

# SENIORS' HOUSING REPORT

## Manitoba



CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2015

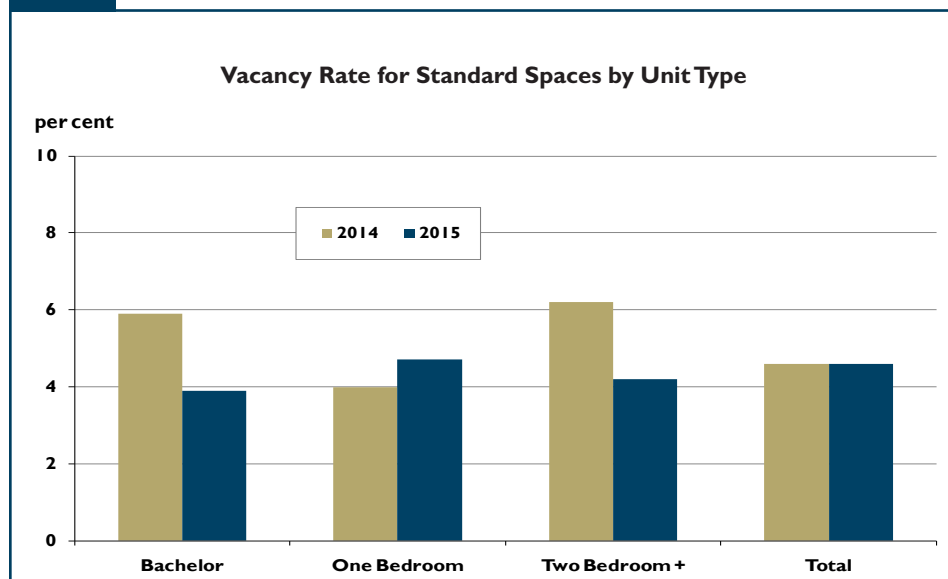
### Highlights

- The overall vacancy rate for standard spaces in retirement homes across Manitoba stood at 4.6 per cent in 2015, unchanged from 2014.
- The overall average rent for a standard retirement space in Manitoba was \$2,565 in 2015 compared to \$2,447 one year earlier.
- There were 36 facilities surveyed in Manitoba in 2015, containing a total of 4,039 spaces and housing 4,309 residents.

