

R

ENTAL MARKET

Northern Ontario

REPORT

Canada Mortgage and Housing Corporation

Greater Sudbury and Thunder Bay Vacancy Rates Decline

The vacancy rates for Greater Sudbury and Thunder Bay fell again this year. Greater Sudbury's vacancy declined for the third consecutive year to 5.1 per cent while Thunder Bay's dropped more than one per cent to 4.7 per cent.

The rate reductions came despite relatively strong resale housing markets this year as low interest rates continued to stimulate the demand for homeowner accommodation. Low mortgage rates continue to make homeownership more attractive with monthly rent payments being comparable to a monthly mortgage payment.

Sudbury Summary

- Greater Sudbury's vacancy rate for rental structures with at least three units fell again this year to 5.1 per cent, down from 5.7 per cent in October 2001.
- The rate decline marks the third consecutive year the vacancy rate has fallen in Sudbury coming off the 1999 peak of 11.1 per cent.
- Lower vacancies have occurred despite very

Attention:

With this report, the Sudbury and Thunder Bay Reports have been consolidated. In addition, Fast Fax reports are available for all markets over 10,000 in Northern Ontario by calling 1-800-493-0059.

good conditions for homebuying over the past year.

- Growing employment has positively impacted on the rental market.
- Call centre jobs and retail expansion have made conditions better for the 18 -30 age segment, people who are typically known as prime renters. Employment by age data shows employment in the 15-24 age group grew seven per cent comparing the first nine months of 2002 with the same period in 2001. Trade and services employment grew 6.4 per cent on average over the same period, two sectors which potentially have a good percentage of renters.
- Out-migration appears to have troughed in Greater Sudbury in turn helping the rental market. Out-

October 2002 Survey

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migration, while still negative declined from 2900 leaving in 1998-99 to 700 net out-migrants in the latest period for which data is available, 2000-2001.

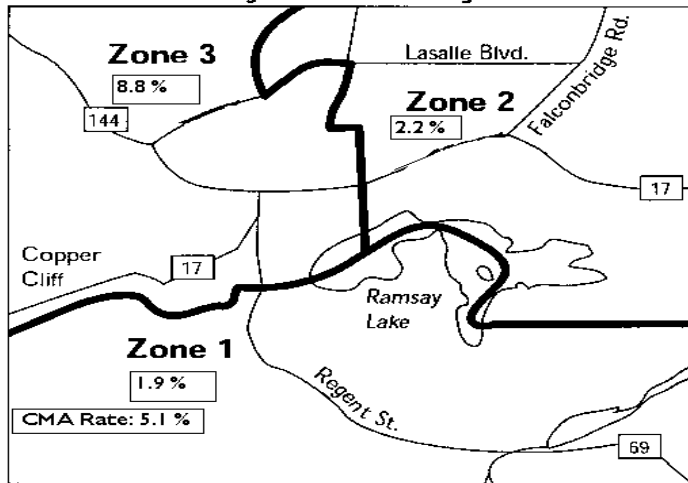
- Despite the drop to 5.1 per cent, Greater Sudbury remains second, trailing Saint John, New Brunswick.



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HOME TO CANADIANS
Canada

Sudbury CMA Vacancy Rates



Zone 4: Valley East, Rayside Balfour, Nickel Centre, Walden & Onaping Falls **4.8%**

