

CITY OF BRANDON

HOUSING NEEDS REPORT

JULY 2023

URBAN
SYSTEMS

PREPARED FOR:
CITY OF BRANDON

PREPARED BY:
URBAN SYSTEMS LTD.

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KEY FINDINGS

DEMOGRAPHICS

- The City of Brandon's population in the 2021 Census was 51,313.
- Brandon's population is generally younger than the Province. The average age is 39.1 and the median age is 37.2 years old.
- Brandon's population is 20% immigrant or non-permanent residents.
- Over 54% of the local immigrant population arrived in Canada between 2011 and 2021.
- The Indigenous population in Brandon is 7,245 or 14%.
- The majority of residents (54%) in Brandon have not moved within the last five years, and the majority of those who have moved (53%) are from within Brandon, the Province, or Canada.

EMPLOYMENT, EDUCATION AND INCOME

- The median household income in Brandon is \$76,000.
- In 2016, the median household income of renters (\$39,862) was less than half of that of owners (\$87,135).
- 72% of owners make over \$60,000 per year, where 72% of renters make less than \$40,000 per year.
- Non-census families earn the lowest median incomes among household types (\$45,200).
- The highest earners are Other Census-Families (\$125,000).
- The unemployment rate in Brandon is 7.3%.
- Over 83% of the population has completed a level of education of high school or above.

HOUSEHOLDS

- The average household size is 2.4 persons. Household size peaked in 2006 at 2.6 persons.
- The most common household sizes are 2-person (34.1%) and 1-person (31.1%). The most significant growth in household sizes since 2011 were 5+ person households, seeing a 22% increase.
- There are 21,200 households in Brandon. Since 2011, the number of households in Brandon have increased by almost 1,900, or at a rate of 10%.

- The majority of dwelling units in Brandon (52%) are single-detached units. 31% of dwellings are within apartment buildings of various styles.
- Over half of the housing units in Brandon are over 40 years old, with 32% of homes built between 1961 and 1980, and 24% before 1960.
- 39.2% of households are renters, 60.8% are owners.
- The most common household types in Brandon are One-Person Households (31%) which also have one of the highest proportions of Renters (56%).
- The majority of renters in Brandon are in One-Person and Two-Person households.
- Average market rents in Brandon have risen steadily over the last 20 years, with the average rent increasing 97% since 2001.
- Since 2001, Brandon has consistently increased its stock of rental units, primarily with larger-sized suites of two and three or more bedrooms.
- In 2021, there were vacancy rates of 3.1% for one-bedrooms, 2.7% for two-bedrooms, and 0.8% for three or more bedrooms.

HOUSING COSTS

- Median rental rates increased from \$808 in 2016 to \$950 in 2021.
- Since 2006, average home prices at the point of sale have increased 107%.
- The median value of dwellings in 2021 was \$290,000, increasing by nearly \$30,000 between 2016 and 2021.

HOUSING CONSTRUCTION

- Since 2001, there have been 5,750 total housing completions and 5,355 starts.
- Between 2018 and 2022, the majority of housing starts were 20% single-detached, and 80% multi-unit, including Apartment (47%) and Row (28%) dwellings.
- In 2022, the majority of housing starts were Row (46%) and Apartment (35%) dwellings.
- Since 2013, there has been a decrease in the absorption of new builds of Single- and Semi-Detached dwellings.

COMMUNITY HOUSING

- 16.6% or 1,387 of all renter households are currently in subsidized housing.
- There are approximately 60 emergency shelter beds and 220 units provided by organizations outside of Manitoba Housing and other seniors' living and medical facilities.

- There are approximately 1,330 Seniors Independent Living units and 600 personal care home beds in Brandon.
- 68 people responded to the 2021 Point In Time (PIT) count. 34% indicated they are staying in a homeless shelter and 29% indicated they were remaining unsheltered in a public space such as a park or bus shelter.
- Safe and Warm Shelter usage more than doubled in 2020, from 168 users in 2019 to 354 people. This number continued to rise in 2021 and 2022, reaching 475 people.
- The number of clients receiving services on Homeless Individuals and Families' Information System increased by over 500 people between 2019 and 2022, to 863 people.

CORE HOUSING NEED AND AFFORDABILITY

- To afford to pay the household costs associated with a home bought at the 2022 average selling price, a household must earn at least \$89,600. 44% of owners make under \$80,000 per year.
- To afford the average rent in Brandon in 2022, a household must earn at least \$40,200. 50% of renters make under \$40,000 per year.
- On-average, most household types can afford to rent in Brandon, however, non-census families and lone-parent families would have to spend closer to 30% of their income just on rent.
- A non-census family would have to earn \$56 more per month to afford a 3+ bedroom unit.
- Approximately 1,450 households are in core housing need.
- 14.2% or 1,187 of total renter households live in core housing need.
- 2% or 276 of total owner households live in core housing need.

COMMUNITY GROWTH

- Brandon's population is projected to increase by a range of 9,136 to 9,878 individuals in the next 20 years.
- From 2021 to 2041, the number of households in Brandon is projected to increase by a range of 5,149 to 5,434.

HOUSING NEEDS

- Brandon could see an increase of 2,964 to 3,140 owner households, and 2,186 to 2,297 renter households between 2021 and 2041.

- On average, 2,000 single-detached, 295 duplex and semi-detached, 1,020 rowhouses, 1,725 apartments, and 245 movable homes are projected over the next 20 years.
- Single-detached units are projected to account for only 26% of all new units over the next 10 years.
- By 2041, the average household size is projected to be between 2.30 to 2.32 persons per household.
- Additional emergency shelter space is required to support the 70+ people experiencing homelessness (2021 PIT count).
- Additional transitional housing units are needed to stabilize people currently living in emergency living situations and the 863 clients receiving various services on HIFIS.
- If it is assumed that half (although this is likely an underestimate) of people currently living in emergency shelter/homeless housing and transitional housing will need long-term supportive housing, an additional 35+ units are needed.
- Based on growth projections, an additional 300+ renters and 60+ owners will be in core housing need by 2041.
- Homeowners who are individuals or lone-parent households require lower cost ownership options.

1.0 INTRODUCTION

1.1 OVERVIEW

There are many factors that affect a community’s specific housing situation. The purpose of this report is to better understand what types of housing are needed in the future to ensure everyone has access to a safe, suitable, and affordable place to call home. The statistical data gathered in this report includes populations and projections, households, employment, and income used to help highlight housing quality including affordability, housing standards and projected demand providing a comprehensive overview of changes in the population that can better inform housing needs in the community.

1.2 THE ROLE OF GOVERNMENT IN THE HOUSING SECTOR

Level of Government	Role	Example
Federal Government	<ul style="list-style-type: none"> • Funds management • Policy development • Research and data provision 	<ul style="list-style-type: none"> • Canada Housing and Mortgage Corporation • National Housing Strategy • Home Buyers Plan
Provincial Government	<ul style="list-style-type: none"> • Policy and regulations • Funds management and investments • Bilateral agreements • Housing development 	<ul style="list-style-type: none"> • Residential Tenancies Act, condominium regulations, real estate regulations • Manitoba Housing • Funding agreements
Municipal Government	<ul style="list-style-type: none"> • Facilitating development through land use management • Regulations • Incentivizing or investing in priority unit types • Education and advocacy • Partnership development 	<ul style="list-style-type: none"> • Development plans, zoning, and land use regulation • Incentivizing, such as density bonusing, parking reductions, etc. • Lobbying senior government for resources • Educating the public on the important of a range of housing

2.0 DEMOGRAPHICS

2.1 POPULATION

The City of Brandon's population in the 2021 Census was 51,313. Brandon is a growing city: between 1996 and 2021, Brandon grew by 33% or almost 13,000 residents (Figure 1). This population growth could be attributed to a rise in newcomers to Brandon, as demonstrated in Figure 4, showing over 54% of the local immigrant population arriving in Canada between 2011 and 2021.

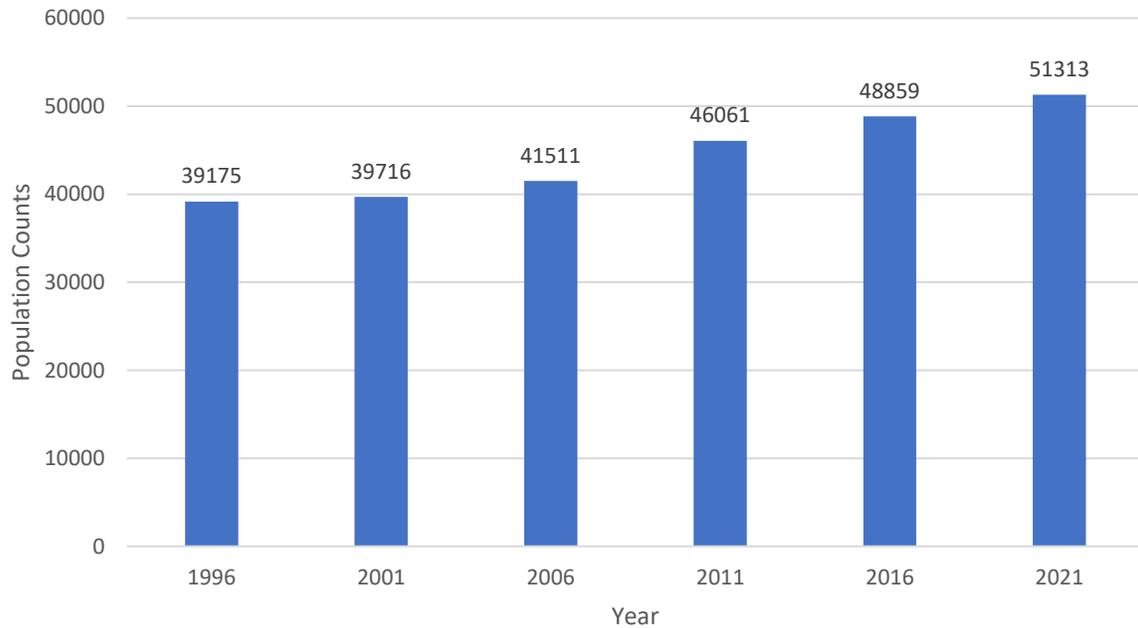


Figure 1. Population Change, City of Brandon Growth Strategy, 1996-2021

2.2 AGE

Brandon’s population is generally younger than the Province (Figure 2). There are more residents in Brandon between the ages of 20 to 45 years (36.8%) than in Manitoba (33.3%). The Province has a higher percentage of people between the ages 55 to 79 (25.7%) compared to Brandon (22.6%). The average age is 39.1 and the median age is 37.2 years old.

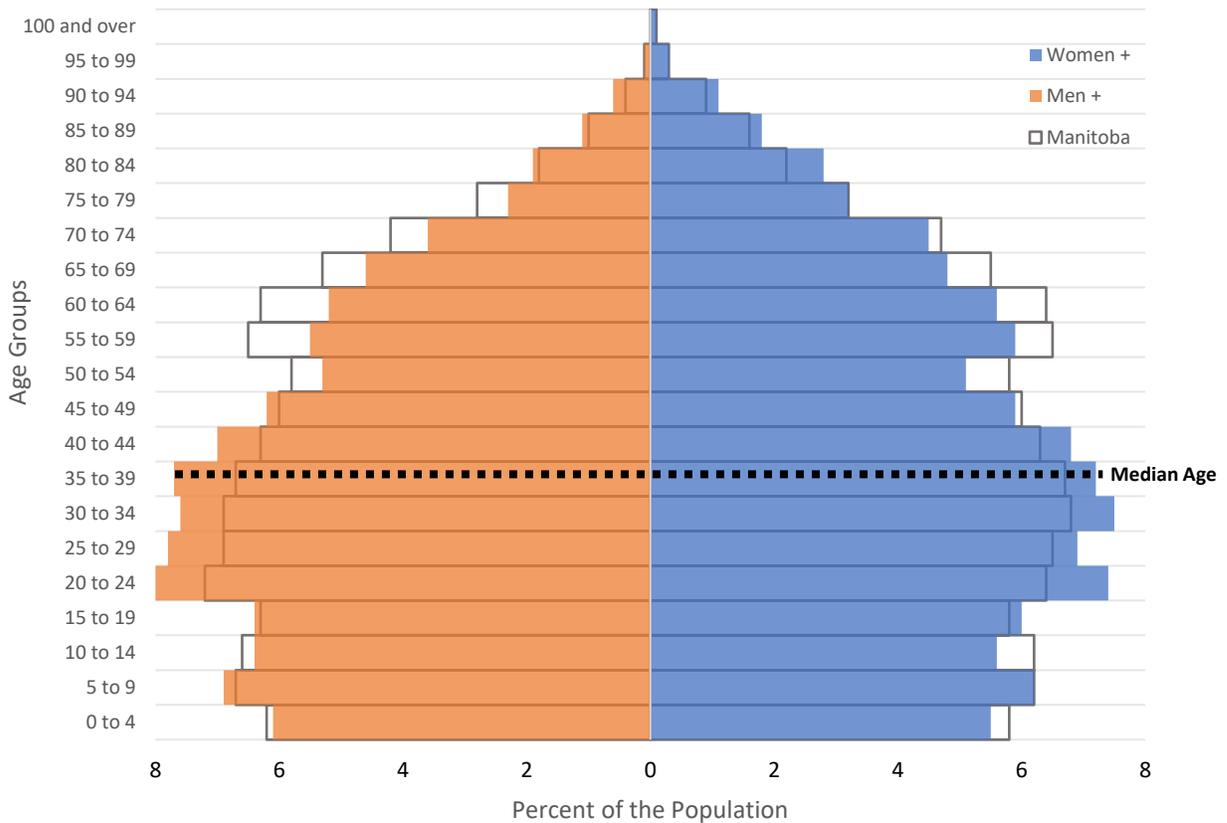


Figure 2. Population Pyramid, City of Brandon Growth Strategy, Province of Manitoba, 2021

A younger population means more people who are working in the community, moving through the housing market, and supporting families, and also implies an upcoming demographic of aging residents.

