

Housing Needs Assessment

Brandon (CY)

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Preface

[Canada's Housing Plan](#) and [Budget 2024](#) both signaled the Government of Canada's intent to use Housing Needs Assessments (HNAs) as a key tool in its evidence-based long-term approach to addressing housing needs across the country. This includes the renewal of the Canada Community-Building Fund and the previously announced permanent transit funding.

As the federal government strives to become a more informed investor, evidence-based tools that provide a clear assessment of local needs and gaps will be required to inform decision making. HNAs will help all levels of government understand the local housing needs of communities - how they may relate to infrastructure priorities - by providing the data necessary to determine what kind of housing needs to be built and where. The intent is to promote systematic planning of infrastructure that takes into consideration current and future housing needs.

Funding Requirement

Under the Housing Accelerator Fund, the Government of Canada currently requires funding recipients to complete an HNA by year 3 of the program, if one has not already been completed within two years of the 2022 federal budget announcement (April 7, 2022).

Going forward, HNAs that meet the federal HNA standard will be required for:

- Communities with a population of 30,000 and over receiving funding through the Canada Community-Building Fund;
- Communities with a population of 30,000 and over receiving funding through permanent transit funding; and,
- Future federal infrastructure funding applicants as required.

Once an HNA has been completed as a federal program requirement, a community will not be required to complete a new one for other Housing, Infrastructure and Communities Canada programs, other than to update it every five years.

Purpose

When done properly and regularly, an HNA will allow a community to answer fundamental questions such as:

- Where does the greatest housing need exist in our community?
- How can we set meaningful housing targets and measure progress to support the right kind of housing for all residents?
- How much housing, which size and at what price point do we need to ensure that all current and future households can live in suitable, adequate and affordable housing?

HNAs will allow all levels of government (federal, provincial/territorial and municipal) to use this evidence base to inform their investments in enabling and supportive infrastructure as well as guide their policy and regulatory decision-making. HNAs as a tool can help communities plan for and build housing more effectively to address the needs of their residents and instill transparency and accountability across the board.

This HNA template has been informed by best practices from jurisdictions across Canada, consultations with experts, and engagements with provinces and territories. These include the City of Vancouver's [Housing Needs Report](#) and the City of Edmonton's [Affordable Housing Needs Assessment](#) (for the affordable housing side of needs assessments), as well as the Housing Research Collaborative at the University of British Columbia which brought together a national network of researchers and experts to develop the Housing Assessment Resource Tool (HART). The HART project provides formatted data from Statistics Canada on key housing indices such as core housing need for a wide variety of jurisdictions and geographic levels.

Based on these best practices, this guidance document includes the following necessary information, explained in more detail below.

1. Development and use of Housing Needs Assessments
2. Community profiles and trends
3. Household profiles and economic characteristics
4. Priority groups
5. Housing profiles
6. Projected housing needs and next steps

Communities completing an HNA as a requirement for federal infrastructure programming will be expected to complete all sections outlined in this template. Communities may use a previously completed HNA if an updated version is available; however, communities would be expected to address any gaps related to any of the sections of the guidance document – both qualitative and quantitative – between their existing HNA and this federal template. Additional details about the timelines for completion and submission of HNAs will be provided with specific infrastructure funding programs (e.g. Canada Community-Building Fund).

While responding to the written questions, please use as much space as required.

1. Methodology

In this section, applicants should outline the research methodology used to inform the completion of the assessment, where the methodology is derived from, any assumptions used, and any necessary justification. While different assessments may incorporate unique methodological elements or considerations depending on context, the following methods should generally be outlined:

- **Quantitative research** such as economic data, population and household forecasts; and,
- **Qualitative research** such as interviews, policy analysis and stakeholder engagement.

Both qualitative and quantitative aspects of this guidance document are equally important.

Communities will be required to engage with key stakeholders in the housing sector, including non-profit housing providers, developers, and public entities, as well as those with specific lived experiences, to develop a comprehensive Housing Needs Assessment (HNA). This section should include what forms of engagement were conducted, with whom, how learnings were incorporated into or informed the HNA's findings, and what engagement opportunities may exist to share findings with the community.

To the extent possible, publicly available data from the following sources will be prepopulated to facilitate automated completion of the quantitative components of the assessments:

- [Statistics Canada Census Data](#)
- [CMHC Housing Market Information Portal](#)
- [Statistics Canada Housing Statistics Dashboard](#)
- [CMHC Demographic Projections: Housing Market Insights, June 2022](#)
- [CMHC Proximity Measures Database](#)
- [Housing Assessment Resource Tool Dashboard](#)
- [Canadian Housing Evidence Collaborative – Housing Intelligence Platform](#)

In addition to this data, communities are required to incorporate internal and non-public facing, non-confidential data, into their HNAs in order to more fully capture local contexts and realities as needed.

If this data is unavailable at the time of completion of the first HNA, communities are expected to collect these data points for future iterations. Other fields will be pre-populated. Fields marked with an asterisk (*) indicate data points which are unavailable from the source or suppressed due to low counts.

Please provide data from the latest census except where otherwise indicated.

1.1 Please provide an overview of the methodology and assumptions used to develop this Housing Needs Assessment, using the guidelines above. This should include both quantitative and qualitative methods. Please also identify the publicly available data sources used to complete this assessment beyond the sources listed above, if applicable.

DATA SOURCES AND METHODOLOGY

Homeless Individuals and Family Information System

[HIFIS \(Homeless Individuals and Families Information System\) – BNRC](#)

Everyone Counts 2024 – Point-in-time homelessness Count – Brandon Manitoba

[Everyone Counts 2024 - report.pdf](#)

Source: Canadian Real Estate Association

[Brandon Median Price | CREA Statistics](#)

Source: Brandon Area Realtors

[Statistics | Brandon Area Realtors](#)

Source: Airbnb (July 22, 2025)

[Airbnb | Brandon – Vacation Rentals & Places to Stay - Manitoba](#)

Source: Vrbo (July 22, 2024)

[Brandon, Manitoba, Canada Vacation Rental Search results](#)

Source: City of Brandon Permit Statistics – City-View

Source: Canadian Human Rights Commission

[Federal Housing Advocate's 2022–2023 Annual Report - Systemic issue 4: Barriers to adequate housing for Two-Spirit, trans and non-binary people](#)

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, HFIS Data

HOUSEHOLD AND POPULATION 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

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.

1.2 Please provide an overview of the methodology and assumptions used to engage with stakeholder groups, e.g. non-profit housing organizations, in the development of this Housing Needs Assessment. This should include qualitative and quantitative methods. Please provide a description of who was engaged, the type of engagement that took place, and the nature of the engagement (e.g. interviews, consultations)

The planning section regularly interacts with the development community and as such has knowledge based on ongoing qualitative data gathering. As part of City Plan (Official Community Plan) engagement efforts, planning reached out to various groups in the city involved in the development of housing. It was important to reach a wide spectrum of groups to ensure the housing need across the housing continuum are accurately reflected. The City met with builders, developers, non-profit agencies and interested community groups. We held engagement sessions that were moderated/facilitated to discuss the current successes and gaps in the community. As well, we conducted webinars and distributed questionnaires for those that could not attend in person engagement sessions.

After each engagement session we prepared a “what we heard” report. The purpose of this was to capture the findings of the engagement sessions and allow participants to make any necessary corrections or additions to the information gathered. The final engagement report can be found here: [city plan 2025-appendix b.pdf](#)

Other sources of data for housing include direct contact with housing providers and non profits via email/phone:

- Samaritan House
- Community Health and Housing (CHHA)
- Housing First
- Youth for Christ
- GAP Youth Outreach
- YWCA
- Westman Seniors Housing Co-op

- HIFIS Coordinator at the Brandon Neighbourhood Renewal Corporation (data shared is not for public consumption)
- Community Safety & Wellbeing Plan Community Profile (not a public document at this time)

By accessing publicly available reports:

- Point in Time Count (PiT)
- Action Research on Chronic Homelessness (ARCH) Report

The City of Brandon Community Housing and Wellness Coordinator has been doing ongoing engagement all along the housing continuum in series with other ongoing housing related projects such as; updating the City's Housing Strategy, Community Safety & Wellbeing Planning, and sits on the Community Advisory Board for Homelessness for Brandon and the Community Wellness Collaborative. Some of the assumptions shared in this document is the result of knowledge based on ongoing qualitative and anecdotal data gathering.

Recently a Housing Huddle was held by the Community Housing & Wellness Coordinator in regards to the updated Housing Strategy that had 15 attendees from various non-profits, private developers and organizations supporting construction and real estate.

1.3 Please provide an overview of the methodology and assumptions used to conduct engagement with the priority groups (identified in Section 4) in the development of this Housing Needs Assessment. This should include qualitative and quantitative methods. Please provide a description of who was engaged, the type of engagement that took place, and the nature of the engagement (e.g. interviews, consultations). If a private individual has been engaged, please anonymize and remove any identifying features from the narrative.

As part of the community engagement in the City Plan process, planning identified groups that are often in the minority like seniors, youth, immigrants, Indigenous peoples and people in the core of the city experiencing homelessness and dependent on various social services. Understanding that it's more effective to go to where the people are instead of expecting them to come out to public events or participate in general city-wide engagement, we identified specific groups that were willing to have a conversation about city planning and housing need. Some of these are:

- Parkview Seniors Housing Coop
- Seniors for Seniors Co-op Inc (S4S)
- Green Acres Elementary School
- Crocus Plains Regional Secondary School
- Brandon University
- Assiniboine College
- Brandon Urban Aboriginal Peoples Council (BUAPC)

- Westman Immigrant Services (WIS)
- The Blue Door
- Brandon Neighborhood Renewal Corporation (BNRC)
- Brandon Literacy Council
- Brandon Accessibility Advisory Committee; among others.

We had different types of engagement for each of these. For some such as WIS and S4S, we presented and had discussions during their regular meetings/gatherings whether virtually or in person. For others, such as BUAPC and the schools, that have larger groups associated with them, we collaborated to host engagement sessions that would cater to their specific needs and get appropriate feedback. More information can be found in the community engagement report: [city plan 2025-appendix b.pdf](#)

During our engagement for the Community Safety & Wellbeing Plan we targeted the following equity deserving groups via various dedicated engagement sessions with each group:

- People with lived experience
- Indigenous Peoples
- Women
- People with disabilities (various)
- Youth
- Newcomers and Immigrants
- Seniors and older adults
- 2SLGBTQ+ community

In addition to the targeted engagement we did an online community survey that had over 2000 responses. More details can be found at [Community Safety and Well-being Plan | City of Brandon](#) once the Plan is completed later in 2025.

2. Community Profile and Trends

In this section, communities are expected to tell their housing story through the lenses of their community and household profiles using both qualitative and quantitative data. Communities may structure this information in different ways, including by providing past benchmarks, present figures, future projections, and current growth rates at a local, regional and provincial level.

2.1 Please detail the existing municipal housing policy and regulatory context, such as approved housing strategies, action plans and policies within Official Community Plans.

