancy rate was pushed higher to 19.3 per cent, one of the highest rates in Western Ontario. The vacancy

rate for private beds in the range \$80-\$99 almost doubled this year.

- These additional beds on the market for semi-private beds, private beds, and suites in Windsor this year pushed average per diems lower. Private bed per diems decreased by four per cent to \$78, while the suite per diems slipped one per cent to \$93. The decrease in per diems for semi and private beds was partially due to the inclusion of a retirement home with lower per diems.

- Vacancy rates outside of the four major markets ranged from a low of 6.8 per cent in Grey County to a high of 22.1 per cent in Oxford County.

- Average per diems rates vary widely between mostly rural counties and the major metropolitan areas in Western Ontario. In rural counties, such as Bruce and Huron, the per diems for private beds are less than \$60. In the less rural counties, including the major metropolitan areas, the average per diem rate is at or above \$75. The difference in per

diems can be attributed to the increased operating costs for the retirement homes, the higher income of the residents, and the larger pool of potential residents.

Western Ontario Capture Rates

- In Western Ontario, Wellington County which includes the City of Guelph, has the highest capture rate at 8.7, while Middlesex County, which includes the City of London, has the lowest capture rate at 3.8.

- In 2004, data from a total of 8,842 beds were included in the survey, a decrease of 187 beds.

New Supply

- Based on current market information, nine retirement homes are either under construction or undergoing major renovations or have been in operation for less than one year and, therefore, ineligible for the 2004 survey.

Essex County

Leamington Court Luxury Retirement Suites

Lambton County

Brookside Retirement Living

Middlesex County

Highview Residences

Kensington Village

The Westmount Retirement Community

Queens Village

Bruce County

Brittany Villa

Waterloo County

Doon Village Retirement Residence

Grey County

Errinrung Retirement Home

Northern Ontario

Including Sudbury

Vacancy Rate Higher Again in 2004

- The Northern Ontario vacancy rate increased to 11.9 per cent in 2004 from 8.9 per cent last year. The vacancy rate for both private beds and suites rose this year, increasing to 11.6 per cent and 3.8 per cent respectively. On the other hand, the vacancy rate for semi-private beds decreased marginally to 21.4 per cent. The increase in the private bed and suite vacancy rates this year is due to the addition of three new retirement homes in lease-up stage.
- Despite a higher vacancy rate, the average per diem for private beds in Northern Ontario increased 4 per cent to \$57. Per diem rents for semi-private beds rose to \$55, while suite rents rose by 7 per cent to \$81. Again, the addition of three new retirement homes helped push the per diems higher.
- Sixty-eight per cent of private beds in Northern Ontario are priced under \$60, down from 74 per cent last year. While the vacancy rate for private beds in Northern Ontario declined for rents below \$60, units priced higher than this, saw increased vacancy rates.
- As in the rest of the North, the Sudbury vacancy rate also increased, rising to 10.1 per cent

this year from 3.0 per cent in 2003. The vacancy rate increased for both semi-private and private beds, with the rate for private beds more than doubling to 8.0 per cent. Part of the reason for the increase in the vacancy rate this year is the inclusion of a retirement home with higher vacancy rates.

- In Sudbury, for both semi-private and private beds, the average per diems decreased marginally, slipping by less than \$1. With the vacancy rates rising, there was no incentive to increase the per diems.
- The capture rate in Sudbury, at 3.8, is lower than the Ontario wide rate of 4.6, reflecting the smaller size of the market relative to those in the rest of Ontario.

New Supply

- Based on market information, there is one facility which has been in operation for less than one year and not included in this year's survey.

