

# SENIORS' HOUSING REPORT

## Manitoba



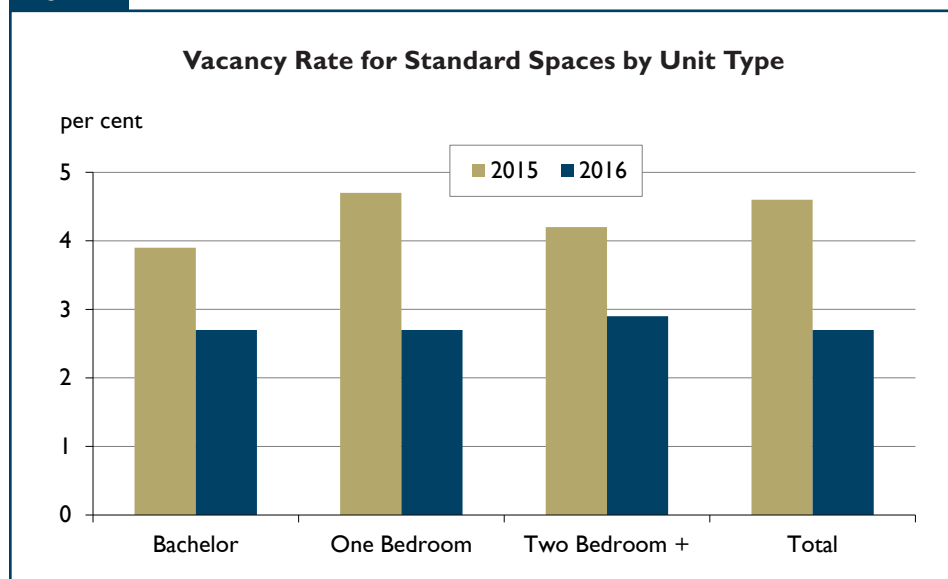
CANADA MORTGAGE AND HOUSING CORPORATION

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### Highlights

- The overall vacancy rate for standard spaces in retirement homes across Manitoba decreased to 2.7 per cent in 2016 from 4.6 in 2015.
- The overall average rent for a standard retirement space in Manitoba was \$2,580 in 2016 compared to \$2,565 one year earlier.
- There were 39 facilities surveyed in Manitoba in 2016, containing a total of 4,174 spaces and housing 4,515 residents.