City Plan – Adopted in 2025, the City Plan provides policy direction guiding growth and change in the City, including:

- Ensuring inclusionary zoning in all areas of city that provides a variety of housing and options types and tenures
- Promoting the establishment of affordable housing and universally accessible housing as part of new multi-unit developments
- Incentivizing and promoting the increase of market housing units downtown
- Ensuring the provision of affordable and transitional housing near service such as transit, active transportation, and recreation
- Assemble city lands and make available for affordable housing developments to meet the greatest community housing needs (i.e. transitional/supportive housing)
- Foster partnerships with upper levels of governments, indigenous communities/organizations, non-profits, and private sector to provide affordable housing options.
- Increasing residential units constructed in established areas (infill) with a focus on arterial corridors with better access to transit and transportation networks.

City of Brandon Emerging Area Growth Strategy – Adopted in 2025, the Emerging Area Growth Strategy identifies where and when growth will occur in alignment with the City Plan growth management policies and capital infrastructure planning.

Zoning By-law – Recent amendments to the zoning by-law provide greater flexibility to meet housing need including reduced parking requirements, establishing one consolidated low-density zone, density bonusing for smaller units, and establishing supportive housing as a use.

Housing Incentives – As funded through the Federal Housing Accelerator fund, Brandon adopted incentives to increase market housing downtown and affordable housing city-wide.

Land Transaction Policy – Brandon’s land transaction policy prioritizes affordable housing and the listing of city held lands for affordable housing opportunities to meet community needs.

Brandon Housing Strategy – Brandon Housing Strategy currently being updated in alignment with changing housing needs and policy direction in City Plan. Focus of strategy will be outlining actions to establish and maintain housing supply to meet changing community housing needs at each level of the housing continuum.

2.2 Community Profile

2.2.1 Population		
Characteristic	Data	Value
Total Population (Number)	2016	48,883
	2021	51,313
	Total	2,430

2.2.1 Population		
Characteristic	Data	Value
Population Growth (Number)	Percentage	5%
Age (Years)	Average	39
	Median	36.8
Age Distribution	0 - 14 years	9,400
	15 - 64 years	33,505
	65+ years	8,410
Mobility	Non-movers	41,255
	Non-migrants	5,445
	Migrants	2,530

2.2.2 Demographic Information		
Characteristic	Data	Value
Immigrants	Total	9,035
Non-Immigrants	Total	39,660
Recent Immigrants (2016-2021)	Total	2,760
Interprovincial migrants (2016-2021)	Total	1,660
Indigenous Identity	Total	7,075

2.3 How have population changes in your community as illustrated by the above data impacted your housing market?

Brandon's population rose from 39,716 in 2001 to 51,313 in 2021—a 23% increase (11,597 people). Most growth came from immigration and Indigenous populations: immigrant populations grew by 6,985 (to 9,035), and Indigenous populations grew by 3,350 (to 7,075). From 2021 to 2024, immigration added 6,405 new residents (about 1,600 per year).

Between 2001 and 2021, approximately 5,800 new dwelling units were constructed in Brandon. From 2018 to 2022, housing starts consisted of 20% single-detached and 80% multi-unit dwellings, which included 47% apartments and 28% row houses.

Between 2021 and 2024 overall homelessness in Brandon increased by 87% with approximately 919 individuals experiencing homelessness in 2024. 625 of the 919 individuals experiencing homelessness identify as indigenous.

According to Statistics Canada estimates, Brandon's population grew by over 5,000 individuals (8%) between 2022 and 2024, primarily as a result of immigration. During this period, the number of dwelling units increased by approximately 700 (3%). The resulting 5% gap between population and housing growth equates to a shortfall of about 1,300 dwelling units within this timeframe.

Demographic shifts and factors related to affordability have led to changes in housing types and tenure over the last five years. Single detached homes now make up 20% of newly constructed dwelling units, a decrease from previous levels, while multi-unit apartments account for 47% and row housing 28%.

The housing assessment indicates there is significant demand for both smaller one-bedroom units and larger three- and four-bedroom family units. The most pressing housing need identified is for supportive and transitional units, given the increasing population experiencing homelessness. Partnering with indigenous organizations is critical given the over representation of indigenous people experiencing homelessness.

3. Household Profiles and Economic Characteristics

This section should provide a general overview of income, housing and economic characteristics of the community being studied. Understanding this data will make it easier to observe the incidence of housing need among different socio-economic groups within the community. Income categories could be used for this analysis and can be completed in accordance with the HART methodology and CMHC data.

Area Median Household Income (AMHI) can be used as the primary basis for determining income brackets (as a percentage of AMHI) and corresponding housing cost ceilings.

This section should also outline the percentage of households that currently fall into each of the income categories previously established. This will allow a better understanding of how municipalities compare to Canadian averages, and the proportion of households that fall into each household income category. This will also allow for a better understanding of drop-off levels between total households and the number of units required to meet anticipated need or demand in each category. Housing tenures allow for the comparison of renter and owner-occupied households experiences and is important for understanding a community's housing context.

Using a stratified, income-based approach to assessing current housing needs can enable communities to target new housing development in a broader and more inclusive and equitable way, resulting in housing that can respond to specific households in core housing need. This is shown in the next section.

3.1 Household Profiles

3.1.1 Household Income and Profile (2021 Data)		
Characteristic	Data	Value
Total number of households	2016	20,277
	2021	21,203
Household income (Canadian dollars per year)	Average	91,000
	Median	76,000
Tenant Household Income (Canadian dollars per year, only available at CMA or CA Level) - Data from Brandon (CA), Man.	Average	58,400
	Median	50,400
Owner household income (Canadian dollars per year, only available at CMA or CA Level) - Data from Brandon (CA), Man.	Average	112,500
	Median	98,000
Average household size (Number of members)	Total	2.4
Breakdown of household by size (Number of households)	Total	21,200
	1 person	6,595
	2 persons	7,235
	3 persons	3,095
	4 persons	2,715
	5 or more persons	1,560
Tenant households (Number of households)	Total	8,300
	Percentage	39.2%
	Total	12,900

3.1.1 Household Income and Profile (2021 Data)		
Characteristic	Data	Value
Owner households (Number of households)	Percentage	60.8%
Percentage of tenant households in subsidized housing	Percentage	16.7%
Households within 800m of a higher-order/high frequency transit stop or station (#)	Total	*
	Percentage	0%
Number of one-parent families	Total	2,465
	Percentage	18.2%
Number of one-parent families in which the parent is a woman+	Total	1,960
Number of one-parent families in which the parent is a man+	Total	500
Number of households by Income Category	Very Low (up to 20% below Area Median Household Income (AMHI))	785
	Low (21% – 50% AMHI)	3,380
	Moderate (51 – 80% AMHI)	4,050
	Median (81% - 120% AMHI)	4,755
	High (>120% AMHI)	8,185

3.2 Please provide context to the data above to situate it within your municipality. For example, is there a significant number of one-parent families? Are owner household incomes far surpassing tenant household incomes?

Median household income is \$98,000 for homeowners and \$50,400 for tenants, highlighting the need for affordable rental housing, especially multi-unit rentals. Non-census families have the lowest median income (\$45,200), followed by lone-parent families (\$58,000), particularly female-led (\$56,400). These figures point to a demand for larger affordable family units (3+ bedrooms).

3.3 Suppression of household formation (e.g., younger people living with their parents due to affordability pressures) and housing demand (e.g., “driving until you qualify”) can both indicate strained local housing market conditions. Please provide any data or information that speaks to how suppression of the formation of new households and suppression of housing demand has impacted your community since 2016, and how projected formation patterns are expected to be impacted over the next 5 to 10 years. Please indicate methods used to determine expected household formation, such as calculating headship rates broken down by specific age estimate impacts.¹

3.3.1 Household Formation						
HH* Head Age Category	2016			2021		
	Pop.	Headship Rate (%)	HHs*	Pop.	Headship Rate (%)	HHs*
15 to 24	6,585	21.5%	1,415	7,110	18.8%	1,340
25 to 34	7,610	49.5%	3,770	7,605	49.8%	3,785
35 to 44	6,770	58.1%	3,930	7,345	57.2%	4,200
45 to 54	5,700	57.5%	3,275	5,765	57.4%	3,310
55 to 64	5,390	62.3%	3,360	5,680	61.8%	3,510
65 to 74	3,805	61.6%	2,345	4,505	61.9%	2,790
75 to 84	2,335	66.6%	1,555	2,605	64.3%	1,675
85 plus	1,395	45.2%	630	1,290	46.1%	595

*Household/Households

Headship rate is defined as the percentage of the population who heads a household.

¹ We recognize that some municipalities may not have this data available at the time of completion, but encourage them to do their best in addressing this question. Municipalities will be expected to build this expertise in subsequent iterations of their Housing Needs Assessments.

3.3.2 Household suppression							
HH* Head Age Category	2006 Actual		2021 Actual		2021 Household Suppression		
	Pop.	HHs*	Pop.	HHs*	Headship Rate (%, 2006)	Potential HHs* (2021)	Suppressed HHs* (2021)
15 to 24	6,805	1,660	7,110	1,340	24.4%	1,734.4	394.4
25 to 34	5,880	3,190	7,605	3,785	54.3%	4,125.8	340.8
35 to 44	5,430	2,960	7,345	4,200	54.5%	4,003.9	0
45 to 54	5,735	3,460	5,765	3,310	60.3%	3,478.1	168.1
55 to 64	4,170	2,455	5,680	3,510	58.9%	3,344	0
65 to 74	2,865	1,775	4,505	2,790	62%	2,791.1	1.1
75 plus	3,615	2,420	3,895	2,270	66.9%	2,607.4	337.4
Total							1,241.8

*Household/Households

3.4 Economic Conditions

3.4.1 Economy and Labour Force		
Characteristic	Data	Value
Number of workers in the Labour Force	Total	27,410
Number of workers by industry (Top 10 only)	Health care and social assistance	4,725
	Retail trade	3,905
	Manufacturing	3,020
	Educational services	2,340
	Accommodation and food services	2,005
	Construction	1,815
	Public administration	1,715
	Transportation and warehousing	1,150
	Other services (except public administration)	1,065
	Administrative and support, waste management and remediation services	910
Unemployment rate and participation rate (Percent)	Unemployment rate	7.5%
	Participation rate	67.8%
All classes of workers (Number)	Total	26,845
Employees (Number)	Total	24,555
Permanent position (Number)	Total	20,660
Temporary position (Number)	Total	3,890

3.4.1 Economy and Labour Force		
Characteristic	Data	Value
Fixed term (1 year or more, Number)	Total	1,280
Casual, seasonal or short-term position (less than 1 year, Number)	Total	2,615
Self-employed (Number)	Total	2,285
Number of commuters by commuting destination	Within census subdivision	17,855
	To different census subdivision	940
	To different census division	1,125
	To another province/territory	125
Number of commuters by main mode of commuting for the employed labour force with a usual place of work or no fixed workplace address	Car, truck or van	20,795
	Public transit	800
	Walked	1,130
	Bicycle	160
	Other method	250

3.5 How have labour conditions (e.g., prevalence of precarious employment, temporary or seasonal workforces, reliance on sectors such as natural resources, agriculture, tourism, etc.) in your community impacted housing supply and demand?

Opened in 1999, the Maple Leaf Foods pork processing plant is one of the largest employers in Brandon, with over 2,000 employees across various roles including production, skilled trades, engineering, and food safety. Maple Leaf's presence helped Brandon grow into a 58,000+ city, significantly boosting the local economy and supporting secondary industries like transportation, logistics, and retail. Looking forward, Maple Leaf is making investments to increase their capacity by 20% with an eventual 300-person increase in staff.