2.3 IMMIGRATION

In 2021, Brandon’s population was 20% immigrant or non-permanent residents (Figure 3), totalling 10,180 people.

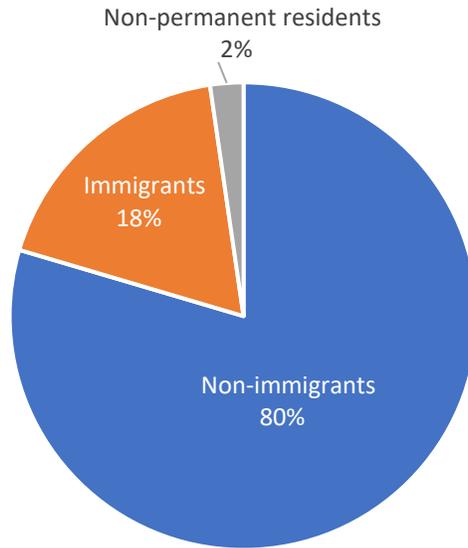


Figure 3. Immigration Status, Statistics Canada, 2021

Over 54% of the local immigrant population arrived in Canada between 2011 and 2021, and 33% between 2001-2010 (Figure 4). This indicates an emerging and continuing growth in the population of newcomers, which will require an influx of housing to support their needs.

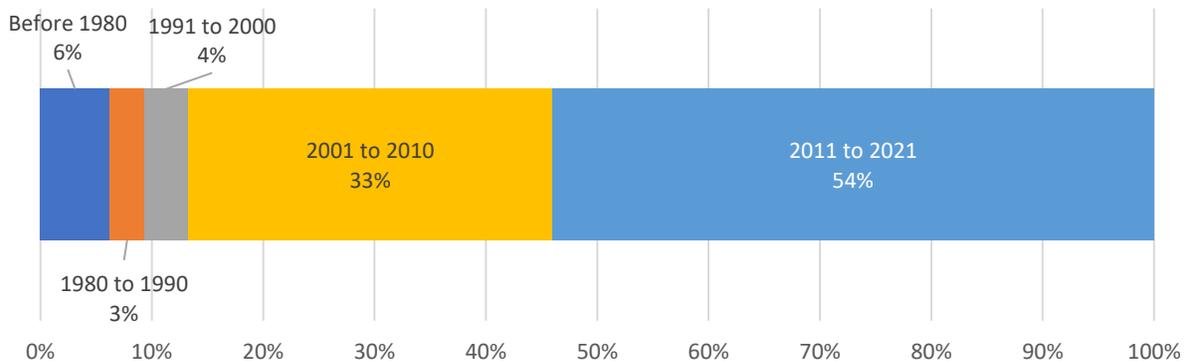


Figure 4. Period of Immigration, Statistics Canada, 2021

2.4 INDIGENOUS POPULATION

In 2021, the Indigenous population in Brandon was 7,075. Of that, 3,925 (55%) identified as First Nation, 2,910 (42%) Metis, 15 (0.2%) Inuk (Inuit) and 160 (2.3%) indicated multiple identities (Figure 5).

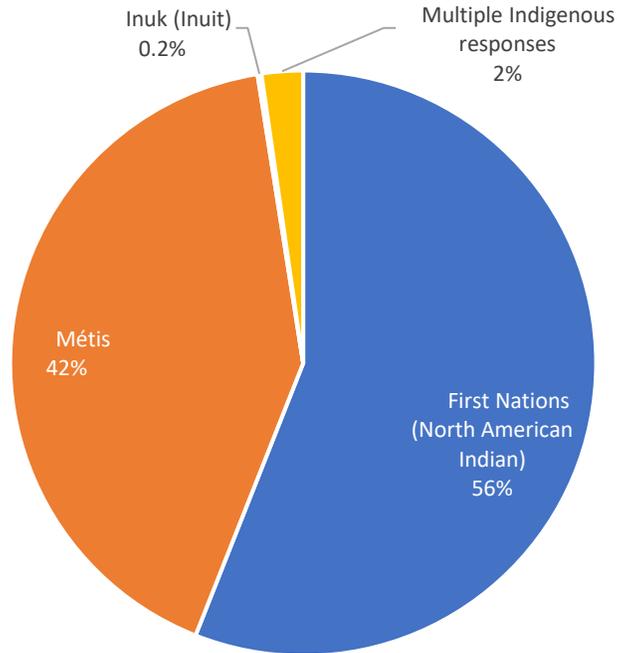


Figure 5. Indigenous Identity, Statistics Canada, 2021

2.5 MOBILITY

Reviewing mobility status can help to understand movement within the housing market as well as the origins of residents. “Movers” are households who have moved residences within a 1-year, or 5-year period as asked in the Census. Movers are both Migrants and Non-migrants. In Brandon, 84% of residents in 2021 were Non-Movers. Of those who did move within the year prior to the Census, 68% were Non-Migrants.

Of those who moved in the one year prior to the Census, and who were migrants, 33% were Internal Migrants coming from within Manitoba or another province, and 14% were External, or coming from outside of Canada (Figure 6).

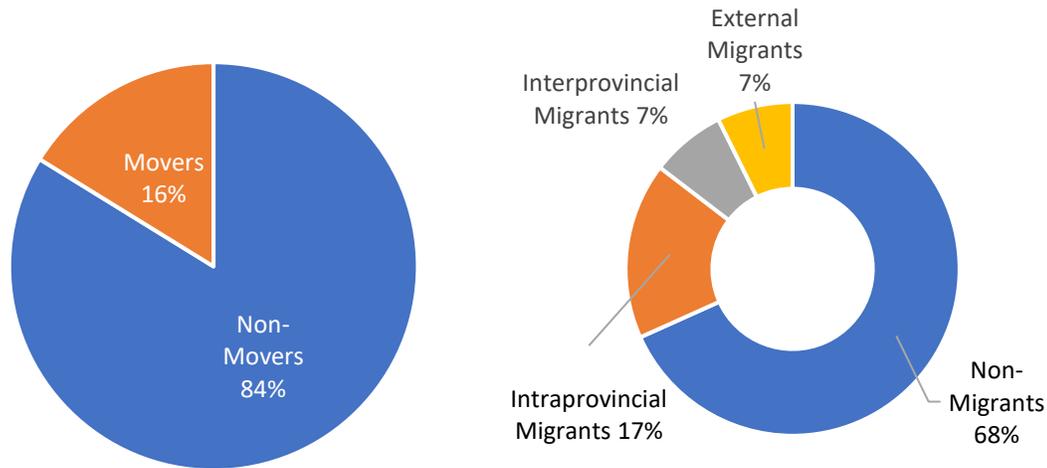


Figure 6. 1 Year Ago - Mobility Status and Origin of Movers, City of Brandon, Statistics Canada, 2021

When comparing to data from 5 years ago (Table 1), there is a considerable difference in the number of movers. As the 2021 Census took place during the height of the COVID-19 pandemic, there is a possibility of less movement due to residual challenges presented including but not limited to delayed immigration processes, border closures, and less people moving due to restrictions or fears.

Table 1. City of Brandon Mobility Status for One Year and 5 Years Ago, Statistics Canada, 2021

	1 Year Ago		5 Years Ago	
	Total	% of Pop.	Total	% of Pop.
Non-Movers	41255	84%	25290	54%
Movers	7975	16%	21560	46%
Non-Migrants	5445	11%	11385	24%
Migrants	2530	5%	10170	22%
Internal migrants	1945	4%	7135	15%
Interprovincial Migrants	1365	3%	5475	12%
Interprovincial Migrants	580	1%	1660	4%
External Migrants	585	1%	3030	6%

The majority of residents (54%) in Brandon have not moved within the last five years, and the majority of those who have moved (53%) are from within Brandon, the Province, or Canada.

2.6 HOUSEHOLD INCOME

The median household income in Brandon is \$76,000. Since 2015, medium household income grew by 15%, and since 2000, 95%.

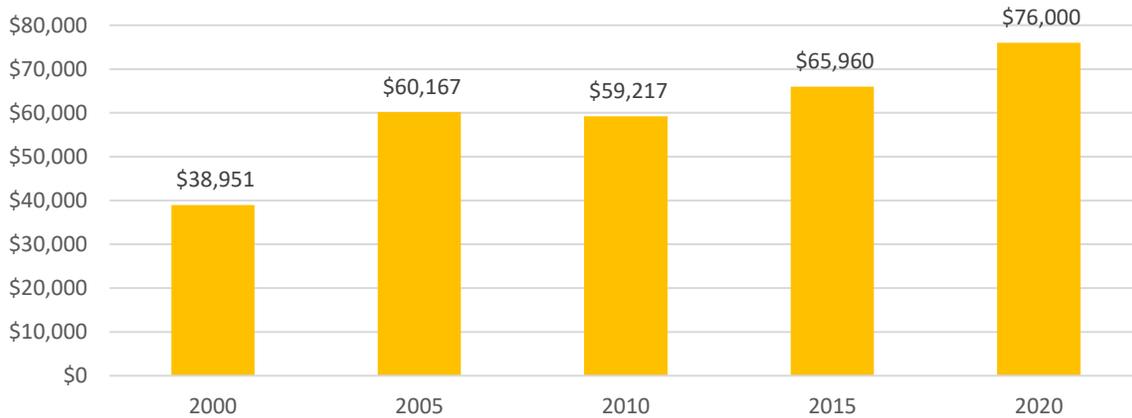


Figure 7. Median Household Income 2000-2020, Statistics Canada

Renters have significantly lower median incomes than owners (Figure 8). This is an important basis for why renters are more vulnerable to being in core housing need than owners. In 2016, the median household income of renters (\$39,862) was less than half of that of owners (\$87,135).

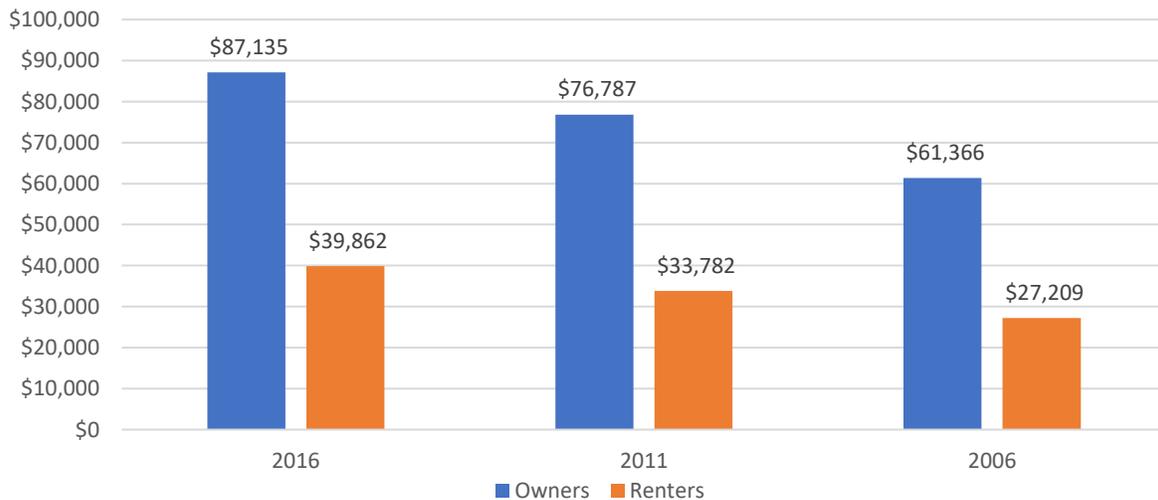


Figure 8. Median Household Income by Tenure 2006-2016, CMHC

Owners on average have higher household incomes than renters (Figure 9). 72% of owners make over \$60,000 per year, where 72% of renters make less than \$40,000 per year.

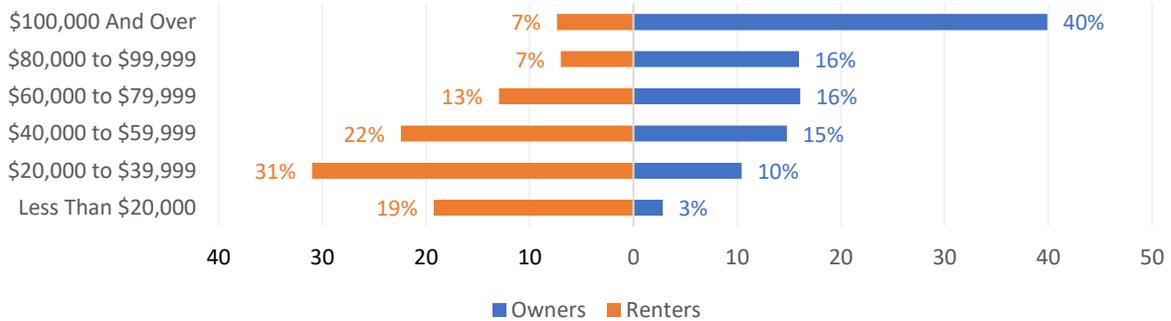


Figure 9. Historical Household Income (Before Taxes), Owners and Renters, CMHC, 2016

Non-census families earn the lowest median incomes among household types (\$45,200) (Figure 10). The second lowest median incomes are lone-parent families, particularly where the parent is a woman¹ (\$56,800). The highest earners are Other Census-Families (\$125,000) which are households that contain one census family with additional persons who are not in a census family, or another one census family. These household types typically have more people within the household, accounting for a larger household income. Couples with Children have the second highest median income (\$122,000), where there are typically two income earners within the household.