Greater Sudbury Area

Southwind Retirement Home

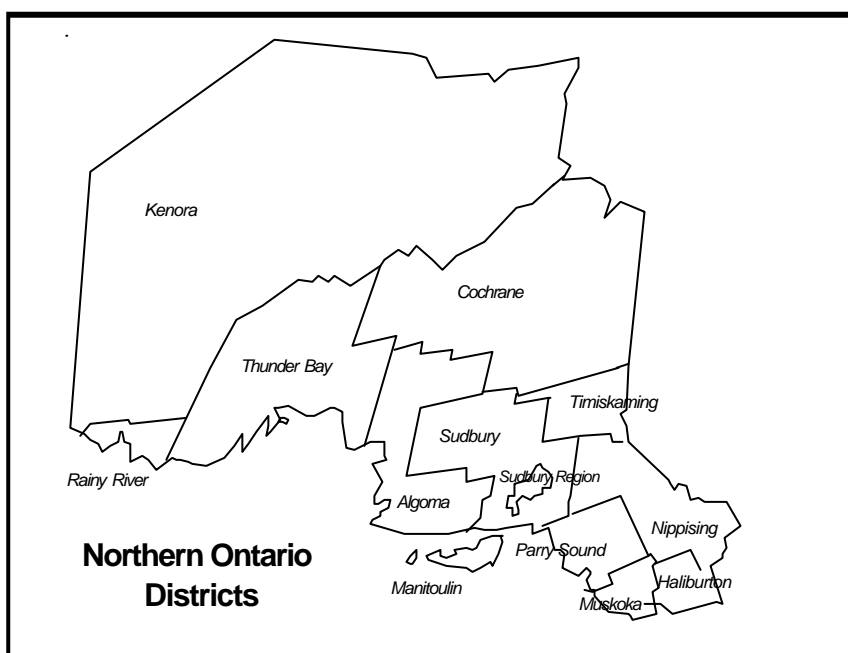


Table 3: Vacancy Rate by Type

Central Ontario	Ward		Semi-private		Private		Suite		Total	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Toronto City	**	-	22.0	4.8	13.5	14.2	26.6	18.0	18.3	15.4
Etobicoke	**	**	18.2	41.7	3.8	6.7	0.0	0.0	5.5	9.2
North York	-	-	18.5	17.5	12.1	14.8	8.3	4.0	12.9	14.0
East York	-	-	-	-	10.5	17.2	3.0	13.9	9.3	16.6
York City	**	**	33.3	**	13.7	16.0	0.0	4.2	14.4	14.3
Scarborough	**	**	20.4	15.2	10.6	15.9	2.0	17.2	11.4	15.7
City of Toronto	12.1	3.4	21.2	16.2	12.0	14.7	18.1	15.0	14.3	14.8
Peel Region	**	**	20.8	19.7	13.2	12.2	6.4	5.7	12.6	12.0
Halton Region	**	**	**	**	13.4	12.8	4.4	2.6	11.0	9.9
Durham Region	2.8	13.3	24.5	24.7	24.5	26.7	3.5	3.2	19.8	20.9
York Region	30.2	28.1	21.3	22.9	15.7	13.8	16.3	8.6	17.2	14.1
GTA	12.8	18.2	21.8	19.5	14.2	15.5	12.8	9.8	14.8	14.6
Brant County	**	**	17.1	20.4	5.3	7.7	**	**	8.2	10.2
Dufferin County	-	-	19.8	26.2	9.2	13.2	27.6	15.5	16.7	17.9
Haldimand Norfolk	-	-	8.3	**	4.4	3.1	**	**	4.8	3.2
Hamilton/Wentworth	39.5	54.5	33.0	28.9	10.5	15.4	7.0	23.3	15.8	19.7
Hamilton City	37.5	58.7	36.1	31.1	13.5	20.1	18.2	11.1	20.1	24.0
Muskoka District	-	**	19.2	40.0	13.1	12.9	**	19.4	13.7	17.5
Niagara Region	**	**	10.1	24.8	8.8	13.2	3.2	11.4	8.4	14.3
St. Catharines	-	-	8.5	25.6	9.6	14.3	10.5	22.2	9.5	17.0
Northumberland Cty	-	-	20.6	23.5	19.9	22.3	7.7	14.7	19.0	20.9
Peterborough Cty	**	**	**	**	13.0	14.1	19.0	16.2	15.2	15.3
Simcoe County	34.7	9.2	14.5	22.4	5.4	8.5	4.1	6.3	8.9	10.7
Barrie City	**	**	6.3	25.0	3.4	12.4	5.9	5.0	4.7	14.0
Victoria/Haliburton	-	-	20.9	20.5	8.3	6.0	-	**	13.3	11.7
Total	22.8	23.4	21.0	22.6	12.0	13.9	12.7	11.3	13.5	14.6
Eastern Ontario										
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Central Ottawa	-	-	18.4	15.8	22.7	7.5	7.1	3.1	18.8	7.0
Inner East	-	-	43.5	38.2	15.2	11.3	3.5	5.9	15.6	11.6
Inner West	-	-	**	**	17.8	8.0	12.8	5.4	16.4	7.2
Outer East	-	-	29.7	23.9	11.2	10.0	7.1	**	17.1	14.0
Outer West	**	**	40.8	43.3	15.1	11.9	26.7	18.9	19.6	17.3
Greater Ottawa	**	**	28.8	25.0	17.3	9.2	10.0	5.6	17.3	9.8
Frontenac	-	-	15.3	25.8	7.0	3.3	0.0	0.7	6.1	5.3
Kingston City	-	-	25.0	25.0	5.9	1.1	0.0	0.7	5.2	3.0
Hastings	48.5	50.0	21.9	16.0	4.6	10.0	30.0	13.6	10.9	13.3
Lanark	**	**	40.0	42.0	16.7	16.0	30.8	19.7	21.9	21.6
Leeds-Grenville	**	**	46.6	34.9	13.0	17.4	**	**	22.4	22.7
Lennox-Addington	**	**	41.7	45.8	13.7	15.3	33.3	27.3	18.9	21.1
Prescott-Russell	**	-	27.7	23.0	11.1	14.1	5.3	0.0	15.1	15.6
Prince Edward	-	-	-	-	23.8	21.9	**	**	22.7	21.8
Renfrew	**	**	38.9	29.2	9.5	8.1	2.8	4.3	13.5	10.9
S. D. & G.	-	-	27.3	27.3	15.5	16.4	17.2	3.2	17.8	16.7
Total	37.0	43.2	29.7	26.5	15.0	10.8	9.2	5.4	16.2	11.8
Western Ontario										
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Bruce County	-	-	11.4	33.3	18.9	14.7	5.7	16.4	16.6	17.2
Elgin County	**	**	15.0	17.9	2.7	10.2	0.0	0.0	4.6	9.7
Essex County	**	11.5	21.2	24.8	10.1	14.5	2.3	3.4	12.1	14.3
Windsor City	**	**	26.2	29.9	12.5	19.3	2.7	3.9	14.4	17.7
Grey County	**	-	11.5	11.1	4.9	6.6	0.0	7.7	5.1	6.8
Huron County	**	**	17.9	24.0	16.3	16.0	4.5	4.5	17.5	16.3
Kent County	**	**	22.3	20.0	10.6	10.3	26.7	11.8	15.1	12.5
Lambton County	**	**	13.0	8.7	20.6	8.7	3.4	7.2	15.8	9.0
Middlesex County	**	**	26.1	11.8	11.0	14.4	8.5	6.4	11.8	11.8
Oxford County	**	**	24.5	22.9	23.2	23.8	8.7	8.7	21.8	22.1
Perth County	**	**	11.5	7.4	9.8	7.9	**	**	10.0	9.0
Waterloo Region	22.2	**	8.2	9.1	11.2	10.5	10.2	2.6	10.5	9.2
Kitchener City	-	-	6.9	4.5	14.8	17.1	30.3	14.8	13.1	13.8
Cambridge City	**	**	14.0	21.6	10.8	6.1	10.3	0.0	11.5	7.7
Wellington County	**	**	13.9	13.9	6.1	9.5	13.6	9.8	8.3	10.5
Guelph City	**	**	3.3	5.2	4.1	6.0	8.8	6.5	4.2	5.8
Total	23.0	15.6	16.2	16.7	11.3	12.0	6.4	5.7	12.0	12.0
Northern Ontario										
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Northern Ontario	**	**	22.4	21.4	8.3	11.6	0.8	3.8	8.9	11.9
Sudbury	-	**	0.0	22.9	3.3	8.0	-	-	3.0	10.1
Total Ontario	24.5	23.5	21.2	21.5	12.4	12.6	10.3	8.6	13.6	13.2