These employment trends, alongside rising infrastructural and climate challenges, have influenced not only the demand for housing but also the types of homes needed by a diversifying workforce. As Brandon's population dynamics shift, pressure mounts to provide a wider range of housing options, including multi-family developments, accessible units, and transitional accommodations for new arrivals.

To support Maple Leaf and other growing local industries, between 2021 and 2024, Brandon recorded 6,405 immigration landings, making its per capita immigration rate one of the highest in the Province of Manitoba. This trend has influenced local housing demand, leading to a higher need for rental units and alternative ownership models such as row-housing. The city has also seen an increase in multi-generational and multi-family households, resulting in larger average household sizes in some neighborhoods.

3.6 Households in Core Housing Need

A household is considered to be in core housing need if it meets two criteria:

1. A household is below one or more of the national adequacy, suitability and affordability standards; and,
2. The household would have to spend 30% or more of its before-tax household income to access local housing that meets all three standards.

Housing is considered to be affordable when housing costs less than 30% of before-tax household income. Housing is considered to be suitable when there are enough bedrooms for the size and make-up of the household. Housing is considered to be adequate when it is not in need of major repairs. Determining the percentage of core housing need would facilitate comparison with forecasts of population growth and household formation, in turn enabling more accurate projection of anticipated housing needs broken down by different factors such as income, household size and priority population, as explained below. It is important to note that official measures of those in core housing need exclude key groups, including those experiencing homelessness, students living independently of their guardians, people living in congregate housing,

and migrant farm workers. This means that core housing need figures may underestimate overall housing need. Due to this, communities should also strive to include as much information as possible about these groups in the Priority Groups section below, in order to provide a comprehensive picture of who is affected by core housing need.

The following section includes data from the Housing Assessment Resource Tool ([Housing Needs Assessment Tool | Housing Assessment Resource Project](#))

Income Categories and Affordable Shelter Costs:

3.6.1 Income Categories and Affordable Shelter Costs		
Income Category, relative to Area Median Household Income (AMHI)	Annual Household Income (Canadian Dollars per Year)	Affordable Shelter Cost (Canadian Dollars per Month)
Very Low Income (20% or less of AMHI)	<= \$15,300	<= \$383
Low Income (21% to 50% of AMHI)	\$15,300 - \$38,250	\$383 - \$956
Moderate Income (51% to 80% of AMHI)	\$38,250 - \$61,200	\$956 - \$1,530
Median Income (81% to 120% of AMHI)	\$61,200 - \$91,800	\$1,530 - \$2,295
High Income (121% or more of AMHI)	>= \$91,801	>= \$2,296

Percentage of Households in Core Housing Need, by Income Category and Household Size:

3.6.2 Percentage of Households (HH) in Core Housing Need (CHN), by Income Category and Household Size						
Income Category	Affordable Shelter Cost (Canadian Dollars per Month)	1 Person HH	2 Person HH	3 Person HH	4 Person HH	5+ Person HH
Very Low Income (20% or less of AMHI)	<= \$383	93%	7%	0%	0%	0%
Low Income (21% to 50% of AMHI)	\$383 - \$956	45.3%	32.1%	12.6%	6.9%	3.1%
Moderate Income (51% to 80% of AMHI)	\$956 - \$1,530	0%	0%	15.4%	35.9%	48.7%
Median Income (81% to 120% of AMHI)	\$1,530 - \$2,295	0%	0%	0%	0%	100%
High Income (121% or more of AMHI)	>= \$2,296	*	*	*	*	*

2021 Affordable Housing Deficit:

3.6.3 2021 Affordable Housing Deficit by Household (HH)						
Income Category	Affordable Shelter Cost (Canadian Dollars per Month)	1 Person HH	2 Person HH	3 Person HH	4 Person HH	5+ Person HH
Very Low Income (20% or less of AMHI)	<= \$383	330	25	0	0	0
Low Income (21% to 50% of AMHI)	\$383 - \$956	360	255	100	55	25
Moderate Income (51% to 80% of AMHI)	\$956 - \$1,530	0	0	30	70	95
Median Income (81% to 120% of AMHI)	\$1,530 - \$2,295	0	0	0	0	40
High Income (121% or more of AMHI)	>= \$2,296	0	0	0	0	0
Total		690	285	135	130	165

3.6.4 Households in Core Housing Need		
Characteristic	Data	Value
Affordability – Owner and tenant households spending 30% or more on shelter costs (# and %)	Total	3,455
	Percentage	16.3%
Affordability – Owner and tenant households spending 30% or more on shelter costs and in core need (# and %)	Total	1,165
	Percentage	5.6%
Affordability – Tenant households spending 30% or more of income on shelter costs (# and %)	Total	2,410
	Percentage	29.1%
Affordability – Tenant households spending 30% or more of income on shelter costs and in core need (# and %)	Total	960
	Percentage	4.6%
Affordability – Owner households spending 30% or more of income on shelter costs (# and %)	Total	1,040
	Percentage	8.1%
Affordability – Owner households spending 30% or more of income on shelter costs and in core need (# and %)	Total	210
	Percentage	1%
Adequacy – Owner and tenant households in dwellings requiring major repair (# and %)	Total	1,190
	Percentage	5.6%
Adequacy – Owner and tenant households in dwellings requiring major repair and in core need (# and %)	Total	220
	Percentage	1.1%
Adequacy – Tenant households in dwellings requiring major repairs (# and %)	Total	530
	Percentage	6.4%
	Total	155

3.6.4 Households in Core Housing Need		
Characteristic	Data	Value
Adequacy – Tenant households in dwellings requiring major repairs and in core need (# and %)	Percentage	0.8%
Adequacy – Owner households in dwellings requiring major repairs (# and %)	Total	660
	Percentage	5.1%
Adequacy – Owner households in dwellings requiring major repairs and in core need (# and %)	Total	60
	Percentage	0.3%
Suitability – Owner and tenant households in unsuitable dwellings (# and %)	Total	1,170
	Percentage	5.5%
Suitability – Owner and tenant households in unsuitable dwellings and in core need (# and %)	Total	215
	Percentage	1%
Suitability – Tenant households in unsuitable dwellings (# and %)	Total	855
	Percentage	10.3%
Suitability – Tenant households in unsuitable dwellings and in core need (# and %)	Total	200
	Percentage	1%
Suitability – Owner households in unsuitable dwellings (# and %)	Total	315
	Percentage	2.4%
Suitability – Owner households in unsuitable dwellings and in core need (# and %)	Total	20
	Percentage	0.1%
Total households in core housing need	Total	1,400
Percentage of tenant households in core housing need	Percentage	14.3%

3.6.4 Households in Core Housing Need		
Characteristic	Data	Value
Percentage of owner households in core housing need	Percentage	2%

3.7 Please provide any other available data or information that may further expand on, illustrate or contextualize the data provided above.

According to HIFIS coordinated Access System, we have 146 individuals living in transitional housing units. Most housing programs in the Coordinated Access System are mandated to a two-year program to support clients. 90% of the clients in the Coordinated Access System require medium to high intensity case management support. Many of the families and individuals require longer support than the two-year program, and for those who have stabilized and are ready to move into independent living, there is not enough affordable market rental units for them to graduate to.

Since the beginning of 2025, 341 distinct individuals have used the overnight drop-in, or emergency and shelter beds. Many agencies have several people sitting on waiting lists who have yet to be entered into the HIFIS system. Unfortunately, within the city we do not have enough beds or units available in the Coordinated Access System to meet Brandon's growing need.

The City estimates 360 transitional, supported units to meet the needs of unsheltered and precariously housed individuals. That number is the sum of the following:

- 75 Family units
- 50 Senior (50+) units
- 80 Youth (18-29) units
- 60 Women safe units
- 95 Single units

4. Priority Groups

There are 12 groups that CMHC defines as priority populations for affordable homes: groups who face a proportionally far greater housing need than the general population. There is also a 13th group, women-led households and specifically single mothers, implied in the National Housing Strategy which targets 33% (with a minimum of 25%) of funding going to housing for women-led households. Priority population groups are:

- Women and children fleeing domestic violence
- Women-led households, especially single mothers
- Seniors 65+
- Young adults aged 18-29
- Indigenous Peoples
- Racialized people
- Recent immigrants, especially refugees
- LGBTQ2S+
- People with physical health or mobility challenges
- People with developmental disabilities
- People dealing with mental health and addictions issues
- Veterans
- People experiencing homelessness

Census data does not disaggregate core housing need data by all priority populations, including veterans, individuals who identify as LGBTQ2S+, survivors of domestic violence, and individuals experiencing homelessness. Many households may have members in multiple priority categories which may also not be represented in the data. With these limitations in mind, information on housing need by priority population would be helpful for developing inclusive housing policies.

4.1 What information is available that reflects the housing need or challenges of priority populations in your community? If data is available, please report on the incidence of core housing need by CMHC priority population groups in your community. If no quantitative data is available, please use qualitative information to describe the need for these priority populations.

In 2024 the Young Women's Christian Association (YWCA) in Brandon served 263 women and 218 children fleeing domestic violence. It is challenging to estimate the amount of women fleeing violence are in core housing need, but it is likely over 50%.

According to the Canadian Human Rights Commission the 2SLGBTQ+ population is more likely to be renters than the general population (54% vs 31%) and more likely to be in core housing need (17% to 12%). Although no specific statistics exist for Brandon it could be assumed that they same trend exists within the Brandon market.

4.1.1 Core Housing Need (CHN) by CMHC Priority Groups		
Characteristic	Data	Value
All households experiencing CHN	Total (Households)	1,400
	Percentage (of all households)	6.7%
CHN in households with women and/or children fleeing domestic violence	Total (Households)	
	Percentage (of priority group)	
CHN in households led by women	Total (Households)	790
	Percentage (of priority group)	8.7%
CHN in households led by single mothers	Total (Households)	350
	Percentage (of priority group)	20.2%
CHN in households led by senior(s) aged 65-84	Total (Households)	240
	Percentage (of priority group)	4.8%
CHN in households led by senior(s) aged 85+	Total (Households)	30
	Percentage (of priority group)	5%

Intentionally left blank because we can't assume the stats we have on women fleeing domestic violence include women in CHN. The stats are for women regardless of the socioeconomic status.

4.1.1 Core Housing Need (CHN) by CMHC Priority Groups		
Characteristic	Data	Value
CHN in households led by young adult(s) aged 18-29	Total (Households)	260
	Percentage (of priority group)	8.7%
CHN in Indigenous-led households	Total (Households)	485
	Percentage (of priority group)	15%
CHN in visible minority-led households	Total (Households)	200
	Percentage (of priority group)	5.8%
CHN in Black-led households	Total (Households)	55
	Percentage (of priority group)	7%
CHN in new-immigrant-led households	Total (Households)	85
	Percentage (of priority group)	11.5%
CHN in refugee-led households	Total (Households)	35
	Percentage (of priority group)	10.3%
CHN in households with a same-sex couple	Total (Households)	*
	Percentage (of priority group)	*
CHN in households with Transgender member(s)	Total (Households)	20
	Percentage (of priority group)	16.7%
CHN in households with Non-Binary member(s)	Total (Households)	*
	Percentage (of priority group)	*
	Total (Households)	290

4.1.1 Core Housing Need (CHN) by CMHC Priority Groups		
Characteristic	Data	Value
CHN in households with member(s) with physical health and/or mobility challenges	Percentage (of priority group)	5.1%
CHN in households with member(s) with developmental disabilities	Total (Households)	275
	Percentage (of priority group)	7.3%
CHN in households with member(s) dealing with mental health and addictions issues	Total (Households)	165
	Percentage (of priority group)	6.7%
CHN in households with Veteran member(s)	Total (Households)	25
	Percentage (of priority group)	2.5%
CHN in people experiencing homelessness	Total (people)	492 (2021) 919 (2024)
	Percentage (of priority group)	N/A

4.2 Please describe the incidence and severity of homelessness in your community, including an estimated number of individuals and/or families experiencing homelessness (hidden, visible, chronic, living in encampments, and episodic). If available, please include recent Point-in-Time counts.

