

SENIORS' HOUSING REPORT

Saskatchewan



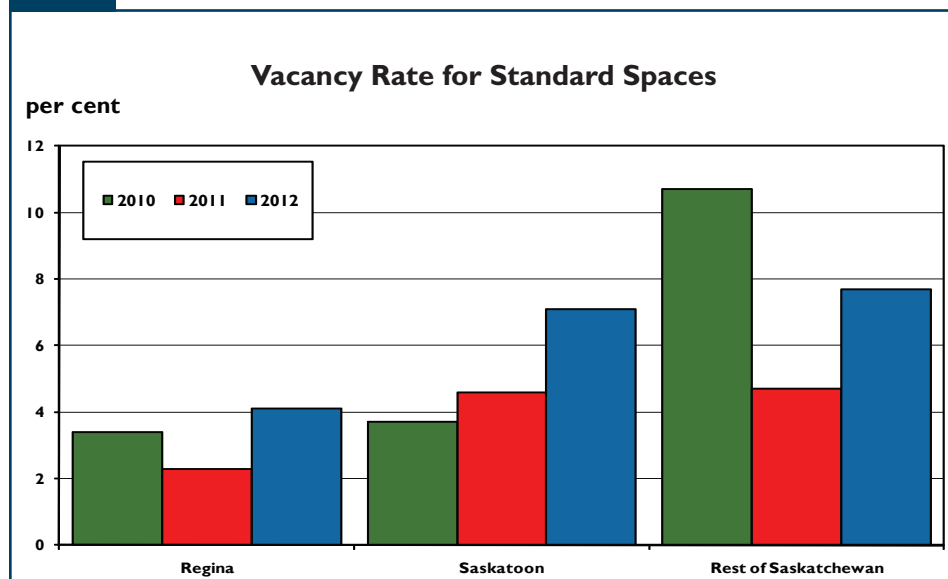
CANADA MORTGAGE AND HOUSING CORPORATION

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Highlights

- Saskatchewan had an overall vacancy rate of 6.7 per cent for standard spaces in retirement homes in 2012 compared to 4.1 per cent in 2011.
- Regina and Saskatoon, the two largest urban centres, reported standard unit vacancy rates of 4.1 and 7.4 per cent, respectively.
- The overall average rent in Saskatchewan for a standard retirement home space was \$2,435 in 2012 compared to \$2,175 in last year's survey.
- The 2012 survey in Saskatchewan identified 154 residences containing a total of 5,531 spaces and housing 5,692 residents.