Table 4: Supply Summary and Capture Rate

Central Ontario	Ward	Semi-private	Private	Suite	Total Beds	Homes	Total Residents	Capture Rate 75+
Toronto City	0	62	1,208	815	2,085	22	1,823	-
Etobicoke	6	24	178	31	239	6	226	-
North York	0	234	769	151	1,154	11	1,035	-
East York	0	0	314	72	386	4	341	-
York City	17	12	376	48	453	4	389	-
Scarborough	6	198	517	87	808	9	713	-
City of Toronto	29	530	3,362	1,204	5,125	56	4,527	2.6
Peel Region	34	208	935	351	1,528	20	1,404	3.7
Halton Region	12	12	724	352	1,100	15	1,046	4.6
Durham Region	60	166	824	283	1,333	24	1,125	4.8
York Region	57	144	919	327	1,447	21	1,323	4.2
GTA	192	1,060	6,764	2,517	10,533	136	9,425	3.2
Brant County	21	103	506	6	636	11	588	6.7
Dufferin County	0	84	121	58	263	5	222	9.7
Haldimand Norfolk	0	8	326	6	340	11	335	4.4
Hamilton/Wentworth	55	298	1,203	163	1,719	35	1,414	3.9
Hamilton City	46	222	716	27	1,011	20	780	-
Muskoka District	8	50	310	31	399	8	340	7.0
Niagara Region	11	210	1,247	264	1,732	28	1,525	4.3
St. Catharines	0	82	470	117	669	8	574	-
Northumberland Cty	0	34	242	68	344	10	284	3.8
Peterborough Cty	11	14	637	291	953	10	860	7.2
Simcoe County	65	210	995	48	1,318	33	1,210	4.9
Barrie City	9	76	437	20	542	9	398	-
Victoria/Haliburton	0	78	133	3	214	3	190	2.2
Total	363	2,149	12,484	3,455	18,451	290	16,393	-
Eastern Ontario	Ward	Semi-private	Private	Suite	Total	Homes	Total Residents	Capture Rate 75+
Central Ottawa	0	114	785	350	1,249	19	1,249	-
Inner East	0	34	779	118	931	14	862	-
Inner West	0	38	1,577	556	2,171	20	2,151	-
Outer East	0	188	419	13	620	16	556	-
Outer West	4	90	463	74	631	14	550	-
Greater Ottawa	4	464	4,023	1,111	5,602	83	5,368	11.7
Frontenac	0	62	274	151	487	13	482	4.9
Kingston City	0	32	183	149	364	7	364	-
Hastings	26	50	329	22	427	14	378	3.9
Lanark	4	88	300	71	463	9	385	8.4
Leeds-Grenville	25	86	322	11	444	10	358	4.7
Lennox-Addington	30	24	190	22	266	8	223	8.1
Prescott-Russell	0	196	799	18	1,013	23	884	22.1
Prince Edward	0	0	73	5	78	7	63	2.5
Renfrew	3	106	508	69	686	17	634	8.4
S. D. & G.	0	128	360	93	581	13	505	5.9
Total	88	926	6,296	1,486	8,796	167	8,174	-
Western Ontario	Ward	Semi-private	Private	Suite	Total	Homes	Total Residents	Capture Rate 75+
Bruce County	0	42	258	55	355	11	303	5.9
Elgin County	4	28	177	27	236	6	219	3.9
Essex County	61	278	924	267	1,530	21	1,374	5.7
Windsor City	35	194	528	228	985	9	859	-
Grey County	0	18	458	26	502	10	490	6.3
Huron County	15	50	244	22	331	9	282	5.4
Kent County	12	160	545	17	734	12	658	8.2
Lambton County	11	46	345	152	554	13	527	5.4
Middlesex County	19	68	665	359	1,111	17	1,017	3.8
Oxford County	21	96	344	23	484	11	384	5.1
Perth County	25	94	266	15	400	9	372	6.6
Waterloo Region	6	286	1,059	192	1,543	28	1,473	6.0
Kitchener City	0	176	486	27	689	8	620	-
Cambridge City	6	74	296	65	441	10	432	-
Wellington County	12	244	765	41	1,062	20	974	8.7
Guelph City	9	154	466	31	660	8	640	-
Total	186	1,410	6,050	1,196	8,842	167	8,073	-
Northern Ontario	Ward	Semi-private	Private	Suite	Total	Homes	Total Residents	Capture Rate 75+
Northern Ontario	17	168	1,259	158	1,602	31	1,468	-
Sudbury	11	48	339	0	398	6	368	3.8
Total Ontario	654	4,653	26,089	6,295	37,691	655	34,108	4.6