Everyone Counts 2024 – Point-in-Time Homelessness Count – Brandon Manitoba

[Everyone Counts 2024 - report.pdf](#)

Homeless Individuals and Family Information System

[HIFIS \(Homeless Individuals and Families Information System\) – BNRC](#)

Our Brandon Tracking Progress Site (United Way) - [Our Brandon](#)

As per HIFIS Data (the most robust data in Brandon) here is a homelessness comparison from 2021-2024:

- 492 individuals experienced homelessness in 2021, 93 of which were considered chronically unhoused by Reaching Home standards. 65 individuals returned to homelessness from being previously housed.
- **919 individuals experienced homelessness in 2024**, 194 of which were considered chronically unhoused by Reaching Home standards. 224 individuals returned to homelessness from a previous housing attempt.
- Overall homelessness in Brandon increased **87%** from 2021 to 2024.
- Chronic homelessness in Brandon increased **109%** from 2021 to 2024.
- Returns to homelessness from a previous housing attempt increased **245%** from 2021 to 2024.
- Between 2021 to 2024 the number of Indigenous people experiencing homelessness increased from 350 to 625 (increase of 79%)
- Age Groups affected by homelessness in between **2021** and **2024**:
 - Children (0-12): 35 – An increase of 67%
 - Youth (13-24): 109 – An increase of 45%
 - Adult (25-49): 596 – An increase of 98%
 - Older Adult (50-64): 155 – An increase of 96%
 - Senior (65+): 24 – An increase of 50%

Point in Time (PiT Count) Oct 2024:

The minimum number of unhoused people in Brandon on October, 17, 2024 was 229. This is based on emergency shelter and service data (46), transitional housing (44), PiT Count surveys (92), and observed homelessness (47). This number only represents the individuals surveyed on that one day may not be a fulsome representation of all those experiencing homelessness or those precariously housed (ex. couch surfing)

Reported homeless encampments:

These stats only include encampments reported to the City in which we respond. This number is underreported due to the many encampments that are not reported and may not include multiple or repeat encampments at the same location.

2021	25
2022	40
2023	40
2024	75
2025 YTD (Sept 17)	71

Homeless data from Emergency Shelter's:

Safe & Warm Shelter:

Safe & Warm usage tripled from 2019 (168 unique individuals) to 2024 (540 unique individuals). YTD for 2025 there has already been **788 unique clients** access the shelter (Jan-June 2025)

Bed Nights	2025	Unique Clients	Visits Evening/Overnight	Turned Away
	January	165	1421	34 clients
	February	123	1131	
	March	117	1257	
	April	118	1064	
	May	133	1225	
	June	132	1038	
		Unique Clients	Visits to Drop In	
Drop In	January	84	389	
	February	82	272	
	March	93	446	
	April	95	390	
	May	100	494	
	June	91	35	

GAP Youth Safe Lodge (ages 16-26):

This is a new service in Brandon that opened in 2025. Aggregate statistics for the period of March 1, 2025 to June 30, 2025: there are 8 overnight shelter beds (4 male and 4 female), a drop-in space and 2 transitional rooms designated for females. When the shelter reaches capacity or if a youth arrives after the intake cut-off time, it is not uncommon for them to stay overnight in the Drop-In space as an overflow option.

Youth Visits - Daily visit totals reflect the number of unique youth accessing the program each day. A youth who enters and exits multiple times within the same 24-hour period is counted as one visit for that day.

Overnight Stays - The overnight stay count reflects the number of youth present at the morning shift-change head count. This number represents those still in the building at that time and does not include youth who stayed part of the night but left before the morning count. This includes individuals in the overnight shelter and the Drop in area.

	Youth Visits	Overnight Stays
March	425	295
April	363	233
May	423	295
June	499	246
	1710	1069

Total Active registrations – 84 (Note: not all youth register, some prefer to be anonymous)

YWCA Women's Shelter:

Emergency shelter in Brandon for women and women with children fleeing domestic violence:

	Women	Children
2015	200	225
2016	243	245
2017	176	163
2018	246	250
2019	311	259
2020	212	139
2021	238	193
2022	291	248
2023	270	268
2024	263	218

Clients turned away in 2024:

Shelter Full - 81

Referred to Other Shelter - 133

Youth for Christ:

2024 stats for supported youth ages 18-29:

- Common Spaces: 30 youth
- U-Turn: 23 youth
- Housing First: 3 youth

Samaritan House - Mary's House:

This is a second-stage transitional housing program (max one year) for women and children fleeing domestic violence.

2024-2025 - 13 women (6 single and 7 with children) and 17 children.

4.3 Please describe local factors that are believed to contribute to homelessness in your community (e.g., the closing of a mental health facility, high numbers of refugee claimants, etc.).

Please note that this is not a fulsome list of reasons people experience homelessness in

our community but include factors backed quantitative, qualitative and anecdotal data. In addition to these, there are many nation-wide systemic issues including systemic oppression for Indigenous people and impacts of colonization

Affordability and Availability of housing stock:

- According to the 2024 PiT Count, the top barriers to housing experienced by 84 of the 92 respondents, the most cited were that rents are too high (49), and income is too low (34).
- Despite the lower than provincial average rental rates, rental housing remains unaffordable for many in Brandon. To afford the average rent in Brandon in 2022, a household must earn at least \$40,200, however 50% of renters make under \$40,000 per year (City of Brandon, 2023). 16.6% of all renter households in Brandon are currently in subsidized housing (Statistics Canada, 2021)
- CMHC Data shows 2024 average market rent in Brandon for a 2 bedroom apartment at \$1068/month which is up \$80 from the year before
- Vacancy rates in 2024 were around 1.6% (CMHC) although no data on 3+ bedroom units which was 0.3 in 2022. Anecdotally we know there is a high demand for larger units due to many multi-generational families facing homelessness and migration bringing large families into Brandon. That being said, there is also a need for smaller 1 bedroom or bachelor suites for singles, students, temporary workers, etc.
- 40% of responses in PiT Count had lost most recent housing from eviction. Most common other reasons for losing housing include substance use issues, partner conflict/abuse, affordability and unfit/unsafe housing conditions.
- In 2022 Brandon lost a 21 unit transitional housing project due to the structural integrity of the building. That was a significant impact on the community. The building has since been demolished and new transitional supportive housing will be built in the future at the same location.
- As per the HIFIS Coordinator in Brandon: Using the new Community Outcomes Report in HIFIS, the By Name List, and the MMIWG2S+ risk report, the estimate for the number of transitional units needed in Brandon are:
 - 75 family units
 - 85 senior (50+years of age) units
 - 80 youth units
 - 70 safe units for women at risk
 - 95 single units

The above numbers have not taken into account transitional units that are currently being built. This assessment is an estimation based on the HIFIS data currently available.

Release from Incarceration:

- Due to capacity in jails, releases on remand, general lack of support and systemic cracks, many people leaving incarceration are forced to use the address of the Safe & Warm Shelter on their release papers and are released directly into homelessness. Inmates leaving Brandon Corrections Centre are released into Brandon not their home community so many are released into an unfamiliar city and quickly slip through the cracks which leads to ongoing recidivism.
- PiT Count: 27 people reported that they had been to jail or prison over the last year with 26 reported multiple times.
- ARCH Report: 62 out of 102 spoke about interactions with the justice system as an adult, but the number is likely much higher as many chose not to speak about their involvement in corrections.

Youth in care and exiting care:

- PiT Count: 46 of the 92 survey respondents have experienced the child welfare system, either in foster care or a youth group home. 29 noted that child protection services had not been helpful in helping them transition to independence, while 9 stated it had. 41 of the 46 are Indigenous.
- ARCH Report: 80 out of 102 of our interviewees spoke about being raised in part or in whole by someone other than their biological parents or parents. 76 out of 102 spoke about involvement in a child protection system or experiencing child abuse and/or neglect.

Domestic and intimate partner violence (see stats)

Capacity in Sector for Supports:

- Based on VISPDAT acuity scores, 90% of our unhoused population have medium to high intensity case management needs. This puts a significant strain on resources and scope of work for housing workers, social workers, mental health professionals and volunteer organizations. Anecdotally there is a high rate of burn out in the sector especially amongst organizational leaders in 2025.
- Most PiT Count respondents reported experiencing addiction in their lifetime; the most commonly reported substances were alcohol, methamphetamine, and crack cocaine.

Migration:

- Brandon is a hub city being the second largest city in Manitoba. We have many people come to Brandon seeking supports from First Nations communities, smaller rural communities in the region, from northern MB and even from Winnipeg (safety reasons, exhausted resources, etc)
- We are right on the Trans Canada Highway which means people are sometimes dropped off here that are hitchhiking or transient.

- Brandon has seen a spike in population growth since 2022 due to immigration. It is a small increase in homelessness as most immigration is well supported through support programs and sponsorship. According to the PiT Count in 2024: there was 6 people identified as newcomers, up from 1 in 2021 - Asylum claimant (1), Immigrant (3), Refugee (1), and Study permit (1)

General information from the Action Research on Chronic Homelessness (ARCH) Report - 2024:

Unsurprisingly, affordable housing was a major concern raised during many interviews. They talked about high rents, a shortage of affordable housing units, and available apartments being snapped up quickly in Brandon. Many spoke about the need for more 1-bedroom apartments to be built for single people.

There were also ideas raised about needs for specific types of housing, including more emergency housing, transitional housing, university housing for women with children, housing for youth aging out of care, a safe house for Indigenous women, and a men's domestic violence shelter.

Other relatives talked about the long wait lists for Manitoba Housing and the lack of MB Housing units for single people in Brandon.

14 out of 102 people talked about a lack of housing references, mostly due to moving off reserve where they lived in homes where they had no lease in their name. 18 people spoke about concerns with EIA that could impact renting. Some folks spoke about wanting to live in their home community, but not having safe housing available on their home reserve.