Figure 1



Source: CMHC

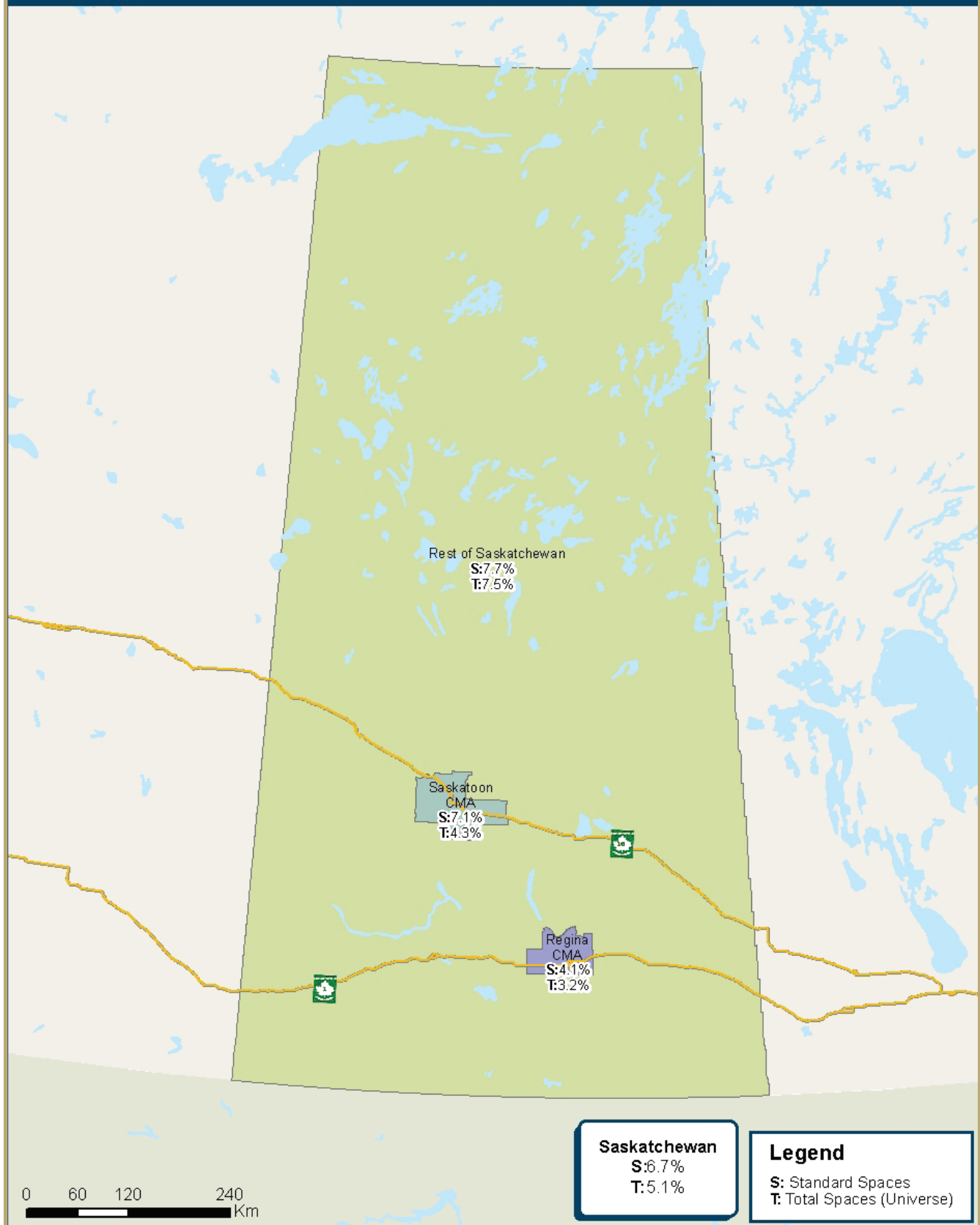
Table of Contents

3	Vacancy Rates
3	Rents
4	Universe
6	Data Tables
14	Methodology
14	Definitions

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Saskatchewan Vacancy Rate of Standard and Total (Universe) Spaces



Vacancy

Vacancy rate for standard care units moved higher in 2012

According to Canada Mortgage and Housing Corporation's (CMHC) 2012 Seniors' Housing Survey, the average vacancy rate for a standard retirement space in Saskatchewan was 6.7 per cent in 2012, compared to a 4.1 per cent vacancy rate recorded a year earlier. CMHC's Seniors' Housing Survey targeted private and non-profit facilities where the majority of residents are over age 65 and have access to additional services not offered in traditional rental structures such as a meal plan, housekeeping, and laundry services.

Among Saskatchewan's two Census Metropolitan Areas (CMAs), Regina reported the lowest overall vacancy rate of 4.1 per cent in 2012, compared to 2.3 per cent reported in 2011. In the Saskatoon CMA, the vacancy rate for standard spaces was 7.1 per cent in 2012 compared to 4.6 per cent last year. Outside the two CMAs, the Rest of Saskatchewan had a vacancy rate of 7.7 per cent in February 2012, compared to 4.7 per cent one year earlier.

CMHC's 2012 survey revealed vacancy rate fluctuations in each centre depending on bedroom type. In the Regina CMA, the vacancy rate was the lowest for one-bedroom spaces at 3.7 per cent. This compares to a vacancy rate of 0.9 per cent the prior year. The highest vacancy rate in Regina was 4.9 per cent for two-bedroom and larger spaces. In Saskatoon, the highest vacancy rate was found in one-bedroom spaces at 8.0 per cent, which increased from 1.9 per cent in 2011.

