

SENIORS' HOUSING REPORT

Manitoba



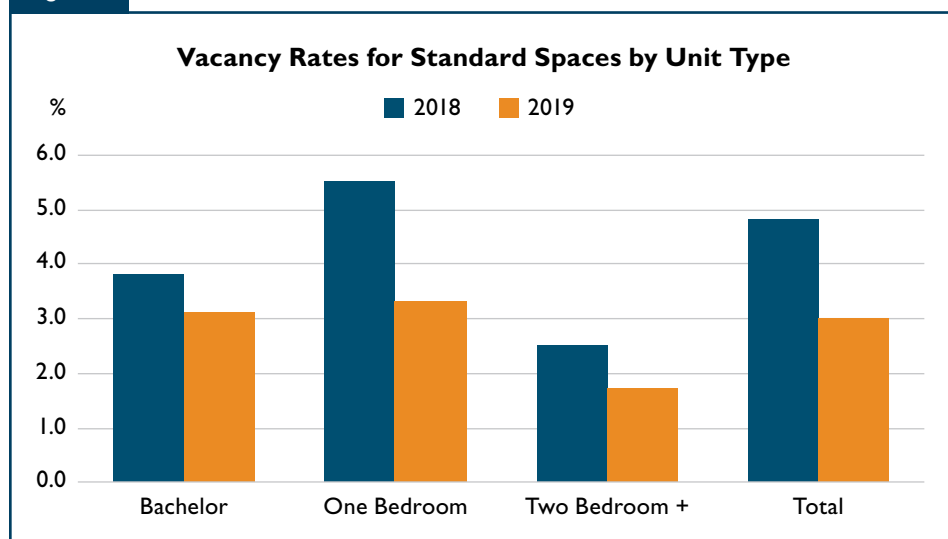
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2019

Highlights

- The overall vacancy rate for standard spaces in seniors' housing across Manitoba decreased to 3.0% in 2019 from 4.8% in 2018. The overall vacancy rate for total senior spaces in the Manitoba province also decreased to 2.8% in 2019 from 4.3% in the previous year.
- The vacancy rate for standard spaces and the overall vacancy rate for total senior spaces in the Winnipeg CMA were the same as the provincial averages.
- The overall average rent in Manitoba for a standard space was \$2,819 in 2019 compared to \$2,733 in 2018. The average rent in the Winnipeg CMA was marginally higher than the provincial average at \$2,831 in 2019.
- The demand for seniors' housing in Manitoba remained strong as the number of residents increased to 5,465 in 2019 compared to 5,238 in the previous survey. The number of residents increased in the Winnipeg CMA and decreased in the rest of Manitoba.
- The universe of seniors' housing spaces in Manitoba increased by 4.7% with 5,050 spaces included in the 2019 survey compared to 4,822 spaces in the previous year. The Winnipeg CMA contributed to over 85% of the supply of the seniors' housing spaces in the province.

