



Dauphin Housing Need & Demand Market Assessment Findings Overview

August 2019

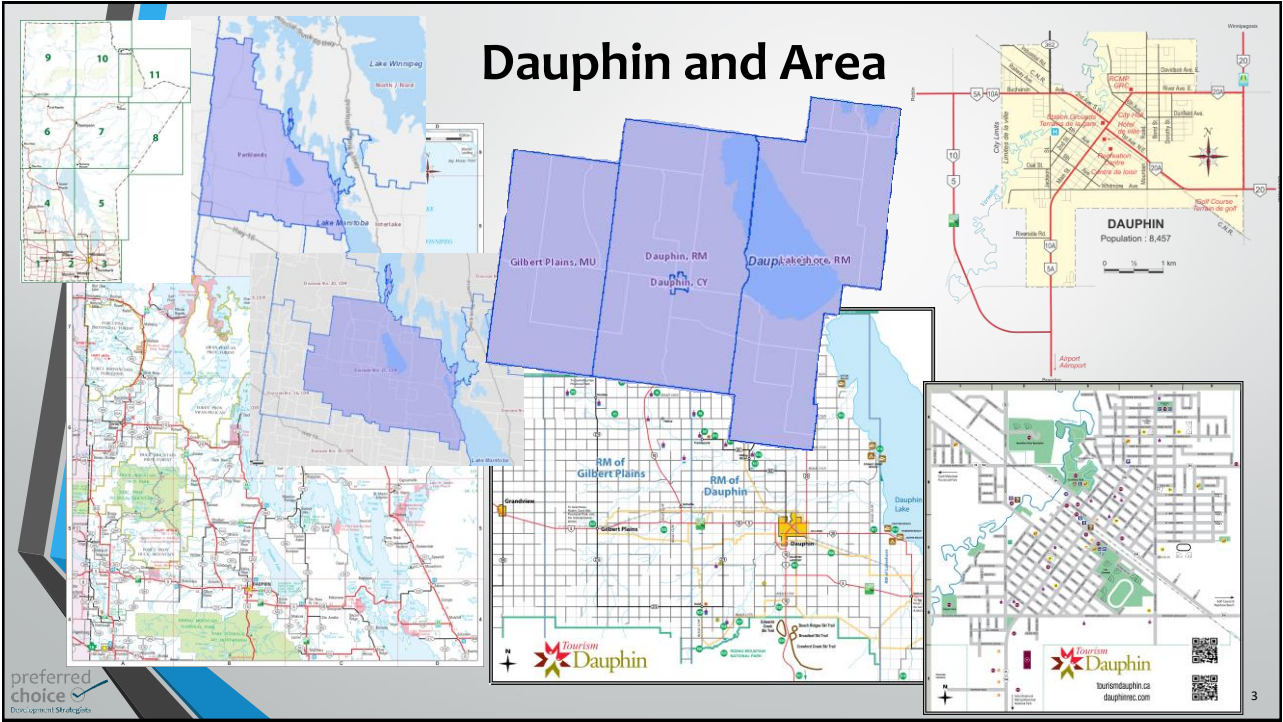
Prepared by

D. James Leier

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Dauphin Housing Assessment Review Agenda

- The Dauphin Area and Housing Market Assessment Project
- Community Housing Continuum
- Community Population, Housing Market, Rental Market, Household Information
- Recent Housing Activity and Supply Capacity
- Regional Employment, Labour, and Population Growth Forecasts
- Housing Market Supply, Demand, and Needs
- Housing Growth Forecast along the Housing Continuum and Market Segments
- Housing Assessment Conclusions
- Housing Assessment Recommendations
- Housing Development Next Steps



Dauphin Housing Market Assessment Project

Dauphin Housing Market Assessment Objectives

Develop a Baseline of Existing Housing Stock for the City

Forecast Projected Housing Needs for the City

Determine the Need Across the Housing Continuum Segments

Provide Key Housing Info for Developers and Non-Profit Entities

Utilize the Findings and Info for Community Planning

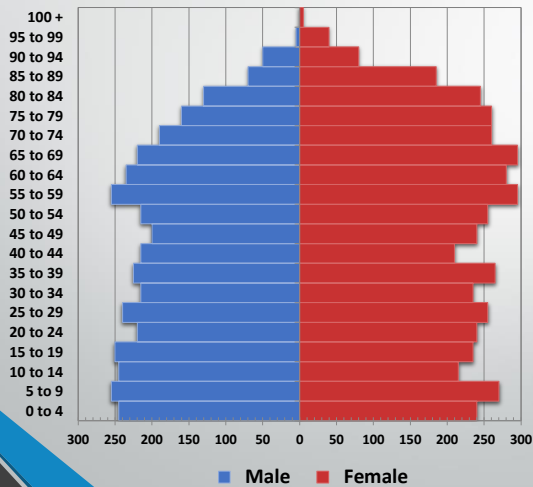
The Housing Continuum

The Community Housing Continuum						
Emergency Shelters	Transitional Housing	Social Housing	Affordable Rental Housing	Affordable Home Ownership	Rental Housing	Home Ownership
⇒	⇒	⇒	⇒	⇒	⇒	⇒
Government Subsidized Housing			Non-Market Housing		Market Housing	

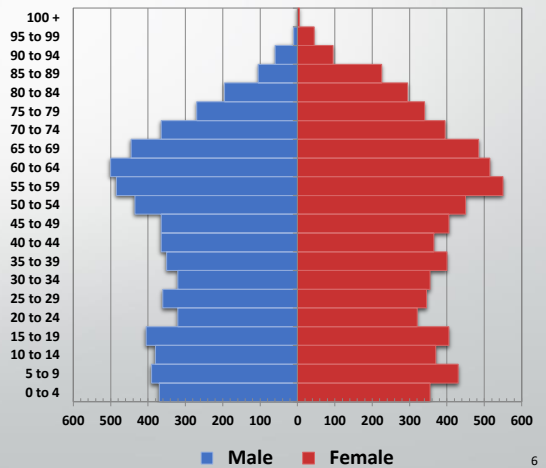
Source: A Guide for Canadian Municipalities for the Development of a Housing Action Plan, Canada Mortgage and Housing Corporation, 2010