In contrast to Regina, Saskatoon's lowest vacancy rate of 1.6 per cent was found in two-bedroom and larger spaces. The highest vacancy rate was found outside the two CMAs in semi-private spaces, where the vacancy rate was over 20 per cent.

The 2012 Seniors' Survey identified vacancy rates by rent range for standard spaces, revealing significant variation in vacancy depending on monthly rent. As was the case in 2011, vacancy rates in the two CMAs tended to be higher in standard spaces with elevated rents. In Saskatoon, the highest vacancy rate of 10.7 per cent was for spaces renting at or above \$2,500 per month. The lowest reported vacancy rate in Saskatoon was 4.2 per cent, found in spaces that rented from \$2,000 to \$2,499 monthly. In Regina, the average vacancy rate ranged from 3 per cent to 5.5 per cent for standard spaces renting in the ranges of \$1,500 to \$1,999 and \$2,000 to \$2,499, respectively.

No vacancies for heavy care spaces

In the province of Saskatchewan, the 2012 survey found no vacancies for heavy care spaces, compared to 11.4 per cent reported in 2011. The difference between a standard care space and a heavy care space is determined by the amount of health care provided to residents. A space where the residence provides 1.5 hours per day or more of health care to the resident is classified as a heavy care space. Examples include Alzheimer, Dementia and mobility support residents. Typically, the additional health care services provided to residents of heavy care facilities increases the rent over standard spaces.

Rents

Average rent of standard spaces moves higher in 2012

In Saskatchewan, the overall average rent for a standard space was \$2,435 per month in 2012, compared to \$2,175 in 2011. The average monthly rent for all spaces in the Regina CMA was \$2,992, compared to \$2,884 in 2011. In the Saskatoon CMA, the overall average rent was \$2,403 in 2012, in contrast to \$1,899 monthly in 2011.

In 2012, for two-bedroom standard spaces and larger the average rent was \$2,797 per month in the Saskatoon CMA, up from an average of \$2,180 a year earlier. The Regina CMA reported the highest average rent for a two-bedroom+ space at \$3,714 per month. This compares to an average of \$3,524 one year earlier. The lowest monthly average rent in Regina was \$2,796 per month for bachelor spaces.

Saskatchewan's universe of standard spaces by rent range is reported in Table 2.3. Almost 46 per cent of seniors' standard spaces in Saskatchewan are rented for at least \$2,500 per month. In Saskatchewan, standard spaces renting for below \$1,500 in 2012 amounted to less than 10 per cent of the universe. In Regina, less than 12 per cent of spaces rented for under \$2,000 per month, while nearly 76 per cent of spaces rented for at least \$2,500 per month. In contrast, Saskatoon reported about 27 per cent of standard spaces renting for less than \$2,000, while over 50 per cent reported rents of at least \$2,500 per month.

Average rent for heavy care spaces

A Heavy Care space provides the resident with more than 1.5 hours of health care per day. In Saskatchewan, the average rent for a heavy care space was \$3,725 per month. The health care service a resident requires in heavy care significantly increases the cost of rent. In Regina, the average rent for a heavy care space was \$3,950 per month in 2012, compared to \$3,519 in 2011.