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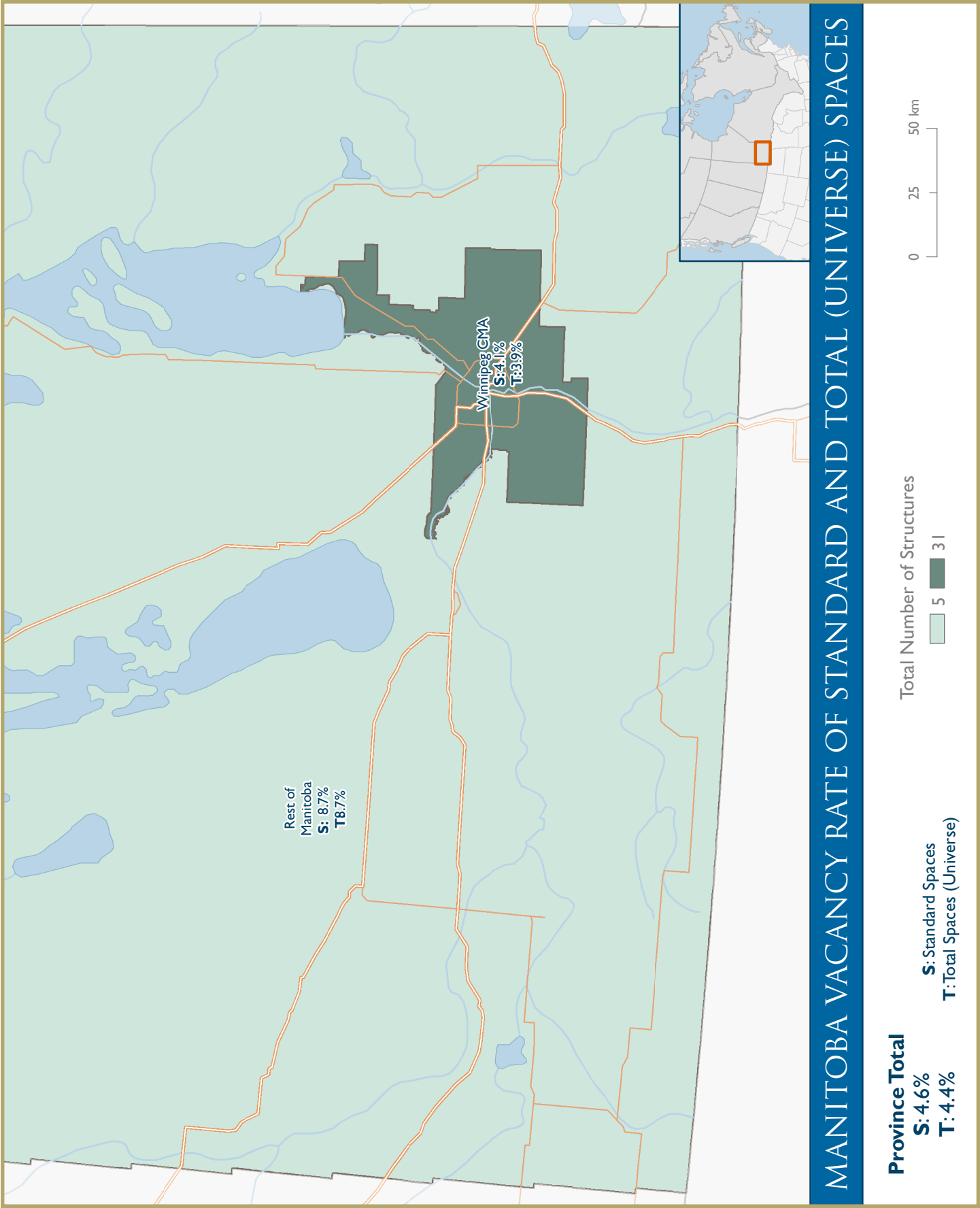
Figure 1



Source: CMHC

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## Vacancy Rates

### Overall vacancy rate unchanged

According to Canada Mortgage and Housing Corporation's (CMHC) 2015 Seniors' Housing Survey, the vacancy rate in standard spaces in seniors' rental residences in the province of Manitoba was 4.6 per cent in 2015, unchanged from where it stood in 2014. The seniors' survey targeted only private and non-profit retirement structures with at least 10 rental units and where the majority of residents are age 65 and over and have access to additional services not offered in traditional rental structures such as meal service, housekeeping, and laundry.

The stable vacancy rate is consistent with a moderate increase in the population of seniors in Manitoba supporting demand for an increased number of spaces. According to Statistics Canada, the population aged 75 and over was projected to increase by 0.9 per cent between the 2014 survey and the 2015 survey. In addition, the projected growth rate for the population above 85 years of age increases to 1.8 per cent. According to Census data, over half the population in residences for seniors are above age 85. Meanwhile, the number of spaces in the overall universe in 2015 increased by 157 spaces or four per cent.

While the overall vacancy rate was unchanged, there were differences when looking at the Winnipeg Census Metropolitan Area (CMA) compared to the rest of the province. The vacancy rate for residences in the CMA was 4.1 per cent in 2015 compared to 3.5 per cent in 2014,

lower than the provincial average. In the rest of Manitoba, the vacancy rate was higher than the provincial average at 8.7 per cent in 2015 compared to 13.1 per cent in 2014. The universe of spaces in the rest of the province represents only one-tenth of the total universe thus small changes in the number of vacant units can result in a large variation in vacancy rate.