2016 Census Population Age Distribution

Dauphin, City Pop Distribution - 2016 Census

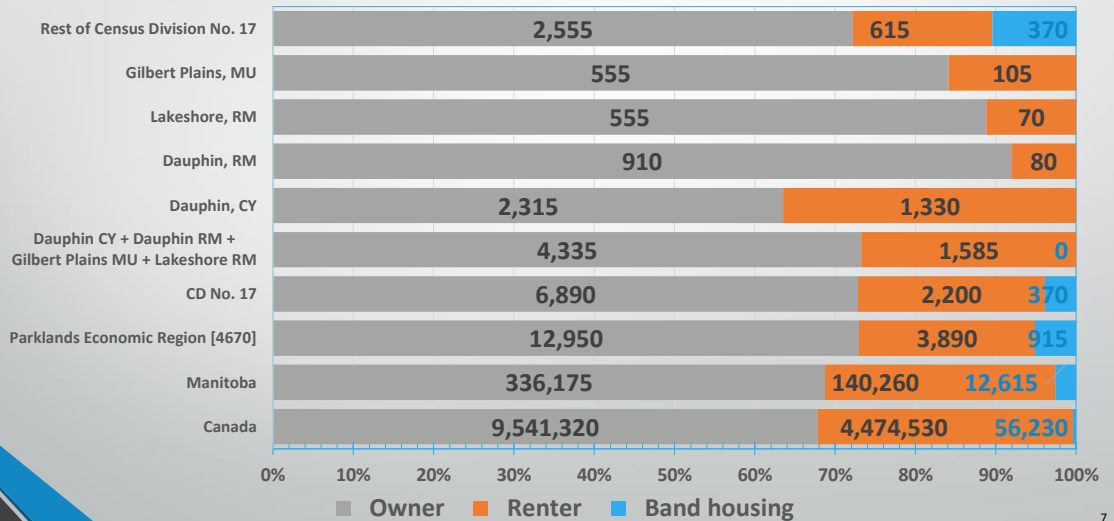


Dauphin CY + Dauphin RM + Gilbert Plains MU + Lakeshore RM Pop Distribution - 2016 Census