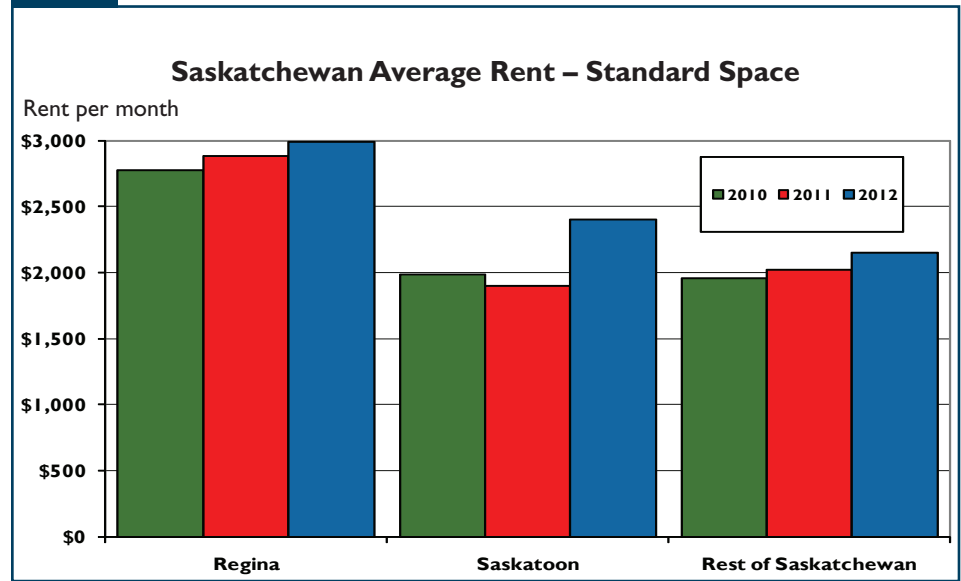
Universe

Universe of standard spaces mostly semi-private and bachelor

CMHC's 2012 survey identified 3,782 standard retirement spaces compared to 3,932 spaces in the 2011 survey. Some of the decline in the universe can be attributed to municipal governments taking over the operations and some residences closing.

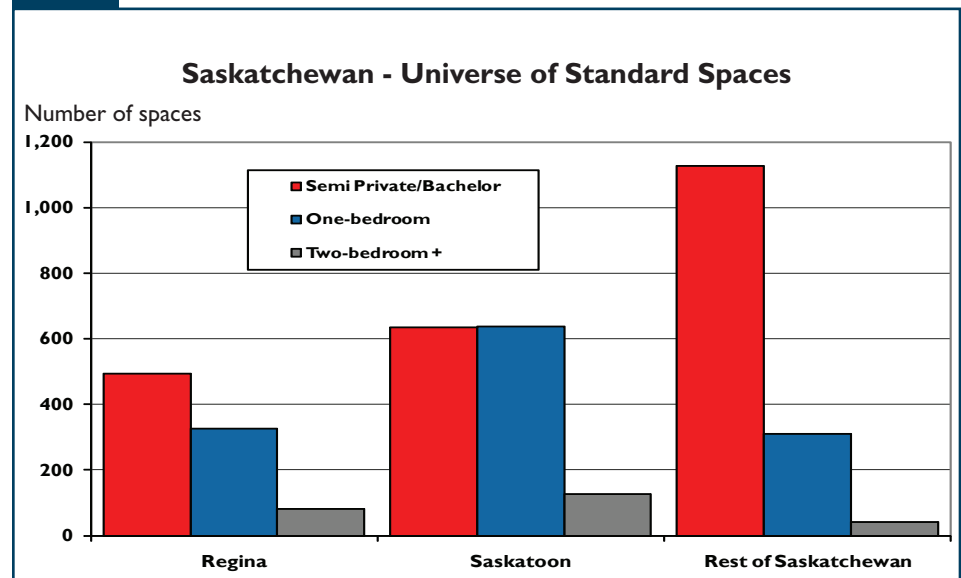
In Saskatchewan, semi-private and bachelor spaces were the most popular, amounting to 2,256 spaces or about 60 per cent of the standard universe. The majority of standard spaces in the Regina CMA and Saskatoon CMA were also semi-private and bachelor spaces, at 55 per cent and 45 per cent, respectively, of each CMA's standard universe. Outside the two CMAs, in the Rest of Saskatchewan the composition of spaces was 76 per cent semi-private and bachelor and 24 per cent one-bedroom and larger spaces.

