Agenda

- Survey Overview
- Demand & Supply
- The Results
Nursing homes, chronic care, or long-term care hospitals

Residences for senior citizens

Other collective residences e.g. hostels, shelters, etc.

Source: CMHC, adapted from Census 2011
Seniors’ Living Arrangements in Canada

- Nursing homes, chronic care, or long-term care hospitals
- Residences for senior citizens
- Other collective residences e.g. hostels, shelters, etc.

Source: CMHC, adapted from Census 2011
## Seniors’ Housing Survey Definitions

<table>
<thead>
<tr>
<th>Standard Spaces</th>
<th>Heavy Care</th>
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</thead>
<tbody>
<tr>
<td><strong>Congregate Residences</strong></td>
<td><strong>Care Facilities</strong></td>
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<tr>
<td><strong>Independent Housing with Support</strong></td>
<td><strong>Assisted Living</strong></td>
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<tr>
<td>- Independent housing</td>
<td>- Independent housing</td>
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<tr>
<td>- Some combination of:</td>
<td>- Registered</td>
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<tr>
<td>› Meals</td>
<td>- Typically includes:</td>
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<tr>
<td>› Housekeeping</td>
<td>› Meals</td>
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<td>› 24-hour response</td>
<td>› Housekeeping</td>
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<tr>
<td>› Social Activities</td>
<td>› 24-hour response</td>
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<tr>
<td>Source: CMHC Seniors’ Housing Survey 2013</td>
<td>› Social activities</td>
</tr>
<tr>
<td></td>
<td>› Personal care</td>
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<td></td>
<td>services</td>
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</tbody>
</table>
To be eligible for inclusion in the 2013 survey results, a residence must:

- Have been in operation for at least one year
- 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.
BC Stats Estimated:
340,000 Persons Aged 75+ in 2013

1.8% from 2012
Capture Rate =

Percent of Seniors 75+ Living in the Survey Universe*

* Includes standard and non-standard units

Source: CMHC Seniors’ Housing Survey 2013
Supply in BC is Growing

Universe of Standard Spaces

- 2013: 15,000
- 2012: 15,000
- 2011: 14,700
- 2010: 14,000
- 2009: 13,000

Source: CMHC Seniors’ Housing Survey 2009 - 2013
Newfoundland & Labrador 25.0%
British Columbia 11.4%
Alberta 10.2%
Saskatchewan 8.8%
Manitoba - 4.8%
Ontario 13.4%
Quebec 8.7%
Prince Edwards Island ↓6.6%
Nova Scotia ↑8.3%
New Brunswick ↓6.8%

Source: CMHC Seniors’ Housing Survey 2013
Standard Space Vacancy Rates in BC

Vacancy Rate

Source: CMHC Seniors’ Housing Survey 2013
Standard Space Average Rent Across Canada

- Newfoundland & Labrador: $2,098
- British Columbia: $2,747
- Alberta: $2,798
- Saskatchewan: $2,505
- Manitoba: $2,378
- Ontario: $3,204
- Quebec: $1,520
- Prince Edwards Island: $2,433
- Nova Scotia: $2,394
- New Brunswick: $1,807

Source: CMHC Seniors’ Housing Survey 2013
Lower Mainland Rents Highest

Source: CMHC Seniors’ Housing Survey 2013
Percentage point change 2013 vs 2012

- Transportation
- Movie Theatre
- Internet

* Reflects the change in the proportion of residences offering the specified amenity versus 2012 levels.

Sources: CMHC Seniors’ Housing Survey 2013 and 2012
Supply of seniors’ housing will continue to grow to meet the increased demand from an increasing seniors population.

Seniors housing will evolve, responding to changing needs and preferences.

Vacancy rates and rent levels will move in response to the changing market.
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Coming in June:
CMHC’s 2014 Seniors Housing Report

Visit www.cmhc.ca