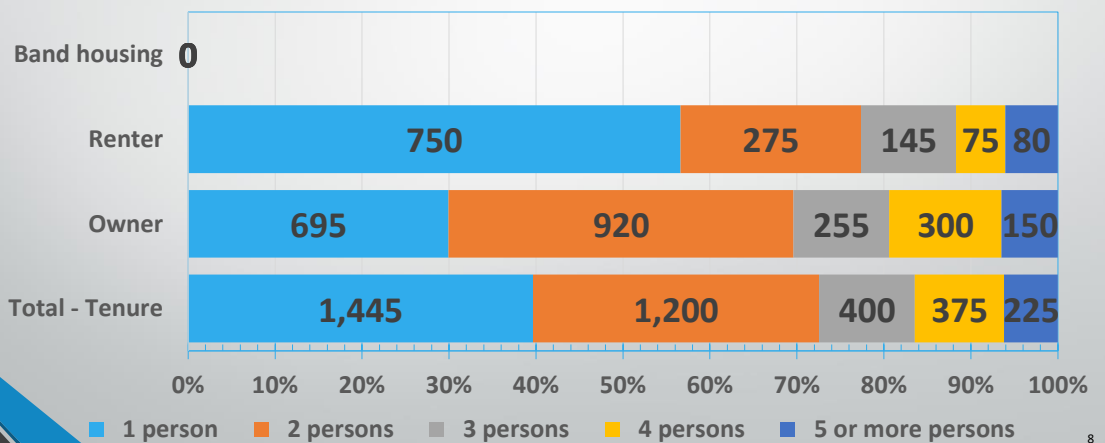
Housing Market Information

Area Housing Tenure for Private Households - 2016 Census



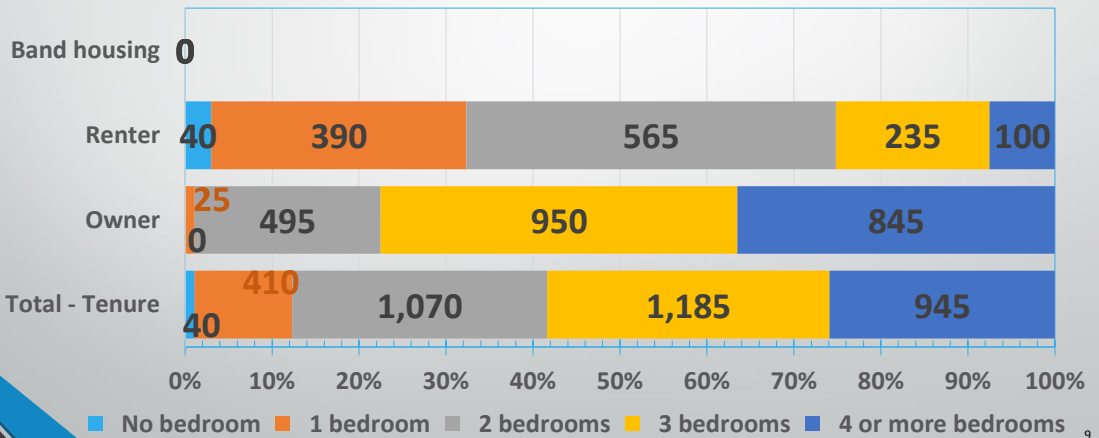
Dauphin Market - Dwellings

Dauphin, CY Household Size by Tenure for Private Households - 2016 Census



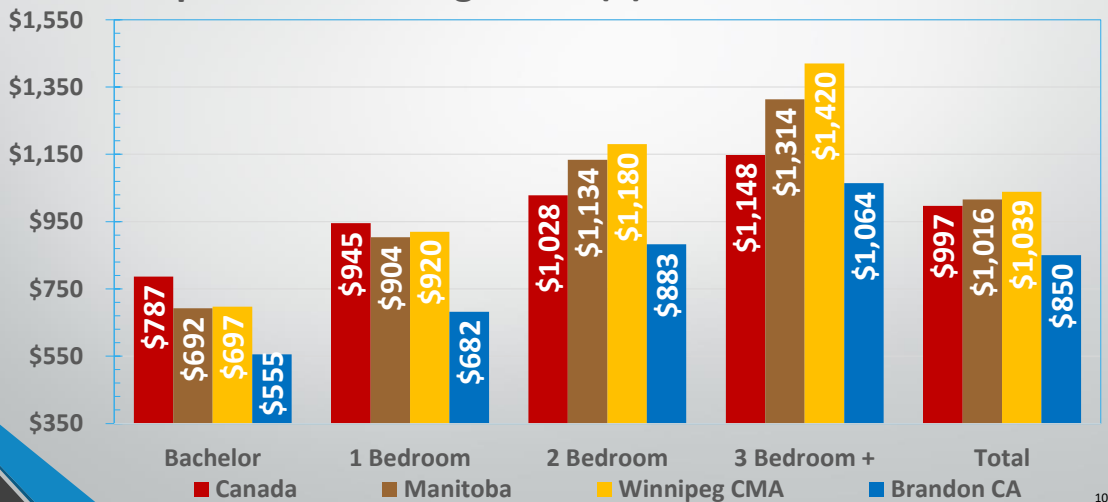
Dauphin Market - Dwellings

Dauphin, CY Number of Bedrooms by Tenure for Private Households - 2016 Census



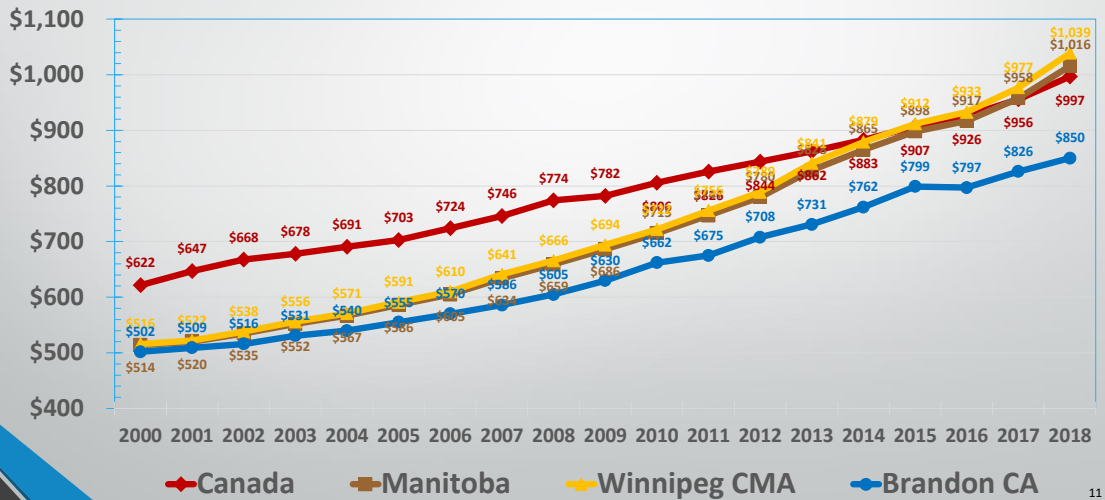
Rental Housing Market Information

Apartment Average Rent (\$), CMHC - Fall 2018



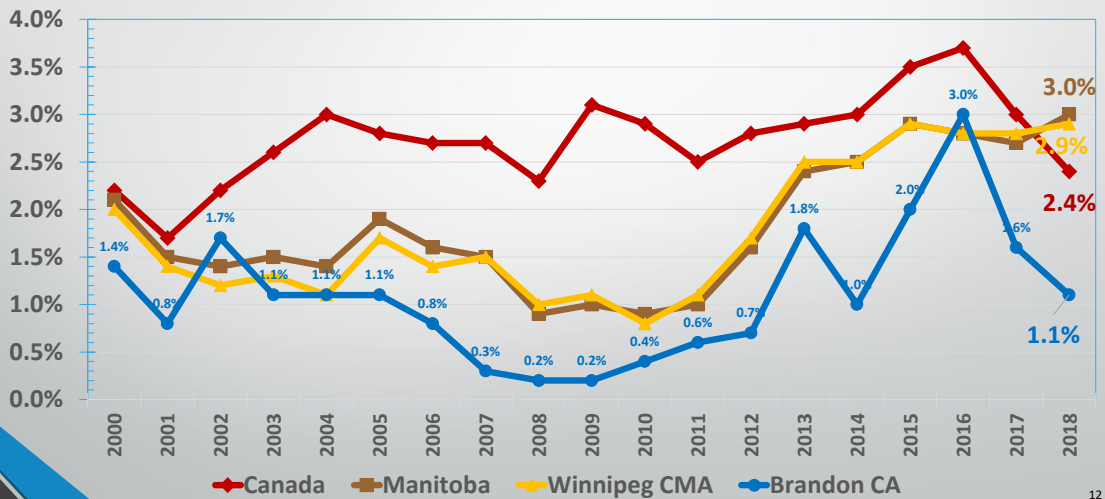
Rental Housing Market Information

Rental Average Rent (\$) Total CMHC - Fall 2000 - 2018



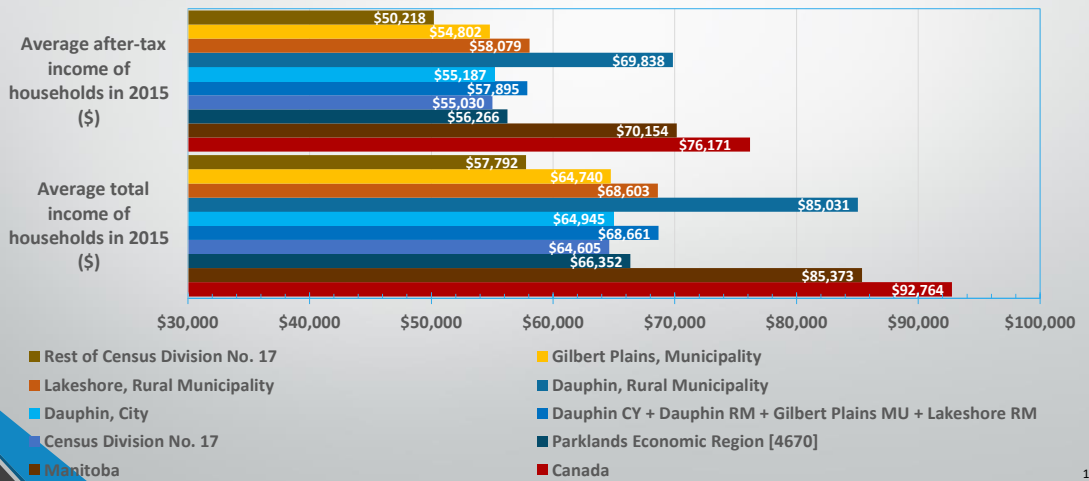
Rental Housing Market Information

Rental Vacancy Rate (%) Total CMHC - Fall 2000 - 2018



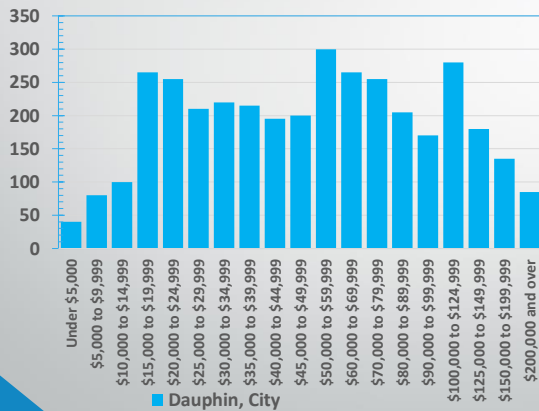
Household Information

Area Household Average 2015 Total Income in Private Households - 2016 Census

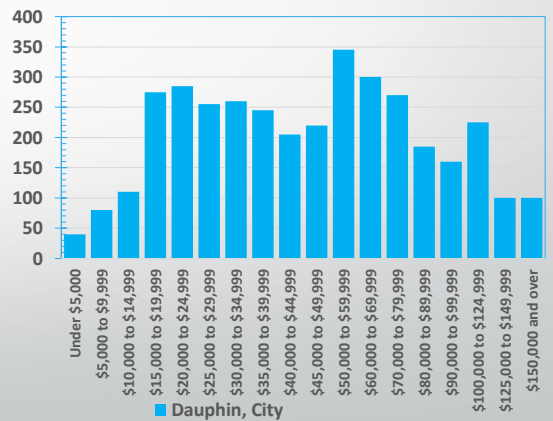


Household Information

Dauphin, City Household 2015 Total Income Groups in Private Households - 2016 Census