24 out of 102 people, that is approximately ¼ of interviewees, spoke about experiencing discrimination by landlords, due to being on EIA, their looks, Indigenous name, Indigenous appearance, the way they spoke, age, race, lack of rental references, children, criminal record, and being unemployed. ARCH Brandon has reached out to the Manitoba Human Rights Commission about these concerns since many of these are protected characteristics

Homelessness & The Impact of Covid-19:

In 2021, the Rural Development Institute at Brandon University, in partnership with the Brandon Neighbourhood Renewal Corporation, completed a comprehensive study of the impact of Covid-19 on those experiencing homelessness in Brandon. Their study found the following:

- The number of homeless adults in Brandon doubled during the first wave of Covid-19, and continued to increase during the 2nd wave
- The number of homeless youths increased by 50% during the 1st wave of Covid 19

- The number of homeless adults that identified as Indigenous doubled during the 1st wave of Covid-19
- Homeless females significantly increased during the 1st wave. There was a three fold increase of women experiencing homelessness during the 1st and 2nd wave of Covid
- Service providers felt the strain of these increasing numbers. During the 1st wave of Covid-19, service providers in Brandon reported a 75% increase in service transactions
- Pre-Covid, a significantly higher proportion of the homeless population in Brandon attributed their homelessness to housing challenges (i.e. experiencing eviction, a loss of housing, or unsafe housing). However, during Covid, there was a significant increase in homeless individuals accessing services because of substance use, including alcohol and drugs.

During Covid, there was an increase in those scoring “high” on the Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT), indicating increasingly complex needs in Brandon’s homeless population (Yousaf & Ashton, 2021).

4.4 Please identify temporary and emergency relief resources available for individuals experiencing homelessness in your community (e.g., number of shelter beds, resource centres, number of transitional beds available). If possible, please indicate whether capacity levels are commensurate with need. There will be an opportunity to provide information on local permanent solutions and resources further down.

Emergency Shelters:

- Safe & Warm Shelter (Samaritan House): This is the only adult emergency shelter in Brandon with 41 beds. They are frequently at capacity and have to turn people in need away.
- YWCA Women’s Shelter: This is the only shelter in Brandon for women and children fleeing domestic violence and has 24 beds. They are frequently at capacity and have to turn people in need away.
- Community Health & Housing (CHHA) Emergency short stay units:
 - 5 micro suites with 2 beds/1 bathroom for small families
 - 3 single bed units/1 bathroom
- GAP Youth Safe Lodge (ages 16-26): 8 (4 male/4 female) bed overnight shelter and 24/7 drop-in space. This is a new program that started in 2025 but estimated 75-80% full.

- Youth for Christ (ages 18-29): 1 emergency bed and it frequently at capacity.

Transitional Supportive Housing:

- CHHA Withdrawal Management Services: 9 supportive recovery units
- Mary's House Second Stage housing: 4 transitional units for women and children
- Youth for Christ:
 - Common Spaces (ages 18-29): 14 units of supportive recovery housing
 - U-Turn (ages 18-29): 20 units transitional housing
- GAP Youth Safe Lodge (ages 16-26): 2 transitional units (female only)
- Pregnancy Support Centre (Bridgeway Housing): 4 two-bedroom apartments
- Housing First:
 - Franny's House: 10 units
 - Chelsea's House: 8 units
 - 2211 Rosser Ave: 9 units
 - 715 Rosser Ave: 8 units
 - Colonial Inn family program: 6 units
 - Outreach (Manitoba Housing): 14 units
 - Other transitional units: 36

Daytime drop-in Spaces/Resources:

- Samaritan House Safe & Warm Drop-in
- Brandon Friendship Centre
- Women's Resource Centre
- Life's Journey
- GAP Youth Safe Lodge

Youth for Christ

4.5 Some groups, including students, those in congregate housing, and temporary foreign workers, may be excluded from publicly available core housing need data sources. Communities are encouraged to use this section to describe the housing needs of these respective populations to ensure that all groups are represented in their HNA.

Brandon has one major university and one major college as well as some smaller post secondary programming. There are many students that come to Brandon for post

secondary education including International Students. The Brandon University does have dormitories on campus however Assiniboine College does not have housing on or off campus. Anecdotally, many students and temporary workers are seeking housing in the private market which can be challenging due to affordability, housing stock, available transportation and finding furnishes suites for short term rental.

We have a number of people living in short/long term stays in hotel rooms, boarding houses, congregate facilities and overcrowded houses (often derelict and breaking public health guidelines) that are not likely captured in the Stats Canada data.

Currently Housing First is utilizing 6 rooms at a local hotel to house families experiencing homelessness.

5. Housing Profile

5.1 Key Trends in Housing Stock:

This section should tell a story of housing changes over time in a community through trends in net change of affordable or below-market housing. This should be expressed through illustrations of net losses or net gains in affordable and non-market housing over the previous three census periods.

5.2 Please provide a brief history of how housing in the community has been shaped by forces such as employment growth and economic development, infrastructure, transportation, climate impacts, and migration. Please include any long-term housing challenges the community has faced:

Housing Supply: According to Statistics Canada estimates Brandon's population grew by over 5,000 individuals (8%) between 2021 and 2024, primarily as a result of immigration. During this period, the number of dwelling units increased by approximately 700 (3%). The resulting 5% gap between population and housing growth equates to a shortfall of about 1,300 dwelling units within this timeframe.

Immigration: Between 2021 and 2024, Brandon recorded 6,405 immigration landings, making its per capita immigration rate one of the highest in the Province of Manitoba. This trend has influenced local housing demand, leading to a higher need for rental units and alternative ownership models such as row-housing. The city has also seen an increase in multi-generational and multi-family households, resulting in larger average household sizes in some neighborhoods.

Shift in Demand: as of 2021 approximately 52% of all residential dwellings in the City were single detached. Between 2018 and 2022 only 20% of dwelling units were single detached, with the other 80% of dwellings other types, including 47% apartment and 28% row-house dwellings. This shifting demand is driven by changing community demographics and increasing demand for rentals and affordability.

Affordability: Availability and affordability for rental housing is a concern with rent increasing by 18% from 2016 to 2023 and a 1.6% vacancy rate in 2024. From 2006 to 2022 the average selling price of a home increased by 107% to approximately \$300,000 in 2022.

Homelessness: The number of individuals experiencing homelessness in Brandon has nearly doubled, rising from 492 in 2021 to 919 in 2024. This significant increase has presented ongoing challenges for local non-profit organizations as they strive to address growing demand, particularly with respect to the need for additional supportive housing units.

Infrastructure: Rising infrastructure needs have led to higher utility rates, taxes, and development charges, increasing affordability challenges for developers, builders, and

taxpayers. Development charges account for about \$100 million of the 20-year capital cost.

Transportation: Changing demographics and affordability concerns have created challenges/opportunities in enhancing transit service and active transportation planning throughout the community. This process can be complex, particularly in established areas where there are existing patterns of service, such as on-street parking.

Climate Change: Brandon has seen increased river flooding and overland flooding from extreme rain events. These events have lead to an increased focus on resiliency including enhancing dike infrastructure, improving land drainage networks and managing development in flood risk areas.

Economic and Employment Impact: Opened in 1999, the Maple Leaf Foods pork processing plant is the largest employers in Brandon, with over 2,000 employees across various roles including production, skilled trades, engineering, and food safety. Maple Leaf's presence helped Brandon grow into a 58,000+ city, significantly boosting the local economy and supporting secondary industries like transportation, logistics, and retail. Looking forward, Maple Leaf is making investments to increase their capacity by 20% with an eventual 300-person increase in staff.

These employment trends, alongside rising infrastructural and climate challenges, have influenced not only the demand for housing but also the types of homes needed by a diversifying workforce. As Brandon's population dynamics shift, pressure mounts to provide a wider range of housing options, including multi-family developments, accessible units, and transitional accommodations for new arrivals.

5.2.1 Housing Units: Currently Occupied/Available		
Characteristic	Data	Value
Total private dwellings	Total	21,200
Breakdown by structural types of units (number of units)	Single-detached	11,045
	Semi-detached	915
	Row house	1,600
	Apartment/flat in a duplex	530
	Apartment in a building that has fewer than 5 storeys	5,220

5.2.1 Housing Units: Currently Occupied/Available		
Characteristic	Data	Value
	Apartment in a building that has 5 or more storeys	725
	Other single attached	30
	Movable dwelling	1,135
Breakdown by size (number of units)	Total	21,200
	No bedrooms	235
	1 bedroom	2,185
	2 bedrooms	6,440
	3 bedrooms	6,910
	4 or more bedrooms	5,435
Breakdown by date built (number of units)	Total	21,200
	1960 or before	5,100
	1961 to 1980	6,725
	1981 to 1990	2,215
	1991 to 2000	1,835
	2001 to 2005	1,165
	2006 to 2010	1,385
	2011 to 2015	1,530
	2016 to 2021	1,245
Rental vacancy rate (Percent)	Total	3.4%
	Bachelor	*
	1 bedroom	4.1%
	2 bedrooms	2.7%
	3 bedrooms+	3.8%

5.2.1 Housing Units: Currently Occupied/Available		
Characteristic	Data	Value
Number of primary and secondary rental units	Primary	4,778
	Secondary	3,502
Number of short-term rental units	Total	108*

*Source: Airbnb and Vrbo (September 26, 2025)

[Airbnb | Brandon – Vacation Rentals & Places to Stay - Manitoba](#) - 86 homes

[Brandon, Manitoba, Canada Vacation Rental Search results](#) – 22 homes

5.3 In the last five years, how many affordable units for low and very low-income households have been built, and how many have been lost? If data is not available, please describe how the loss of affordable housing units may have impacted your community.

Between 2016 and 2021, the City added 85 affordable housing units. Brandon promotes affordable housing through construction coordination, updated by-laws, and incentives like tax credits, fee offsets, and cash supplements. Public land is prioritized for such projects and often sold for \$1, as with a recent deal for 24 supportive units opening in fall 2025. The City is also selling land to Gambler First Nation for \$1 for a possible 50-unit supportive/transitional housing project.

5.3.1 Change in Units Affordable to Low-Income Households		
Characteristic	Data	Value
Affordable units built (number of units)	2016 to 2021	85
Change in number of affordable units built before 2016 (number of units)	2016 to 2021	190
Change in number of affordable units (number of units)	2016 to 2021	275

5.4 How have average rents changed over time in your community? What factors (economic, social, national, local, etc.) have influenced these changes?

Average rents have steadily increased in Brandon with an average rent of \$1,035 in 2024 compared to & \$797 in 2016. This range includes an average rent of \$813 for a one-bedroom unit and \$1,373 for rent of a three plus bedroom unit. New construction rents are typically \$200 to \$400 higher than the average monthly rental rates.

Rental rates, particularly for new construction, are associated with construction cost increases that reflect changes in borrowing rates, CMHC MLI select insurance premiums, local development charge rates, and material costs.

5.4.1 Average Rent by Year		
Characteristic	Data	Value
Average Monthly Rent (number, by year)	2016	797
	2017	826
	2018	850
	2019	894
	2020	931
	2021	962
	2022	1,005
	2023	963
Change in Average Monthly Rent (percent, by year)	2016-2017	3.6%
	2017-2018	2.9%
	2018-2019	5.2%
	2019-2020	4.1%
	2020-2021	3.3%
	2021-2022	4.5%
	2022-2023	-4.2%

5.5 How have vacancy rates changed over time? What factors have influenced this change?

The vacancy rate has decreased to 1.6% in 2024. Driving factor is Statistics Canada estimated population growth of 5,141 from 2022 to 2024 (stats Canada estimate) with only 694 new residential units permitted during this timeframe. An estimated shortage of approximately 1,300 units during this timeframe.