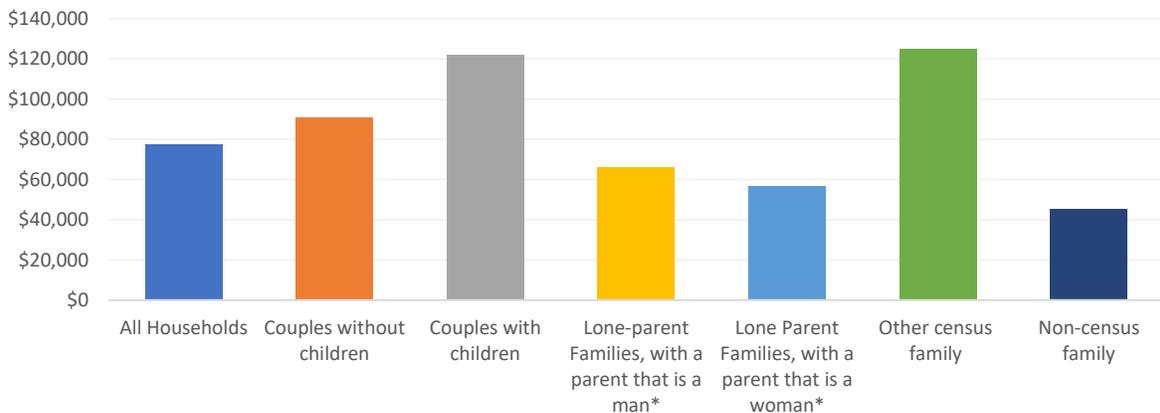


Figure 10. Household Income by Household Type, Statistics Canada, 2021

¹ Prior to the 2021 Census, the Lone-Parent Categories for parents that are a Man or Woman referred to males or females. Starting in 2021, the “man” category includes men (and/or boys), as well as some non-binary persons and the “woman” category includes woman (and/or girls), as well as some non-binary persons.

This data further implies that attention needs to be paid to affordable housing options for single people and lone-parents to ensure that lower-cost rentals or affordable homeownership options are available, as households with lower income are more susceptible to core housing need.

2.7 EMPLOYMENT AND INDUSTRY

In 2021 the unemployment rate in Brandon was 7.3%, down from 7.5% in 2016 (Figure 11). From 2016 to 2021, Brandon’s labour participation rate increased slightly from 67.8% of the population to 69.9%, likely reflecting Brandon’s younger population entering the workforce.

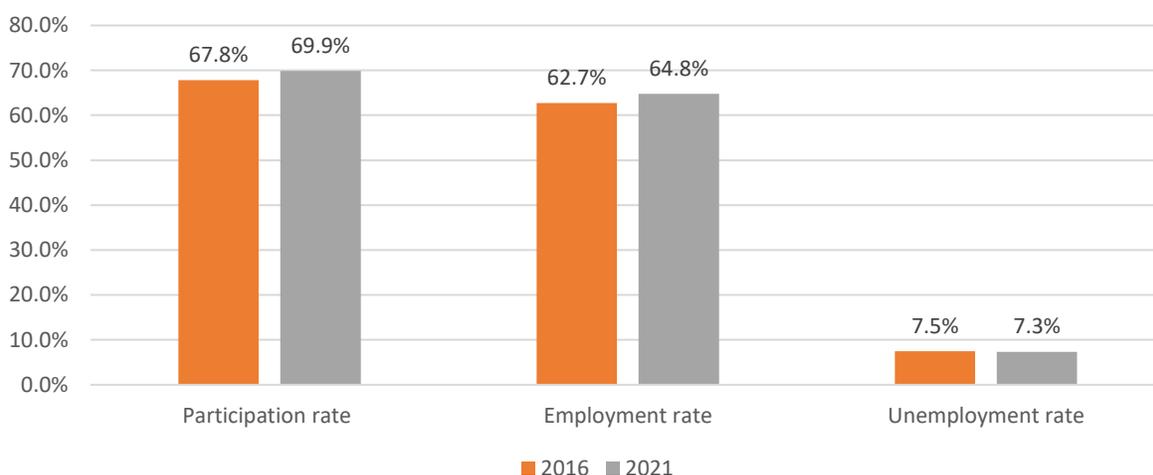


Figure 11. Participation, Employment, and Unemployment Rates, Statistics Canada, 2021

2.8 EDUCATION

In 2021, over 83% of the population has completed a level of education of high school or above (Table 2).

Table 2. Completed Levels of Education, Statistics Canada, 2021

	Total	% of Population
No Certificate, diploma, or degree	6,985	17%
High School certificate or equivalent	13,330	33%
College, CEGEP or other non-university certificate or diploma	7,920	20%
Apprenticeship or trades certificate or diploma	2,805	7%
University certificate, diploma, or degree	9,410	23%

3.0 HOUSING PROFILE

3.1 HOUSEHOLDS

In 2021, the average household size was 2.4 persons. 2011 and 2016 both saw slightly smaller average household sizes of 2.3. Household size peaked in 2006 at 2.6 persons. This could indicate some children reaching an age to move out of their family homes, which would support the age demographics seen in Figure 2.

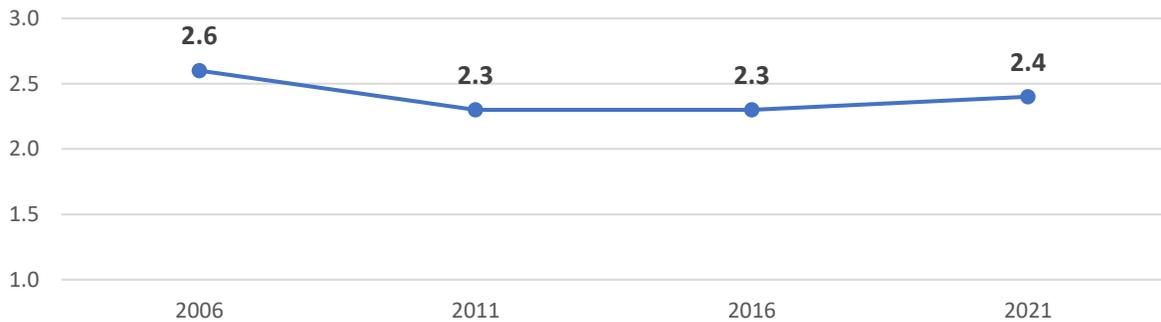


Figure 12. Average Household Sizes, 2006-2021, Statistics Canada

In 2021, the most common household sizes were 2-person (34.1%) and 1-person (31.1%). The most significant growth in household sizes since 2011 were 5+ person households, seeing a 22% increase.

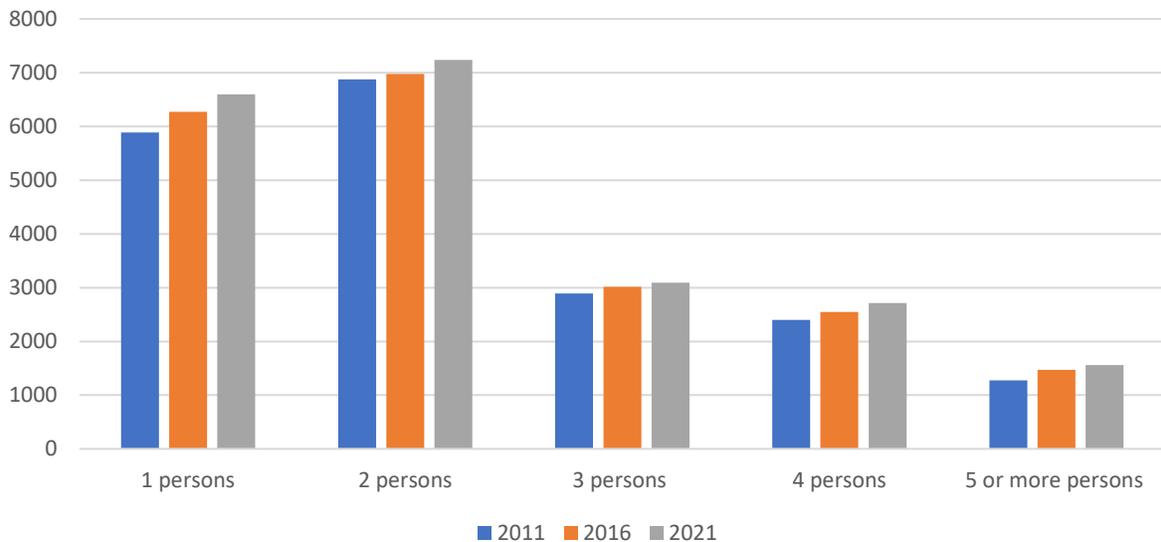


Figure 13. Number of Households by Household Size, Statistics Canada, 2021

Changes in the number of households compared to household composition in a community can indicate whether population change is based on increasing family size or newcomers to the area. There are 21,200 households in Brandon. Since 2011, the number of households in Brandon have increased by almost 1,900, or at a rate of 10%. This typically keeps pace with Brandon’s population growth.

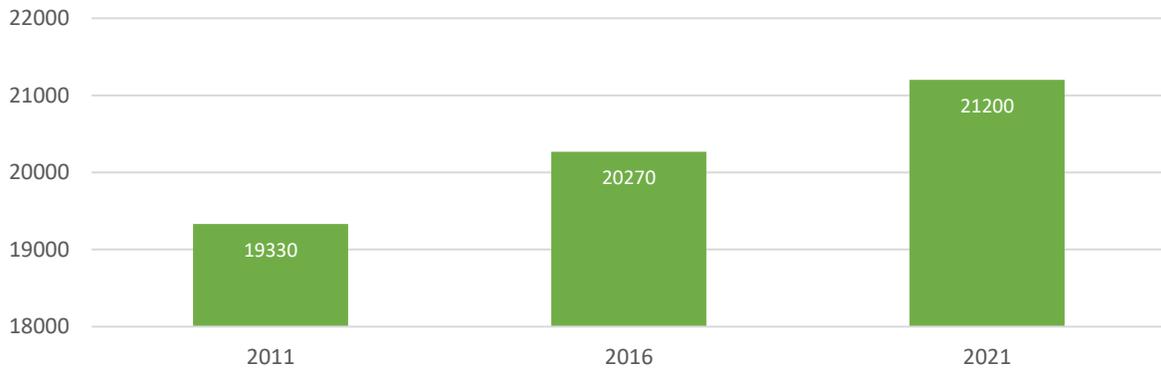


Figure 14. Number of Households, Statistics Canada

3.2 DWELLING UNITS

The majority of dwelling units in Brandon (52%) are single-detached units however, almost one-third of dwellings (31%) are within apartment buildings of various styles which is a higher rate than the Province (24%). Ground-oriented dwellings (single-detached, semi-detached, row, flat/duplex, moveable dwellings) are 72% of all dwelling types.

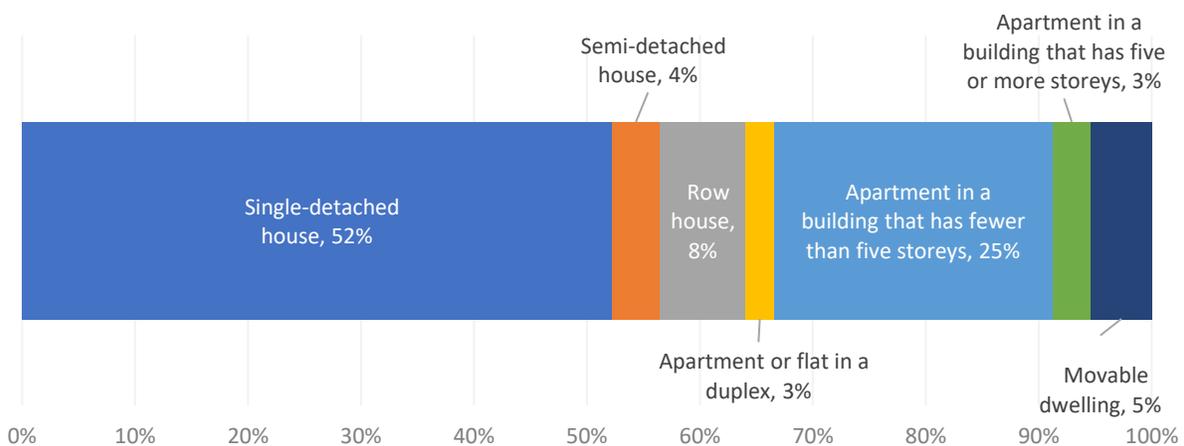


Figure 15. Dwellings by Structure Type, Statistics Canada, 2021

3.3 HOUSING STOCK

Over half of the housing units in Brandon are over 40 years old, with 32% of homes built between 1961 and 1980 and 24% before 1960 (Figure 16). Aging housing stock can require significant investment for maintenance, decreasing affordability due to required renovations. Older rentals can also be at risk of coming off the market for renovation or redevelopment.