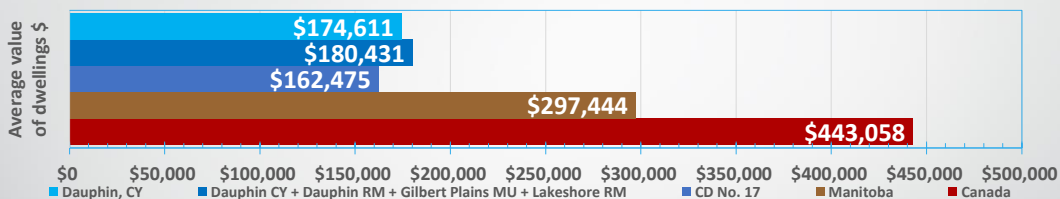


Dauphin, City Household After-Tax 2015 Total Income Groups in Private Households - 2016 Census

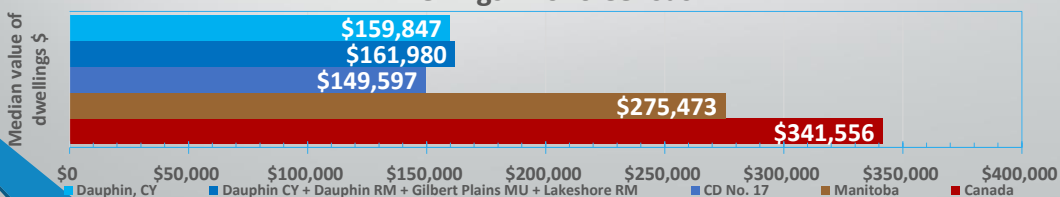


Housing Information

Area Owner Estimated Average Value of Dwelling for Private Dwellings - 2016 Census

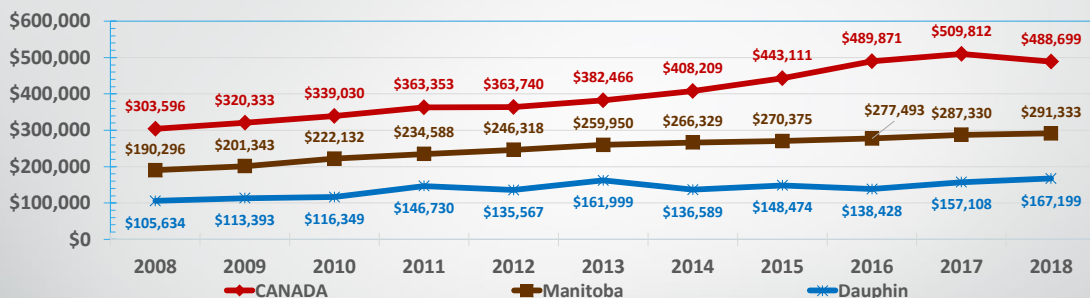


Area Owner Estimated Median Value of Dwelling for Private Dwellings - 2016 Census