Figure 1



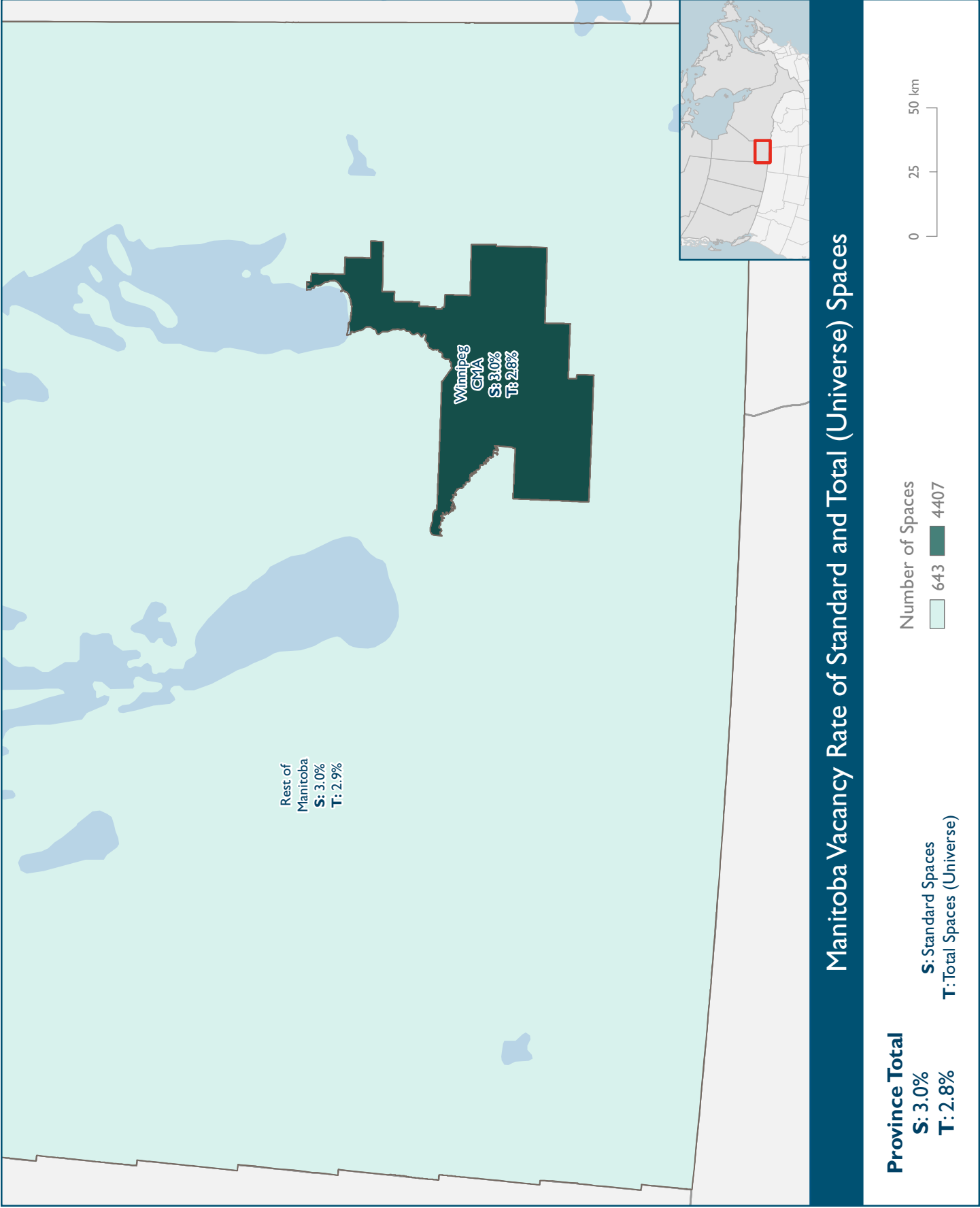
Source: CMHC Seniors' Housing Survey

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

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
Winnipeg CMA	**	**	3.1 ^b	2.5 ^a	4.6 ^a	3.5 ^a	2.8 ^a	1.6 ^a	4.2 ^a	3.0 ^a
Rest of Manitoba	**	**	5.4 ^d	4.5 ^d	10.7 ^c	2.4 ^b	**	3.2 ^a	8.2 ^b	3.0 ^a
Manitoba	**	**	3.8^c	3.1^c	5.5^a	3.3^a	2.5^a	1.7^a	4.8^a	3.0^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).

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 - \$2,999		\$3,000 and More	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
Winnipeg CMA	**	**	0.5 ^a	1.3 ^a	1.7 ^a	1.1 ^a	3.1 ^a	0.5 ^a	7.7 ^a	5.8 ^a
Rest of Manitoba	**	**	1.7 ^a	7.5 ^a	5.6 ^a	1.1 ^a	**	**	**	1.8 ^c
Manitoba	**	1.1^a	0.7^a	2.4^a	2.0^a	1.1^a	3.8^b	0.9^a	8.6^a	5.3^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.