Since 2001, housing development has continued to increase at a steady rate, with a slight drop from 2016 to 2021. This can be accounted for by the COVID-19 pandemic, when many construction projects stopped due to health concerns, or were delayed due to challenges with availability of building materials.

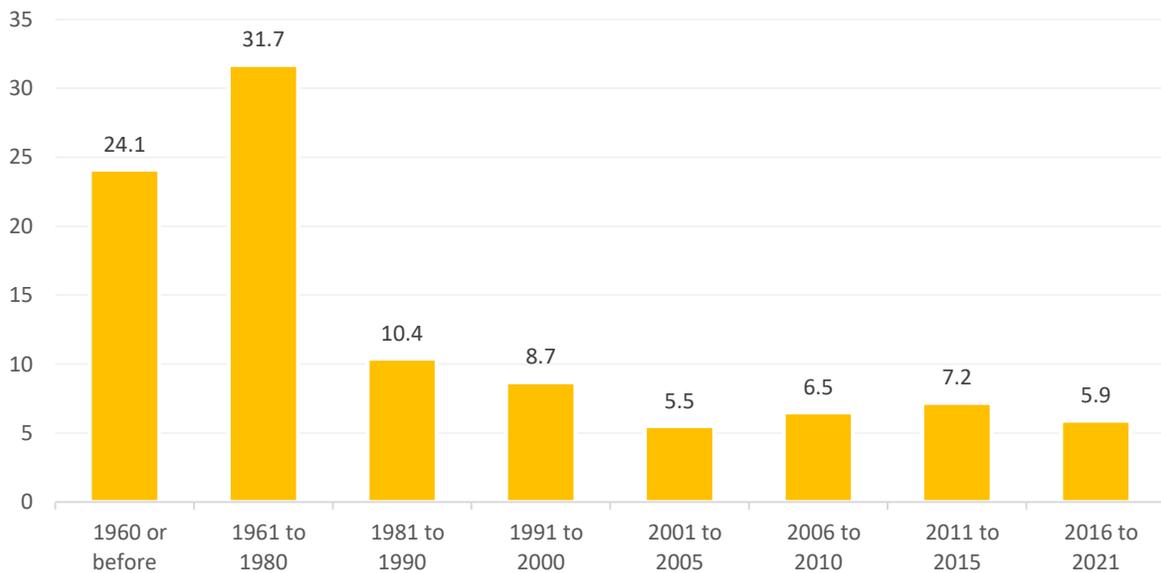


Figure 16. Occupied Private Dwellings by Period of Construction (%), 2021, Statistics Canada, CMHC

3.4 TENURE

Brandon has a similar composition of household tenures to the rest of the Province. On average there is a slightly higher percentage of renters (39.2%) in Brandon and a lower proportion of owners (60.8%) compared to Manitoba (30.2 and 67.4%, respectively).

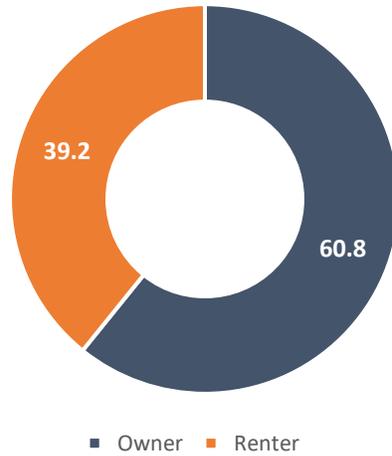


Figure 17. Household Tenure, Statistics Canada, 2021

Couple families with- and without-children typically own their homes, while one-person, lone-parent families, and non-family households typically rent.

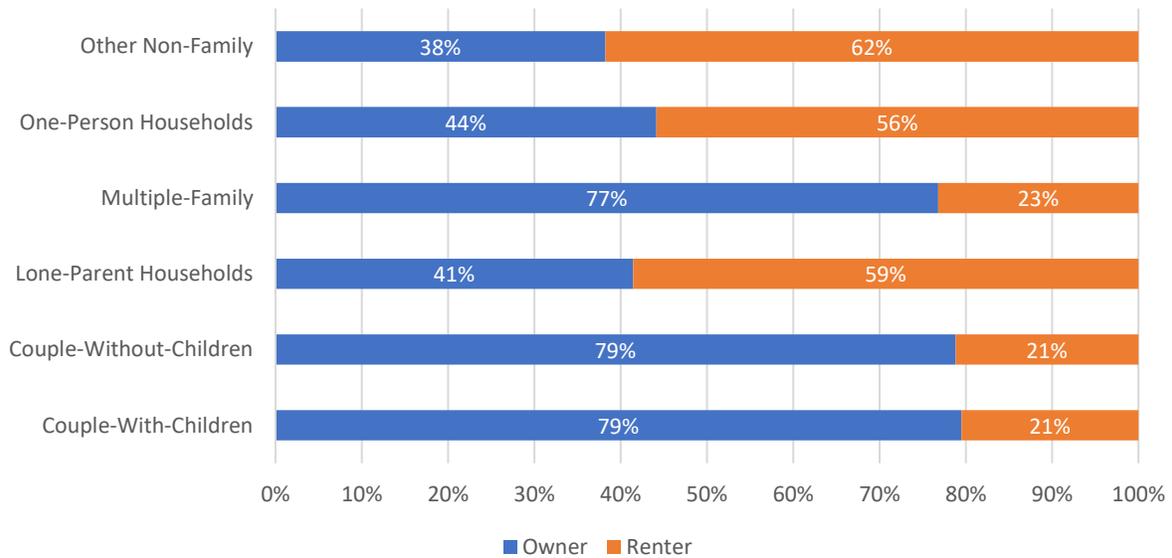


Figure 18. Household Type by Dwelling Tenure, CMHC, 2016

The majority of renters in Brandon are in One-Person and Two-Person households. Brandon has several secondary education establishments hosting students year-round, which may account for the high percentage of residents living alone, particularly in rentals as seen in Figure 19.

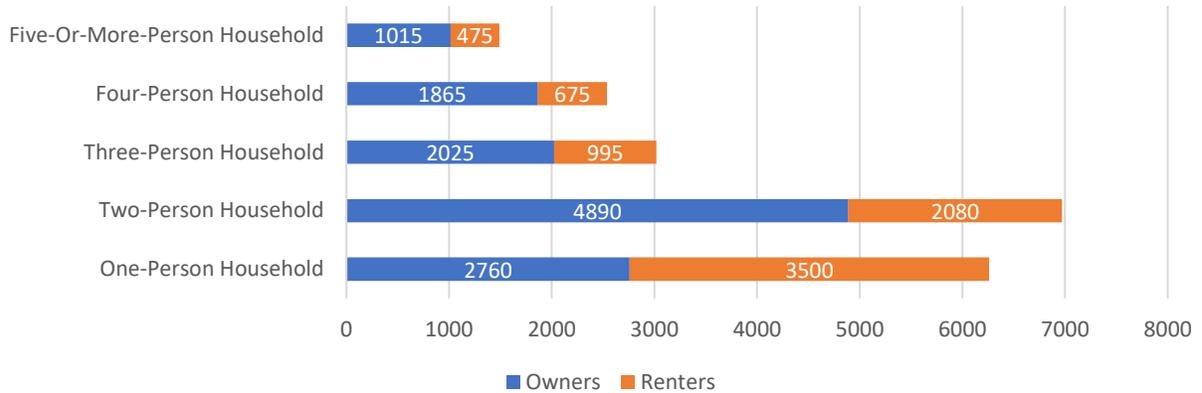


Figure 19. Household Size by Dwelling Tenure 2021, CMHC

3.5 RENTAL HOUSING

Average market rents in Brandon have risen steadily over the last 20 years, with the average rent increasing 97% since 2001, and a year-over-year average of 3%. Larger rental suites of three bedrooms or more have seen more dramatic price increases, peaking to over \$1,200 in 2022 (a 122% increase), where bachelor units averaged at over \$500 in the same year.

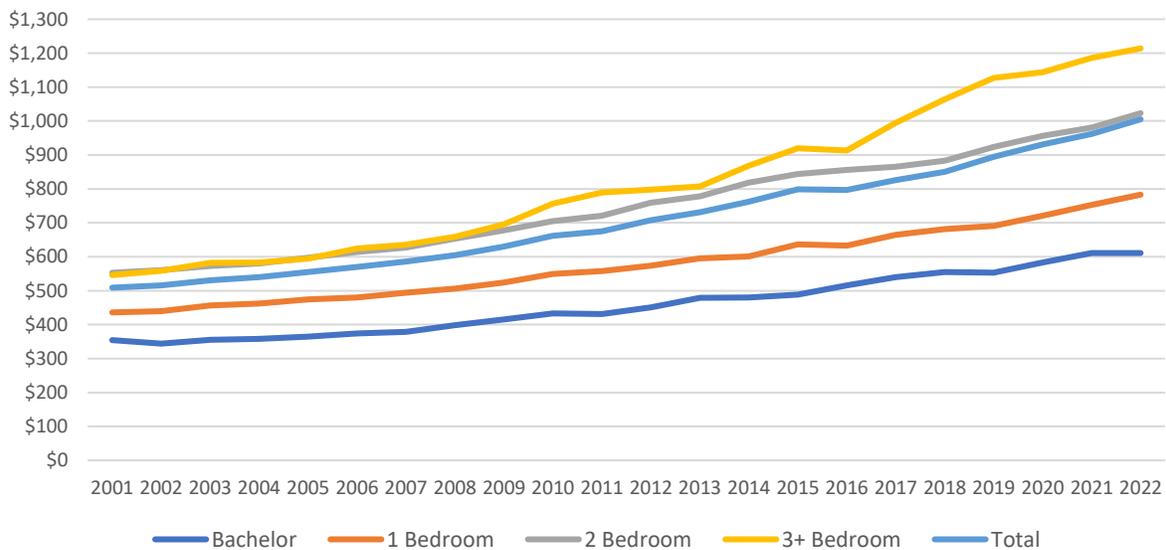


Figure 20. Average Market Rents, CMHC

The affordable rent limit for the Manitoba Housing Affordable Housing Rental Program increased by 5% between 2019 and 2023.

Affordable Housing Rental Program Rents - No Utilities Included, Manitoba Housing

	Studio	1 Bedroom	2 Bedroom	3 Bedroom	4+ Bedroom
2019	\$520	\$641	\$850	\$1,002	\$1,118
2023	\$546	\$673	\$893	\$1,052	\$1,174

Since 2001, Brandon has consistently increased its stock of rental units, primarily with larger-sized suites of two and three or more bedrooms.

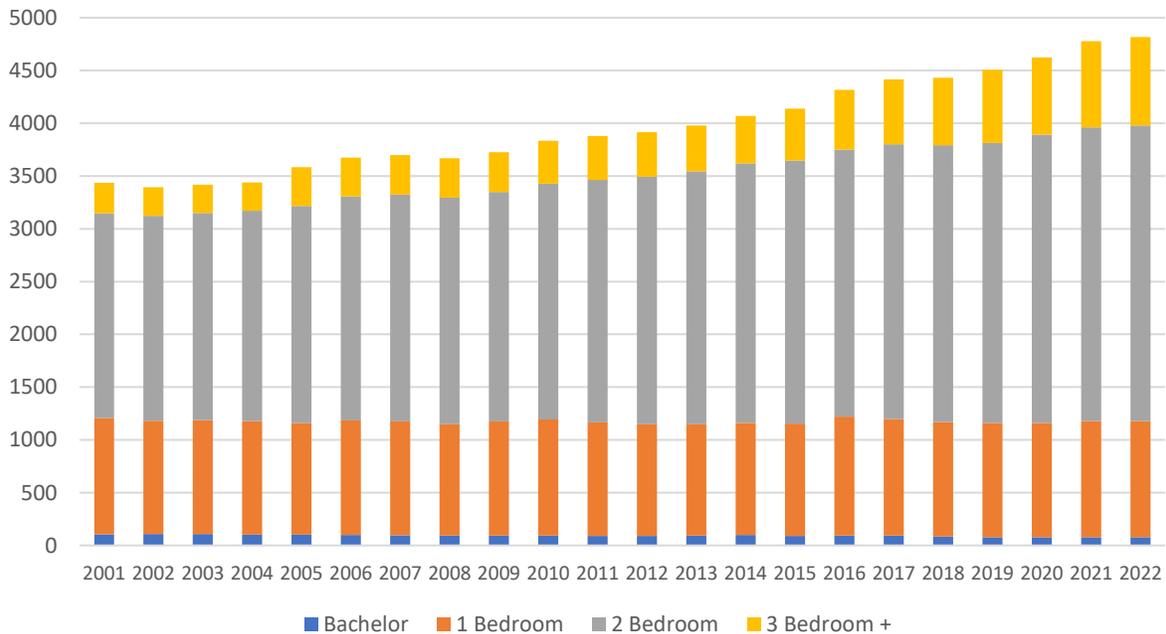


Figure 21. Total Amount of Rental Units in Brandon (Historic Universe), CMHC

As previously noted, in 2016 the majority of renters were one-person households (Figure 18). However, since that time there has been a significant increase in the immigration of families due to worldwide events such as the war in Ukraine, as well as unit upsizing to allow for home-office spaces due to the COVID-19 pandemic.