Figure 2



Source: CMHC

Figure 3

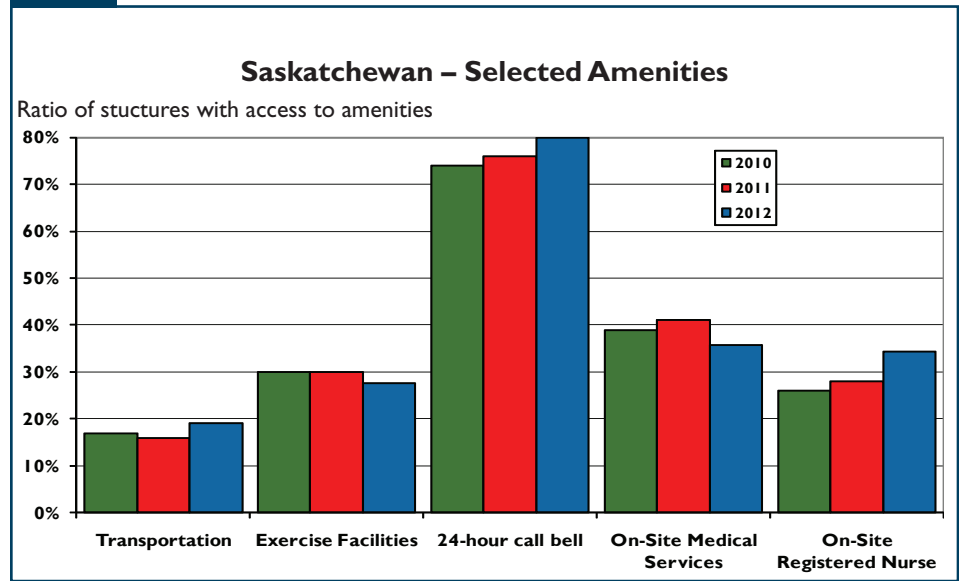


Source: CMHC

Services and Amenities

The Seniors' Survey targeted residences where the majority of residents are seniors that have access to additional services not offered in traditional rental structures, such as an onsite meal plan. Seniors' residents offered a variety of different amenities depending on the residence. The most common amenity in Saskatchewan was 24-hour bell service, which was provided in 80 per cent of structures. The second most common amenity was on-site medical services, which was available in almost 36 per cent of structures in the province. Other popular amenities accessible to residents included exercise facilities, internet and transportation services.

Figure 4



Source: CMHC

TABLES INCLUDED IN THE SASKATCHEWAN SENIORS' HOUSING REPORT

Standard Tables	Page
1.1 Vacancy Rate (%) of Standard Spaces by Unit Type	7
1.2 Vacancy Rate of Standard Spaces (%) by Rent Range (\$)	7
1.3 Vacancy Rates (%) and Average Rents (\$) of Heavy Care Spaces	7
1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)	8
2.1 Universe of Total Spaces by Unit Type	9
2.2 Universe by Unit Type	9
2.3 Universe of Standard Spaces by Rent Range (\$)	10
2.4 Proportion (%) of Structures where Select Services are Available By Structure Size	10
2.5 Proportion (%) of Structures with Access to Selected Amenities By Structure Size	11
3.1 Average Rent (\$) of Standard Spaces by Unit Type	11
Optional Tables	
O1 Building Structure Makeup (%)	12
O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)	12
O3 Vacancy Rate (%) of Standard Spaces by Date Residence Opened	13
O4 Average Rents (\$) of Standard Spaces by Date Residence Opened	13

1.1 Vacancy Rates (%) of Standard Spaces by Unit Type Saskatchewan

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Regina CMA	--	--	3.0 a	4.2 a	0.9 a	3.7 a	3.6 a	4.9 a	2.3 a	4.1 a
Saskatoon CMA	**	**	9.1 a	7.4 a	1.9 a	8.0 a	1.7 a	1.6 c	4.6 a	7.1 a
Rest of Saskatchewan	25.6 a	20.4 a	3.8 a	7.4 a	5.0 a	7.1 a	6.1 a	**	4.7 a	7.7 a
Saskatchewan	24.4 a	16.7 d	5.0 a	6.7 a	2.4 a	6.7 a	3.2 a	5.1 a	4.1 a	6.7 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates of Standard Spaces (%) by Rent Range (\$) Saskatchewan