Table 5: Vacancy Rate by Rent Range - Private Beds

Central Ontario	<\$60		\$60 - \$79		\$80 - \$99		\$100 - \$119		\$120 - \$149		\$150+	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Toronto City	14.1	8.9	27.8	82	6.1	9.5	5.0	21.2	10.2	20.3	25.0	33.3
Etobicoke	7.3	13.5	10.0	30.0	2.4	2.6	-	5.7	-	-	-	-
North York	-	0.0	29.2	28.5	6.1	7.1	9.1	13.6	0.0	13.9	-	-
East York	-	-	-	50.0	10.7	14.0	-	-	-	-	-	-
York City	0.0	0.0	15.3	17.5	9.3	12.5	0.0	0.0	-	-	-	-
Scarborough	20.7	25.0	6.9	21.9	13.9	19.6	10.3	8.8	0.0	0.0	-	-
City of Toronto	14.1	11.6	20.4	19.5	9.0	12.6	7.3	15.5	5.6	17.5	25.0	33.3
Peel Region	27.0	29.5	18.4	12.9	9.8	13.4	7.1	4.8	3.6	2.3	20.0	10.0
Halton Region	0.0	0.0	21.0	16.6	9.5	7.0	22.9	15.6	30.8	0.0	-	-
Durham Region	25.5	35.9	26.1	29.8	19.8	22.0	24.2	42.4	-	-	-	-
York Region	14.3	20.0	14.5	17.1	14.1	11.1	23.7	14.4	25.8	-	-	-
GTA	16.8	17.6	20.6	20.3	10.9	12.6	10.5	14.2	12.7	12.8	21.4	15.4
Brant County	5.8	10.2	5.3	7.9	4.1	-	-	-	-	-	-	-
Dufferin County	25.9	4.5	2.8	17.1	0.0	28.6	7.9	10.0	-	-	-	-
Haldimand Norfolk	46.7	3.3	2.3	2.9	0.0	0.0	-	-	-	-	-	-
Hamilton/Wentworth	19.0	21.7	8.7	7.1	4.3	11.0	10.9	32.1	0.0	0.0	-	-
Hamilton City	27.6	26.1	10.1	3.5	4.8	16.3	12.0	35.3	-	-	-	-
Muskoka District	7.7	14.0	16.2	10.9	-	12.5	-	-	-	-	-	-
Niagara Region	15.4	15.0	7.5	11.3	4.4	16.2	10.0	38.9	-	0.0	-	-
St. Catharines	33.3	10.0	2.0	8.2	5.6	31.1	0.0	-	-	0.0	-	-
Northumberland Cty	21.0	31.4	20.9	16.9	17.2	0.0	-	-	-	-	-	-
Peterborough Cty	13.8	23.1	17.4	17.7	0.8	9.1	11.9	2.4	-	-	-	-
Simcoe County	10.3	11.5	5.5	7.3	2.4	12.3	2.6	3.4	0.0	0.0	-	-
Barrie City	8.3	11.1	4.0	11.9	0.0	14.5	-	16.7	0.0	0.0	-	-
Victoria/Haliburton	25.8	25.8	3.4	6.7	0.0	0.0	-	-	-	-	-	-
Total	18.4	16.2	13.7	13.9	9.1	12.3	10.2	14.1	12.1	11.7	21.4	15.4
Eastern Ontario	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Central Ottawa	7.5	12.4	18.6	11.8	33.6	5.3	24.3	0.0	-	16.7	0.0	-
Inner East	30.4	40.2	15.4	8.7	0.0	8.2	-	-	66.7	-	-	-
Inner West	13.0	19.4	25.8	8.8	6.6	3.4	19.9	15.7	20.0	22.2	-	-
Outer East	16.8	13.0	-	-	-	-	-	-	-	-	-	-
Outer West	21.3	18.8	9.6	3.2	100.0	100.0	0.0	0.0	-	-	-	-
Greater Ottawa	17.5	18.1	19.0	8.5	11.4	4.3	21.3	10.1	27.3	21.2	0.0	-
Frontenac	6.3	7.3	10.1	4.0	4.5	0.0	0.0	25.0	-	-	-	-
Kingston City	0.0	5.9	10.0	0.0	4.5	0.0	0.0	25.0	-	-	-	-
Hastings	6.6	12.2	3.3	9.4	-	-	0.0	-	-	0.0	-	-
Lanark	29.1	28.2	8.0	3.8	100.0	100.0	0.0	0.0	0.0	-	-	-
Leeds-Grenville	15.9	31.3	10.6	8.6	0.0	10.2	-	-	-	-	-	-
Lennox-Addington	37.7	22.3	0.0	0.0	8.3	32.7	-	50.0	-	-	-	-
Prescott-Russell	14.5	17.1	-	70.0	-	-	-	-	-	-	-	-
Prince Edward	16.1	28.0	-	8.7	100.0	-	-	-	-	-	-	-
Renfrew	9.2	29.0	15.2	4.8	-	-	-	-	-	-	-	-
S. D. & G.	18.0	18.6	18.4	18.1	0.0	0.0	-	-	-	-	-	-
Total	14.9	17.4	16.1	9.6	10.8	9.1	21.2	10.6	27.3	20.0	0.0	-
Western Ontario	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Bruce County	23.3	21.9	9.6	4.1	-	-	-	-	-	-	-	-
Elgin County	9.1	23.0	0.0	2.7	0.0	0.0	-	0.0	-	-	-	-
Essex County	15.3	20.2	8.9	9.8	14.1	24.0	-	14.3	-	-	-	0.0
Windsor City	24.3	23.2	14.0	12.2	13.6	24.6	-	11.5	-	-	-	0.0
Grey County	12.6	10.3	3.0	6.0	5.3	0.0	-	-	-	-	-	-
Huron County	19.1	20.6	2.6	13.0	0.0	-	-	-	-	-	-	-
Kent County	14.7	10.0	9.9	10.8	0.0	0.0	-	-	-	-	-	-
Lambton County	24.0	16.4	19.7	5.2	20.4	0.0	0.0	-	-	-	-	-
Middlesex County	6.8	14.0	8.9	9.3	13.4	28.1	30.0	19.4	0.0	0.0	-	-
Oxford County	19.9	26.6	25.5	21.1	-	-	-	-	-	-	-	-
Perth County	17.1	7.9	9.3	9.3	-	-	-	-	-	-	-	-
Waterloo Region	12.6	10.4	10.4	6.7	11.0	16.8	0.0	0.0	-	-	-	-
Kitchener City	18.9	12.0	16.6	11.5	14.2	27.6	-	-	-	-	-	-
Cambridge City	10.8	9.7	16.5	7.6	4.9	14.3	0.0	0.0	-	-	-	-
Wellington County	16.5	24.1	3.6	10.2	3.2	4.9	-	-	-	-	-	-
Guelph City	0.0	0.0	5.4	9.3	3.3	5.0	-	-	-	-	-	-
Total	17.0	17.8	9.6	9.4	10.4	15.5	22.5	14.3	0.0	0.0	-	0.0
Northern Ontario	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Northern Ontario	10.7	7.8	2.0	14.5	-	61.1	-	-	-	-	-	-
Sudbury	7.7	10.1	0.0	0.0	-	-	-	-	-	-	-	-
Total Ontario	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
	16.1	17.1	12.8	11.6	9.7	12.4	13.8	13.5	13.2	13.1	18.8	11.1