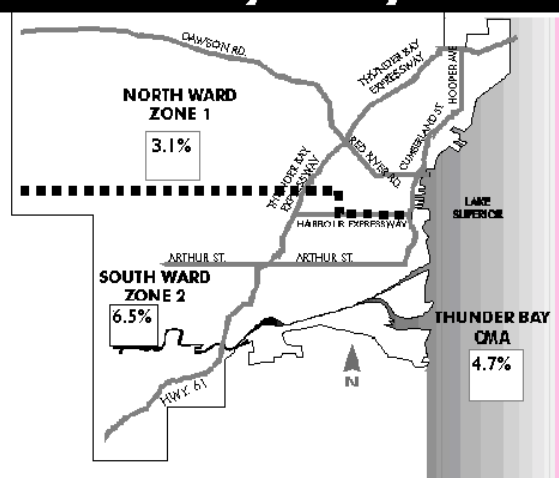
- Greater Sudbury once again exhibited tighter conditions in Lockerby (Zone 1) and New Sudbury (Zone 2). Lockerby's vacancy rate was 1.9 per cent, down from 2.8 per cent in 2001 while New Sudbury's rate fell to 2.2 per cent from 2.7 per cent.
- The falling vacancy rate allowed for some rent increases with two bedroom units rising 4.4 per cent to \$647 this October from \$620 last year. One bedroom rents rose 2.6 % to \$513 per month from \$500.
- The highest rents in Greater Sudbury were found in Zone 1 and 2 respectively, areas with the lowest vacancy rate. Zone 3 or Old Sudbury is dominated by older stock as the name suggests. Zone 3 also takes in Copper Cliff which is somewhat removed from the area deemed attractive by the prime renter age group. Lower average rents are found in Old Sudbury which

is what one would expect of a less attractive, older portion of the market.

Thunder Bay Summary

- After remaining stable for two years, Thunder Bay's vacancy rate for rental structures with at least three units resumed a downward trend falling this year to 4.7 per cent, down from 5.8 per cent in October 2001.
- The rate decline moves Thunder Bay out of first place and into fourth among CMA's (centres with populations over 100,000) in Canada with high vacancy rates.
- Fewer out-migrants from Thunder Bay and job growth in the prime renter age group has helped fuel the drop in the vacancy rate over that past twelve months.
- Like Greater Sudbury, out-migration appears to have troughed in Thunder Bay. Although still negative, it declined from 1100 leaving in 1999-2000 to 200 net out-migrants in the latest

Thunder Bay Survey Zones



period, 2000-2001. This has helped the rental market.

- The average rent for two bedroom apartments in CMA structures with at least three units (3+) was \$657 in October 2002, unchanged from last October.
- Thunder Bay's North Ward or Zone 1 had a lower vacancy rate than the South Ward or Zone 2.
- The average rent for a one bedroom apartment in structures with at least three units also rose to \$532, three dollars more than the figure recorded in 2001.
- Vacancies by bedroom type in Thunder Bay show only three bedroom units with a higher vacancy rate than one year ago. The two bedroom unit vacancy rate fell to 3.8 per cent from 4.9 per cent and the one bedroom unit vacancy rate declined to 5.3 per cent.
- The highest rents in Thunder Bay were found in Zone 1 or the North Ward, also the part of the city with the lowest vacancy rate.

**TABLE 1: VAC RATES IN PRIVATE APT STRUCTURES OF 3 UNITS AND OVER
1997-2002**

METROPOLITAN AREA	1997	1998	1999	2000	2001	2002
	October	October	October	October	October	October
ABBOTSFORD	N/A	N/A	N/A	N/A	2.4	2
CALGARY	0.5	0.6	2.8	1.3	1.2	2.9
CHICOUTIMI	4.1	4.8	4.9	4.4	4.4	4.9
EDMONTON	4.6	1.9	2.2	1.4	0.9	1.7
HALIFAX	7.7	5.5	3.6	3.6	2.8	2.7
HAMILTON	3.1	3.2	1.9	1.7	1.3	1.6
KITCHENER	1.9	1.5	1.0	0.7	0.9	0.9
LONDON	5.1	4.5	3.5	2.2	1.6	2.3
MONTRÉAL	5.9	4.7	3.0	1.5	0.6	2
OSHAWA	2.4	2.0	1.7	1.7	1.3	0.7
OTTAWA-HULL	5.4	3.1	1.6	0.5	0.7	2.4
OTTAWA	4.2	2.1	0.7	0.2	0.8	2.3
HULL	9.4	6.7	4.4	1.4	0.6	0.5
QUÉBEC	6.6	5.2	3.3	1.6	0.8	1.9
REGINA	1.5	1.7	1.4	1.4	2.1	0.3
ST. CATHARINES	5.4	4.6	3.2	2.6	1.9	1.9
SAINT JOHN	8.2	7.3	5.2	3.4	5.6	6.3
ST. JOHN'S	16.6	15.4	9.2	3.8	2.5	2.7
SASKATOON	0.9	0.8	0.9	1.7	2.9	3.7
SHERBROOKE	7.5	7.3	7.6	4.7	2.3	1.8
GREATER SUDBURY	7.2	9.4	11.1	7.7	5.7	5.1
THUNDER BAY	7.7	9.3	7.5	5.8	5.8	4.7
TORONTO	0.8	0.8	0.9	0.6	0.9	2.5
TROIS-RIVIÈRES	8.6	8.5	7.9	6.8	4.7	3
VANCOUVER	1.7	2.7	2.7	1.4	1.0	1.4
VICTORIA	3.5	3.8	3.6	1.8	0.5	1.5
WINDSOR	4.5	4.3	2.7	1.9	2.9	3.9
WINNIPEG	5.9	4.0	3.0	2.0	1.4	1.2
CHARLOTTETOWN	N/A	N/A	N/A	N/A	1.8	2.2
TOTAL (1)	4.1	3.4	2.6	1.6	1.2	1.7