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	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Regina CMA	--	--	--	--	2.5 a	3.0 b	6.0 a	5.5 b	1.3 a	3.8 a	2.1 a	3.9 a
Saskatoon CMA	0.0 a	**	2.3 a	++	1.9 a	5.3 b	8.1 a	4.2 b	8.1 a	10.7 a	4.6 a	7.1 a
Rest of Saskatchewan	**	--	7.5 a	9.5 b	3.2 a	7.5 a	4.5 a	5.5 a	6.1 a	9.9 a	4.7 a	7.7 a
Saskatchewan	0.5 a	**	5.0 a	5.4 b	2.8 a	6.4 a	6.2 a	5.0 a	4.4 a	8.0 a	4.0 a	6.7 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

1.3 Vacancy Rates (%) and Average Rents (\$) of Heavy Care Spaces Saskatchewan

Centre	Vacancy Rate		Average Rent	
	2011	2012	2011	2012
Regina CMA	0.0 a	0.0 a	3,519 a	3,950 a
Saskatoon CMA	**	--	**	--
Rest of Saskatchewan	16.4 a	**	2,036 a	**
Saskatchewan	11.4 a	0.0 c	2,294 a	3,725 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

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

Saskatchewan

Centre	Total Number of Spaces	Overall Vacancy Rate (%)			Number of Residences	Number of Residents	Estimated Population Aged 75+ ¹	Capture Rate ² (%)
		2011		2012				
Regina CMA	1,143	1.8	a	3.2	a	34	1,185	a
Saskatoon CMA	2,611	3.0	a	4.3	a	63	2,773	b
Rest of Saskatchewan	1,777	5.5	a	7.5	a	57	1,734	a
Saskatchewan	5,531	3.6	a	5.1	a	154	5,692	a
							79,600	7.2

¹ Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2009-2036, Scenario 3.

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

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

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

2.1 Universe of Total Spaces by Unit Type Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom +	Total
Regina CMA	672	471	1,143
Saskatoon CMA	918	1,693	2,611
Rest of Saskatchewan	1,346	431	1,777
Saskatchewan	2,936	2,595	5,531

2.2 Universe by Unit Type Saskatchewan

Centre	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Regina CMA	672	389	82	1,143
Standard Spaces	495	326	82	903
Non-Standard Spaces	177	63	--	240
Unknown Spaces	--	--	--	--
Saskatoon CMA	918	1,423	270	2,611
Standard Spaces	635	638	127	1,400
Non-Standard Spaces	217	701	129	1,047
Unknown Spaces	66	84	14	164
Rest of Saskatchewan	1,346	389	42	1,777
Standard Spaces	1,126	311	42	1,479
Non-Standard Spaces	204	45	--	249
Unknown Spaces	16	33	--	49
Saskatchewan	2,936	2,201	394	5,531
Standard Spaces	2,256	1,275	251	3,782
Non-Standard Spaces	598	809	129	1,536
Unknown Spaces	82	117	14	213

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

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

Centre	Less than \$1,500	\$1,500 - \$1,999	\$2,000 - \$2,499	\$2,500 and more
	% of Total ¹	% of Total ¹	% of Total ¹	% of Total ¹
Regina CMA	--	11.7 a	12.6 a	75.7 a
Saskatoon CMA	12.5 a	14.7 a	22.2 a	50.5 a
Rest of Saskatchewan	12.0 a	33.3 a	30.3 a	24.4 a
Saskatchewan	9.5 a	21.3 a	23.2 a	45.9 a

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

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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