Among the different bedroom types in Manitoba's seniors' rental residences, one-bedroom units saw the highest vacancy rate at 4.7 per cent in 2015, up from four per cent in 2014. This type of unit also saw its overall universe increase by 109 units or four per cent since 2014 which contributed to the increase in vacancy rate. The lowest vacancy rate was found in bachelor spaces with a vacancy rate of 3.9 per cent, down from 5.9 per cent one year earlier. Bachelor units also saw an increase in universe of 24 units or 5.4 per cent. The decline in vacancy rate in concert with an increase in universe indicates that there was more demand from seniors for this type of unit. Vacancies in two-bedroom units also registered a decline, moving from 6.2 per cent in 2014 to 4.2 per cent in 2015. The universe of two-bedroom units also expanded by 24 units since the 2014 survey, this brought it to 750 units or 19 per cent of the total universe. Census data shows that 20 per cent of Manitobans over 75 years of age living in seniors' residences live as married spouses or common-law partners, supporting demand for two-bedroom units.

### Vacancy rate moved higher in upper rent range

Across the province, vacancy rates were highest among spaces renting for

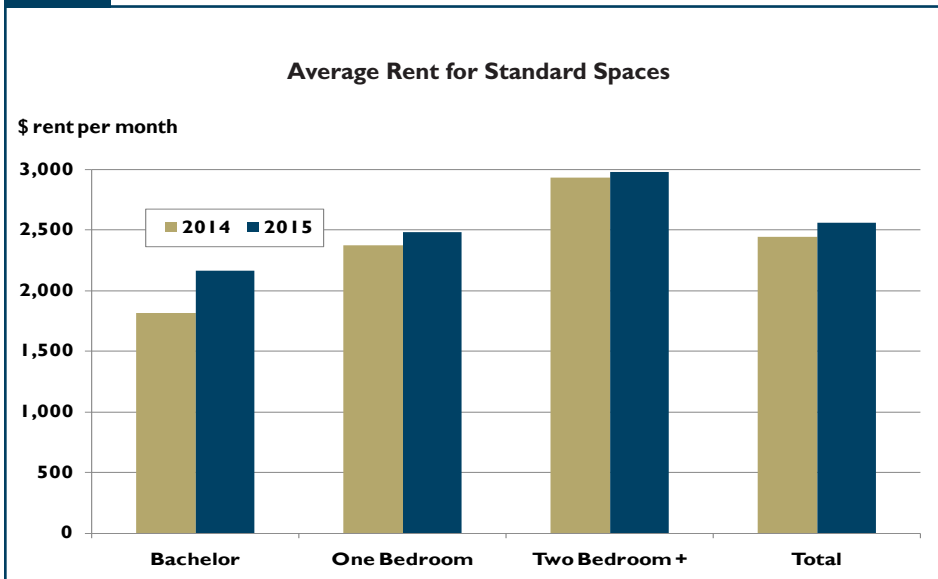
more than \$2,500 per month which had a vacancy rate of 6.2 per cent in 2015, compared to 5.8 per cent in 2014. The lowest vacancy rate at 0.4 per cent in 2015 was for spaces renting between \$1,500 and \$1,999 per month. Spaces renting between \$2,000 and \$2,499 saw their vacancy rate move slightly lower from 4.3 per cent in 2014 to 3.9 per cent in 2015, lower than the overall average of 4.6 per cent for all unit types.

## Rents

### Average monthly rents move higher

The average rent for a standard space in Manitoba was \$2,565 per month in 2015, compared to \$2,447 in 2014. The additional services and amenities provided to residents contribute to the higher rents in seniors' facilities compared to accommodations in the purpose-built rental market. There was some difference in average rents between the CMA and the rest of the province as average rent within Winnipeg was \$2,571 per month while in the rest of Manitoba it was \$2,513. Average rent was lowest for bachelor suites at \$2,165 per month in 2015, up from \$1,815 per month in 2014. This represented the largest increase in average rent among all unit types; moreover, bachelor spaces also saw the greatest proportional increase in universe. The average rent likely increased as a result of new construction which tends to have higher rents than existing spaces. The highest average rent was for two-bedroom spaces at \$2,978 per month in the 2015 survey compared to \$2,934 in 2014. The average rent for a one-bedroom space was \$2,485 in the 2015 survey compared to a monthly average of \$2,379 in 2014.