Figure 1



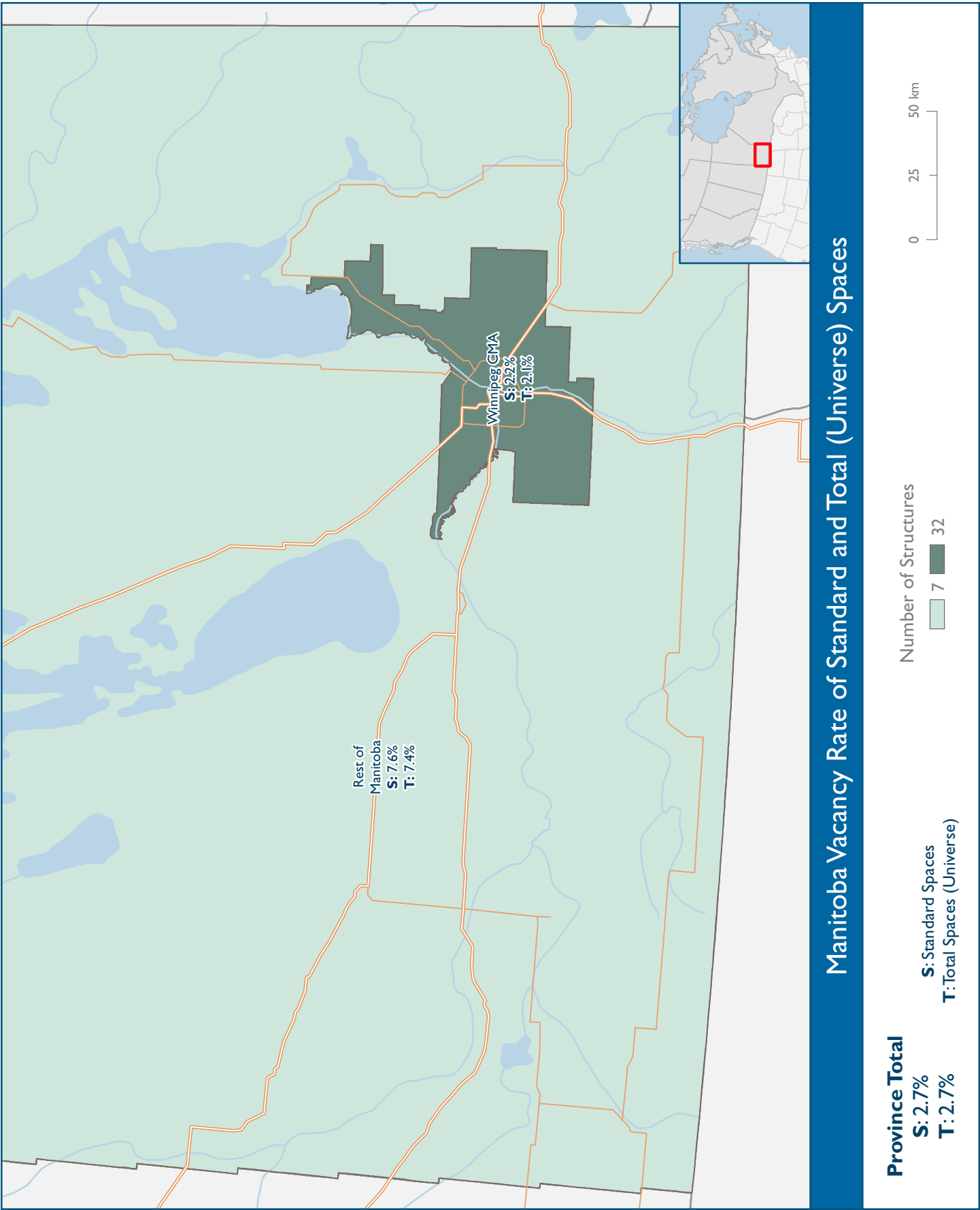
Source: CMHC

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## Vacancy Rates

### Vacancy rates decreased in 2016

According to Canada Mortgage and Housing Corporation's (CMHC) 2016 Seniors' Housing Survey, the vacancy rate for standard spaces<sup>1</sup> in Manitoba's seniors' rental residences was 2.7 per cent in 2016, 1.9 percentage points lower than in 2015. The decrease in the vacancy rate is consistent with the population growth of seniors in Manitoba, creating additional demand for spaces. According to Statistics Canada, the population aged 75 and over was projected to increase by 1.5 per cent between the 2015 survey and the 2016 survey, larger than the 0.9 percent increase the year prior. Seniors residences housed 4,515 people in 2016, 206 more than the year before. Meanwhile, the number of spaces in the overall universe in 2015 increased by 135 spaces, or 3.5 per cent, a smaller increase than the year before. The combination of larger population growth and smaller space growth has caused the decline in vacancy rates.

Vacancy rates declined across the province. The vacancy rate for residences in the Winnipeg Census Metropolitan Area (CMA) was 2.2 per cent in 2016 compared to 4.1 per cent in 2015, it continued to be lower than the provincial average. In the rest of Manitoba, the vacancy rate was above the provincial average at 7.6 per cent in 2016 compared to 8.7 per cent in 2015, continuing its downward trend. Spaces in the rest of the province represent only one-tenth of all spaces, thus small changes in the number of vacant units can result in a large variation in vacancy rate.

Units with two or more bedrooms recorded the highest overall vacancy rate for standard units in Manitoba, at 2.9 per cent. Forty three units of this type were added in 2016, the most out of any unit type. Bachelor suites and one bedroom suites had vacancy rates equal to the overall provincial average of 2.7 percent; down from their respective 2015 levels of 3.9 per cent for bachelor suites and 4.7 per cent for one-bedroom suites. The decrease in vacancy rates for one-bedroom suites was due to a contraction in the universe of one-bedroom suites classified as a standard space. Over 100 suites were reclassified from standard spaces to unknown spaces in 2016.