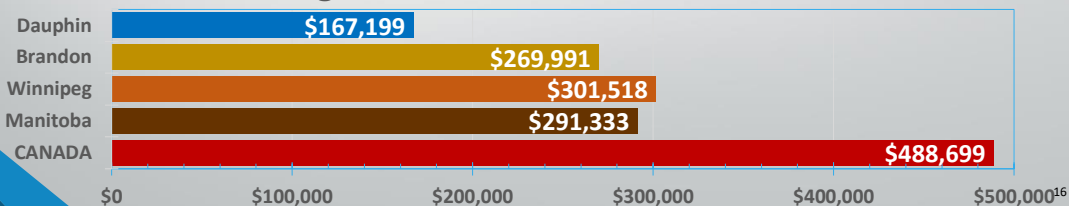


Housing Information

Average Residential MLS® Sales Price 2008 - 2018

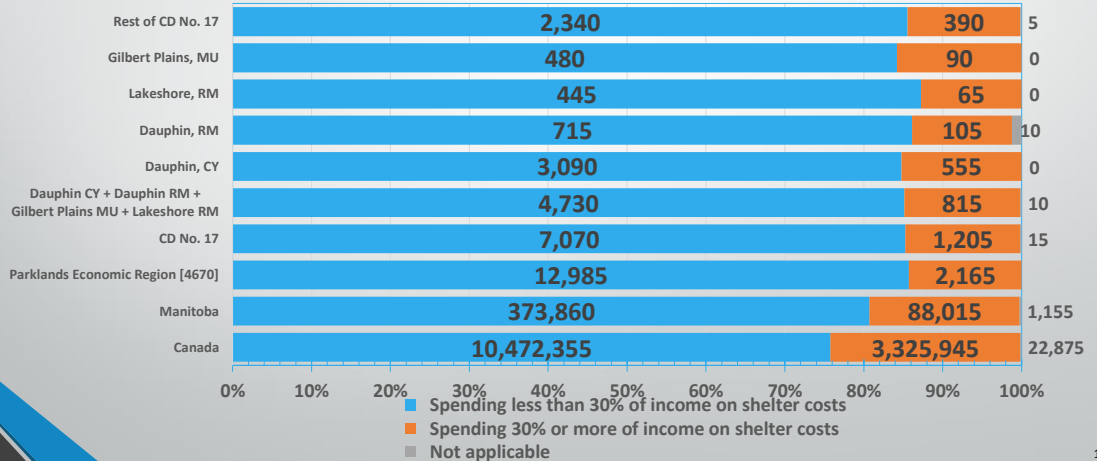


2018 Average Residential MLS® Sales Price



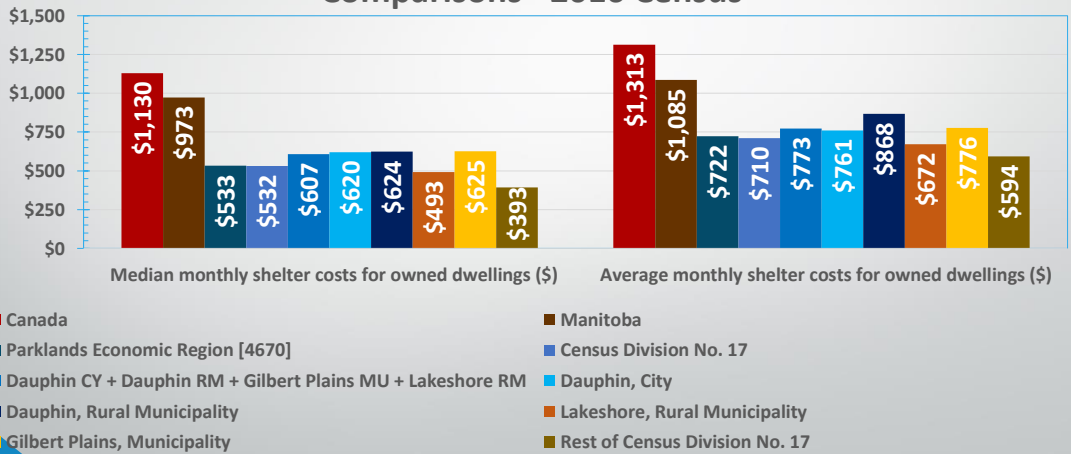
Housing Affordability Information

Area Household Shelter Cost to Income Ratio for Private Dwellings - 2016 Census



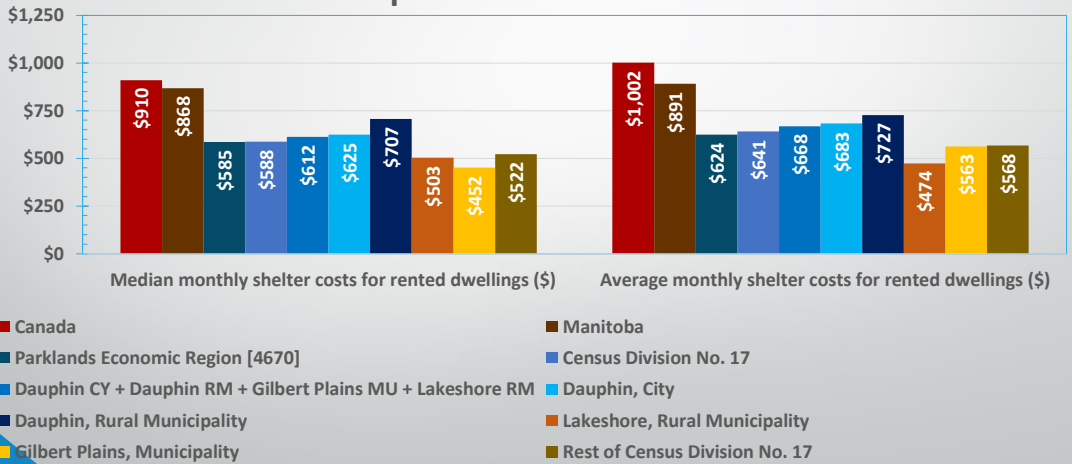
Housing Affordability Information

Area Owner Housing Median and Average Shelter Costs Comparisons - 2016 Census



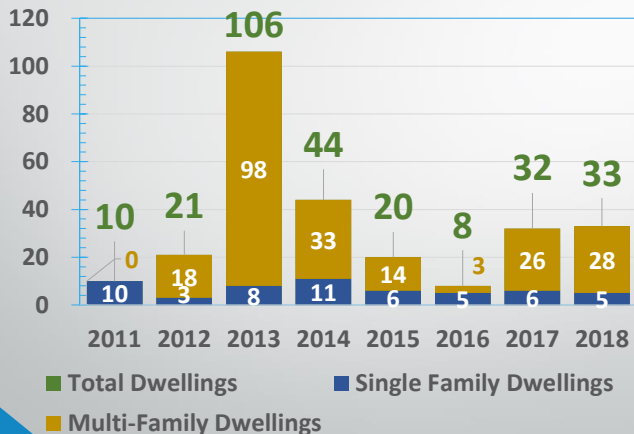
Housing Affordability Information

Area Renter Housing Median and Average Shelter Costs Comparisons - 2016 Census

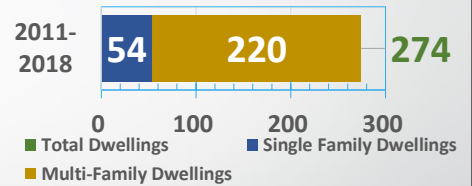


Recent Housing Demand Activity

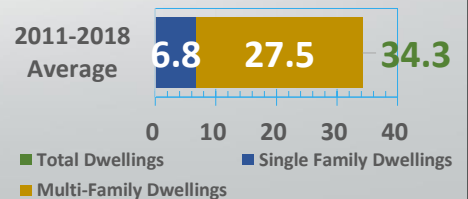
City of Dauphin New Total Dwellings 2011-2018



City of Dauphin New Total Dwellings 2011-2018

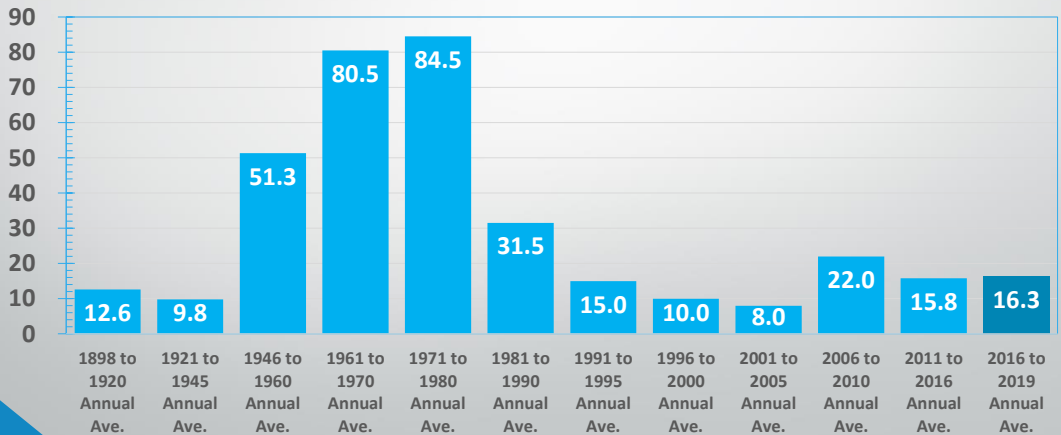


City of Dauphin Average New Total Dwellings 2011-2018



Dauphin Housing Market Overview

Dauphin, CY Dwelling Period of Construction for Private Households - 2016 Census & City of Dauphin data



Dauphin Housing Market Overview

Exhibit - Dauphin, City Estimated 2018 Housing Composition

	Bachelor / Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom +	Total	
RENTAL							
Apartment		20	150	150	15	0	390
Single-Detached House		0	35	170	120	60	385
Multi-plexes / Townhouse		0	70	35	30	20	155
Movable Dwelling		0	0	25	20	0	45
ACCESSIBLE & SENIORS							
Senior Units		15	135	140	10	0	300
Family Units		0	10	55	40	20	125
Accessible & Special Needs		0	0	0	0	0	0
Individual Units		0	0	0	0	0	0
BAND HOUSING							
Band Housing		0	0	0	0	0	0
OWNERSHIP							
Single-Detached House		0	15	435	890	825	2,404
Apartment		0	0	10	0	0	195
Multi-plexes / Townhouse		0	0	0	10	10	33
Movable Dwellings		0	0	55	60	0	115
Total *		35	415	1,075	1,195	935	4,147

* Note: New Built Facilities bedrooms are not known, therefore column totals by number of bedrooms do not include all of the housing units - All facilities are represented in the overall total units. Accessible & Seniors Units represent non-market housing (social and affordable housing units only) from Community-Based Organizations for non-temporary or non-transitional residents.