Centre	Meals				On-Site Medical Services	Registered Nurse onsite ²	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Regina CMA	2.9 ^a	0.0 ^a	2.9 ^a	94.1 ^a	47.1 ^a	50.0 ^a	88.2 ^a	0.0 ^a
10 - 49	0.0 ^a	0.0 ^a	0.0 ^a	100.0 ^a	40.0 ^a	52.0 ^a	88.0 ^a	0.0 ^a
50 - 89	25.0 ^a	0.0 ^a	0.0 ^a	75.0 ^a	100.0 ^a	75.0 ^a	75.0 ^a	0.0 ^a
90 or more	0.0 ^a	0.0 ^a	20.0 ^a	80.0 ^a	40.0 ^a	20.0 ^a	100.0 ^a	0.0 ^a
Saskatoon CMA	18.0 ^a	8.2 ^b	1.6 ^c	72.1 ^a	24.6 ^a	32.8 ^a	70.5 ^a	0.0 ^b
10 - 49	4.8 ^c	0.0 ^b	0.0 ^b	95.2 ^a	26.2 ^a	40.5 ^a	78.6 ^a	0.0 ^b
50 - 89	++	++	++	++	++	++	66.7 ^a	++
90 or more	++	++	++	++	++	++	++	++
Rest of Saskatchewan	0.0 ^b	0.0 ^b	3.5 ^a	96.5 ^a	41.2 ^a	26.6 ^a	85.5 ^a	0.0 ^b
10 - 49	0.0 ^b	0.0 ^b	4.2 ^a	95.8 ^a	40.6 ^a	25.3 ^a	84.8 ^a	0.0 ^b
50 - 89	0.0 ^a	0.0 ^a	0.0 ^a	100.0 ^a	50.0 ^a	33.3 ^a	83.3 ^a	0.0 ^a
90 or more	**	**	**	**	**	**	**	**
Saskatchewan	8.0 ^a	3.4 ^b	2.6 ^a	86.0 ^a	35.7 ^a	34.3 ^a	80.0 ^a	0.0 ^b
10 - 49	1.8 ^b	0.0 ^b	1.7 ^a	96.5 ^a	35.1 ^a	36.7 ^a	83.2 ^a	0.0 ^b
50 - 89	31.9 ^a	10.7 ^d	0.0 ^c	57.3 ^a	47.0 ^a	31.3 ^a	73.6 ^a	0.0 ^c
90 or more	22.5 ^d	16.9 ^d	11.1 ^c	49.5 ^a	27.6 ^a	22.2 ^d	66.2 ^a	0.0 ^c

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 Registered Nurse on site means a RN, not a RPN or LPN.

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

Centre	Transportation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Regina CMA	26.5 a	2.9 a	11.8 a	14.7 a	26.5 a	23.5 a
10 - 49	12.0 a	0.0 a	0.0 a	0.0 a	8.0 a	12.0 a
50 - 89	25.0 a	25.0 a	25.0 a	25.0 a	50.0 a	50.0 a
90 or more	100.0 a	0.0 a	60.0 a	80.0 a	100.0 a	60.0 a
Saskatoon CMA	16.4 d	1.6 c	4.9 c	4.9 c	27.9 a	19.7 a
10 - 49	9.5 b	0.0 b	0.0 b	0.0 b	9.5 b	11.9 c
50 - 89	++	++	++	++	++	++
90 or more	++	++	++	++	90.0 a	++
Rest of Saskatchewan	17.7 a	0.0 b	8.8 a	1.8 a	28.2 a	19.5 a
10 - 49	8.5 b	0.0 b	4.2 a	0.0 b	21.0 a	19.0 a
50 - 89	66.7 a	0.0 a	33.3 a	0.0 a	66.7 a	16.7 a
90 or more	**	**	**	**	**	**
Saskatchewan	19.1 a	1.3 a	7.9 a	5.9 a	27.7 a	20.5 a
10 - 49	9.6 a	0.0 b	1.7 a	0.0 b	13.9 a	14.9 a
50 - 89	36.6 a	5.2 a	20.9 a	10.5 c	52.5 a	31.6 a
90 or more	60.7 a	5.6 d	33.1 a	38.6 a	88.9 a	44.4 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.