### Vacancy rate increases with higher rent

Across the province, vacancy rates were highest among spaces renting for more than \$2,000 per month which had a vacancy rate of

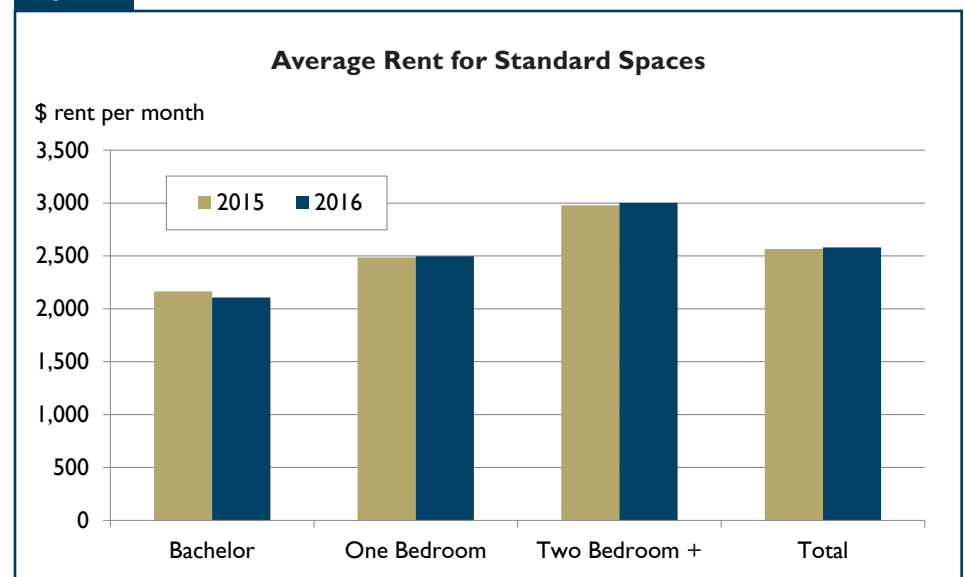
2.9 per cent in 2016. In 2015, units with rent between \$2,000 and 2,500 per month had a vacancy rate of 3.9 per cent and units with rent greater than \$2,500 had a vacancy rate of 6.2 per cent. The lowest vacancy rate, at 1.2 per cent in 2016, was for spaces renting between \$1,500 and \$1,999 per month up from 0.4 per cent in 2015. However, the units with the lowest rent, below \$1,500 a month, recorded vacancy rates of 2.4 per cent.

## Rents

### Average monthly rents increased

Average monthly rent for any type of standard space in Manitoba rose \$15, to \$2,580 in 2016. Rent in seniors residences are higher than those in the purpose-built rental market due to additional amenities and services provided in seniors' residences. The increase in average rent was driven by increases in

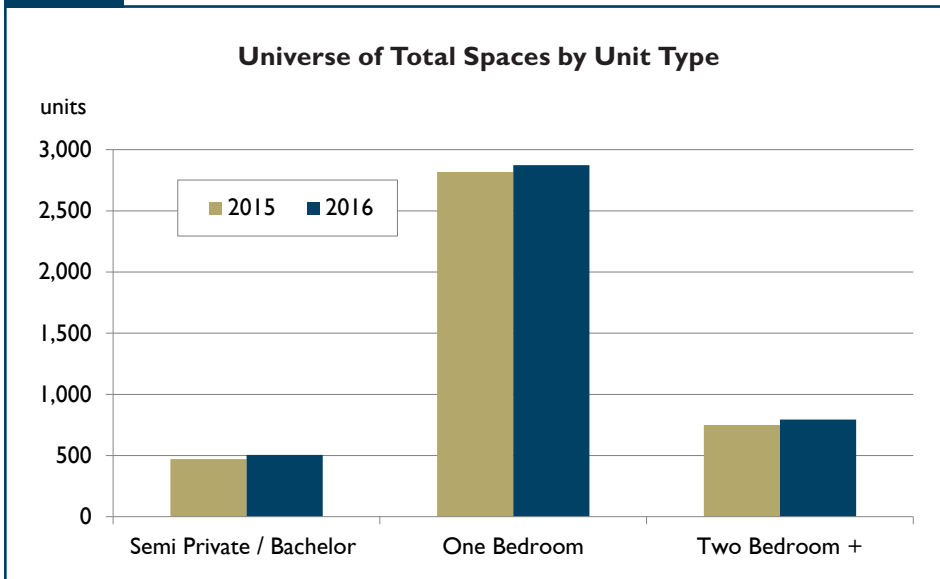
Figure 2



Source: CMHC

<sup>1</sup> Standard spaces exclude the following unit types: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

Figure 3



Source: CMHC

Winnipeg. The average rent for all space types in Winnipeg was \$2,591, \$20 higher than the year before, while the average rent elsewhere in the province declined by \$25 to \$2,488 in 2016.