Table 6: % Distribution of Private Beds by Rent Range

Central Ontario	<\$60		\$60 - \$79		\$80 - \$99		\$100 - \$119		\$120 - \$149		\$150+	
	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Toronto City	43.2	33.6	18.9	19.5	16.1	12.6	16.6	27.7	4.9	6.4	0.3	0.3
Etobicoke	44.6	26.8	10.9	7.3	44.6	27.5	0.0	38.4	0.0	0.0	0.0	0.0
North York	0.0	0.1	24.3	25.3	34.5	28.6	36.1	41.0	5.1	4.9	0.0	0.0
East York	0.0	0.0	0.0	9.9	100.0	90.1	0.0	0.0	0.0	0.0	0.0	0.0
York City	1.8	1.3	82.4	85.8	12.2	8.6	3.6	4.3	0.0	0.0	0.0	0.0
Scarborough	14.2	17.3	25.0	16.3	51.2	57.0	7.1	8.7	2.5	0.8	0.0	0.0
City of Toronto	19.5	15.2	27.6	27.4	33.3	30.6	16.1	23.2	3.3	3.5	0.1	0.1
Peel Region	10.5	10.0	26.2	28.2	34.4	32.1	22.2	23.6	5.8	5.0	1.1	1.1
Halton Region	0.5	0.5	15.6	33.8	74.9	58.7	5.2	6.8	3.9	0.2	0.0	0.0
Durham Region	12.1	11.3	56.9	53.3	26.7	31.4	4.3	4.1	0.0	0.0	0.0	0.0
York Region	0.8	1.2	32.5	28.3	46.0	45.7	13.4	24.8	7.3	0.0	0.0	0.0
GTA	12.9	10.4	30.3	31.7	38.7	36.1	14.1	19.2	3.9	2.4	0.2	0.2
Brant County	37.7	21.0	50.5	79.0	11.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dufferin County	23.7	19.3	31.6	36.0	11.4	6.1	33.3	35.1	0.0	3.5	0.0	0.0
Haldimand Norfolk	68.2	66.6	30.8	32.5	1.1	1.0	0.0	0.0	0.0	0.0	0.0	0.0
Hamilton/Wentworth	28.5	22.1	46.4	49.9	19.9	22.6	4.7	5.0	0.4	0.4	0.0	0.0
Hamilton City	29.3	28.0	41.5	40.4	21.8	23.8	7.5	7.9	0.0	0.0	0.0	0.0
Muskoka District	29.7	18.8	70.3	78.6	0.0	2.6	0.0	0.0	0.0	0.0	0.0	0.0
Niagara Region	15.4	15.2	7.5	72.1	4.4	10.7	10.0	1.6	0.0	0.4	0.0	0.0
St. Catharines	17.8	2.7	37.4	79.6	44.3	16.6	0.5	0.0	0.0	1.1	0.0	0.0
Northumberland Cty	42.2	43.8	46.2	51.7	11.6	4.6	0.0	0.0	0.0	0.0	0.0	0.0
Peterborough Cty	12.8	10.3	29.8	51.8	20.6	31.2	6.7	6.7	0.0	0.0	0.0	0.0
Simcoe County	13.8	13.3	68.6	54.4	12.8	23.1	4.0	9.1	0.8	0.1	0.0	0.0
Barrie City	3.6	2.6	81.2	71.4	12.8	22.2	0.0	3.5	2.4	0.3	0.0	0.0
Victoria/Haliburton	24.8	24.4	69.6	70.1	5.6	5.5	0.0	0.0	0.0	0.0	0.0	0.0
Total	18.9	15.4	41.4	44.4	28.0	26.4	9.4	12.4	2.2	1.4	0.1	0.1
Eastern Ontario	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Central Ottawa	22.3	24.3	33.1	37.0	16.2	21.9	28.2	15.9	0.0	1.0	0.3	0.0
Inner East	14.3	12.6	75.0	80.3	9.8	7.1	0.0	0.0	0.8	0.0	0.0	0.0
Inner West	7.6	7.2	44.2	42.9	27.5	34.5	20.1	13.5	0.7	2.0	0.0	0.0
Outer East	100.0	100.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Outer West	51.3	56.9	45.5	41.3	0.2	0.2	1.8	1.6	1.2	0.0	0.0	0.0
Greater Ottawa	24.9	25.3	44.9	45.9	15.9	19.4	13.7	8.5	0.7	1.0	0.1	0.0
Frontenac	24.1	21.3	41.6	38.4	34.0	38.8	0.4	1.6	0.0	0.0	0.0	0.0
Kingston City	9.6	9.4	39.6	33.2	50.3	55.3	0.6	2.2	0.0	0.0	0.0	0.0
Hastings	45.4	30.0	64.4	69.4	0.0	0.0	0.3	0.0	0.0	0.6	0.0	0.0
Lanark	44.2	51.7	51.2	45.5	0.3	0.4	2.6	2.4	1.8	0.0	0.0	0.0
Leeds-Grenville	57.0	42.3	39.3	26.1	3.8	31.6	0.0	0.0	0.0	0.0	0.0	0.0
Lennox-Addington	31.1	29.6	38.3	41.9	30.6	27.4	0.0	1.1	0.0	0.0	0.0	0.0
Prescott-Russell	100.0	98.3	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Prince Edward	91.8	68.5	0.0	31.5	8.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Renfrew	89.9	60.1	10.1	39.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
S. D. & G.	46.6	47.4	53.0	52.3	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0
Total	37.1	40.5	40.4	40.3	13.2	14.3	8.9	4.4	0.4	0.5	0.0	0.0
Western Ontario	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Bruce County	68.4	61.5	31.6	38.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Elgin County	32.1	44.3	27.0	22.2	40.9	28.7	0.0	4.8	0.0	0.0	0.0	0.0
Essex County	9.2	14.6	47.6	54.2	37.1	25.9	5.4	4.8	0.0	0.0	0.6	0.6
Windsor City	8.4	20.9	22.7	30.6	58.3	37.9	9.5	9.7	0.0	0.0	1.1	0.9
Grey County	21.1	21.7	74.7	74.3	4.2	4.0	0.0	0.0	0.0	0.0	0.0	0.0
Huron County	83.7	43.8	14.8	56.2	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kent County	24.7	9.4	75.1	88.6	0.2	2.1	0.0	0.0	0.0	0.0	0.0	0.0
Lambton County	31.7	34.8	52.7	63.4	14.9	1.8	0.6	0.0	0.0	0.0	0.0	0.0
Middlesex County	8.7	8.5	61.2	56.3	25.4	28.9	4.4	6.1	0.1	0.2	0.0	0.0
Oxford County	40.5	41.7	59.5	58.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Perth County	42.1	37.1	57.9	62.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Waterloo Region	17.7	16.1	40.2	42.3	41.3	41.1	0.7	0.5	0.0	0.0	0.0	0.0
Kitchener City	10.2	12.6	30.2	32.9	59.6	54.5	0.0	0.0	0.0	0.0	0.0	0.0
Cambridge City	36.4	25.3	38.9	46.0	21.8	27.0	2.9	1.8	0.0	0.0	0.0	0.0
Wellington County	23.3	15.5	46.4	42.0	30.3	42.5	0.0	0.0	0.0	0.0	0.0	0.0
Guelph City	3.3	3.3	49.7	30.9	47.0	65.8	0.0	0.0	0.0	0.0	0.0	0.0
Total	26.0	22.2	51.0	55.3	21.5	20.8	1.4	1.6	0.0	0.0	0.1	0.1
Northern Ontario	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004	2003	2004
Northern Ontario	74.4	68.4	25.6	27.2	0.0	4.4	0.0	0.0	0.0	0.0	0.0	0.0
Sudbury	79.1	82.5	20.9	17.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total Ontario	27.1	24.0	42.8	45.8	21.9	21.7	7.0	7.6	1.2	0.8	0.1	0.1