Figure 2



Source: CMHC

Reviewing the universe of spaces by rent range, the largest share of spaces, at 51.4 per cent, rented for more than \$2,500 per month. This was up from a 46.6 per cent share one year earlier. There was a higher concentration of spaces in this rent range outside the Winnipeg CMA with a 71.1 per cent share in the rest of Manitoba compared to 49.2 per cent within the CMA. The next largest share was comprised of spaces renting between \$2,000 and \$2,499 per month, which represented 33.4 per cent of the total universe, down from 37.0 per cent in the previous year. Only 2.2 per cent of all seniors' rental spaces in the province charged less than \$1,500 per month in 2015.

## Services and amenities vary among structures

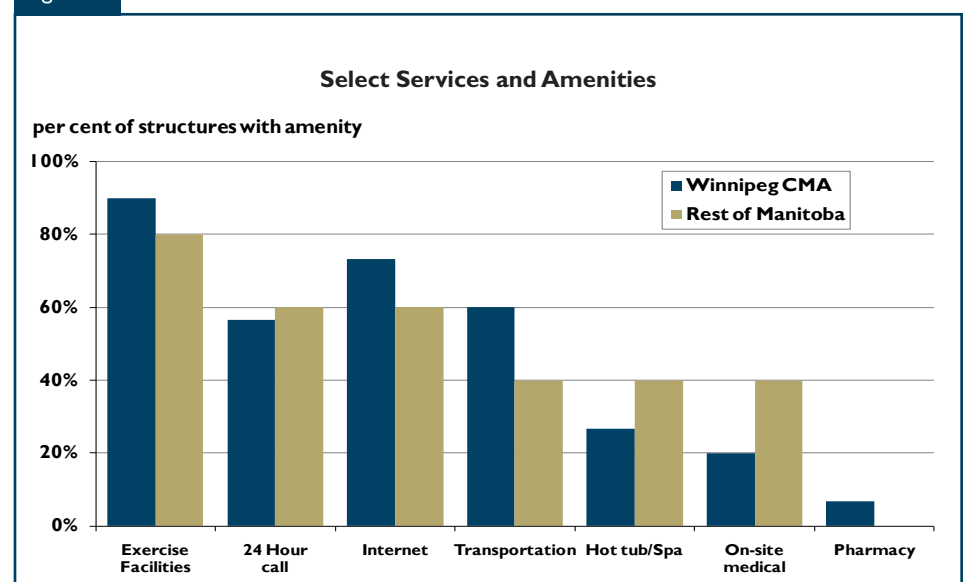
Only seniors' facilities offering an on-site meal plan qualify for the survey, and 97 per cent of facilities in the 2015 survey opted to include the meal plan as part of the rent whereas smaller facilities outside of Winnipeg had a higher tendency to make the

meal plan optional. Many senior suites contain kitchenettes suitable for the preparation of a snack or light meal and, as such, at 57.1 per cent, the majority of all structures reported the inclusion of two meals per day as part of the rent. This represented a slightly higher proportion from 2014, when 51.6 per cent of structures offered this kind of plan. The share

of structures providing three daily meals fell slightly from 45.3 per cent in 2014 to 37.2 per cent in 2015. A higher proportion of facilities within the Winnipeg CMA reported including three meals per day in the rent compared to the rest of Manitoba. Only 2.9 per cent of all structures reported a plan with one meal per day in the 2015 survey.

In addition to meal services, on-site medical services were available in 22.8 per cent of all structures in 2015, up from 18.2 per cent in 2014. Structures outside the CMA were more likely to have on-site medical services available as 40 per cent of facilities in the rest of Manitoba offered this service. This was similar to the proportion of structures outside of Winnipeg that had a registered nurse on-site. Within the CMA, 13.3 per cent of structures provided on-site nursing services, bringing the provincial average to 17.0 per cent, up from 15.1 per cent in 2014. Pharmacies were available in 5.7 per cent of all facilities up from 3.1 per cent in 2014. A popular service was a 24-hour call bell, which

Figure 3



Source: CMHC

was available in 57.1 per cent of all structures in the province in 2015. By comparison, this service was available in 60.4 per cent of all structures in 2014.