Since 2020, there has been a significant increase in rental vacancies, though these are now trending down. In 2021, there were vacancy rates of 3.1% for one-bedrooms, 2.7% for two-bedrooms, and 0.8% for three plus-bedrooms. This indicates that the current growth is being absorbed by the secondary rental market. The influx of vacancy rates in 2020 could be

attributed to the COVID-19 pandemic where many residents moved into market housing, or with relatives or friends for support.

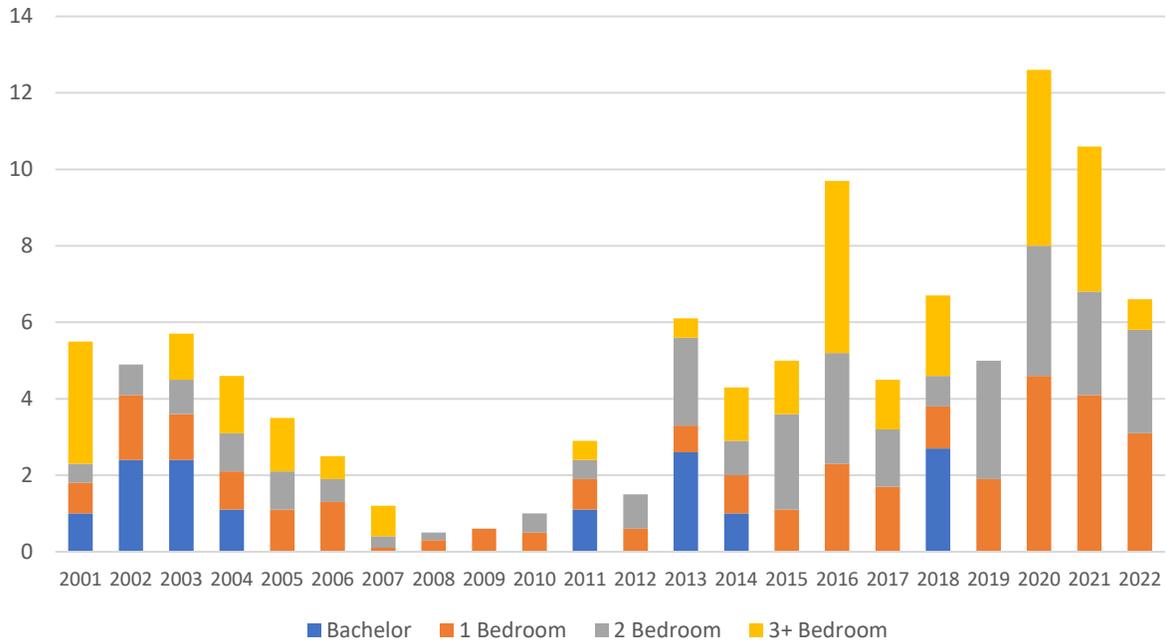


Figure 22. Primary Rental Market Vacancy Rates (%), CMHC

Median rental rates increased from \$808 in 2016 to \$950 in 2021. This value is slightly less than the Provincial median of \$1,040.

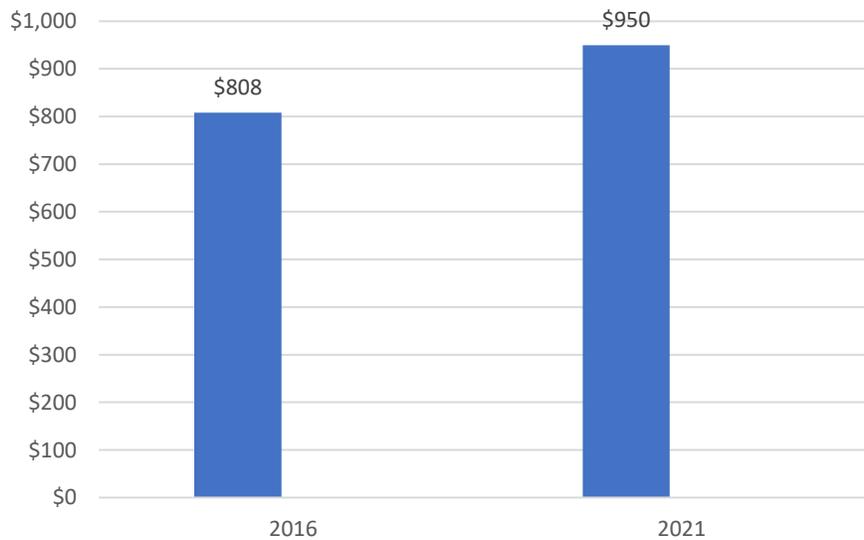


Figure 23. Median Shelter Costs for Rented Dwellings, Statistics Canada, 2021

3.6 OWNED HOUSING

Home values are steadily increasing. Since 2006, average home prices at the point of sale have increased (107%) which is more than the rate of median income levels indicating homeowners are potentially unable to keep up with the increasing price of housing stock (Figure 24). Since 2006, annual residential sales have decreased (-25%), supporting the data that more residents in Brandon are renting, instead of buying homes (Figure 24).

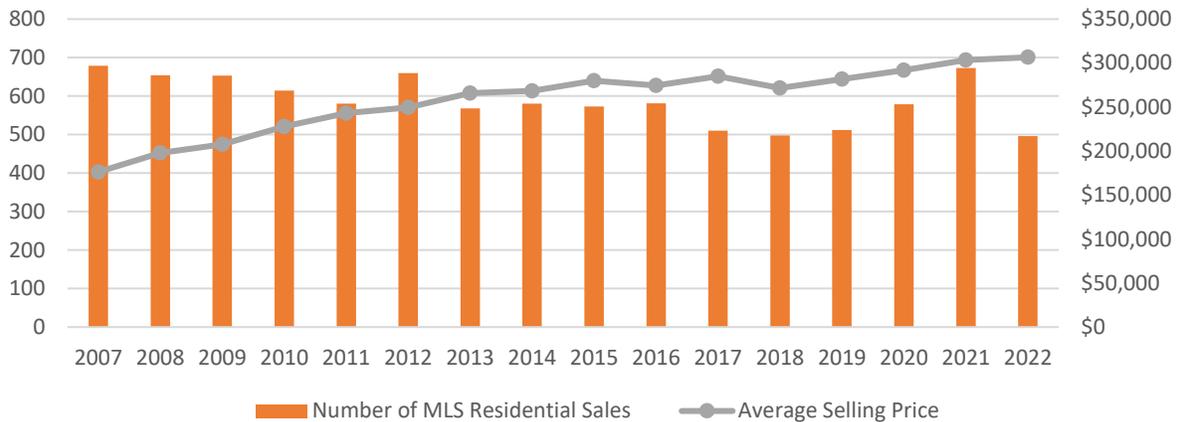


Figure 24. Average Sales Count and Price of Homes, MLS, Economic Development Brandon

The average value of owner-occupied dwellings (Figure 25) has also risen significantly between 2006 and 2016, by an average of 119%. Row housing had the highest increase (119%) during this time period, where Semi-detached saw the lowest increase of 78%. There is no data for high-rise apartments for 2016 however, between 2006 and 2011, average prices increased by 301%. Overall, “other” dwellings are the most affordable, which comprise of single-attached homes and mobile/moveable dwellings. Duplexes and Low-rise apartments are then tied for second-most affordable owner-occupied dwellings.

CITY OF BRANDON - HOUSING NEEDS ASSESSMENT

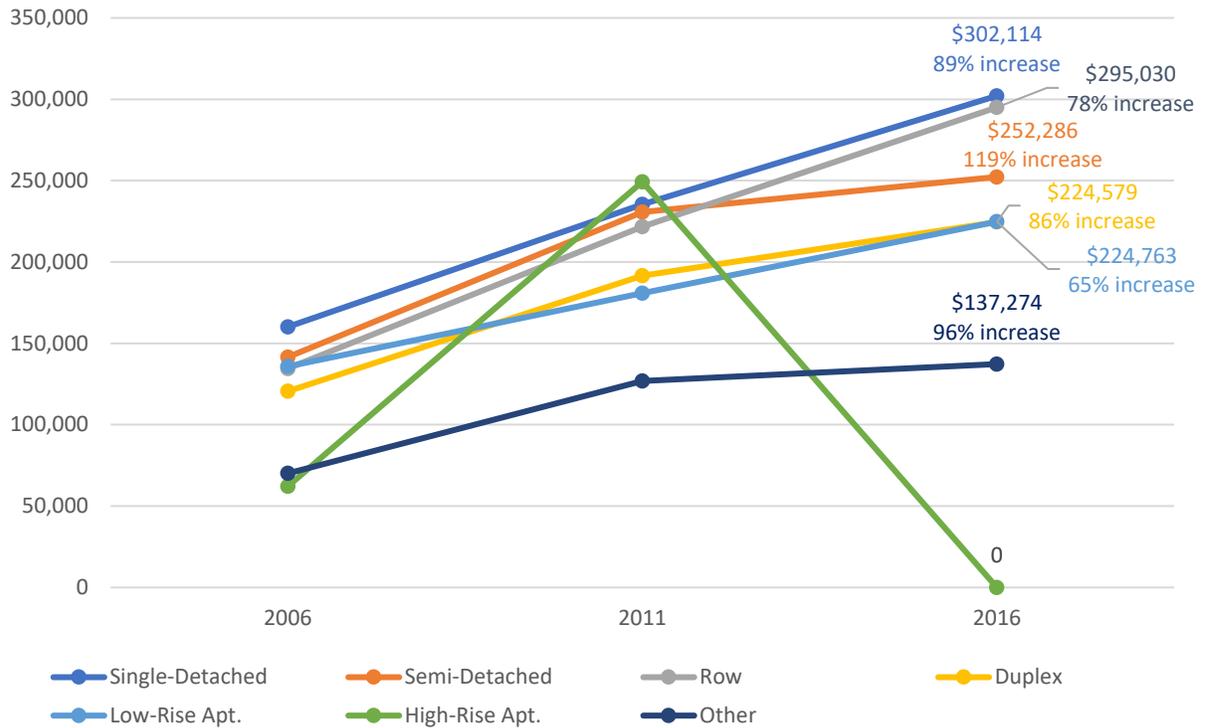


Figure 25. Historical Average Value of Owner-Occupied Dwellings (\$), CMHC, 2006-2016

The median value of dwellings increased nearly \$30,000 between 2016 and 2021, totalling \$290,000. This value fell below the provincial median by \$14,000.

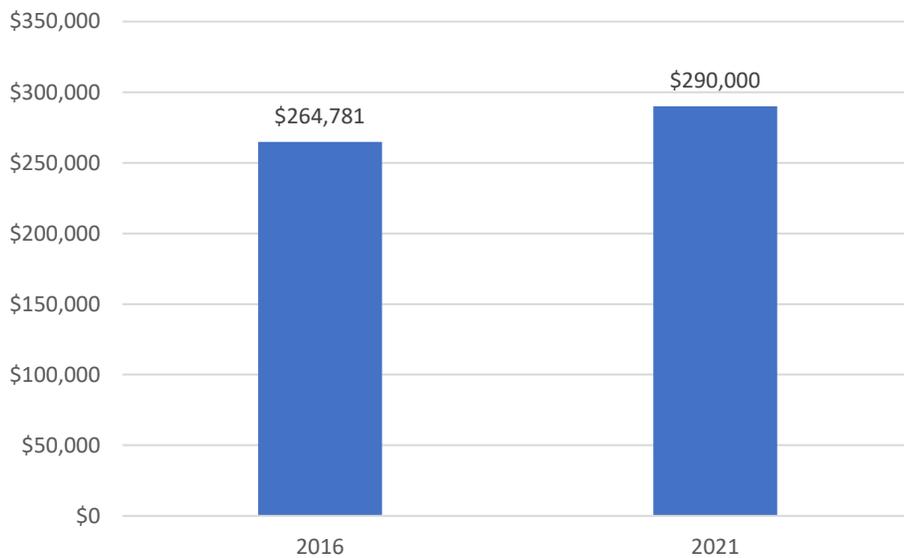


Figure 26. Median Value of Dwellings, Statistics Canada, 2021

3.7 NEW HOME CONSTRUCTION

Since 2001, housing starts have trended towards an increase in apartment builds and a decrease in development of single-family homes. Between 2018 and 2022, the majority of housing starts were Apartment (47%) and Row (28%) dwellings.

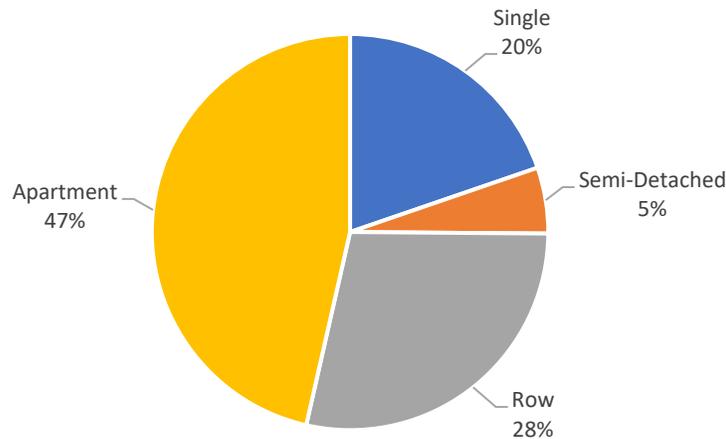


Figure 27. Housing Starts by Dwelling Type, 2018-2022, CMHC

Overall, Apartment starts have increased by an average of 154%, with Single-Detached homes only increasing by an average of 1%. This shows how developers in Brandon have been responding to the increased need for apartments and rentals.