Table 7: Average Per Diem by Bed Type

Central Ontario	Semi-private			Private			Suite		
	2003	2004	% change	2003	2004	% change	2003	2004	% change
Toronto City	\$38	\$37	-3%	\$75	\$83	10%	\$125	\$121	-4%
Etobicoke	\$51	\$52	2%	\$71	\$85	19%	\$99	\$138	39%
North York	\$63	\$64	2%	\$95	\$96	1%	\$132	\$131	-0%
East York	-	-	-	\$95	\$94	-1%	\$147	\$137	-7%
York City	\$59	**	-100%	\$67	\$79	17%	\$104	\$112	8%
Scarborough	\$65	\$66	1%	\$84	\$83	-1%	\$93	\$100	8%
City of Toronto	\$58	\$60	5%	\$82	\$87	6%	\$123	\$121	-1%
Peel Region	\$62	\$61	-2%	\$87	\$88	1%	\$112	\$116	3%
Halton Region	**	\$53	**	\$86	\$83	-3%	\$106	\$106	-0%
Durham Region	\$49	\$55	11%	\$75	\$76	2%	\$95	\$96	1%
York Region	\$71	\$62	-14%	\$87	\$88	1%	\$131	\$120	-8%
GTA	\$59	\$60	1%	\$83	\$85	3%	\$117	\$116	-1%
Brant County	\$46	\$47	3%	\$64	\$65	3%	**	**	**
Dufferin County	\$48	\$48	1%	\$79	\$83	6%	**	**	**
Haldimand Norfolk	\$36	\$42	15%	\$52	\$53	3%	\$94	\$80	-15%
Hamilton/Wentworth	\$47	\$49	5%	\$68	\$71	4%	\$102	\$102	-1%
Hamilton City	\$46	\$47	2%	\$68	\$70	3%	\$117	\$113	-4%
Muskoka District	\$45	\$45	1%	\$61	\$63	4%	**	\$96	**
Niagara Region	\$47	\$50	7%	\$67	\$71	6%	\$81	\$82	1%
St. Catharines	\$46	\$47	2%	\$71	\$74	5%	\$99	\$88	-11%
Northumberland Cty	\$48	\$48	0%	\$64	\$65	1%	\$82	\$77	-6%
Peterborough Cty	\$42	\$45	6%	\$74	\$77	4%	\$97	\$104	7%
Simcoe County	\$48	\$50	4%	\$71	\$74	4%	\$108	\$111	3%
Barrie City	\$49	\$52	8%	\$73	\$74	2%	\$107	\$114	7%
Victoria/Haliburton	\$52	\$53	3%	\$68	\$70	3%	-	**	**
Total	\$53	\$55	3%	\$76	\$78	3%	\$112	\$110	-1%
Eastern Ontario	2003	2004	% change	2003	2004	% change	2003	2004	% change
Central Ottawa	\$44	\$46	5%	\$83	\$78	-6%	\$140	\$140	0%
Inner East	\$48	**	-100%	\$67	\$68	1%	\$107	\$109	2%
Inner West	**	**	**	\$81	\$81	-0%	\$98	\$105	7%
Outer East	\$41	\$41	-1%	\$47	\$47	-0%	\$81	**	**
Outer West	\$45	\$45	-1%	\$62	\$61	-1%	\$91	\$85	-7%
Greater Ottawa	\$44	\$44	-0%	\$73	\$72	-1%	\$113	\$116	3%
Frontenac	\$46	\$48	5%	\$70	\$71	2%	\$91	\$91	-1%
Kingston City	\$52	\$55	4%	\$75	\$76	0%	\$91	\$91	-1%
Hastings	\$39	\$41	6%	\$61	\$64	5%	\$108	\$109	1%
Lanark	\$44	\$45	1%	\$63	\$61	-2%	\$91	\$85	-7%
Leeds-Grenville	\$41	\$41	0%	\$63	\$66	5%	**	**	**
Lennox-Addington	\$45	\$50	10%	\$70	\$71	2%	\$57	\$55	-3%
Prescott-Russell	\$40	\$40	1%	\$46	\$47	3%	\$81	\$78	-3%
Prince Edward	-	-	-	\$49	\$50	4%	**	**	**
Renfrew	\$38	\$39	3%	\$54	\$55	2%	\$66	\$65	-2%
S. D. & G.	\$40	\$41	3%	\$56	\$57	2%	\$67	\$66	-2%
Total	\$42	\$43	1%	\$68	\$68	-1%	\$103	\$106	3%
Western Ontario	2003	2004	% change	2003	2004	% change	2003	2004	% change
Bruce County	\$46	\$45	-2%	\$54	\$56	5%	\$73	\$76	4%
Elgin County	\$47	\$50	7%	\$69	\$67	-2%	\$106	\$112	6%
Essex County	\$52	\$53	2%	\$75	\$75	-0%	\$92	\$92	-0%
Windsor City	\$55	\$53	-3%	\$81	\$78	-4%	\$94	\$93	-1%
Grey County	\$44	\$46	5%	\$64	\$66	3%	-	**	**
Huron County	\$48	\$48	-0%	\$55	\$59	8%	\$71	**	**
Kent County	\$46	\$50	8%	\$64	\$67	4%	\$87	\$92	5%
Lambton County	\$47	\$49	4%	\$65	\$63	-3%	\$75	\$78	4%
Middlesex County	\$59	\$62	5%	\$74	\$77	4%	\$92	\$97	5%
Oxford County	\$48	\$49	2%	\$60	\$62	4%	\$62	\$70	12%
Perth County	\$50	\$50	0%	\$61	\$62	2%	**	**	**
Waterloo Region	\$48	\$53	10%	\$75	\$75	-0%	\$100	\$102	2%
Kitchener City	\$49	\$58	18%	\$78	\$77	-1%	\$131	\$139	6%
Cambridge City	\$46	\$47	2%	\$69	\$70	2%	\$89	\$91	2%
Wellington County	\$48	\$49	2%	\$71	\$75	6%	\$105	\$108	3%
Guelph City	\$52	\$54	4%	\$79	\$83	5%	\$113	\$117	3%
Total	\$49	\$51	4%	\$68	\$68	0%	\$90	\$92	2%
Northern Ontario	2003	2004	% change	2003	2004	% change	2003	2004	% change
Northern Ontario	\$36	\$38	4%	\$55	\$57	4%	\$76	\$81	7%
Sudbury	\$40	\$40	-2%	\$57	\$56	-0%	-	-	-
Total Ontario	2003	2004	% change	2003	2004	% change	2003	2004	% change
Total Ontario	\$49	\$51	3%	\$71	\$73	2%	\$104	\$105	1%