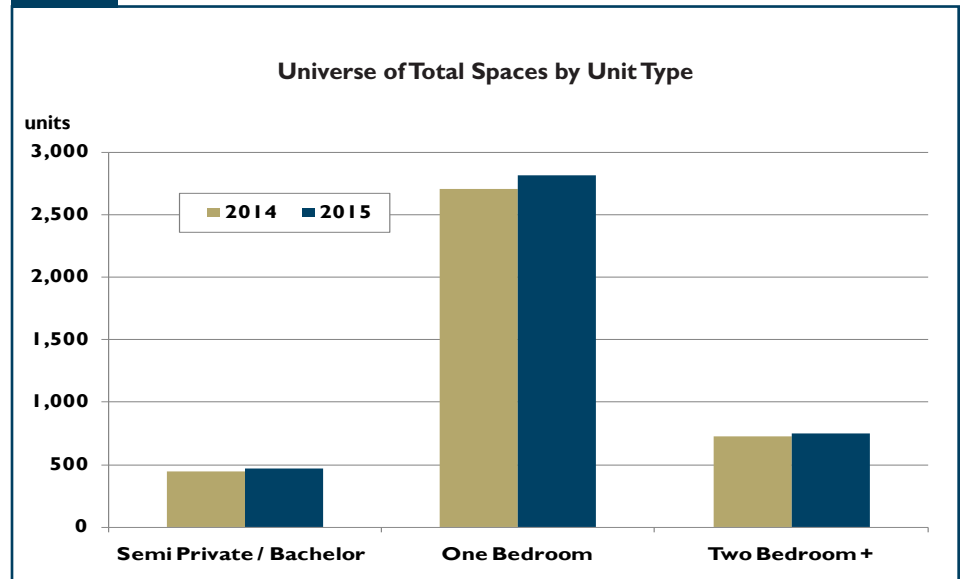
Among amenities offered in structures, 88.6 per cent had access to an exercise facility in 2015, virtually unchanged from one year earlier. This continues to be the most commonly available amenity offered to tenants. Internet access was the next most common amenity offered, and was provided in 71.5 per cent of all structures in the province, up from 57.8 per cent in 2014. Structures within the Winnipeg CMA were more likely to offer this amenity. Transportation services were available in 57.2 per cent of structures compared to 51.6 per cent in 2014. This service was also more commonly available in the CMA with 60 per cent of Winnipeg structures offering transport compared to 40 per cent of structures outside the CMA. Other amenities provided include a movie theatre in 51.4 per cent of facilities and a spa or hot tub, found in 28.5 per cent of structures.

## Universe

### Survey coverage

The total number of seniors' residences surveyed across the province in 2015 was 36, one additional structure since 2014. All but five of these structures were located in the Winnipeg CMA. Within these structures there were 3,646 spaces located in the CMA and 393 in

Figure 4



Source: CMHC

the rest of Manitoba bringing the total number of spaces in the provincial universe to 4,039, four per cent more than in the 2014 survey. These housed 4,309 residents, which represents a capture rate equivalent to 5.1 per cent of Manitoba's estimated population over 75 years of age. This was lower than the national capture rate of 8.9 per cent. Given the lower capture rate, the vast majority of seniors in Manitoba opt for independent living and may be choosing to access home care services rather than move to a collective dwelling such as a seniors' residence.

The majority of spaces surveyed, at 69.7 per cent, were one bedroom spaces, followed by two bedroom spaces at 18.6 per cent. Semi-private and bachelor spaces made up the remaining 11.7 per cent.

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

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Winnipeg CMA	**	**	5.7 <sup>b</sup>	5.1 <sup>b</sup>	3.5 <sup>a</sup>	4.6 <sup>a</sup>	3.0 <sup>a</sup>	2.1 <sup>a</sup>	3.5 <sup>a</sup>	4.1 <sup>a</sup>
Rest of Manitoba	**	**	**	**	8.9 <sup>a</sup>	6.3 <sup>a</sup>	36.8 <sup>a</sup>	**	13.1 <sup>a</sup>	8.7 <sup>a</sup>
<b>Manitoba</b>	<b>**</b>	<b>**</b>	<b>5.9<sup>a</sup></b>	<b>3.9<sup>b</sup></b>	<b>4.0<sup>a</sup></b>	<b>4.7<sup>a</sup></b>	<b>6.2<sup>a</sup></b>	<b>4.2<sup>a</sup></b>	<b>4.6<sup>a</sup></b>	<b>4.6<sup>a</sup></b>

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).