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1.4 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+ ¹	Capture Rate ² (%)
		2018	2019				
Winnipeg CMA	4,407	3.7 ^a	2.8 ^a	40	4,755 ^a		
Rest of Manitoba	643	8.0 ^b	2.9 ^a	11	709 ^a		
Manitoba	5,050	4.3 ^a	2.8 ^a	51	5,465 ^a	92,300	5.9

¹ 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

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

2.1 Universe of Total Spaces by Unit Type

Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Winnipeg CMA	551	3,005	851	4,407
Rest of Manitoba	96	448	99	643
Manitoba	647	3,453	950	5,050

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

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2.2 Universe by Unit Type Manitoba				
Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Winnipeg CMA	551	3,005	851	4,407
Standard Spaces	242	2,894	823	3,959
Non-Standard Spaces	309	73	24	406
Unknown Spaces	-	38	4	42
Rest of Manitoba	96	448	99	643
Standard Spaces	80	296	81	457
Non-Standard Spaces	14	64	-	78
Unknown Spaces	2	88	18	108
Manitoba	647	3,453	950	5,050
Standard Spaces	322	3,190	904	4,416
Non-Standard Spaces	323	137	24	484
Unknown Spaces	2	126	22	150

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 - \$2,999	\$3,000 - \$3,499	\$3,500 and More
	% of Total ¹	% of Total ¹	% of Total ¹	% of Total ¹	% of Total ¹	% of Total ¹
Winnipeg CMA	3.5 ^a	7.9 ^a	25.7 ^a	19.4 ^a	28.3 ^a	15.2
Rest of Manitoba	6.4 ^a	11.9 ^a	15.6 ^d	17.9 ^a	39.1 ^a	9.2
Manitoba	3.9^a	8.4^a	24.5^a	19.2^a	29.6^a	14.4

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).

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

Province	Meals				On-Site Medical Services	On-Site Nursing Services ²	24-Hour Call Bell	Pharmacy
	Optional	# of Meals Included in Rent						
		1	2	3				
Winnipeg CMA	10.3 c	2.6 b	48.7 a	38.5 a	25.6 a	20.5 d	56.4 a	10.3 c
10 - 49	**	**	**	**	**	**	**	**
50 - 89	28.6 d	**	71.4 a	**	14.3 d	**	**	**
90 or more	0.0 c	3.7 c	51.9 a	44.4 a	33.3 a	29.6 a	74.1 a	14.8 c
Rest of Manitoba	9.1 a	9.1 a	**	**	**	**	36.4 a	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	**	**
Manitoba	10.0 c	4.0 b	49.0 a	**	23.1 d	19.0 d	52.1 a	8.0 b
10 - 49	**	**	29.6 a	40.3 a	**	**	**	**
50 - 89	20.2 d	9.8 a	60.2 a	9.8 a	10.1 d	**	**	**
90 or more	0.0 c	3.3 c	**	**	**	**	76.6 a	13.4 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 On-site nursing services include RN, RPN or LPN.

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

Province	Transportation Services	Swimming Pool	Hot Tub/Spa	Movie Theatre	Exercise Facilities	Internet
Winnipeg CMA	41.0 a	0.0 c	20.5 d	51.3 a	66.7 a	56.4 a
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	14.3 d	14.3 d	**
90 or more	55.6 a	0.0 c	29.6 a	66.7 a	88.9 a	77.8 a
Rest of Manitoba	27.3 a	**	**	27.3 a	**	36.4 a
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	**	**
Manitoba	38.1 a	0.0 b	19.0 d	46.1 a	67.0 a	52.1 a
10 - 49	10.1 d	**	**	10.1 d	49.6 a	10.1 d
50 - 89	**	**	**	10.1 d	29.7 d	9.8 a
90 or more	59.9 a	0.0 c	**	69.9 a	85.1 a	79.9 a

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

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

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

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
Winnipeg CMA	**	**	2,173 ^a	2,141 ^a	2,655 ^a	2,748 ^a	3,224 ^a	3,326 ^a	2,750 ^a	2,831 ^a
Rest of Manitoba	**	**	2,064 ^a	2,338 ^a	2,655 ^a	2,642 ^a	2,900 ^a	3,553 ^a	2,634 ^a	2,734 ^a
Manitoba	**	**	2,141 ^a	2,202 ^a	2,655 ^a	2,737 ^a	3,179 ^a	3,349 ^a	2,733 ^a	2,819 ^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 (%)		
Manitoba		
Province	Concrete Frame	Wood Frame
Manitoba	25.5	74.5