The average monthly rent for bachelor suites decreased \$58 across the province, to \$2,107. However the average rent for bachelor suites in Winnipeg increased by \$9, to \$2,061 in 2016, so the decline in rent occurred elsewhere in the province. Rent for two-bedroom spaces was \$3,002 per month in 2016, up \$24 compared to average rent in 2015. The average rent for a one-bedroom space was \$2,497, up \$12 compared to 2015.

Over half of all retirement spaces in the province rented for more than \$2,500 per month. This proportion was higher in markets outside of Winnipeg. Nearly seventy per cent of units outside of Winnipeg rented for above \$2,500 a month, while only 53 per cent of units in Winnipeg

were in that price range. The next largest share was comprised of spaces renting between \$2,000 and \$2,499 per month, which represented 33.1 per cent of the total universe. Only 3.2 per cent of all seniors' rental spaces in the province charged less than \$1,500 per month in 2015.

## Universe

### Survey coverage

There were 39 seniors residences surveyed across the province in 2016 of which three structures were built since 2015. Only seven of the 39 structures surveyed are outside Winnipeg. The seniors' survey targeted only private and non-profit retirement structures where: the residence had at least ten rental units, the majority of residents are older than 65, and the residents have access to additional services not offered in traditional rental structures such as meal service, housekeeping, and laundry.

Across the province, there are 4,174 units, which housed 4,515 residents. There were 3,753 spaces located in the CMA and 421 in the rest of Manitoba. This represents a capture rate<sup>2</sup> of 5.2 per cent, relatively unchanged from the year before. This was lower than the national capture rate of 9.1 per cent. The majority of spaces surveyed, 69 per cent, were one bedroom spaces, followed by two bedroom spaces at 19 per cent. Semi-private and bachelor spaces made up the remaining 12 per cent.

## Services and amenities vary among structures

Seniors' residences provide services and amenities that are not typically present in purpose-built rental buildings. Such services may include housekeeping, meal plans, medical services, and various recreational programs. Only seniors' facilities offering an on-site meal plan qualify for the survey, and 92 per cent of facilities in the 2016 survey opted to include the meal plan as part of the rent. However, smaller facilities outside of Winnipeg were more likely to make the meal plan optional, 43 per cent of residences outside of Winnipeg had optional meal plans. No structures surveyed in Winnipeg had an optional meal plan. Most structures in the province, 59 per cent, included two meals in the rent. This represented a slightly higher proportion from 2015, when 58 per cent of structures offered this kind of plan.

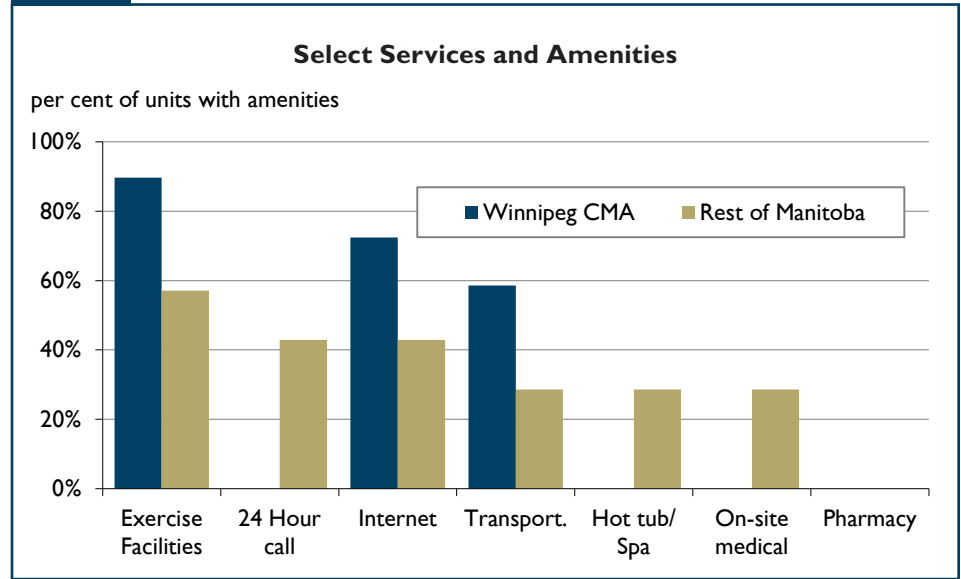
The most common amenities provided were exercise facilities, internet access, transportation facilities, and a 24 hour call bell. Exercise facilities were featured in 84 per cent of structures, 67 per cent