(1) Weighted average of Metropolitan areas surveyed.

Rental Outlook for 2003:

Double Cohort effect should improve fortunes of landlords

Whether it's Sudbury or Thunder Bay, the presence of a university and a community college play a role in the private rental market. With two high school classes graduating in the spring of 2002, this means more first-year students for the post-secondary institutions, some of whom will be looking for rental housing in the communities. This combined with the aging of the echo baby boom means more demand for rental housing and potentially lower vacancy rates in both Sudbury and Thunder Bay.

No new rental construction is forecasted which adds to the likelihood of a fall in vacancy rates as rental supply will not be increased. Retail and call centre expansion continues with its natural attractiveness to the prime renter age group of 18-30. Out-migration appears to also be on the decline which bodes well for continued demand. Despite a small rise in interest low homeownership carrying costs will prompt continued moves out of rental countering any large decline in vacancy rates. On balance, Sudbury's rate will fall to 4.7 per cent while Thunder Bay's

will drop to 3.7 per cent by the fall of 2003.

Rents are forecast to rise with falling vacancy rates. After a 4.4 per cent jump in average two bedroom rents to \$647 per month, Greater Sudbury rents will rise a more subdued 0.5%, or \$3 on average, to \$650 per month. Rents in Thunder Bay meanwhile, will rise 1.5 per cent in 2003 to \$667 per month, up \$10 from 2002.

**Table 3: Apartment Vacancy Rates By Zone and Bedroom Type
Sudbury CMA**

Area	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
Zone 1	2.8	1.9	21.9	7.4	2	1.3	1.7	1.8	4.6	2.5
Zone 2	2.7	2.2	11	**	3.4	0.7	1.6	2.2	**	**
Zone 3	9.3	8.8	18.8	16.7	8.7	9.7	7.6	7	9.3	1.5
Sudbury City 1-3	5.8	5.2	17.5	13	5.8	5.9	4.1	4	5.8	1.7
Zone 4	5.1	4.8	**	**	8.4	6.9	3.4	4.2	7.1	5.3
Sudbury CMA	5.7	5.1	17.4	12.5	6	5.9	4	4.1	6.1	2.5

**Table 3a: Apartment Vacancy Rates By Zone and Bedroom Type
Thunder Bay CMA**

Area	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
North Ward 1	4.1	3.1	**	**	3.5	2.8	4.2	2.3	**	**
South Ward 2	7.7	6.5	21.5	12.4	9.1	7.7	5.5	5.5	**	**
Thunder Bay CMA	5.8	4.7	17.7	14.1	6.3	5.3	4.9	3.8	3.1	6.8

Page Highlights

- According to Table 5 on the page 6, vacancy rates in both Greater Sudbury and Thunder Bay are lower in structures built after 1960. Newer structures have better amenities and are in greater demand.
- In Greater Sudbury, as seen in Table 5, the vacancy rate is 2.6 per cent in structures built after 1984, the lowest of any age range presented while in Thunder Bay the vacancy rate is lowest in structures built between 1960 and 1974.
- Greater Sudbury structures built between 1975 and 1984 present the only challenge to the hypothesis of rents being higher in newer buildings as their average rents (\$782 per month for a two bedroom unit) are actually higher than structures built after 1984 (\$705 per month for a two bedroom unit).