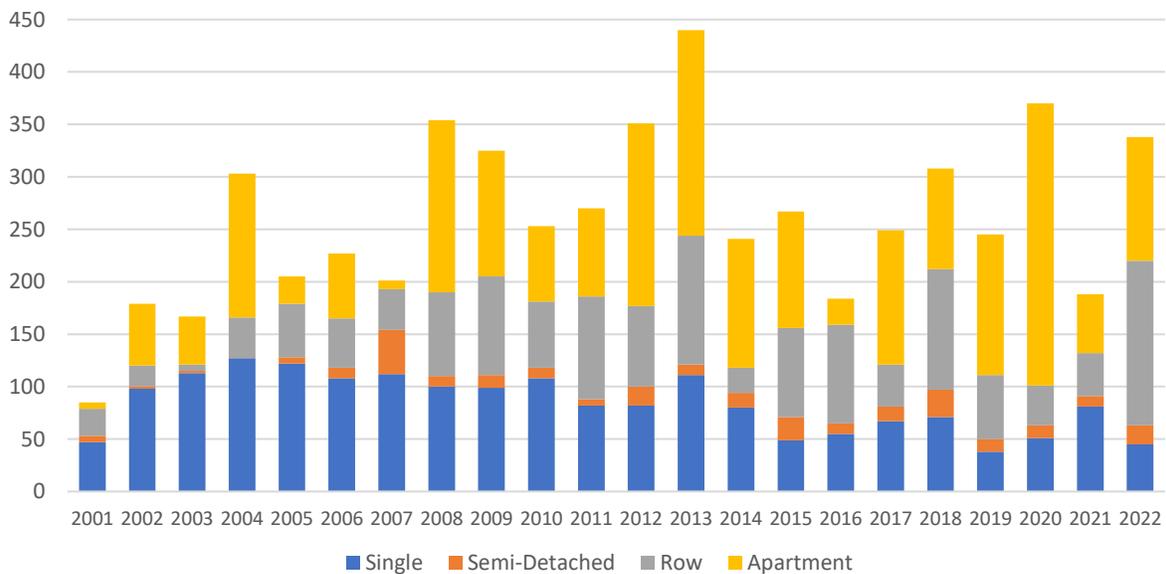


Figure 28. Housing Starts by Dwelling Type, CMHC

Since 2001, there have been 5,750 total housing completions, compared to 5,355 starts (Figure 29).

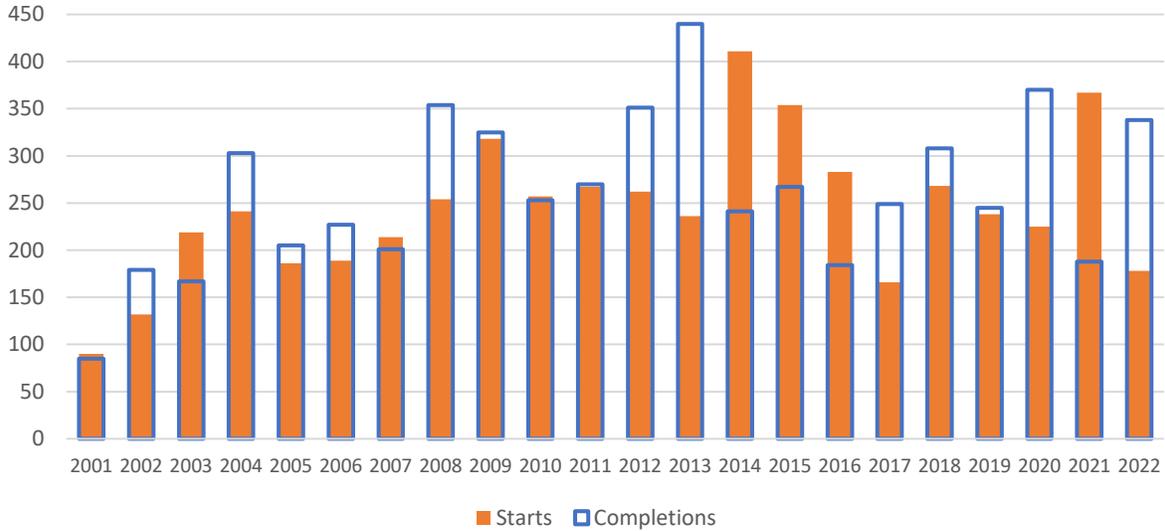


Figure 29. Historical Housing Starts and Completions, All Household Types, CMHC

Since 2013, there has been a decrease in the absorption of new build Single- and Semi-Detached dwellings, which compliments the data in Figure 28. While the supply of newer dwelling units decreased, there has been a 48% increase in the average unit price of these dwellings from 2013 to 2022 (Figure 30).

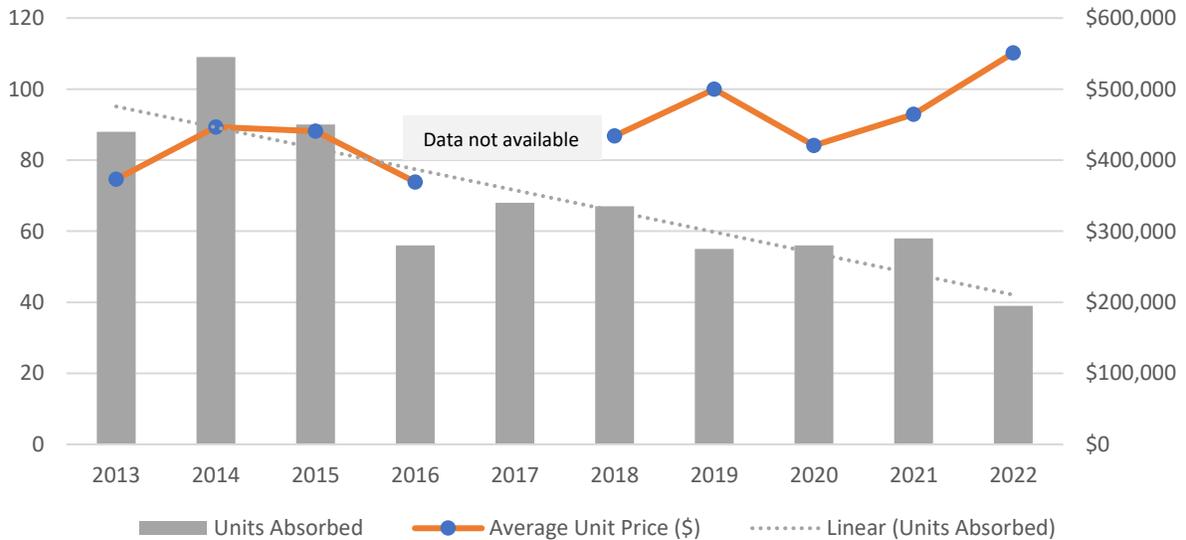


Figure 30. Total Single/Semi-Detached Dwelling Absorptions and Average Prices, CMHC

3.8 COMMUNITY HOUSING

16.6% or 1,387 of all renter households are currently in subsidized housing (Statistics Canada, 2021).

A variety of organizations and agencies currently provide community housing in Brandon. There are approximately 60 emergency shelter beds and 220 units provided by organizations outside of Manitoba Housing and other seniors' living and medical facilities.

Location	Type	Units
Community Health and Housing - 1202 Rosser	Community Housing	26 units
Community Health and Housing - 1220 Rosser	Community Housing	4 units
Community Health and Housing - 1233 Rosser	Community Housing	4 units
Community Health and Housing - 5-Plex	Community Housing	5 units
Community Health and Housing - Massey Manor	Community Housing	39 units
John Howard Society of Brandon	Transitional Housing	24 units*
Joshua Jacks Sober Living	Transitional Housing	6 units
Joshua Jacks Sober Living	Supportive Housing	9 units
Kairos Maternity Home	Transitional Housing	8 units
Manitoba Housing managed by Brandon Friendship Centre	Community Housing	78 units
Project Hope	Supportive Housing	8 units
Samaritan House Ministries - Mary's House	Supportive Housing	4 units
Samaritan House Ministries - Safe & Warm Shelter	Emergency Shelter	35 beds
Youth for Christ U-Turn	Transitional Housing	14 units
Youth for Christ U-Turn	Community Housing	16 units
YWCA - Westman Women's Shelter	Emergency Shelter	24 beds
Manitoba Housing – data not available		

*Announced but not yet constructed

3.9 SENIOR'S HOUSING

There are approximately 1,330 Senior's Independent Living units and 600 personal care homes beds in Brandon.

Location	Type	Units / Beds
Falcon Ridge	Independent Living	48
Fernwood Estates	Independent Living	24
Grand Valley	Independent Living	24
Hobbs Manor	Independent Living	52
Kin Village Inc.	Independent Living	100
Kiwanis Court Westman	Independent Living	47
Lawson Lodge	Independent Living	36
Lions Manor Westman	Independent Living	51
Odd Fellows Corner	Independent Living	188
Parkview	Independent Living	50
Princess Park	Independent Living	27
Princess Towers	Independent Living	68
Riverheights Terrace	Independent Living	100
Rotary Villas	Independent Living	119
Sokol Manor Apartment	Independent Living	108
Victoria Landing	Independent Living	32
Winnipeg House	Independent Living	10
Western MB Seniors Non-Profit Housing Cooperative	Independent Living	136
The Salvation Army Dinsdale Home	Personal Care Home	60
Fairview Home	Personal Care Home	248
Hillcrest Place	Personal Care Home	100
Rideau Park	Personal Care Home	100
Valleyview Care Centre	Personal Care Home	89

3.10 HOMELESSNESS

In 2021, 68 people responded to the PIT count. When asked where they would be staying that night or where they stayed the night before, the most common answer was “staying in a homeless shelter” followed by “remaining unsheltered in a public space such as a park or bus shelter”. 16% of respondents stated they were unsure where they would be staying.

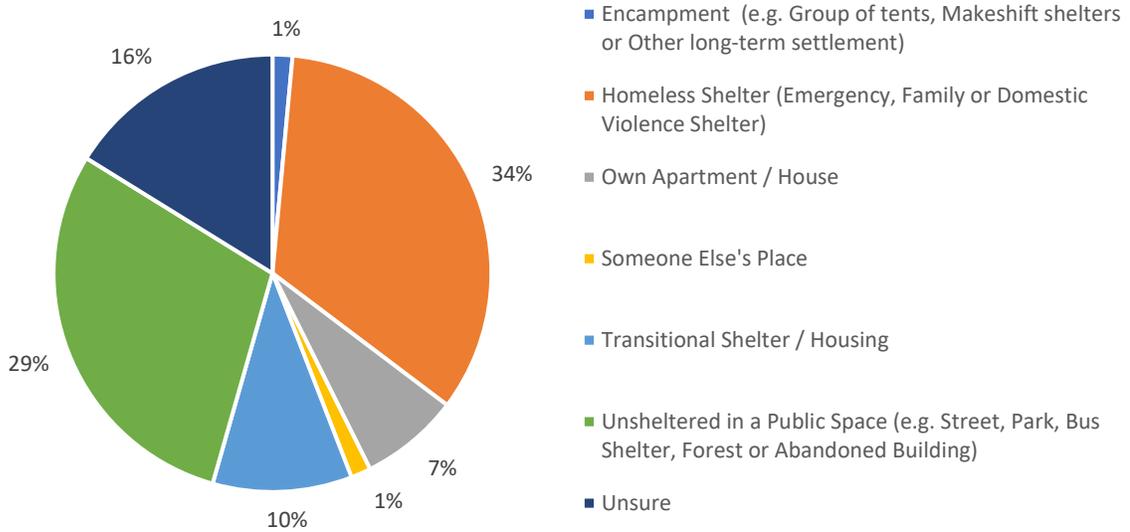


Figure 31. Where are you staying tonight? / Where did you stay last night? PiT Count, 2022

The Safe and Warm Shelter is a 35-bed emergency shelter designated for adults who experience occasional homelessness. Safe and warm usage more than doubled in 2020, from 168 users in 2019 to 354 people. This number continued to rise in 2021 and 2022, reaching 475 people. COVID-19 could be a factor contributing to the rise in homelessness because many people were laid off and social conditions worsened. The Safe and Warm shelter also received extra funding and support which may have allowed them to provide shelter to more people.