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

had internet access, 53 per cent had transportation services and 50 per cent of buildings have a 24 hour call bell. Compared to 2015: 89 percent of buildings had exercise facilities, 71 per cent had internet access, 57 per cent had transportation services and 57 per cent of buildings have a 24 hour call bell. These amenities were more common in Winnipeg than elsewhere in the province.

On-site medical services and an on-site nurse were less common, only 22 per cent of buildings surveyed had one or both of these features. On-site nurses have become more prevalent this year, as only 17 per cent of buildings had one in 2015. Structures outside the Winnipeg CMA were more likely to have these medical services than the province as a whole. Over 40 per cent of buildings surveyed outside of Winnipeg had on-site nurses and 29 per cent had on-site medical services.

Figure 4



Source: CMHC

Note: A value of zero on this chart indicates suppressed data.

# TABLES INCLUDED IN THE MANITOBA SENIORS' HOUSING REPORT

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

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Winnipeg CMA	**	**	5.1 <sup>b</sup>	3.7 <sup>c</sup>	4.6 <sup>a</sup>	2.1 <sup>a</sup>	2.1 <sup>a</sup>	2.1 <sup>a</sup>	4.1 <sup>a</sup>	2.2 <sup>a</sup>
Rest of Manitoba	**	**	**	**	6.3 <sup>a</sup>	8.5 <sup>a</sup>	**	**	8.7 <sup>a</sup>	7.6 <sup>a</sup>
<b>Manitoba</b>	<b>**</b>	<b>**</b>	<b>3.9<sup>b</sup></b>	<b>2.7<sup>b</sup></b>	<b>4.7<sup>a</sup></b>	<b>2.7<sup>a</sup></b>	<b>4.2<sup>a</sup></b>	<b>2.9<sup>a</sup></b>	<b>4.6<sup>a</sup></b>	<b>2.7<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	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Winnipeg CMA	**	**	0.4 <sup>a</sup>	1.4 <sup>a</sup>	2.7 <sup>a</sup>	1.4 <sup>a</sup>	6.3 <sup>a</sup>	3.0 <sup>a</sup>	4.1 <sup>a</sup>	2.2 <sup>a</sup>
Rest of Manitoba	**	**	**	**	**	**	**	**	8.7 <sup>a</sup>	7.6 <sup>a</sup>
<b>Manitoba</b>	<b>**</b>	<b>2.4<sup>a</sup></b>	<b>0.4<sup>a</sup></b>	<b>1.2<sup>a</sup></b>	<b>3.9<sup>a</sup></b>	<b>2.9<sup>a</sup></b>	<b>6.2<sup>a</sup></b>	<b>2.9<sup>a</sup></b>	<b>4.6<sup>a</sup></b>	<b>2.7<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> (%)
		2015	2016				
Winnipeg CMA	3,753	3.9 <sup>a</sup>	2.1 <sup>a</sup>	32	4,073 <sup>a</sup>		
Rest of Manitoba	421	8.7 <sup>a</sup>	7.4 <sup>a</sup>	7	442 <sup>a</sup>		
<b>Manitoba</b>	<b>4,174</b>	<b>4.4<sup>a</sup></b>	<b>2.7<sup>a</sup></b>	<b>39</b>	<b>4,515<sup>a</sup></b>	<b>86,600</b>	<b>5.2</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	417	2,625	711	3,753
Rest of Manitoba	89	249	83	421
<b>Manitoba</b>	<b>506</b>	<b>2,874</b>	<b>794</b>	<b>4,174</b>