5.5.1 Rental Vacancy Rate by Year		
Characteristic	Data	Value
Rental vacancy rate (percent, by year)	2016	3%
	2017	1.6%
	2018	1.1%
	2019	3.9%
	2020	3.9%
	2021	3.4%
	2022	2.4%
	2023	2.1%
	2024	1.6%

5.6 How have trends in core housing need changed over time between both tenant and owner-occupied households?

Core housing needs in owner occupied households has stayed relatively stable between 2016 and 2021 with 2% of owner-occupied households in core housing need. Core housing needs are significantly higher for tenant households (14.34%), however this represents a decrease of approximately 4% from 2016. The suspected decrease in core housing need for tenants could in part be driven by an increased proportion of multi-unit buildings constructed within the five-year period to meet market demand.

5.6.1 Core Housing Need by Year and Tenure		
Characteristic	Data	Value
Owner households in Core Housing Need (number)	2016	255
	2021	260
	Total Change	5
	Percent Change	1.96%
Tenant households in Core Housing Need (number)	2016	1,395
	2021	1,145
	Total Change	-250
	Percent Change	-17.92%
Owner households in Core Housing Need (percentage)	2016	2.05%
	2021	2.03%
Tenant households in Core Housing Need (percentage)	2016	18.86%
	2021	14.34%

5.7 Non-Market Housing

5.7.1 Current Non-Market Housing Units		
Characteristic	Data	Value
Number of housing units that are subsidized	Total	1,395
Number of housing units that are below market rent in the private market (can either be rent or income-based definition)	Total	6,505
Number of co-operative housing units	Total	296
Number of other non-market housing units (permanent supportive, transitional, etc.)	Total	146 individuals = approximately 90 units

5.8 Please describe any other affordable and community housing options and needs/gaps currently in your community that are not captured in the table above.

Examples can include:

- Are any of these affordable housing units accessible or specifically designed for seniors, including long-term care and assisted living?
- Does your municipality provide rent supplements or other assistance programs that deepen affordability for households?
- Is your community in need of supportive housing units with wrap-around supports, such as for those with disabilities?

One of biggest gaps in Brandon is supportive transitional housing (including wrap around supports). As per the HIFIS Coordinator in Brandon: Using the new Community Outcomes Report in HIFIS, the By Name List, and the MMIWG2S+ risk report, the estimate for the number of **transitional units needed** in Brandon are:

- 75 family units
- 85 senior (50+years of age) units

- 80 youth units
- 70 Safe units for women at risk
- 95 single units

The above numbers have not taken into account transitional units that are currently being built. This assessment is an estimation based on the HIFIS data currently available

We also have a need for more affordable housing for seniors. We have limited affordable housing options for seniors. One of the most successful programs has been the Westman Seniors Housing Coop which now has 2 buildings with 97 units in total and a waitlist of 480 people.

We do not have any housing programs specifically for the 2SLGBTQ+ community or for men fleeing domestic violence.

There is a rent supplement program called the Canda-Manitoba Housing Benefit run out of the Brandon Neighborhood Renewal Corporation that is funded through Province and the CMHC [Canada Manitoba Housing Benefit – BNRC](#)

5.9 Housing Trends

5.9.1 Housing Values		
Characteristic	Data	Value
Median monthly shelter costs for rented dwellings (Canadian dollars)	Median	950
Purpose-built rental prices by unit size (Average, Canadian dollars)	Total	962
	Bachelor	611
	1 bedroom	753
	2 bedrooms	981
	3 bedrooms+	1,186
Purpose-built rental prices by unit size (Median, Canadian dollars per month)	Total	914
	Bachelor	595
	1 bedroom	716
	2 bedrooms	961
	3 bedrooms+	1,292
Sale prices (Canadian dollars)	Average	297,782
	Median	275,000
Sale prices by unit size (Average, Canadian dollars)	Average	297,782
	Bachelor	-
	1 bedroom	153,398
	2 bedrooms	228,109
	3 bedrooms+	324,867
Sale prices by unit size (Median, Canadian dollars)	Median	275,000
	Bachelor	-
	1 bedrooms	126,000
	2 bedrooms	220,000

5.9.1 Housing Values		
Characteristic	Data	Value
	3 bedrooms+	300,000

Source: Canadian Real Estate Association

[Brandon Median Price | CREA Statistics](#)

Source: Brandon Area Realtors and Brandon Real Estate Board

[Statistics | Brandon Area Realtors](#)

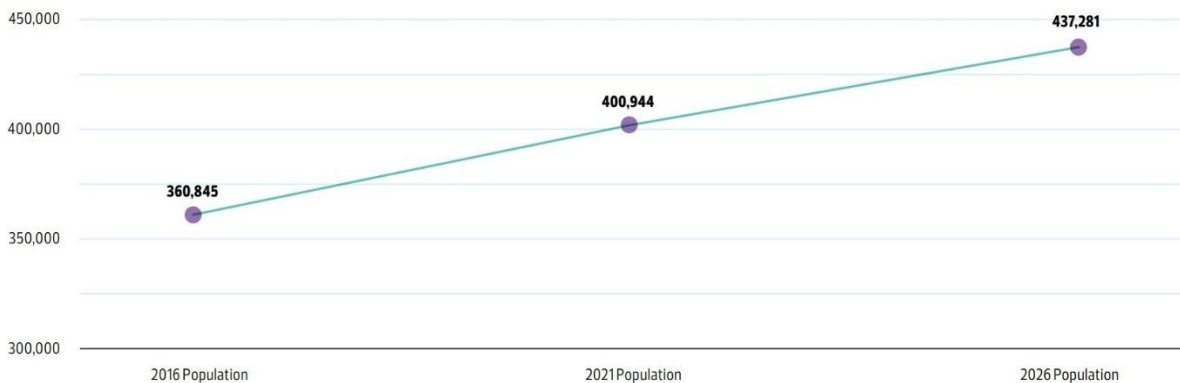
5.9.2 Housing Units: Change in Housing Stock (2021)		
Characteristic	Data	Value
Demolished – breakdown by tenure	Tenant	11
	Owner	10
Completed – Overall and breakdown by structural type (annual, number of structures)	Total	178
	Single	70
	Semi-detached	8
	Row	30
	Apartment	70
Completed – Breakdown by tenure (annual, number of structures)	Tenant	47
	Owner	76
	Condo	55
	Coop	0
Starts – Overall and breakdown by structural type (2021, number of structures)	Total	188
	Single	81
	Semi-detached	10

5.9.2 Housing Units: Change in Housing Stock (2021)		
Characteristic	Data	Value
	Row	41
	Apartment	56
Starts – Breakdown by tenure (2021, number of structures)	Tenant	56
	Owner	91
	Condo	41
	Coop	*

6. Projected Housing Needs and Next Steps

This section aims to answer the question, how much and what type of housing is needed to meet the needs of the population over the next 10 years? How will this Housing Needs Assessment (HNA) be meaningfully used in planning and investment decisions?

This section projects population trends from the previous 10 years, dividing by income category and target housing costs while considering migration trends. An example of a benchmarked projection from [Edmonton's Affordable Housing Needs Assessment](#) is provided below.



Household Growth Projection 2016- 2026. [Source: Edmonton Affordable Housing Needs Assessment – August 2022](#)

HNAs should be able to convey through their data-driven narrative how many housing units are needed by income category, household size and dwelling type over the next 10 years. In completing this section, communities must carefully consider their past growth trends and future demographic projections, including recent immigration patterns, aging population dynamics, and economic trends. Furthermore, it is also crucial for communities to consider any pre-existing housing shortages, as evidenced by indicators such as recent trends in rental vacancy rates, growth in prices/rents, the number of households in core housing need, and the aging of their current housing stock.

6.1 Projection Methodology Guidelines

There are several projection methodologies that can be used to project housing demand, [including the HART housing needs projection here](#). The federal government recommends using the HART methodology as a reference point, with additional considerations and data points to improve the validity of the methodology. These considerations, including economic data integration and supply capacity and gaps as well as steps for calculating the methodology are noted below. Provinces and territories, in consultation with their municipalities/communities, are invited to use a methodology that fits their regional circumstances, ensuring the assumptions that inform their

preferred methodology are also clearly explained. The federal government will review the HNAs as a requirement for its various funding programs and assess the methodology and assumptions that inform it for their validity and robustness. If needed, further engagements can take place to better align the preferred methodology with the federal government's expectations.

In employing a projection methodology, jurisdictions may find the following list of key considerations and steps useful. The following approach involves first projecting the population into the future, then projecting household formation from headship rates, and then **demand for housing by tenure, dwelling type and size, family type and income groups**. Following the Population Projection, Household Projection and Housing Demand Projection steps, a table is presented of the key considerations for each step in the process.

Step 1: Population Projection

- Conceptually the projected population is calculated as the survived population + births + projected net migrants. An example of an accepted method to calculate population projection is the Cohort-Component population projection method.

Step 2: Household Projection

- Project family and non-family households separately by multiplying the projected population by age group in a given year with projected headship rates (household formation) by age group in a given year.
 - A headship rate represents the probability that a member of a given age group will head (maintain) a household of a given type (family or non-family). Historical headship rates are calculated as the ratio of household heads in an age group to the population of that age group.
 - Total headship rates can be determined by adding family and non-family headship rates together for a given age group and year. An increase in the total headship of any particular age group means that overall a higher proportion of that group heads households than previously. The converse holds true for a decrease in the total headship rate. Thus, the total rate is an overall indication of the propensity to form households in a particular age group.
- Project both family and non-family households by household type (composition), including couples without children, couples with children, lone parents, multiple-family households, one-person households, and other non-family households. This can be achieved by multiplying the projected number of households in a particular age group by the projected household type proportions for that age group.

- Historical proportions for family households are the ratio of the number of family households of a given type in an age group to the total number of family households headed by that age group.
 - Historical proportions for non-family households are the ratio of the number of non-family households of a given type in an age group to the total number of non-family households headed by that age group.
- Project net household formation according to family and non-family household types by calculating the difference between projected households in successive years.

Step 3: Housing Demand (Need) Projection

- Project the number of owner households within a particular age range and household type by multiplying projected household by type (family and non-family) by projected ownership rates.
- Project the number renter households by calculating the difference between projected households and the number of projected owner households.
 - Historical ownership or renter rates are the ratio of the number of owning/ or renter households of a given type and age of head to the total number of households (owners and renters combined) of that type and age of head.
- Project dwelling type (single, semi, row, apartment) by multiplying projected age-specific renter and owner dwelling choice propensities by household type (family and non-family) with the projected number of renter and owner households of the given household type and age group.
 - Historical dwelling choice (occupancy) propensities describe the proportion of a given household type, tenure, and age of head group occupying each of the four dwelling types.
- Finally, communities should integrate assessments of pre-existing housing shortages into their final calculations. This integration should be informed by a thorough review of the preceding quantitative and qualitative analyses within the HNA. Additionally, communities should utilize the data and more advanced methodologies detailed in the Annex to ensure a comprehensive estimation of these shortages.

HART Household Projections – Projected Households by Household Size and Income Category

- The HART methodology estimates the total number of units by type (number of bedrooms) and with reference to income categories that will be needed to house a community's projected population.