Definitions

Room Types

Suite: differs from Private in that the bedroom(s) are separate from other living area

Semi: two beds, shared accommodation

Ward: three or more beds, shared accommodation

Private: room not shared (except by couple).

Short-stay/Respite Beds

If a room is restricted for respite use it is removed from the total room/bed counts.

Effective Operating Capacity

Many retirement homes have a modular set-up that permits interchangeable use of a room on a private or semi-private basis. For the purposes of CMHC's survey we are not interested in the design capacity but rather how the facility is being used. When a 'semi' room (2 beds) is being occupied and paid for at the private rate we record the unit as one (1) private bed. Vacant modular rooms are usually recorded as vacant private beds or split to reflect effective demand in the marketplace for private/semi-private accommodation.

Couples

We record both individuals in

the total resident count but only record as one(1) under the bed count for the purpose of calculating the bed vacancy rate.

Prices

Operators provide us with either a daily or monthly rate. Monthly rates are converted to a daily per diem. Rates are collected for both existing residents and vacant beds. The rate collected is the 'Regular' assisted living per diem, i.e. up to 1½ hours of care and 3 meals per day. Extra care charges, e.g. Assisted Daily Living, special care, heavier care are not used in the calculation of the average per diem rate. If a room is occupied by a 'Couple' and there is a separate charge for the 2nd person we record the single person rate for the room or simply do not record the rate for the couple so as not to distort the average per diem rate. The owner may have a contract to supply a number of units at a set rate (subsidized rate) which in some areas of the province has been raised to a range of \$40-\$44 per day. Beds at the subsidy rate are excluded from the calculation of the weighted average per diem rate.

Suites

Separate per diem and vacancy information is collected for 1 and 2 bedroom suites. However, the information is combined and shown under the Suite category in the report.

Capture Rate

This refers to the total number of retirement home residents in our sample in a defined geographic area, for example a county, divided by the total number of persons living in that area who are most likely to live in this type of facility. CMHC has established that the target age group for retirement home facilities are persons 75 years and older. The calculation can be expressed in two ways: **1.** There are 70 retirement home residents per 1,000 persons 75 years and older or, **2.** A capture rate of 7.0 per cent of the target population group. Other terms sometimes used to describe capture rate are absorption rate and penetration rate.

Capture rates differ widely across Ontario as a result of the range of alternatives in the marketplace and the impact of recent additions of new retirement home beds. In some areas there may be more independent living retirement homes; adult communities; life lease housing developments; and seniors apartments/condominiums. Other centres may have a larger and/or newer supply of beds (more private rooms) in long-term care facilities. Variations in the availability of home care and meal-on-wheels and other residential supports for seniors also have an impact on the demand for retirement home accommodation.

Methodology

Introduction

Canada Mortgage and Housing Corporation (CMHC) conducted its first survey of private retirement homes in 1989 for the Toronto area. In the early 1990's, the survey was extended to all major Ontario centres and most smaller areas. All retirement home facilities in Ontario were included in the survey universe in 2000. The following year a standardized questionnaire was implemented to collect information on vacancies and per diems by bed type, number of residents, number of couples, and number of subsidized beds. The survey is now conducted annually during the month of April.

How we conduct the Survey

A letter is sent to each owner/residence administrator before the survey is completed, requesting their co-operation in participating in CMHC's Annual Survey and advising them that all data collected is treated as **being confidential**. They are

advised that a Survey Enumerator will be contacting them by telephone. Almost all surveys are completed over the phone. The survey data is input and then reviewed to ensure completeness. Follow up calls are made where required.

What is included in the Survey?

The objective is to include retirement homes that provide in their basic service up to 1½ hours of care (on site nursing / assistance with medications) and three meals per day. There are a few facilities included that do not provide nursing assistance but all other services (three meals/snacks, housekeeping, activity programs are provided). The majority of residents must be seniors (65+ years of age). Some facilities may include individuals with an intellectual disability or mental illness that have not reached 65 years of age. Excluded from this survey are retirement developments which only offer independent daily living, including life lease and seniors private and non-

profit apartments. Long-term care facilities (nursing homes) are not part of this survey.