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

Province	Less than \$1,500		\$1,500 - \$1,999		\$2,000 - \$2,499		\$2,500 and more		Total where rents are known	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Winnipeg CMA	6.1 <sup>b</sup>	**	**	0.4 <sup>a</sup>	2.7 <sup>a</sup>	2.7 <sup>a</sup>	4.9 <sup>a</sup>	6.3 <sup>a</sup>	3.5 <sup>a</sup>	4.1 <sup>a</sup>
Rest of Manitoba	**	**	**	**	17.5 <sup>a</sup>	**	**	**	13.1 <sup>a</sup>	8.7 <sup>a</sup>
<b>Manitoba</b>	<b>5.8<sup>b</sup></b>	<b>**</b>	<b>**</b>	<b>0.4<sup>a</sup></b>	<b>4.3<sup>a</sup></b>	<b>3.9<sup>a</sup></b>	<b>5.8<sup>a</sup></b>	<b>6.2<sup>a</sup></b>	<b>4.6<sup>a</sup></b>	<b>4.6<sup>a</sup></b>

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.

### I.4 Universe, Number of Residents Living in Universe and Capture Rate (%) Manitoba

Province	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+ <sup>1</sup>	Capture Rate <sup>2</sup> (%)
		2014	2015				
Winnipeg CMA	3,646	3.3 <sup>a</sup>	3.9 <sup>a</sup>	31	3,908 <sup>a</sup>		
Rest of Manitoba	393	13.0 <sup>a</sup>	8.7 <sup>a</sup>	5	401 <sup>a</sup>		
<b>Manitoba</b>	<b>4,039</b>	<b>4.3<sup>a</sup></b>	<b>4.4<sup>a</sup></b>	<b>36</b>	<b>4,309<sup>a</sup></b>	<b>85,300</b>	<b>5.1</b>

<sup>1</sup> Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario, age and sex, as of July 1, Canada, provinces and territories, annual (persons), CANSIM

<sup>2</sup> 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:

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

\*\* : Suppressed for confidentiality/statistical reliability      - : A zero count or no Universe

## 2.1 Universe of Total Spaces by Unit Type Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Winnipeg CMA	411	2,568	667	3,646
Rest of Manitoba	61	249	83	393
<b>Manitoba</b>	<b>472</b>	<b>2,817</b>	<b>750</b>	<b>4,039</b>

## 2.2 Universe by Unit Type Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
<b>Winnipeg CMA</b>	<b>411</b>	<b>2,568</b>	<b>667</b>	<b>3,646</b>
Standard Spaces	156	2,499	657	3,312
Non-Standard Spaces	192	-	-	192
Unknown Spaces	63	69	10	142
<b>Rest of Manitoba</b>	<b>61</b>	<b>249</b>	<b>83</b>	<b>393</b>
Standard Spaces	26	181	67	274
Non-Standard Spaces	-	-	-	-
Unknown Spaces	35	68	16	119
<b>Manitoba</b>	<b>472</b>	<b>2,817</b>	<b>750</b>	<b>4,039</b>
Standard Spaces	182	2,680	724	3,586
Non-Standard Spaces	192	-	-	192
Unknown Spaces	98	137	26	261

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

Province	Less than \$1,500	\$1,500 - \$1,999	\$2,000 - \$2,499	\$2,500 and more
	% of Total <sup>1</sup>	% of Total <sup>1</sup>	% of Total <sup>1</sup>	% of Total <sup>1</sup>
Winnipeg CMA	1.8 a	13.5 a	35.6 a	49.2 a
Rest of Manitoba	6.6 a	7.6 a	14.7 a	71.1 a
<b>Manitoba</b>	<b>2.2 a</b>	<b>12.9 a</b>	<b>33.4 a</b>	<b>51.4 a</b>

<sup>1</sup> % 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).