**Table 4: Apartment Average Rents By Zone and Bedroom Type
Sudbury CMA**

Area	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
Zone 1	661	697	457	432	592	627	699	740	802	840
Zone 2	620	638	394	**	550	561	665	681	**	**
Zone 3	510	519	370	365	456	461	572	593	636	661
Sudbury City 1-3	579	598	389	387	509	519	637	663	712	752
Zone 4	506	536	**	**	402	439	530	560	618	619
Sudbury CMA	570	590	387	387	500	513	620	647	693	719

**Table 4a: Apartment Average Rents By Zone and Bedroom Type
Thunder Bay CMA**

Area	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
North Ward 1	647	650	**	**	561	567	692	684	**	**
South Ward 2	562	573	371	412	498	501	618	626	**	**
Thunder Bay CMA	605	612	375	398	529	532	657	657	819	820

**Table 5: Apartment Vacancy Rates By Structure Year of Completion and Bedroom Type
Sudbury CMA**

Year of Completion	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
No Date Available	**	**	N/A	N/A	**	**	**	**	N/U	N/U
Pre 1940	9.7	6.5	**	**	6	6.5	9.7	5.5	**	**
1940 - 1959	13	11.1	24.8	14.6	11.7	12.1	10.4	10.2	9.7	**
1960 - 1974	4.3	4.5	15.6	12.9	4.1	3.6	3.2	4.1	4.4	3.5
1975 - 1984	5.5	3.2	**	**	**	**	4.3	3.2	**	**
After 1984	1.9	2.6	4.1	9.6	3	3.6	1.4	1.7	**	**
Total	5.7	5.1	17.4	12.5	6	5.9	4	4.1	6.1	2.5

**Table 5a: Apartment Vacancy Rates By Structure Year of Completion and Bedroom Type
Thunder Bay CMA**

Year of Completion	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
No Date Available	**	**	N/A	**	**	**	**	**	N/U	N/U
Pre 1940	12.6	12.5	**	**	13.1	13.3	10.2	11.3	**	**
1940 - 1959	**	**	**	**	**	**	**	**	N/A	**
1960 - 1974	3.5	2.1	**	**	2	1	4.8	3.1	**	**
1975 - 1984	3.4	2.5	7.8	**	3.1	1.9	3.5	2.7	0	**
After 1984	7.7	7.2	59.8	41.4	14.9	13.4	4.6	4	4	9.4
Total	5.8	4.7	17.7	14.1	6.3	5.3	4.9	3.8	3.1	6.8

**Table 6: Average Apartment Rents By Year of Completion and Bedroom Type
Sudbury CMA**

Year of Completion	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
No Date Available	**	**	N/A	N/A	**	**	**	**	N/U	N/U
Pre 1940	441	466	**	**	415	432	475	522	**	**
1940 - 1959	468	471	379	363	427	430	521	534	637	**
1960 - 1974	569	587	390	397	521	538	597	618	705	718
1975 - 1984	671	718	**	**	**	**	733	782	**	**
After 1984	649	672	433	420	578	606	680	705	**	**
Total	570	590	387	387	500	513	620	647	693	719

**Table 6a: Average Apartment Rents By Year of Completion and Bedroom Type
Thunder Bay CMA**

Year of Completion	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom +	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
No Date Available	**	**	N/A	N/A	**	**	**	**	N/U	N/U
Pre 1940	477	467	**	**	459	430	541	540	**	**
1940 - 1959	**	**	**	**	**	**	**	**	N/A	**
1960 - 1974	602	620	**	**	548	570	660	663	**	**
1975 - 1984	636	641	433	**	574	578	667	672	789	**
After 1984	669	671	350	354	525	543	686	678	835	845
Total	605	612	375	398	529	532	657	657	819	820