Please use the Housing Assessment Resource Tools Households Projections tab to fill out the table below for your jurisdiction – [Housing Needs Assessment Tool | HART](#)

6.1.1 Projected Households by Household Size and Income Category, 2031						
HH Income Category	1 person	2 person	3 person	4 person	5+ person	Total
Very Low Income	727	47	0	51	0	825
Low Income	2,647	629	231	85	58	3,650
Moderate Income	1,939	1,786	374	246	209	4,554
Median Income	1,298	2,316	950	531	376	5,471
High Income	542	3,015	1,951	2,098	1,289	8,895
Total	7,153	7,793	3,506	3,011	1,932	23,395

Key Considerations

Population

- It is strongly advised to use the updated post-census population estimates for 2022 as your base population provided by Statistics Canada's demographic estimates division. These estimates account for any discrepancies in population counts, whether they are undercounts or overcounts. These estimates also smooth out the sharp downturn in immigration due to the pandemic in 2020/21. Please refer to annex for links to Statistics Canada CSD and CMA estimates.
- If historical fertility, survival and mortality rates by age category are stable and not trending, apply average historical rates to current population by age to project forward. If rates do trend by age over time, estimate the average change in rates in percentage points and add to current rates when projecting forward for the baseline scenario.
- For larger communities and centres where the data exists, disaggregate and project baseline net migration flows for respective components (i.e., net interprovincial, net intra migration and net international). Disaggregate net international migration and project its components further (emigration, returning Canadians, non permanent residents, etc.) and use recent growth trends per flow to project total net international migration. In projecting international migration, it will be important for communities to use the more updated federal immigration targets as an anchor.
- Because of the economic uncertainty triggered by the COVID-19 pandemic and potential future shocks, larger communities are expected to create one additional population scenario (high) to supplement the baseline. Utilize StatsCan projection methodology for fertility, survival, and migration to establish the high scenario. Consult Statistics Canada's population projection report cited in the appendix. Communities should avoid using low population or migration scenarios to prevent housing need undercounting.
- **Smaller Communities:**
 - In smaller centers where population projection scenarios are unavailable from StatsCan, but there is the capacity to generate them, cities can resort to using historically high population growth rates or migration scenarios as alternative methods for projecting future population.
 - One industry communities should also develop multiple population scenarios to manage economic volatility

Household Projections

- Headship rate is commonly defined as the ratio of the number of households by age to the population of adults by age in each community and can be used to project future households.

- If historical headship rates data is not trending or stable by age, apply the average historical census family/non-family headship rates by age group to the corresponding population within each age group.
- If historical headship rates by age is showing a trend over time, include the average historical census family/non-family headship rates percentage point change to the current headship rate. Subsequently, apply these adjusted headship rates by age to the corresponding population within each age group. By incorporating average historical headship rates into household projections, communities can mitigate the impact of potential decreases in recent headship rates that may be due to housing unaffordability, therefore avoiding artificially low household projections.
- **Optional for Smaller Communities:**
 - For the younger population aged 18-34, predict family/non-family headship rates using economic modeling. See UK study in annex for further guidance.
 - Project household composition by family/non-family households using latest census proportions by family type.
 - Project household size by age for family/nonfamily type by dividing population by households.

Housing Demand

To project housing demand by tenure:

- If ownership rates for family/non-family households within specific age groups are not showing a trend over time, apply the average historical ownership rates to projected households by age. The remaining households are considered renter households by age.
- If ownership rates for family/non-family households within specific age groups are trending over time, include the average historical percentage point change to the current ownership rates. Apply these adjusted ownership rates to household counts by age to project tenure by age. The remaining households are considered renter households by age.

To project housing demand by dwelling type:

- If historical dwelling propensities by family type, age, and tenure are not exhibiting a trend, apply the average historical demand propensity by type, age, and tenure to project households by type, age, and tenure.
- If historical demand type propensities are trending, incorporate the average percentage point change in demand type propensities to the current propensities. Apply these adjusted propensities to household types to estimate future dwelling propensities.

Economic Data Integration

- Relying solely on traditional demographic approaches to forecast housing needs can underestimate housing demand.
- Headship rates by age and family type can be projected by considering economic factors as explanatory drivers. These factors could include income, unemployment rates, prices, rents, and vacancy rates.
- CMHC is developing models to project headship rates for household maintainers aged 18-34 in provinces and larger metropolitan areas. Larger communities can benefit from leveraging these projections.
- Using an economic approach to project headship rates and incomes facilitates the estimation of household counts by age, size, tenure, and income. When integrated with dwelling type, price, and rent data, this approach assists in identifying potential households in core housing need.

Supply Capacity & Supply Gaps

- Housing need projections should be adjusted upwards or downwards to account for the **net effects** of conversions, demolitions, and vacant units in each community.
- Where data is available, communities should assess future capacity by compiling data on draft approved serviced lots, categorized by dwelling type and tenure, that will be available for residential development. When combined with household projections by dwelling type and tenure, help estimate supply gaps
- In addition, larger communities can leverage supply gap estimates from CMHC to help inform where need is greatest and to identify housing shortages.
- **Optional for Smaller Communities:**
 - Comparing housing need projections with supply capacity will enable communities to identify potential gaps in supply by dwelling type and tenure.

6.2 Projection Methodology

Population projections were undertaken at the CA level, rather than directly for the City, as the requisite data is not available at the City level. Additionally, cohort-component methods are more appropriate for higher levels of aggregation.

Cohort Component Population Projection Method

The population projection method used is the cohort-component method. This method is the same general methodology as that used by Statistics Canada for official population projections at the provincial and national levels.

This method involves identifying components of population change for each age group for each period, and combining these components.

Assumptions for each component can take the form of counts, or rates. Fundamentally, population change is defined as follows:

$$P_{a-1,s}^{t+1} = P_{a,s}^t + B_{a,s}^{t,t+1} - D_{a,s}^{t,t+1} + IM_{a,s}^{t,t+1} - NE_{a,s}^{t,t+1} + NIPM_{a,s}^{t,t+1} + NIRM_{a,s}^{t,t+1} + NNPR_{a,s}^{t,t+1}$$

Where

- a is a specific age group
- s is a specific sex or gender
- t is a time (July 1st of each year, typically)
- $t, t + 1$ indicates the period between time t and time $t + 1$
- P is population
- B are births (only relevant for age group -1)
- D are deaths (subtracted)
- IM is permanent international immigration
- NE is net emigration
- $NIPM$ is net interprovincial migration
- $NIRM$ is net intraprovincial (or inter-regional) migration
- $NNPR$ is net non-permanent residents

Component specific assumptions

Wherever possible, assumptions are driven by those used by Statistics Canada for their most recent population projections for the provinces and nationally. As a consequence, the methodology used here leads to projections for Manitoba which closely align with those produced by Statistics Canada. The projections used are most closely aligned with Statistics Canada's M1 scenario.

Fertility

Fertility rates are based on fertility rate projections used by Statistics Canada for Manitoba. These projected rates are adjusted to account for differences in the number of births observed across areas within Manitoba. For example, Brandon's age-specific

fertility rates were adjusted by a factor of 0.95 to reflect historically fewer births than would be predicted by Manitoba-level fertility rates.

A masculinity ratio of 105 male births to 100 female births is used, consistent with Statistics Canada assumptions.

Mortality

Mortality rates are based on projections of mortality rates used by Statistics Canada for Manitoba. These rates are taken as-is.²

Immigration

Immigration to Brandon CA is modelled as a “capture” of immigration to Manitoba as projected by Statistics Canada. Brandon CA is projected to receive a constant share of immigration to Manitoba. This share is based on the most recent historical share. This recent reference point is used as it was felt to be most reflective of expected patterns, especially given pilot programs which are expected to sustain elevated immigration to Brandon.

The age-sex distribution of immigration to Brandon CA was based off of the historical distribution in Brandon CA (and elsewhere in Manitoba), disciplined by the projected age-sex distribution for Manitoba as a whole.

Net emigration

Net emigration is a relatively small component of growth. Net emigration rates were computed for Brandon CA based off of historical rates.

Net interprovincial migration

Limited data is available for net-interprovincial migration at the sub-provincial level. Net interprovincial migration was modelled as an age and sex specific rate at the local level. These rates were based on historical rates of net interprovincial migration.

This is a methodological departure from the Statistics Canada methodology, necessitated by a lack of data. Specifically, age and sex specific migration flows from each area to each other area would be needed to follow Statistics Canada’s methodology more closely, and this data is not available. (Furthermore, with sub-provincial geographies, these patterns would likely be even more noisy, making projection more idiosyncratic.)

Net intraprovincial migration

Net intraprovincial migration is not (by definition) a part of Statistics Canada population projections at the provincial level. As net-intraprovincial migration must equal zero within

² This is not expected to be a consequential assumption. While mortality rates vary by sub-provincial geography, they are fairly similar, and data does not support a much more detailed analysis.

the province, net-intraprovincial migration is here modeled as an age-sex specific rate **on a provincial base**.

Net non-permanent residents

Net non-permanent residents were modelled in a manner analogous to immigrants. Brandon CA was assumed to capture a share of the provincial net-non-permanent residents. The age-sex distribution of net-non-permanent residents was based on the projected provincial distribution.³

CA to CSD allocation

Projections were developed using the cohort-component model at the CA level. To go from Brandon CA to Brandon CY, a constant age- and sex-specific share is used, taken from the 2021 Census. Concretely:

$$P_{as,CY}^t = P_{as,CA}^t \frac{CEN_{as,CY}^{2021}}{CEN_{as,CA}^{2021}}$$

As Brandon CY has reflected a high and relatively stable share of CA level population, this is expected to be a reasonable assumption.

Population level differences

Population levels vary based on data source. Statistics Canada's population estimates (at an annual frequency) are typically higher than the Census population counts in the same year. This reflects the fact that the Census misses people and households. The population projections produced here are based on the levels consistent with Statistics Canada's population estimates. These estimates are expected to be a better reflection of actual population.

However, as household projections are based on Census levels, an adjusted population projection is also produced to be in line with these Census levels.

Headship rate projections

Headship rates describe the proportion of individuals of a given age group which lead (or "head") a household of a specific type.

Headship rates can change over time for a number of reasons, including availability and affordability of housing. In general (and excluding children) if population growth is more rapid than growth in the housing stock, headship rates must decline.

³ This age-sex distribution varies by sub-provincial geography, but is generally similar to the provincial distribution.

Headship rates (by age and family type) are based on the average of rates seen in 2016 and 2021.⁴ Tenure shares (by age and family type) and dwelling structure type shares (by age, family type, and tenure) are assumed to continue on the trajectory observed between 2016 and 2021.

Household projections

Household / occupied dwelling projections are based on applying headship rates (along with tenure and dwelling structure type shares, as applicable) to population projections.

Major caveats

Projections are not predictions

Projections are not forecasts or predictions of what will occur. Instead, they are assumption driven scenarios, typically relying on historical patterns. Projections can be understood as an answer to the question “what would things look like if things follow the basic pattern of the recent past?”

Components of growth change, and are influenced by economic and cultural factors

Components of change are generally projected according to patterns of the recent past. However, this does not consider in any detail the **context** in which those patterns occurred in the past, and whether or not that context is expected to be meaningfully different in the future.

An important piece of this is economic context. Migration is sensitive to local economic contexts – people are more likely to move to places with greater employment opportunities, or perhaps to areas with better balances of cost of living and income. These population projections (as with most population projections) do not consider how these factors are likely to evolve in the future.