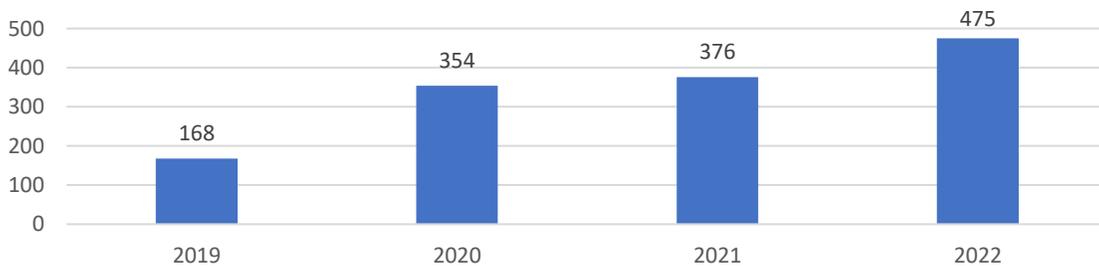


Figure 32. Safe and Warm Usage, Our Brandon, 2022

The Homeless Individuals and Families' Information System (HIFIS) is a web-enabled Homelessness Management Information System (HMIS) that can provide communities with the information they need to further their efforts with addressing homelessness. This data includes people who are: in absolute homelessness, couch surfing, precariously housed, sleeping rough, staying in shelter, receiving housing loss prevention supports, Housing First clients, or in transitional or supportive housing. Similar to the increase in Safe and Warm Shelter usage, the number of clients receiving services on HIFIS increased by over 500 people between 2019 and 2022.

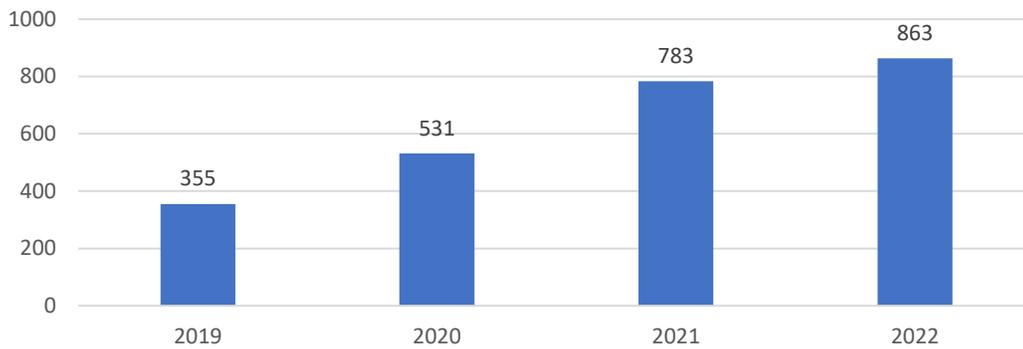


Figure 33. Clients Receiving Services on HIFIS, Our Brandon, 2022

*This data includes people staying overnight and/or staying for shorter visits to Safe and Warm Shelter

HIFIS had a consistent number of new clients for two years in 2019 and 2020 before seeing an uptake in new clientele in 2021. In 2022, the number of new clientele was comparable to 2019 and 2020.

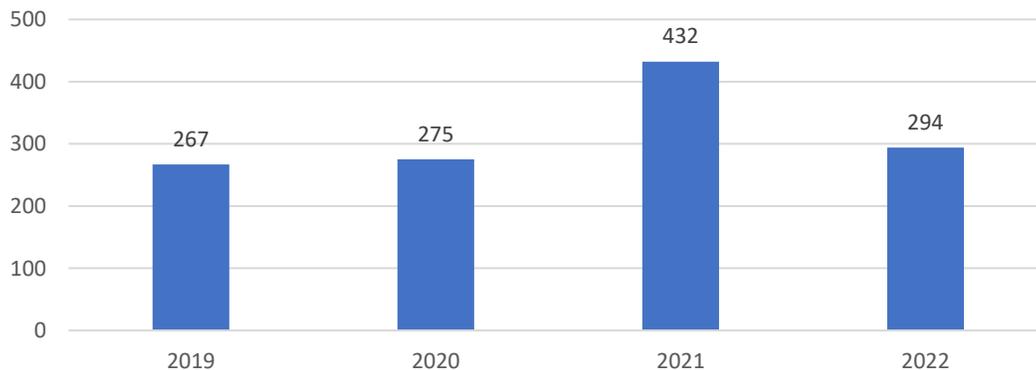


Figure 34. New Clients Entered into HIFIS, Our Brandon, 2022

4.0 CORE HOUSING NEED

4.1 HOUSING AFFORDABILITY

To afford the household costs associated with a home bought at the average selling price in Brandon in 2022 (\$306,535), a household must earn at least \$89,600 (paying calculated monthly housing costs of \$2,240² and to pay 30% of their income on housing costs. However 44% of owners make under \$80,000 per year (Figure 9).

Table 3. Affordable Housing Costs for Census Family Types compared to Average Rental Prices, Statistics Canada and CMHC, 2021

	Median Household Income	Affordable Monthly Shelter Costs ³	Monthly Rental Affordability Gap			
			Bachelor \$611	1 Bed \$753	2 Bed \$981	3+ Bed \$1,186
All Households	\$77,500	\$1,938	\$1,327	\$1,185	\$957	\$752
Couples without children	\$91,000	\$2,275	\$1,664	\$1,522	\$1,294	\$1,089
Couples with children	\$122,000	\$3,050	\$2,439	\$2,297	\$2,069	\$1,864
Lone-parent Families, with a parent that is a man ⁴	\$66,000	\$1,650	\$1,039	\$897	\$669	\$464
Lone Parent Families, with a parent that is a woman ⁴	\$56,800	\$1,420	\$809	\$667	\$439	\$234
Other census family	\$125,000	\$3,125	\$2,514	\$2,372	\$2,144	\$1,939
Non-census family	\$45,200	\$1,130	\$519	\$377	\$149	-\$56

When comparing median household incomes to rentals, on-average, most household types can afford to rent in Brandon, however, non-census families and lone-parent families would have to spend closer to 30% of their income just on rent (not including any additional shelter

² Monthly shelter costs were calculated including using a mortgage calculator with a 10% down payment at 5.5% for 25 years including property taxes, utilities, and insurance.

³ Calculated as 30% of monthly median income.

⁴ Prior to the 2021 Census, the Lone-Parent Categories for parents that are a Man or Woman referred to males or females. Starting in 2021, the “man” category includes men (and/or boys), as well as some non-binary persons and the “woman” category includes woman (and/or girls), as well as some non-binary persons.

costs such as utilities, parking, etc.) and a non-census family would have to earn \$56 more per month to afford a 3+ bedroom unit.

4.2 CORE HOUSING NEED

Core housing need shows households who experience one or more indicators (affordability, adequacy (repair), and suitability (crowding) and would have to spend 30% or more of pre-tax income on housing costs if moving to an appropriate dwelling.

As per the 2021 Census, approximately 1,450 households in core housing need. 14.2% or 1,187 of total renter households live in core housing need. 2% or 276 of total owner households live in core housing need.

Table 4. Historical Housing Type (Households in Core Housing Need), CMHC, 2006-2016, Statistics Canada 2021

		2006	2011	2016	2021
Owners	Couples with children	65	50	50	n/a
	Couples without children	65	15	10	n/a
	Lone-parent households	65	55	55	n/a
	Multiple family	0	0	10	n/a
	One-person households	165	110	130	n/a
	Other non-family	10	25	10	n/a
	Total	375	250	250	276
Renters	Couples with children	50	35	130	n/a
	Couples without children	85	35	75	n/a
	Lone-parent households	325	405	405	n/a
	Multiple family	15	0	10	n/a
	One-person households	655	520	695	n/a
	Other non-family	70	55	150	n/a
	Total	1,195	1,070	1,400	1,187
Total	Couples with children	120	90	180	n/a
	Couples without children	150	50	85	n/a
	Lone-parent households	395	465	460	n/a
	Multiple family	15	0	20	n/a
	One-person households	820	630	820	n/a
	Other non-family	750	85	85	n/a
	Total	1,575	1,325	1,650	1,463

As of 2021, unaffordability (14.7%) is the most common issue with housing standards in Brandon (Figure 35). To afford the average rent in Brandon in 2022, a household must earn at least \$40,200 (paying rent at 30% of household income) however 50% of renters make under \$40,000 per year (Figure 9). Since 2015, housing prices have increased at a slightly lower rate than incomes. However, since 2005, housing prices have increased at a higher rate than median incomes.

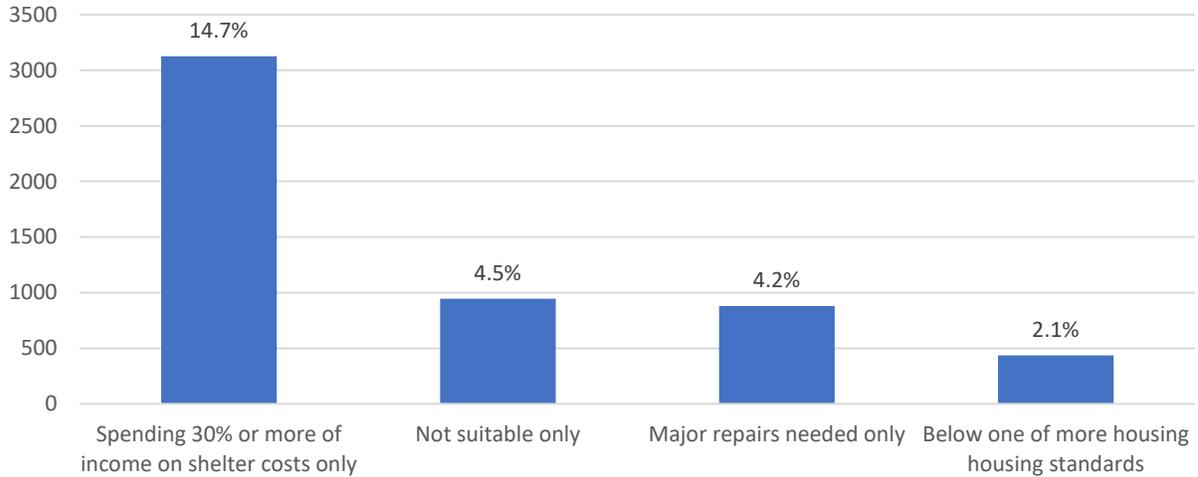


Figure 35. Dwellings Below Housing Standards, Statistics Canada, 2021

Table 5. Historical Housing Standards (Households in Core Housing Need), CMHC, 2006-2016

		2006	2011	2016
Owners	Below Affordability Standard	335	240	220
	Below Adequacy Standard	80	55	55
	Below Suitability Standard	40	0	20
	Below One or More Housing Standards	375	255	255
Renters	Below Affordability Standard	1,130	970	1,280
	Below Adequacy Standard	90	135	165
	Below Suitability Standard	145	160	180
	Below One or More Housing Standards	1,200	1,070	1,395
Total	Below Affordability Standard	1,475	1,205	1,500
	Below Adequacy Standard	170	190	220
	Below Suitability Standard	180	165	205
	Below One or More Housing Standards	1,570	1,325	1,650

5.0 COMMUNITY GROWTH AND HOUSING NEEDS

5.1 POPULATION PROJECTIONS

Housing demand projection for the next 20 years were developed for two potential growth scenarios in Brandon’s 2022 *Market Analysis and Development Forecast Update*:

- **Base case:** Base population trajectory assuming the economy mirrors the historical growth rate.
- **High growth scenario:** Higher in-migration and population growth due to improvement in output and investment to the economy.

Figure 36 summarizes the projected population growth trajectory of Brandon under the two scenarios. Based on the population projection, Brandon’s population is projected to increase by a range of 9,136 to 9,878 individuals in the next 20 years, reaching a population of 60,446 to 61,188 in 2041. This represents a growth of 17.8% to 19.3% over the next 20 years.

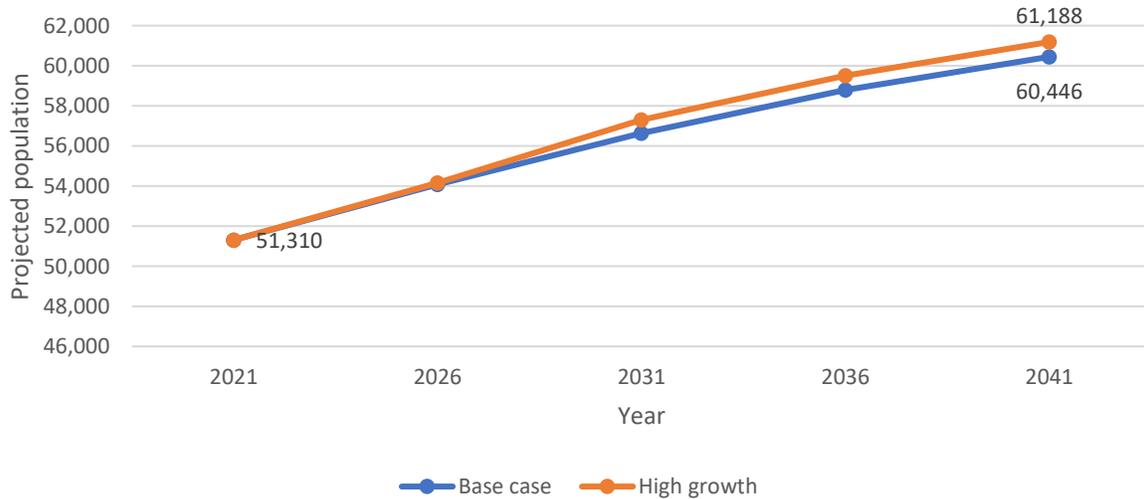


Figure 36. Population Projections, Adapted from Brandon’s Market Analysis and Development Forecast, 2022

The median age of the population City of Brandon is projected to increase by 5 over the next 20 years under both of the growth scenarios.