**Table 7: Apartment Vacancy Rates By Structure Size and Bedroom Type
Sudbury CMA**

Structure Size	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
3 - 5 Units	6.9	9.7	17.2	14.8	7.2	11.3	4.1	8.9	7.6	1.6
6 - 19 Units	9.2	5.7	26	16.2	10.5	6.7	6.4	4	11	6.8
20 - 49 Units	4.9	4.1	19.8	5.9	5.7	6.5	2.8	2.7	7.3	4.4
50 - 99 Units	2.6	2.5	7.5	9.8	1.8	1	1.8	1.8	2.6	0.9
100+ Units	2.4	2.3	**	**	2.7	1.3	2.3	2.9	1.8	0.9
Total	5.7	5.1	17.4	12.5	6	5.9	4	4.1	6.1	2.5

**Table 7a: Apartment Vacancy Rates By Structure Size and Bedroom Type
Thunder Bay CMA**

Structure Size	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
3 - 5 Units	8.5	5.3	**	**	10.5	4.9	7.6	6.1	**	**
6 - 19 Units	8.5	9.9	**	**	8.2	12.8	7	6.6	**	**
20 - 49 Units	3.4	1.2	**	**	4.8	1.4	2.1	1.1	0	0
50 - 99 Units	3.5	0.6	0	0	1.6	0.4	4.6	0.7	**	**
100+ Units	**	**	N/U	N/U	**	**	**	**	**	**
Total	5.8	4.7	17.7	14.1	6.3	5.3	4.9	3.8	3.1	6.8

Page Highlights

- The bigger the project the lower the vacancy rates is borne out examining information found in Table 7 above with rents being generally higher (see Table 8 below) in larger projects in both Greater Sudbury and Thunder Bay. Again this reflects better amenities in larger buildings

**Table 8: Average Apartment Rents By Structure Size and Bedroom Type
Sudbury CMA**

Structure Size	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
3 - 5 Units	478	482	351	352	417	421	520	538	655	654
6 - 19 Units	526	542	392	377	437	454	579	598	601	625
20 - 49 Units	589	613	395	412	516	526	648	671	649	695
50 - 99 Units	637	672	416	411	597	645	700	738	813	849
100+ Units	667	699	**	**	604	632	692	726	756	782
Total	570	590	387	387	500	513	620	647	693	719

**Table 8a: Average Apartment Rents By Structure Size and Bedroom Type
Thunder Bay CMA**

Structure Size	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
3 - 5 Units	537	529	**	**	454	460	592	566	**	**
6 - 19 Units	585	596	**	**	519	508	624	630	**	**
20 - 49 Units	627	633	**	**	550	554	688	689	739	769
50 - 99 Units	674	688	439	438	597	622	712	720	**	**
100+ Units	**	**	N/U	N/U	**	**	**	**	**	**
Total	605	612	375	398	529	532	657	657	819	820

**Table 9: Apartment Vacancy Rates By Rent Range and Bedroom Type
Sudbury CMA**

Rent Range	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
< \$400	14.6	13.6	18.8	15.5	12.3	13.6	**	**	**	**
\$400 - 499	8.2	7.7	17.5	9.2	6.7	8.2	5.8	5.5	**	**
\$500 - 599	5.1	6.2	**	**	4.2	4	5.6	7.7	**	**
\$600 - 699	3.2	3.8	N/U	N/U	**	2	3.1	4.3	4.3	2.9
\$700 - 799	3.1	1.5	N/U	N/U	**	**	2.2	1.3	**	**
\$800 +	**	1.6	**	N/U	**	**	**	**	**	**
Total	5.8	5.3	18.4	12.2	6	6.2	3.8	4.2	6.8	2.3

**Table 9a: Apartment Vacancy Rates By Rent Range and Bedroom Type
Thunder Bay CMA**

Rent Range	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
< \$400	24.9	21.6	24.8	**	28	**	**	**	N/U	N/U
400-499	9	7.8	9.2	**	10	8.3	**	7	**	**
500-599	4.5	4.3	**	**	3.7	2.9	5.8	6.2	**	N/U
600-699	5.7	3.4	N/U	**	2.1	0.6	6.5	4.4	**	**
700-799	2.7	1.2	N/U	N/U	**	**	2.8	1.4	**	**
\$800 +	2.1	4.5	N/U	N/U	**	**	**	**	**	**
Total	6.1	4.7	18	10.9	6.9	5.5	4.9	3.7	3.3	7.9

Page Highlights

- According to Table 9 on the page 7, vacancy rates in both Greater Sudbury and Thunder Bay are higher in structures with lower rents and lower in structures with higher rents. Thunder Bay structures with rents over \$800 are an exception to this rule.
- Two bedroom units dominate both markets. In Greater Sudbury, as seen in Table 10, 56 per cent of units are two bedrooms while in Thunder Bay, 58 per cent of units are two bedroom units.