Source: Preferred Choice modelling based upon Canada Mortgage and Housing Corporation (CMHC), A Guide for Canadian Municipalities for the Development of a Housing Action Plan planning table; Statistics Canada 2016 Housing Tenure and Dwellings by Bedroom Number Census data, and City of Dauphin Building Permits info

Dauphin Housing Supply Capacity

Exhibit - City of Dauphin Available Lot Supply 2019

- 20 Available Vacant Properties
 - 4 Single Family Lots
 - 6 Farm Land Areas
 - 2 Vacant Larger Land Areas
 - 7 Vacant Lots
 - 1 Municipal Lot

Source: Prepared by Preferred Choice based on City of Dauphin data

Dauphin Housing Supply Capacity

Exhibit - Residential Subdivision Development History for Dauphin

In the 1960s and earlier, development would have been extensions of existing streets.

Komarniski land was conceptual from the 1970s

Timeframe	Location	Lots
1977	Tulip Crescent, Barker St	70 single lots
1980	Veterans Drive	59 lots
1986	Macneill Place	19
2000	Hawthorne West	23
2011	Hawthorne East	28 plus multifamily

These subdivisions were initiated in the years indicated but took many years to fill (Hawthorne W still has 2 undeveloped lots). None of these subdivisions were owned or initiated by the municipality.

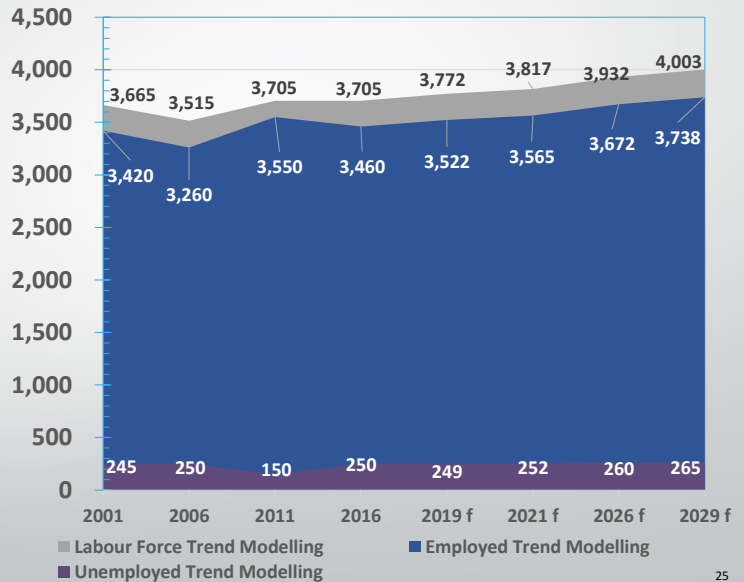
Source: City of Dauphin

Dauphin Labour Market and Housing Forecast



Source: Preferred Choice Housing Market
Calculations based on data from Statistics Canada data

Dauphin, City Labour Force Growth Model 2016 - 2029

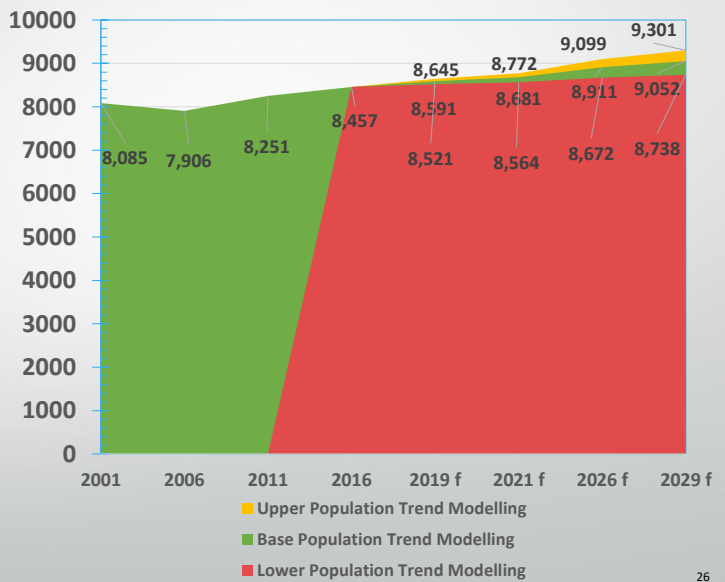


Dauphin Population Forecast



Source: Preferred Choice Housing Market
Calculations based on data from Statistics Canada and Manitoba Health, Seniors and Active Living data

Dauphin, City Population Growth Model 2016 - 2029

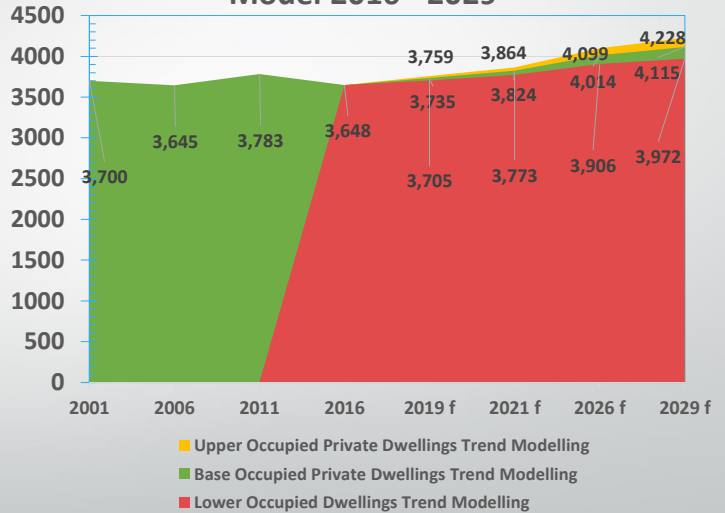


Dauphin Housing Forecast

- Baseline annual 0.93% growth
- Base growth of 467 Households (average 35.9 dwellings per annum)
- Lower model of modest HHS growth
- Upper growth potential of further growth



Dauphin, City Private Dwellings Occupied by Usual Residents Growth Model 2016 - 2029