## 2.2 Universe by Unit Type Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
<b>Winnipeg CMA</b>	<b>417</b>	<b>2,625</b>	<b>711</b>	<b>3,753</b>
Standard Spaces	162	2,394	700	3,256
Non-Standard Spaces	192	3	-	195
Unknown Spaces	63	228	11	302
<b>Rest of Manitoba</b>	<b>89</b>	<b>249</b>	<b>83</b>	<b>421</b>
Standard Spaces	40	181	67	288
Non-Standard Spaces	14	-	-	14
Unknown Spaces	35	68	16	119
<b>Manitoba</b>	<b>506</b>	<b>2,874</b>	<b>794</b>	<b>4,174</b>
Standard Spaces	202	2,575	767	3,544
Non-Standard Spaces	206	3	-	209
Unknown Spaces	98	296	27	421

## 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	2.5 a	9.1 a	35.4 a	53.0 a
Rest of Manitoba	9.1 a	8.1 a	13.3 a	69.5 a
<b>Manitoba</b>	<b>3.2 a</b>	<b>9.0 a</b>	<b>33.1 a</b>	<b>54.7 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	3.4 d	62.1 a	**	**	**	**	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0 c	4.3 d	**	**	**	**	**	**
Rest of Manitoba	42.9 a	**	42.9 a	14.3 a	28.6 a	42.9 a	42.9 a	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	**	**
Manitoba	7.7 a	2.8 c	58.6 a	**	22.1 d	21.8 d	50.1 a	5.7 d
10 - 49	**	**	**	**	**	16.1 d	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0 c	4.0 d	63.7 a	**	**	27.5 d	63.7 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.

<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>58.6</b> a	<b>0.0</b> c	<b>**</b>	<b>**</b>	<b>89.7</b> a	<b>72.4</b> a
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	<b>65.2</b> a	<b>0.0</b> c	**	**	<b>100.0</b> a	<b>87.0</b> a
<b>Rest of Manitoba</b>	<b>28.6</b> a	<b>**</b>	<b>28.6</b> a	<b>42.9</b> a	<b>57.1</b> a	<b>42.9</b> a
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	**	**
<b>Manitoba</b>	<b>53.2</b> a	<b>0.0</b> c	<b>24.9</b> d	<b>50.1</b> a	<b>83.8</b> a	<b>67.1</b> a
10 - 49	**	**	**	16.1 d	16.1 d	16.1 d
50 - 89	**	**	**	**	**	**
90 or more	<b>67.8</b> a	<b>0.0</b> c	**	<b>63.7</b> a	<b>100.0</b> a	<b>87.9</b> 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.

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

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

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2015	2016	2015	2016	2015	2016	2015	2016	2015	2016
Winnipeg CMA	**	**	2,052 a	2,061 a	2,480 a	2,491 a	3,039 a	3,054 a	2,571 a	2,591 a
Rest of Manitoba	**	**	**	**	2,532 a	2,550 a	**	**	2,513 a	2,488 a
<b>Manitoba</b>	<b>**</b>	<b>**</b>	<b>2,165 a</b>	<b>2,107 a</b>	<b>2,485 a</b>	<b>2,497 a</b>	<b>2,978 a</b>	<b>3,002 a</b>	<b>2,565 a</b>	<b>2,580 a</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	25.6	74.4

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	37.5	43.8	15.6	**
	Telephone	3.1	78.1	18.8	**
Rest of Manitoba	Cable	28.6	71.4	**	**
	Telephone	**	100.0	**	**
Manitoba	Cable	35.9	48.7	12.8	**
	Telephone	2.6	82.1	15.4	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened				
Manitoba				
Province	Before 1990	1990 - 1999	2000 or later	Total
Manitoba	**	**	2.5 a	2.7 a

O4 Average Rents (\$) of Standard Spaces by Date Residence Opened					
Manitoba					
Province		Before 1990	1990 - 1999	2000 or later	Total
Manitoba	Semi-Private	**	**	**	**
	Bachelor	**	**	2,552 a	2,107 a
	One Bedroom	**	**	2,531 a	2,497 a
	Two Bedroom +	**	**	2,946 a	3,002 a
	All	**	**	2,631 a	2,580 a

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

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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.

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

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 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 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.

## CMHC—HOME TO CANADIANS

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