Population and household growth influence one-another

The methodology presented treats household growth as a direct consequence of population growth. In reality, population and household growth are jointly determined. Population growth is restrained by the amount of housing available to accommodate that growth, and how much housing is built is influenced by both government decisions (including local planning) as well as economic factors (house prices and costs of development).

⁴ Assuming headship rates (by age and family type) were to continue on the trajectory observed between 2016 and 2021 led to implausible headship rates, and so were discarded.

Please refer to the Assumptions Tables spreadsheet attached for further detail

6.2.1 Projections				
Characteristic	Data/Formula	2021	2025	2031
Men by age distribution (# and %)	0-14	4,965 19%	5,348 18%	5,201 16%
	15-19	1,635 6%	1,821 6%	2,120 7%
	20-24	2,247 9%	2,592 9%	2,697 9%
	25-64	13,393 52%	15,810 53%	16,872 53%
	65-84	3,137 12%	3,577 12%	4,166 13%
	85+	425 2%	461 2%	490 2%
Women by age distribution (# and %)	0-14	4,547 17%	4,974 17%	4,943 16%
	15-19	1,573 6%	1,700 6%	2,003 6%
	20-24	2,069 8%	2,354 8%	2,320 7%
	25-64	13,489 51%	15,000 51%	15,949 51%
	65-84	3,957 3%	4,447	5,108 16%
	85+	849 3%	895 3%	921 3%
Male Births	Births x Estimated Proportion of Male Births	n/a	338	362
Female Births	Births x Estimated Proportion of Female Births	n/a	314	336
Male Survival Rate	Survival rate for those not yet born at the beginning of the census year	n/a	99%	99%

6.2.1 Projections				
Characteristic	Data/Formula	2021	2025	2031
Female Survival Rate	Survival rate for those not yet born at the beginning of the census year	n/a	99%	99%
Net Migrations	Net migration (in and out)	n/a	6	800
Projected Family Households	Age-group population x projected age-specific family headship rate	13,170	14,789	16,089
Projected Non-family Households	Age-group population x projected age-specific non-family headship rate	8,016	8,913	9,679
Total Projected Headship Rate	Households / Population age 15 and older	30.4%	28.1%	28.7%
Projected Net Household Formation	Projected households by type (family and non-family) (Year 2) – Projected households by type (family and non-family) (Year 1)	n/a	272	427
Projected Owner Households	Projected households by type, year and age group x Projected ownership rate by type, year and age group	12,896	14,079	15,058
Projected Renter Households	Projected households by type, year and age group – projected owner households by type, year and age group	8,520	9,624	10,706
	Apartment	6,362	7,220	7,698

6.2.1 Projections				
Characteristic	Data/Formula	2021	2025	2031
Projected Dwelling Choice	Other	1,122	1,227	1,407
	Row	1,622	2,016	2,627
	Semi	897	1,038	1,170
	Single	11,185	12,202	12,864

6.3 Population and Households Projections

6.3.1 Anticipated Population by 2031		
Characteristic	Data	Value
Anticipated population	Total	62,790
Anticipated population growth (2021 – 2031)	Total	9,959
	Percentage	18.9%
Anticipated age	Average	38.8
	Median	36.6
Anticipated age distribution (# and %)	0-14	10,144
	15-19	4,123
	20-24	5,017
	25-64	32,821
	65-84	9,274
	85+	1,411

6.3.2 Anticipated Households by 2031		
Characteristic	Data	Value
Current number of households (2021)	Total	21,187
Anticipated number of households (2031)	Total	25,765
Anticipated Household Age	15 to 24 years	1,746
	25 to 34 years	4,896
	35 to 44 years	5,045
	45 to 54 years	4,313
	55 to 64 years	3,327
	65 to 74 years	3,330
Anticipated Households by Tenure	Renter	10,706
	Owner	15,058
Anticipated Units by Type	Total	25,765
	Single	12,864
	Semi-detached	1,170
	Row	2,627
	Apartment	7,698
	Other	1,407
Anticipated Units by Number of Bedrooms	No bedrooms	235
	1 bedroom	3,325
	2 bedroom	8,036
	3 bedroom	8,050
	4 or more bedrooms	6,119
Anticipated Households by Income	Average	112,500
	Median	98,000

6.3.2 Anticipated Households by 2031		
Characteristic	Data	Value
	Very Low	909
	Low	4,020
	Moderate	5,015
	Median	6,025
	High	9,796
Anticipated average household size	Total	2.4
Draft approved lots by planned housing type	Total	782
Draft approved lots by tenure	Tenant	39
	Owner	743

7. Use of Housing Needs Assessments in Long-Term Planning

7.1 This final section aims to determine how your community anticipates using the results and findings captured in the Housing Needs Assessment to inform long-term planning as well as concrete actions that can address identified needs. Please use the following questions to describe how those linkages will be made.

- **How will this HNA inform your official community or development plan, housing policies and/or actions going forward?** For example, if the HNA identifies specific needs in your community across the housing spectrum – such as housing needed for priority populations, units for large households in denser form factors, more diverse structural types such as missing middle housing, or more affordable and higher-density housing near transit - how could actions and changes in policy and planning help address those needs?

The housing needs assessment has already influenced our development community and we are seeing more of the units that were identified as lacking in the market such as 1 bedroom units, 3+ bedroom units and transitional housing.

The results of the assessment are used in our growth strategy to confirm or adjust inputs as needed to continue to inform decisions around growth and infrastructure planning.

As well, the housing needs assessment allows us to align Official Community Plan (City Plan) policies with the identified trends and projections.

- **How will data collected through the HNA help direct those plans and policies as they aim to improve housing locally and regionally, and how will this intersect with major development patterns, growth management strategies, as well as master plans and capital plans that guide infrastructure investments?**

Housing Incentives are available for affordable housing city wide and market housing downtown

Zoning Standards were recent changed to address housing needs including providing incentives for creation of one bedroom units.

Development Charges

Capital plans 10 year are largely created based on population and unit projection which the HNA provides

- **Based on the findings of this HNA, and particularly the projected housing needs, please describe any anticipated growth pressures caused by infrastructure gaps that will need to be prioritized and addressed in order to effectively plan and prepare for forecasted growth. This can relate to any type of enabling infrastructure needed for housing, including fixed and non-fixed assets, as well as social, community or natural infrastructure that**

your local government has identified as a priority for fostering more complete and resilient communities.

Several areas of the city are at capacity for wastewater and development has had to inch along as infrastructure is being upgraded. The city recently built a lift station in the south growth area of Brandon and is in the process of installing another lift station to accommodate the growth that Brandon is experiencing. Furthermore, due to concerns with water pressure, the city is currently assessing water in the south growth area to determine limitations and opportunities for upgrades. The city is also investing in drainage infrastructure in several areas such as the southeast to alleviate drainage concerns as a result of growth.

There are two schools proposed in the south growth area that would alleviate the current strain on the school system. Brandon's public transit is currently under reevaluation to determine how well it meets the needs of our growing population.

Examples may include:

- Will your public transit system have the capacity to meet increasing demand?
- Will your water and wastewater system have the capacity for additional connections based on the amount of new housing units that will need to be built?
- Will new roads or bridges need to be built to serve new or growing communities?
- Will new schools, parks, community or recreational centres need to be built to serve new or growing communities?
- Will broadband service and access need to be significantly expanded to help new residents and businesses connect? Are there any climate risks or impacts that will affect new growth?

Annex A: Relevant Links for Developing Housing Needs Projections

Data and Analysis

[Housing Statistics - Statistics Canada](#)

[Population estimates, July 1, by census subdivision, 2016 boundaries \(statcan.gc.ca\)](#)

[Population estimates, July 1, by census metropolitan \(statcan.gc.ca\)](#)

[Population and demography statistics \(statcan.gc.ca\)](#)

[Population Projections for Canada \(2021 to 2068\), Provinces and Territories \(2021 to 2043\) \(statcan.gc.ca\)](#)

[Housing Market Information Portal](#)

[UrbanSim – Scenario Modeling](#)

Reports & Publications

[Housing Markets Insight - CMHC's household projections for 8 of Canada's major urban centres until 2042](#)

[CMHC - Housing Shortages in Canada Report](#)

[University of British Columbia - Housing Assessment Resource Tools \(HART\)](#)

[University of London - Affordability targets: Implications for Housing Supply](#)

[Nova Scotia Housing Needs Assessment Report Methodology](#)

[Ontario Land Needs Assessment Methodology](#)

[British Columbia Affordable Housing Need Assessment Methodology](#)

Annex B: Glossary

Affordable Housing: A dwelling unit where the cost of shelter, including rent and utilities, is a maximum of 30% of before-tax household income.

Area Median Household Income: The median income of all households in a given area.

Cooperative Housing: A type of residential housing option whereby the owners do not own their units outright. This would include non-profit housing cooperatives, as stand-alone co-operatives or in partnership with another non-profit, including student housing co-ops, as well as Indigenous co-ops, including those in partnership with Indigenous governments and organizations. This does not, however, include homeownership co-ops or equity co-ops that require an investment, which along with any profit earned, is returned to co-op investors.

Core Housing Need: Refers to whether a private household's housing falls below at least one of the indicator thresholds for housing adequacy, affordability or suitability, and would have to spend 30% or more of its total before-tax income to pay the median rent of alternative local housing that is acceptable (attains all three housing indicator thresholds).

- *Adequate* – Does not require any major repairs, according to residents. Major repairs include those to defective plumbing or electrical wiring, or structural repairs to walls, floors or ceilings.
- *Suitable* – Has enough bedrooms for the size and make-up of resident households, according to guidelines outlined in National Occupancy Standard (NOS).
- *Affordable* – All shelter costs total less than 30% of a household's before-tax income.

Household: A person or a group of persons (other than foreign residents) who occupy a private dwelling and do not have a usual place of residence elsewhere in Canada.

Household Formation: The net change in the number of households.

Supportive Housing: Prioritizes people experiencing chronic homelessness and other vulnerable people who have the highest support needs. It provides long-term affordable housing and a diversity of customized support services.

Permanent Supportive Housing: Prioritizes people experiencing chronic homelessness and other vulnerable people who have the highest support needs. It provides long-term affordable housing and a diversity of customized support services.

Purpose-Built Rental: Also known as the primary rental market or secure rentals; multi-unit buildings (three or more units) which are built specifically for the purpose of providing long-term rental accommodations.

Short-Term Rentals: All or part of a dwelling unit rented out for less than 28 consecutive days in exchange for payment. This includes bed and breakfasts (B&Bs) but excludes hotels and motels. It also excludes other accommodations where there is no payment.

Suppressed Household Formation: New households that would have been formed but are not due to a lack of attainable options. The persons who would have formed these households include, but are not limited to, many adults living with family members or roommates and individuals wishing to leave unsafe or unstable environments but cannot due to a lack of places to go.

Missing Middle Housing: Housing that fits the gap between low-rise, primarily single-family homes and mid-rise apartment buildings, typically including secondary and garden suites, duplexes, triplexes, fourplexes, rowhouses and townhouses, courtyard housing, and low-rise apartment buildings of 4 storeys or less. These housing types provide a variety of housing options that add housing stock and meet the growing demand for walkability. The missing middle also refers to the lack of available and affordable housing for middle-income households to rent or own.