Dauphin Housing Forecast Market Segments

Exhibit - Dauphin, City - Household Income Distribution for Base Dwelling Forecast Projections

Dauphin, City Household (HH) Income Distribution	Total HH Income	2019-2029 10 Year	3 Year 2016-2019 f	2 Year 2019 f-2021 f	5 Year 2021 f-2026 f	3 Year 2026 f-2029 f	13 Year 2016-2029 f
Less than \$40,000 per annum	37.8%	152.0	33.0	33.7	71.8	38.1	176.6
\$40,000 to \$59,999 per annum	19.0%	76.3	16.5	16.9	36.0	19.1	88.6
\$60,000 to \$79,999 per annum	14.2%	57.1	12.4	12.7	27.0	14.3	66.3
Greater than \$80,000 per annum	29.0%	116.3	25.2	25.8	55.0	29.1	135.2
Total	100.0%	401.7	87.1	89.2	189.8	100.6	466.7

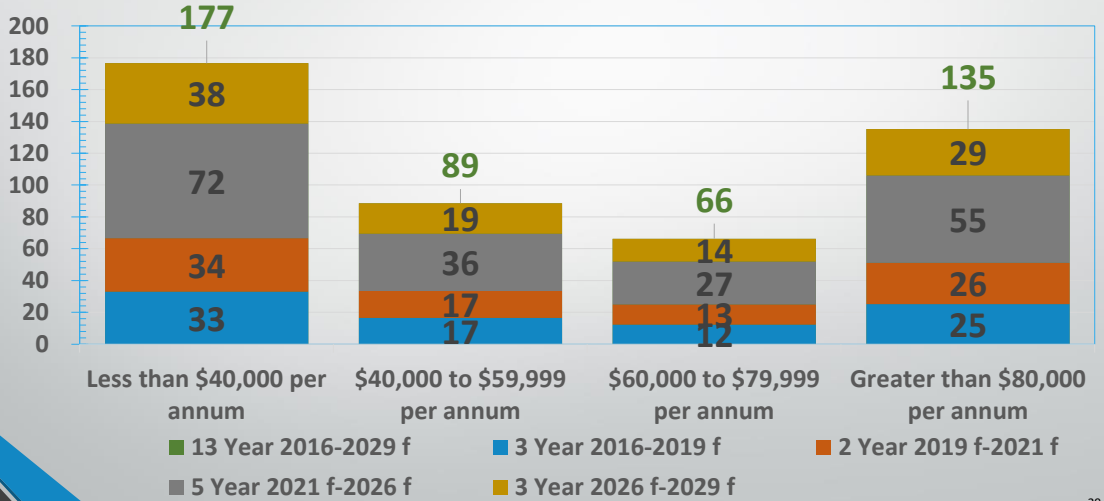
* Note: Base Housing Estimate Model for Dauphin, City Range of about 87 to 467 More Households from 2016 to 2029

Source: Preferred Choice modelling based upon Growth Analysis, Statistics Canada 2006 - 2016 Census data, 2011 National Household Survey, Manitoba Health, Seniors and Active Living 2006-2018 Population Report data, and City of Dauphin data



Dauphin Housing Forecast Market Segments

Household Growth by Income Estimates 2016 to 2029



Dauphin Housing Forecast Market Segments

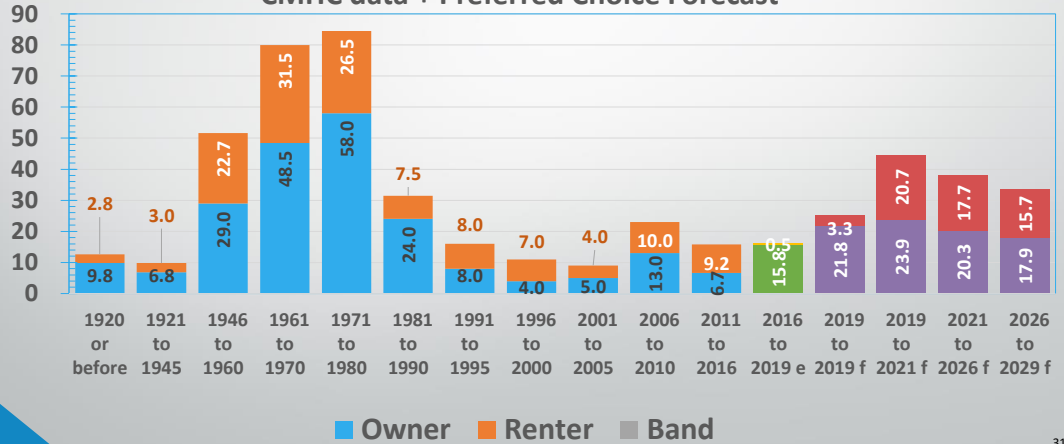
Exhibit - Dauphin, City - Projected Housing Continuum Needs by Affordability Threshold Modelling

	Social Housing	Affordable Housing	Entry Level Housing	Market Housing
Household Annual Income Range	< \$40,000	\$40,000 to \$59,999	\$60,000 to \$79,999	\$80,000+
Estimated Affordable Housing Price Range	< \$105,000	\$105,000 to \$167,249	\$167,250 to \$224,999	\$225,000+
Monthly Affordable Mortgage	Mortgage Payments Less Than \$625 / month	\$625 to \$999 Mortgage / month	\$1,000 to \$1,349 Mortgage / month	More Than \$1,350 / month Mortgage
Monthly Affordable Rent	Rent Payments Less Than \$780 / month	\$780 to \$1,234 Rent / month	\$1,235 to \$1,664 Rent / month	More Than \$1,665 / month Rent
Estimated Total Housing / Rental Supply Needed from 2018 to 2029	152 units (85 owner & 68 rental)	76 units (43 owner & 34 rental)	57 units (32 owner & 26 rental)	116 units (65 owner & 52 rental)
Housing Continuum Position	Government Subsidized Housing	⇒ Non-Market Housing ⇒		Market Housing

Source: Preferred Choice Modelling based upon Growth Analysis utilizing defined Housing Affordability Threshold Modelling Variables

Dauphin Housing Forecast Market Segments

Dauphin, CY Average Annual Dwelling Construction Period by Tenure for Private Households - 2016 Census, City of Dauphin, & CMHC data + Preferred Choice Forecast



Dauphin Housing Forecast Market Segments

Exhibit - Estimated 2029 - 10 Year Dauphin, City Housing Requirement

	Bachelor / Studio	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom +	Total
RENTAL						
Apartment	2	5	13	3	0	23
Single-Detached House	0	1	6	11	5	23
Multi-plexes / Townhouse	0	4	12	14	2	31
Movable Dwelling	0	0	0	0	0	1
ACCESSIBLE & SENIORS						
Senior Units	23	57	34	0	0	115
Family Units	0	0	11	32	14	57
Accessible & Special Needs	0	43	14	0	0	57
Individual Units	0	0	0	0	0	0
BAND HOUSING						
Band Housing	0	0	0	0	0	0
OWNERSHIP						
Single-Detached House	2	2	5	23	39	72
Apartment	0	1	5	4	0	10
Multi-plexes / Townhouse	0	1	7	6	0	15
Movable Dwellings	0	0	0	1	0	1
Total *	27	114	109	95	60	405

* Note: The 10 Year Dauphin, City Housing Requirements is a Conservative Model based on Base Population Projections, adjustments have been made to account for recent housing activity noted by the City of Dauphin, the core model is based on the 2016 Housing Tenure and Dwellings by Bedroom Number Census data plus municipal data. Accessible & Seniors Units represent non-market housing (social and affordable housing units only) from Community-Based Organizations.