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## 2.4 Proportion (%) of Structures where Select Services are Available<sup>1</sup> by Structure Size Manitoba

Province	Meals				On-Site Medical Services	On-Site Nursing Services <sup>2</sup>	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Winnipeg CMA	0.0 c	3.3 d	56.7 a	40.0 a	20.0 d	13.3 c	56.7 a	6.7 c
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0 c	4.3 d	56.5 a	39.1 a	21.7 d	17.4 d	65.2 a	8.7 c
Rest of Manitoba	20.0 a	**	60.0 a	20.0 a	40.0 a	40.0 a	60.0 a	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	**	**
Manitoba	2.8 a	2.9 c	57.1 a	37.2 a	22.8 d	17.0 d	57.1 a	5.7 c
10 - 49	19.6 d	**	**	80.4 a	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0 c	4.0 d	59.9 a	36.1 a	27.8 d	23.8 d	67.9 a	8.0 c

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

<sup>2</sup> On-site nursing services include RN, RPN or LPN.

## 2.5 Proportion (%) of Structures with Access to Selected Amenities<sup>1</sup> by Structure Size Manitoba

Province	Transportation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
<b>Winnipeg CMA</b>	<b>60.0</b> a	<b>0.0</b> c	<b>26.7</b> d	<b>50.0</b> a	<b>90.0</b> a	<b>73.3</b> a
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	65.2 a	0.0 c	**	56.5 a	100.0 a	87.0 a
<b>Rest of Manitoba</b>	<b>40.0</b> a	<b>**</b>	<b>40.0</b> a	<b>60.0</b> a	<b>80.0</b> a	<b>60.0</b> a
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	**	**
<b>Manitoba</b>	<b>57.2</b> a	<b>0.0</b> c	<b>28.5</b> a	<b>51.4</b> a	<b>88.6</b> a	<b>71.5</b> a
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	67.9 a	0.0 c	35.8 a	59.9 a	100.0 a	88.0 a

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

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

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2014	2015	2014	2015	2014	2015	2014	2015	2014	2015
Winnipeg CMA	**	**	1,627 <sup>a</sup>	2,052 <sup>a</sup>	2,373 <sup>a</sup>	2,480 <sup>a</sup>	2,936 <sup>a</sup>	3,039 <sup>a</sup>	2,439 <sup>a</sup>	2,571 <sup>a</sup>
Rest of Manitoba	**	**	**	**	2,429 <sup>a</sup>	2,532 <sup>a</sup>	2,916 <sup>a</sup>	**	2,509 <sup>a</sup>	2,513 <sup>a</sup>
<b>Manitoba</b>	<b>**</b>	<b>**</b>	<b>1,815<sup>a</sup></b>	<b>2,165<sup>a</sup></b>	<b>2,379<sup>a</sup></b>	<b>2,485<sup>a</sup></b>	<b>2,934<sup>a</sup></b>	<b>2,978<sup>a</sup></b>	<b>2,447<sup>a</sup></b>	<b>2,565<sup>a</sup></b>

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 (%)		
Manitoba		
Province	Concrete Frame	Wood Frame
Manitoba	27.8	72.2

O2 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	35.5	41.9	19.4	**
	Telephone	3.2	74.2	19.4	**
Rest of Manitoba	Cable	40.0	60.0	**	**
	Telephone	**	100.0	**	**
Manitoba	Cable	36.1	44.4	16.7	**
	Telephone	2.8	77.8	16.7	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened				
Manitoba				
Province	Before 1990	1990 - 1999	2000 or later	Total
Manitoba	**	**	4.5 a	4.6 a

O4 Average Rents (\$) of Standard Spaces by Date Residence Opened					
Manitoba					
Province		Before 1990	1990 - 1999	2000 or later	Total
Manitoba	Bachelor	**	**	2,549 a	2,165 a
	One Bedroom	**	**	2,501 a	2,485 a
	Two Bedroom +	**	**	2,920 a	2,978 a
	All	**	**	2,598 a	2,565 a

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

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\*\* : Suppressed for confidentiality/statistical reliability - : A zero count or no Universe

## 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.

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

- ✓ have at least one unit that is not subsidized;
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2012 to be included in the 2013 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its 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; and
- ✓ have at least 50 per cent of its 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 to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order 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 (that is, 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 of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

**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 actual amount a resident pays per month for his or her 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 co-operation 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 provided through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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