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

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
Regina CMA	--	--	2,741 a	2,796 a	2,939 a	3,084 a	3,524 a	3,714 a	2,884 a	2,992 a
Saskatoon CMA	**	**	2,254 a	2,372 a	1,637 a	2,365 a	2,180 a	2,797 a	1,899 a	2,403 a
Rest of Saskatchewan	1,542 a	1,659 a	1,863 a	1,971 a	2,360 a	2,627 a	3,272 a	**	2,021 a	2,147 a
Saskatchewan	1,595 a	1,723 a	2,173 a	2,256 a	2,087 a	2,605 a	2,832 a	3,214 a	2,175 a	2,435 a

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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O1 Building Structure Makeup (%)		
Saskatchewan		
Centre	Concrete Frame	Wood Frame
Saskatchewan	24.0%	76.0%

O2 Ancillary Services, Cable and Telephone and Optional Costs (% of residences)					
Saskatchewan					
Centre	Services	Included in Rent (%)	Tenant Arrange (%)	Optional (%)	Average Cost if Optional (\$)
Regina CMA	Cable	17.6	76.5	5.9	**
	Telephone	--	100.0	--	--
Saskatoon CMA	Cable	25.4	69.8	3.2	**
	Telephone	--	100.0	--	--
Rest of Saskatchewan	Cable	17.5	68.4	14.0	29.75
	Telephone	1.8	96.5	1.8	**
Saskatchewan	Cable	20.8	70.8	7.8	32.00
	Telephone	0.6	98.7	0.6	**

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

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

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened Saskatchewan

Centre	Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	**	5.5 a	3.2 a	4.1 a
Saskatoon CMA	2.6 b	4.2 b	8.9 a	7.1 a
Rest of Saskatchewan	9.2 a	5.8 b	8.1 a	7.7 a
Saskatchewan	5.5 a	5.2 a	7.3 a	6.7 a

O4 Average Rents (\$) of Standard Spaces by Date Residence Opened Saskatchewan

Centre		Before 1990	1990 - 1999	2000 or later	Total
Regina CMA	Semi Private	--	--	--	--
	Bachelor	**	2,382 a	3,038 a	2,796 a
	One Bedroom	--	**	3,116 a	3,084 a
	Two Bedroom +	--	**	3,542 a	3,714 a
	All	**	2,771 a	3,117 a	2,992 a
Saskatoon CMA	Semi Private	**	**	**	**
	Bachelor	2,060 a	2,285 a	2,455 a	2,372 a
	One Bedroom	**	**	2,737 a	2,365 a
	Two Bedroom +	**	**	3,069 a	2,797 a
	All	1,514 a	2,225 a	2,636 a	2,403 a
Rest of Saskatchewan	Semi Private	**	**	**	1,659 a
	Bachelor	1,997 a	1,792 a	2,035 a	1,971 a
	One Bedroom	2,438 a	**	2,660 a	2,627 a
	Two Bedroom +	--	--	**	**
	All	2,047 a	1,851 a	2,250 a	2,147 a
Saskatchewan	Semi Private	**	**	**	1,723 a
	Bachelor	2,063 a	2,065 a	2,357 a	2,256 a
	One Bedroom	1,293 a	2,561 a	2,804 a	2,605 a
	Two Bedroom +	**	2,981 a	3,318 a	3,214 a
	All	1,772 a	2,281 a	2,582 a	2,435 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)

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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2012 survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e., before January 2011
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C.)
- ✓ Offer an on-site meal plan
- ✓ Not 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.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ Have at least 50% of residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey, therefore, all seniors' residences in Canada meeting these criteria are included to be part of this survey.

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. 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 where the resident does not receive high-level care (i.e., the resident receives less than 1.5 hours of care per day.) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy Care Space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). 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: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. 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.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement

The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire 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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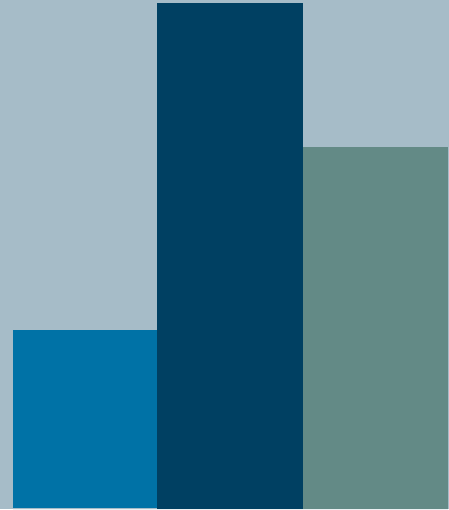
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