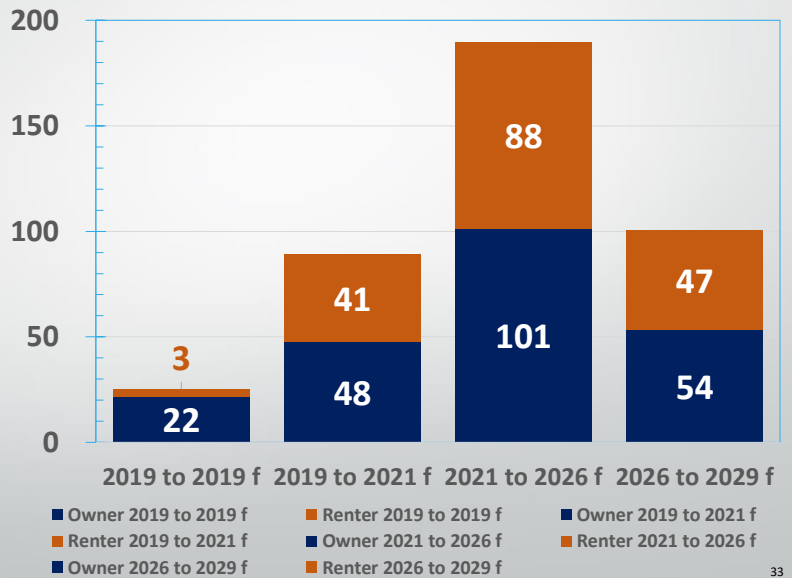
Source: Preferred Choice modelling based upon Canada Mortgage and Housing Corporation (CMHC), A Guide for Canadian Municipalities for the Development of a Housing Action Plan planning table; Statistics Canada 2016 Housing Tenure and Dwellings by Bedroom Number Census data, and City of Dauphin Building Permits and Dwelling Incentive data

Dauphin Housing Assessment Conclusions

- Steady employment, population, and dwelling growth is forecast to continue



Dauphin, CY Owner & Renter Housing Growth Forecast 2019 to 2029 f



Dauphin Housing Assessment Conclusions

Conclusion #1: There is a strong anticipated need for additional housing and rental housing in the City of Dauphin over the next 10 years with a further 375 to 425 dwelling units needed in the next decade should forecast population growth occur.



Dauphin Housing Assessment Conclusions

Conclusion #2: There is potential for additional housing growth in the City of Dauphin above base forecast levels through active attraction of seniors, rural residents moving into the community, and attraction of individuals throughout the region and beyond.

Dauphin Housing Assessment Conclusions

Conclusion #3: Lower income levels in the City of Dauphin enable the community to afford housing across the housing continuum from social to affordable to market housing options.

Dauphin Housing Assessment Conclusions

Conclusion #4: Potential additional housing growth in the City of Dauphin at a healthy pace over the next 10 years would require about 125 to 140 lots for about 70 to 80 single family dwellings and about 280 to 320 multi-unit dwellings.

Dauphin Housing Assessment Conclusions

Conclusion #5: The City of Dauphin must actively engage developers and builders to encourage, facilitate, assist, and advance the development of housing to address the projected housing needs of Dauphin.

Factors to Position Housing Projects

- Securing a suitable site(s) / land / or existing locations ideal for the project
- Providing experienced construction and project management to enable the project to occur in a timely manner
- Having strong project managers to ensure the project is developed in a cost-effective manner
- Targeting particular market segments to meet the needs of particular groups in the area
- Delivering quality project and property management services to attract, service, and retain unit sales and tenants in a well-run care home & supported housing development

Dauphin Housing Assessment Recommendations

Recommendation #1: That the City of Dauphin work closely with housing project proponents to continue to develop the envisioned Housing Projects in Dauphin.

Dauphin Housing Assessment Recommendations

Recommendation #2: That the City of Dauphin work with project proponents to further define the project scale, market niche, and proposed location for the envisioned Dauphin Housing Development Projects.

Dauphin Housing Assessment Recommendations

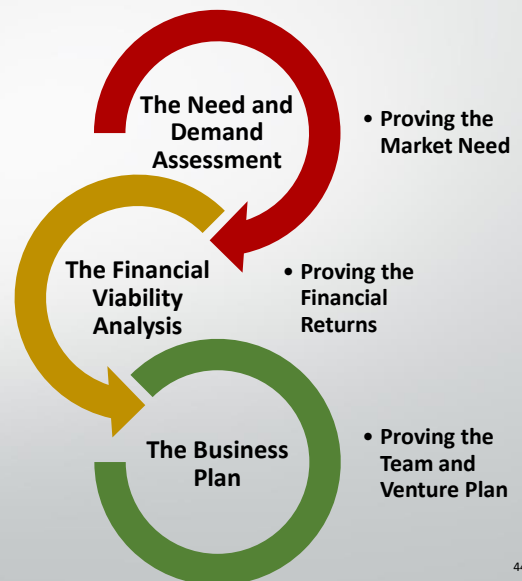
Recommendation #3: That the City of Dauphin work with project proponents to enable the initiation of a Financial Viability Analysis phase of each project, followed by a Business Plan as appropriate.

Dauphin Housing Assessment Recommendations

Recommendation #4: That the City of Dauphin seek resources to develop a Housing Market Demographic Supplement and follow-up housing plans as appropriate.

Dauphin Housing Development Project Next Steps

- Review, revise, and approve the 2019 Dauphin Housing Need and Demand Market Assessment Report
- Determine, access, secure, and allocate available resources to continue initiatives geared towards housing project development
- City of Dauphin consider proceeding with a Demographic and Seniors Market Segments Supplement
- Encouraging development of suitable project site(s) for a range of Housing Projects
- The City of Dauphin to Secure Project Partnerships as appropriate
- Determine, access, secure, and allocate available resources as required to attract and advance housing project development



Dauphin Housing Need & Demand Market Assessment

Findings
Discussion



Development Strategist Contact



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