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	35.0	52.5	12.5	44.00
	Telephone	7.5	82.5	10.0	**
Rest of Manitoba	Cable	18.2	72.7	**	**
	Telephone	9.1	81.8	**	**
Total	Cable	31.4	56.9	9.8	44.00
	Telephone	7.8	82.4	7.8	**

O3 Vacancy Rates (%) of Standard Spaces by Date Residence Opened				
Manitoba				
Province	Before 1990	1990 - 1999	2000 or Later	Total
Manitoba	**	**	3.4 a	3.0 a

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O3.2 Vacancy Rates (%) of Total Spaces¹ by Unit Type Manitoba

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2018	2019	2018	2019	2018	2019	2018	2019	2018	2019
Winnipeg CMA	**	**	1.1 ^a	1.5 ^a	4.5 ^a	3.4 ^a	2.5 ^a	1.5 ^a	3.7 ^a	2.8 ^a
Rest of Manitoba	**	**	5.3 ^d	3.9 ^d	10.2 ^c	2.5 ^b	**	3.2 ^a	8.0 ^b	2.9 ^a
Manitoba	**	**	1.7^b	1.9^a	5.3^a	3.3^a	2.4^a	1.7^a	4.3^a	2.8^a

¹ Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

O3.3 Universe of Total Spaces¹ by Size of Residence Manitoba

Centre	< 50 Spaces		50 - 99 Spaces		100 + Spaces		Median Residence Size
	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Number of Residences	Total Spaces	
Winnipeg CMA	6	211	10	740	24	3,456	115
Rest of Manitoba	5	77	3	201	3	365	52
Manitoba	11	288	13	941	27	3,821	103

¹ Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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**O3.4 Vacancy Rate (%) and Universe of Total Spaces¹
by Date Residence Opened
Manitoba**

Centre	Before 2001		2001 or Later		Total	
	Vacancy Rate	Universe	Vacancy Rate	Universe	Vacancy Rate	Universe
Winnipeg CMA	1.4	1,100	3.3	3,307	2.8	4,407
Rest of Manitoba	**	223	3.3	420	2.6	643
Manitoba	1.4 a	1,323	3.3 a	3,727	2.8 a	5,050

¹ Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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

Province		Before 1990	1990 - 1999	2000 or Later	Total
Manitoba	Semi-Private	**	**	**	**
	Bachelor	**	**	2,361 a	2,202 a
	One Bedroom	**	**	2,748 a	2,737 a
	Two Bedroom +	**	**	3,273 a	3,349 a
	Total	**	**	2,850 a	2,819 a

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**O5 Number of Residents, Number of Residents Living Alone and
Number of Residents in Heavy Care Units
Manitoba**

Centre	2018	2019
Winnipeg CMA		
Total number of residents	4,512 <i>a</i>	4,755 <i>a</i>
Number of residents living alone	3,476 <i>a</i>	3,810 <i>a</i>
Total number of couples	518 <i>a</i>	473 <i>a</i>
Number of residents in heavy care units	**	**
Rest of Manitoba		
Total number of residents	726 <i>b</i>	709 <i>a</i>
Number of residents living alone	514 <i>c</i>	539 <i>a</i>
Total number of couples	106 <i>a</i>	85 <i>d</i>
Number of residents in heavy care units	**	**
Manitoba		
Total number of residents	5,238 <i>a</i>	5,465 <i>a</i>
Number of residents living alone	3,989 <i>a</i>	4,350 <i>a</i>
Total number of couples	625 <i>a</i>	557 <i>a</i>
Number of residents in heavy care units	**	**

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 (Exception: British Columbia for select Optional Tables only);
- ✓ 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](#).

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 space is less than market rent or where the resident occupying the space 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.

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