	2021	2031	2041	Change (2021-2041)
Base case	36.8	38.2	41.8	+5.0
High growth	36.8	38.2	41.8	+5.0

5.2 HOUSEHOLD PROJECTIONS

Two population forecast scenarios were used to determine future housing unit demand by structure type over the next 20 years. The housing demand projections are derived using estimated household maintainer rates or ‘headship⁵’ rates by age group.

From 2021 to 2041, the number of households in Brandon is projected to increase by a range of 5,150 to 5,437. Based on the tenure trend observed in the past 15 years across age groups, Brandon could see an increase of 2,964 to 3,140 owner households, and 2,186 to 2,297 renter households between 2021 and 2041.

Over the next five years, the average household size is projected to remain similar. In 2021, it was 2.42 persons per household. By 2041, it is projected to be between 2.30 to 2.32 persons per household.

	2021	2031		2041		Housing demand 2021-2041	
		Base case	High growth	Base case	High growth	Base case	High growth
Owner	12,898	14,063	14,223	15,862	16,038	2,964	3,140
Renter	8,304	9,891	9,996	10,490	10,601	2,186	2,297
Total	21,202	23,954	24,219	26,352	26,639	5,150	5,437
Average household size	2.42	2.36	2.39	2.30	2.32		

⁵ Headship rates refer to the proportion of individuals in each age group who lead (or “head”) a household. Tracking headship rates is helpful for forecasting future housing demand, as it gives an indication of how housing demand will change due to both population growth and changing age profile. By applying headship rates to population projections, demand for units can be forecasted year-over-year, broken out by tenure and dwelling types. Total headship rate is first determined by age group, which is assumed to be constant at 2021 across the projection period of the next 20 years. Then, the proportion of rental tenure by age group is projected over the next 10 years (to 2031) based on the historical trend of rental tenure proportion in the past 15 years from 2006 to 2021 to determine the proportion of renters in the next 10 years. The rental proportion is assumed to remain steady after 2031. The owner headship rate and renter headship rate by age groups is derived based on the projected rental tenure proportion. The distribution of households by dwelling type is determined based on the historical trend of headship rates by dwelling type from 2006 to 2021 across age groups (i.e. the proportion of the population of the age group maintaining, or “heading”, a household in a particular dwelling type), and standardized to the headship rates by age groups and tenure.

The following table shows the household projections by dwelling type. Of the average 5,295 projected new dwellings between 2021 to 2041. Over the next 10 years, an average of 745 single-detached, 140 duplex and semi-detached, 765 rowhouse, 1,180 apartment, and 50 movable homes are projected. Over the next 20 years, an average of 2,000 single-detached, 295 duplex and semi-detached, 1,020 rowhouse, 1,725 apartment, and 245 movable homes are projected. Single-detached units are projected to account for only 26% of all new units over the next 10 years.

	2021	2031		2041		Household growth (2021-2031)		Household growth (2021-2041)	
		Base case	High growth	Base case	High growth	Base case	High growth	Base case	High growth
Single-detached	11,093	11,771	11,903	13,026	13,167	678	810	1,933	2,074
Duplex and semi-detached	1,371	1,504	1,520	1,657	1,674	133	149	286	303
Rowhouse	1,613	2,366	2,391	2,619	2,647	753	778	1,006	1,034
Apartment	5,941	7,083	7,161	7,623	7,709	1,142	1,220	1,682	1,768
Other single-attached	10	12	12	15	15	2	2	5	5
Movable homes	1,174	1,218	1,232	1,412	1,427	44	58	238	253
Total	21,202	23,954	24,219	26,352	26,639	2,752	3,017	5,150	5,437

5.3 SUMMARY OF HOUSING NEED



Emergency Shelter

Facilities providing temporary, short-term accommodation for homeless individuals and families. This may or may not include other services such as food, clothing or counselling. Emergency housing is short-term accommodation for people who are homeless or in crisis.

Available	Need
<ul style="list-style-type: none"> • ~ 35 shelter beds • ~ 24 women’s shelter beds 	<ul style="list-style-type: none"> • 70+ people experiencing homelessness (2021 PIT count), but likely higher

Transitional Housing

Housing that is intended to offer a supportive living environment for residents, including offering them the experience, tools, knowledge, and opportunities for social and skill development to become more independent. It is considered an intermediate step between emergency shelter and supportive housing and has limits on how long an individual or family can stay. Stays are typically between three months and three years.

Available	Need
<ul style="list-style-type: none"> • ~ 28 units 	<ul style="list-style-type: none"> • Units to stabilize people currently living in emergency living situations • 863 Clients receiving various services on HIFIS

Supportive Housing

Housing that provides a physical environment that is specifically designed to be safe, secure, enabling and home-like, with support services such as social services, provision of meals, housekeeping, and social and recreational activities, in order to maximize residents' independence, privacy and dignity.

Available	Need
<ul style="list-style-type: none"> • ~ 20 supportive housing units • 1,930 seniors units / beds 	<ul style="list-style-type: none"> • Additional seniors (age 65+) will need downsized homes or supported and independent living • Supported housing for people experiencing mental health, addiction, or difficult life circumstances is needed to ensure there are long-term supports in place for people who currently reside in transitional units and may not be able to move to independent housing • If it is assumed that half (although this is likely an underestimate) of people currently living in emergency shelter/homeless housing and transitional housing will need long-term supportive housing, an additional 35+ units are needed

Community Housing

Umbrella term that typically refers to either housing that is owned and operated by non-profit housing societies and housing co-operatives, or housing owned by provincial, territorial or municipal governments.

Available	Need
<ul style="list-style-type: none"> • ~ 170 community housing units 	<ul style="list-style-type: none"> • 276 owner households in core housing need in 2021. • 1,187 renter households in core housing need in 2021. • Homeowners who are individuals or lone-parent households require lower cost ownership options.

Affordable Housing

A very broad term that can include housing provided by the private, public and non-profit sectors. It also includes all forms of housing tenure: rental, ownership and co-operative ownership, as well as temporary and permanent housing. In Canada, housing is considered “affordable” if it costs less than 30% of a household’s before-tax income.

Available	Need
<ul style="list-style-type: none"> • 16.6% of renter households are currently in subsidized housing (Statistics Canada, 2021) • Town houses, apartments, and mobile dwellings are most affordable for ownership for lone-parent families and non-census families 	<ul style="list-style-type: none"> • 276 owner households in core housing need in 2021. • 1,187 renter households in core housing need in 2021. • Based on growth projections, an additional 300+ renters and 60+ owners will be in core housing need by 2041 • Homeowners who are individuals or lone-parent households require lower cost ownership options.

Market Owned Housing

Fee simple homeownership, condominium ownership, multi-unit and single-detached homes, and shared equity (such as mobile homes or housing co-operatives).

Available	Need
<ul style="list-style-type: none"> • Most prevalent housing tenure type, 61% of the population owns their home. • 52% of the housing stock is single-detached houses 	<ul style="list-style-type: none"> • Projected to be 15,862 - 16,038 owner households by 2041, an addition of 2,964 – 3,140 owner households. • New housing stock is anticipated to be approximately 60% multi-unit over the next 20 years.

Market Rental Housing

Purpose-built, long-term rental apartments, private rental townhomes, secondary suites, carriage homes and single-family rental homes.

Available	Need
<ul style="list-style-type: none">• 39% of the population rent their home• 31 % of the housing stock is rental	<ul style="list-style-type: none">• Projected to be between 10,490 – 10,601 renter households by 2041, an addition of 2,186 – 2,997 renter households.• New housing stock is anticipated to be approximately 60% multi-unit over the next 20 years.

6.0 DATA SOURCE, METHODS, LIMITATIONS

6.1 DATA SOURCES AND METHODOLOGY

The primary data used for this assessment is from the 2021 Statistics Canada Census. While the trends and analysis drawn from this data provide important insights, they do not necessarily accurately represent the most up to date housing context. Therefore, more recent quantitative and qualitative data is used wherever available to supplement data from the Census. A list of additional data sources used in this report can be found below.

- Statistics Canada 1996 – 2021
- Canada Housing and Mortgage Corporation
- Province of Manitoba
- City of Brandon Growth Strategy
- 2022 PIT Count
- Our Brandon: Tracking Progress Site
- Economic Development Brandon

6.2 HOUSEHOLD PROJECTIONS

It is important to note that population projection is driven by the historical trajectory of population and assumptions made about the future demographics in the region. These trends could drastically change under changes in various socio-economic factors. As a result, projections are best understood as one possible scenario based on historical growth and responses to that growth – what might happen, especially if similar actions to those in the past are taken in the future with respect to growth and development

6.3 LIMITATIONS

There are limitations to this data, such as the time difference between when it is collected and when it is used, and its focus on high-level information void of the stories of people who provided this data. Collecting and analyzing available data also requires sensitivity to the current economic and health climate, and the potential impacts on the relevance of the data.

7.0 DEFINITIONS

DWELLING STRUCTURE TYPES

Single-Detached: A single dwelling not attached to any other dwelling or structure (except its own garage or shed). A single-detached house has open space on all sides and has no dwellings either above it or below it. A mobile home fixed permanently to a foundation is also classified as a single-detached house.

Semi-Detached: One of two dwellings attached side by side (or back to back) to each other, but not attached to any other dwelling or structure (except its own garage or shed). A semi-detached dwelling has no dwellings either above it or below it, and the two units together have open space on all sides.

Row/Town House: One of three or more dwellings joined side by side (or occasionally side to back), such as a townhouse or garden home, but not having any other dwellings either above or below.

Apartment in a building that has fewer than five stories: A dwelling unit attached to other dwelling units, commercial units, or other non-residential space in a building that has fewer than five storeys.

Apartment in a building that has five or more stories: A dwelling unit in a high-rise apartment building which has five or more storeys.

Apartment or flat in a duplex: One of two dwellings, located one above the other, may or may not be attached to other dwellings or buildings.

Movable Dwelling: Includes mobile homes and other movable dwellings such as houseboats and railroad cars.

CORE HOUSING NEED

A household is in **core housing need** if its housing does not meet one or more standards for housing adequacy (repair), suitability (crowding), or affordability and if it would have to spend 30 per cent or more of its before-tax income to pay the median rent (including utilities) of appropriately sized alternative local market housing. Adequate housing does not require any major repairs, according to residents. Suitable housing has enough bedrooms for the size and make-up of resident households. Affordable housing costs less than 30 per cent of before-tax household income.

Affordable Housing: Affordable housing costs less than 30 per cent of before-tax household income. Includes households below more than one standard (in addition to the affordability standard). Accordingly, the sum of the number of households below each standard will be larger than the total number of households below standards.

Adequate Housing: Adequate housing does not require any major repairs, according to residents. Includes households below more than one standard (in addition to the adequacy standard). Accordingly, the sum of the number of households below each standard will be larger than the total number of households below standards.

Suitable Housing: Suitable housing has enough bedrooms for the size and make-up of resident households. Includes households below more than one standard (in addition to the suitability standard). Accordingly, the sum of the number of households below each standard will be larger than the total number of households below standards.

CENSUS FAMILY TYPES

Census Family: Census family is defined as a married couple and the children, if any, of either and/or both spouses; a couple living common law and the children, if any, of either and/or both partners; or a parent of any marital status in a one-parent family with at least one child living in the same dwelling and that child or those children. All members of a particular census family live in the same dwelling. Children may be biological or adopted children regardless of their age or marital status as long as they live in the dwelling and do not have their own married spouse, common-law partner or child living in the dwelling. Grandchildren living with their grandparent(s) but with no parents present also constitute a census family.

Couple Family: Couple family refers to a family that contains a married or common-law couple.

Couple Family with Children: Couple family with children refers to a census family that contains a married couple or a couple living common law and at least one child. The term 'two-parent family' can also be used when referring to a couple family with children.

Lone Parent Family: A census family that consists of only one parent living with their children.

Other Census Family Household: Households that contain one census family with additional persons who are not in a census family, or another one census family. Multigenerational households are not considered Other Census Families.

Non-Census Family Household: Non-census-family households are either one person living alone or a group of two or more persons who live together but do not constitute a census family.

HOUSING MARKET

Absorption: When a new dwelling is being built, it is defined as **absorbed** once an agreement is made to buy the dwelling.

Housing Start: When construction has begun on a new housing unit or building.

EMPLOYMENT

Labour Force: Refers to persons who are either **employed** or **unemployed**.

Employment Rate: Percentage of the population who are employed.

Unemployment Rate: Percentage of the labour force who are unemployed.

Participation Rate: Percentage of the population who are in the labour force.

MOBILITY

Mover & Non-Mover: Persons who, on Census Day, lived in the same residence as they did on the same date 1 year or 5 years earlier are referred to as **non-movers**, and persons who, on Census Day, did not live in the same residence as they did 1 year or 5 years earlier are referred to as **movers**. Movers include non-migrants and migrants.

Non-Migrant are movers who lived in the same census subdivision on Census Day as they did on the same date 1 year or 5 years earlier.

Migrants include **internal migrants** and **external migrants**.

Internal migrants include migrants who lived in Canada 1 year or 5 years ago. This includes persons who moved to a different city, town, township, village, municipality or Indian reserve within Canada. Greater detail can be provided for internal migrants by identifying whether they crossed a provincial boundary or the limits of a large municipality, specifically a census metropolitan area (CMA) or census agglomeration (CA).

External migrants include migrants who did not live in Canada 1 year or 5 years ago.