**Table 10: Number of Apartment Units - Vacant and Total (Universe) By Zone and Bedroom Type
Sudbury CMA**

Area	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total
Zone 1	53	2,745	9	119	12	908	28	1,556	4	162
Zone 2	51	2,370	**	**	4	579	33	1,522	**	**
Zone 3	394	4,501	65	389	177	1,818	149	2,133	2	160
Sudbury City 1-3	499	9,616	87	666	194	3,305	211	5,211	7	434
Zone 4	67	1,384	**	**	19	284	39	937	7	127
Sudbury CMA	565	11,000	88	702	213	3,588	250	6,148	14	561

**Table 10a: Number of Apartment Units - Vacant and Total (Universe) By Zone and Bedroom Type
Thunder Bay CMA**

Area	All Units		Bachelor		One Bedroom		Two Bedroom		Three Bedroom+	
	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total	Vacant	Total
North Ward 1	87	2,814	**	**	26	939	38	1,680	**	**
South Ward 2	170	2,627	14	111	75	982	81	1,477	**	**
Thunder Bay CMA	258	5,441	24	171	101	1,921	119	3,157	13	192

METHODOLOGY

Canada Mortgage and Housing Corporation conducts the Rental Market Survey every year in October to determine the number of vacancies and the rents charged in rental structures. The survey is conducted on a sample basis in all urban areas with populations of 10,000 or more. Only structures which have been on the market for at least three months are included. While this publication is mainly about privately initiated apartments with three units and more, the CMHC survey also examines row houses and publicly initiated rental and co-op housing.

Acknowledgement

The Rental Market Survey could not have been conducted without the co-operation of the many property owners and managers throughout Canada. We greatly acknowledge their hard work and assistance in providing timely and accurate information. We sincerely hope that the results of this work will provide a benefit to these clients and to the entire housing industry.

Zones

The survey zones reported in this publication are identified on the map on page two.

Thunder Bay Zones

Zone 1: Thunder Bay's North Ward: Thunder Bay Census Metropolitan Area north of a line running roughly along 10th and 11th Avenues to Edward Street; then east of Edward Street to Oliver Road; then north of Oliver Road to the CMA's western boundary.

Zone 2: Thunder Bay's South Ward: Thunder Bay Census Metropolitan Area south of a line running roughly along 10th and 11th Avenues to Edward Street; then west of Edward Street to Oliver Road; then south of Oliver Road to the CMA's western boundary.

Sudbury Zones

Zone 1: - Lockerby: includes the entire area south of Ramsey Lake.

Zone 2: - New Sudbury: includes New Sudbury and Minnow Lake.

Zone 3: - Old Sudbury: includes the West End, Gatchell and Copper Cliff.

Zone 4: - Remainder Metropolitan Area: includes Valley East, Rayside-Balfour, Nickel Centre, Walden and Onaping Falls.

Definitions

Vacancy: A unit is considered vacant if, at any time of the survey, it is physically unoccupied and available for immediate rental.

Rent: The rent data refers to the actual amount tenants pay for their unit. Amenities and services such as heat, light, parking, hot water and laundry facilities may or may not be included in the monthly rent

reported in individual cases. The average rent figures reported in the publication represent the average of different units in the market area, some of which may have some or all of these services.

Rental apartment structure: Any building containing three or more rental dwellings which are not ground-oriented.

Rental row house structure: Any building with three or more ground-oriented rental dwellings.

Abbreviations:

****** - data cannot be published due to confidentiality concerns.

N/U - no units in this category.