New Supply

The approach that we have taken when dealing with new facilities is that generally they are not included in the survey unless they have been open for at least one year. This allows for a reasonable initial lease-up period. Renovations to an existing facility which result in the net addition to the supply of beds are dealt with on a case by case basis.

Universe vs. Sample

The survey results shown are based on the sample. We captured survey results from an estimated 96% of total supply of retirement home beds operating in Ontario in April 2004. Three-quarters of the four per cent of supply not included in the survey results were because the facilities were too new or extensively renovated. We did not make contact or information was not provided for just one per cent of the estimated universe.

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ETIREMENT HOMES REPORT SUPPLEMENT

Ontario

Canada Mortgage and Housing Corporation
2004 Supplement

New Long Term Care Bed Impact on Private Retirement Homes Market

- In April 1998, the government of Ontario announced an eight year plan to build 20,000 new long-term care (LTC) beds and redevelop 16,000 beds in older facilities.
- The table on page 2 shows that as of June 30, 2004, there were 16,640 new LTC beds built and another 3,271 beds under development. The Greater Toronto Area (GTA) is the location of 57.5 per cent or 11,445 new LTC beds. In addition, 1,514 beds were allocated to Hamilton/Wentworth and 1,327 to the Greater Ottawa Area.
- With the addition of the new LTC beds, the supply of LTC beds in Ontario will have grown to over 74,000 by the end of this year. As of April 30, 2004, over 96 per cent of the current LTC beds were being utilized.
- The increase in long term care beds continue to impact retirement home beds at the low end of the market where competition from the LTC beds is the greatest. Shared accommodation (ward and semi-private beds), usually beds at the low end of the rent range, have also been negatively impacted by the LTC beds. Many retirement homes, in response to the higher vacancy rates in ward and semi-private beds, continue to convert these beds to private and suite units, where demand is the strongest.
- In addition, as of June 30, 2004, there were still approximately 8,500 D-facility beds left to be redeveloped to A-facility beds. Although this does not represent an actual increase of new beds, A-facilities are much more likely to compete head on with private retirement home beds than a D-facility.
- The number of LTC beds developed in an area when compared to the number of retirement home beds varied greatly across the province. In both the GTA and Hamilton/Wentworth the large number of LTC beds contributed to higher vacancy rates. In the GTA, the LTC beds built represents a number equal to 83 per cent of all retirement home beds. This ratio rose to 88 per cent in Hamilton/Wentworth. On the other hand, this ratio was only 24 per cent in the GOA, and reflects the decreasing vacancy rate.
- The impact of the new LTC beds on the retirement home market will continue to diminish as the project nears completion. The vacancy rates in retirement homes will be influenced more by localized market conditions, including the introduction of new products into the retirement lifestyle market, than by the increase in LTC beds.



HOME TO CANADIANS
Canada

Ontario Long-Term Care Redevelopment Project

Central Ontario	Number of LTC Beds Built	Number of LTC Beds Under Development	Total Number of LTC Beds	Total Number of Retirement Home Beds	Retirement Home Vacancy Rate 2004
City of Toronto	3,321	1,403	4,724	5,125	14.8
Peel Region	2,090	408	2,498	1,528	12.0
Halton Region	1,396	272	1,668	1,100	9.9
Durham Region	737	0	737	1,333	20.9
York Region	1,202	616	1,818	1,447	14.1
GTA	8,746	2,699	11,445	10,533	14.6
Brant County	136	0	136	636	10.2
Dufferin County	0	0	0	263	17.9
Haldimand Norfolk	0	89	89	340	3.2
Hamilton/Wentworth	1,514	0	1,514	1,719	19.7
Muskoka District	218	0	218	399	17.5
Niagara Region	416	208	624	1,732	14.3
Northumberland Cty	207	0	207	344	20.9
Peterborough Cty	189	0	189	953	15.3
Simcoe County	594	64	658	1,318	10.7
Victoria/Haliburton	298	0	298	214	11.7
Eastern Ontario	Number of LTC Beds Built	Number of LTC Beds Under Development	Total Number of LTC Beds	Total Number of Retirement Home Beds	Retirement Home Vacancy Rate 2004
Greater Ottawa	1,327	0	1,327	5,602	9.8
Frontenac	148	0	148	487	5.3
Hastings	0	0	0	427	13.3
Lanark	0	0	0	463	21.6
Leeds-Grenville	0	0	0	444	22.7
Lennox-Addington	34	0	34	266	21.1
Prescott-Russell	10	0	10	1,013	15.6
Prince Edward	0	0	0	78	21.8
Renfrew	15	0	15	686	10.9
S. D. & G.	20	0	20	581	16.7
Western Ontario	Number of LTC Beds Built	Number of LTC Beds Under Development	Total Number of LTC Beds	Total Number of Retirement Home Beds	Retirement Home Vacancy Rate 2004
Bruce County	0	0	0	355	17.2
Elgin County	0	0	0	236	9.7
Essex County	578	0	578	1,530	14.3
Grey County	43	0	43	502	6.8
Huron County	20	0	20	331	16.3
Kent County	0	0	0	734	12.5
Lambton County	270	0	270	554	9.0
Middlesex County	192	0	192	1,111	11.8
Oxford County	21	0	21	484	22.1
Perth County	0	0	0	400	9.0
Waterloo Region	778	33	811	1,543	9.2
Wellington County	96	0	96	1,062	10.5
Northern Ontario	Number of LTC Beds Built	Number of LTC Beds Under Development	Total Number of LTC Beds	Total Number of Retirement Home Beds	Retirement Home Vacancy Rate 2004
Northern Ontario	770	178	948	1,602	11.9
Sudbury/Manitoulin	318	0	318	495	9.1
Thunder Bay	146	22	168	84	-
Algoma	276	0	276	616	13.5
Kenora/Rainy River	0	42	42	0	-
Parry Sound	30	114	144	55	-
Other N. Ontario	0	0	0	352	8.0
Total Ontario	Number of LTC Beds Built	Number of LTC Beds Under Development	Total Number of LTC Beds	Total Number of Retirement Home Beds	Retirement Home Vacancy Rate 2004
	16,640	3,271	19,911	37,691	

Source: Ontario Ministry of Health and Long Term Care - June 30, 2004

*CMHC Retirement Homes Survey