



LONG-TERM CARE FOR CANADA

MARKET RESEARCH REPORT

UNIVERSITY CANADA WEST

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TABLE OF CONTENTS

03	Introduction	04	Seniors in Collective Dwelling
05	Current Landscape	06	Demand for LTC
07	Outlook & Implications	08	Market Segmentation
11	Customer Personas	12	Target Market
13	Value Proposition	14	References
15	Appendices		

INTRODUCTION



THE PRODUCT & SERVICE

The growing demand for elderly care in Canada is expected to triple by 2041 due to Canadian baby boomers aging and becoming more vulnerable to complex health issues and needing 24-hour care. The gap in supply of facilities and staffing has led to the government raising the alarm and calling for all hands on deck to provide a better standard of care and dignity to the elderly.

The market report aims to give context to the situation in long-term care, defining the landscape, the outlook and the implications. Supported by research data and industry insights, this report presents a strong case and rationale for a new product and service in long-term care.

The privately-owned Long-Term Care (LTC) home is a comprehensive person-centred care facility for the elderly over 85. The modern green living design is a safe, comfortable and secure environment that reflects the diverse needs of its residents and is well-integrated within the community. The home-like facilities incorporate design and operations that blend human touch with technological support to optimize service and focus on quality of life and meaningful engagement involving staff, family and the community at large. Strategically located in Sidney, British Columbia, the LTC will provide a high standard of comprehensive 24-hour nursing and personal care, ensuring autonomy and dignity with private ensuite rooms and access to amenities so residents still feel at home and connected to the community. Technological support and innovation will ensure the facilities are future-proof for ease of operational efficiency, allowing staff to focus on the personal touch.

INDUSTRY OVERVIEW

- The fastest growing population in Canada is 65 years and over, according to Statistics Canada (April 27, 2022), and this aging population is placing enormous pressure on hospitals, emergency services, and homecare services.
- Aging with dignity has been highlighted as a shared health priority by Canada's federal, provincial and territorial governments. The goal is to aid senior Canadians to live comfortably and safely either at home with community support or in a long-term care facility (Government of Canada, 2023)
- There is increasing demand for long-term care to meet more complex health needs, which require 24/7 support, and the most vulnerable 75 and older adults are extremely dependent due to chronic health conditions and mobility issues (Brocker, 2025).
- The COVID-19 pandemic revealed challenges in infection prevention and control, staff shortages and outdated equipment, highlighting the urgent need for action. Long Term Care standards, along with the Safe Long-Term Care Act, were released in 2023 as a mandate to ensure dignity, comfort and respect for the elderly in Canada (Government of Canada, 2023)

SENIORS IN COLLECTIVE DWELLING

People living in collective dwellings tend to move from seniors' residences to nursing care facilities as they age

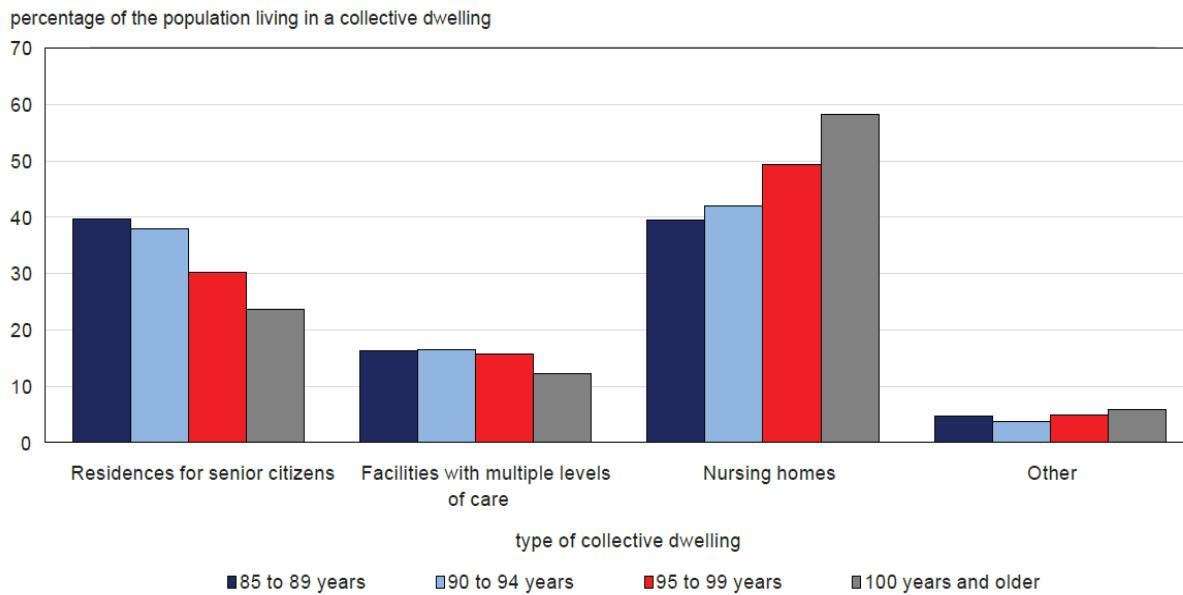
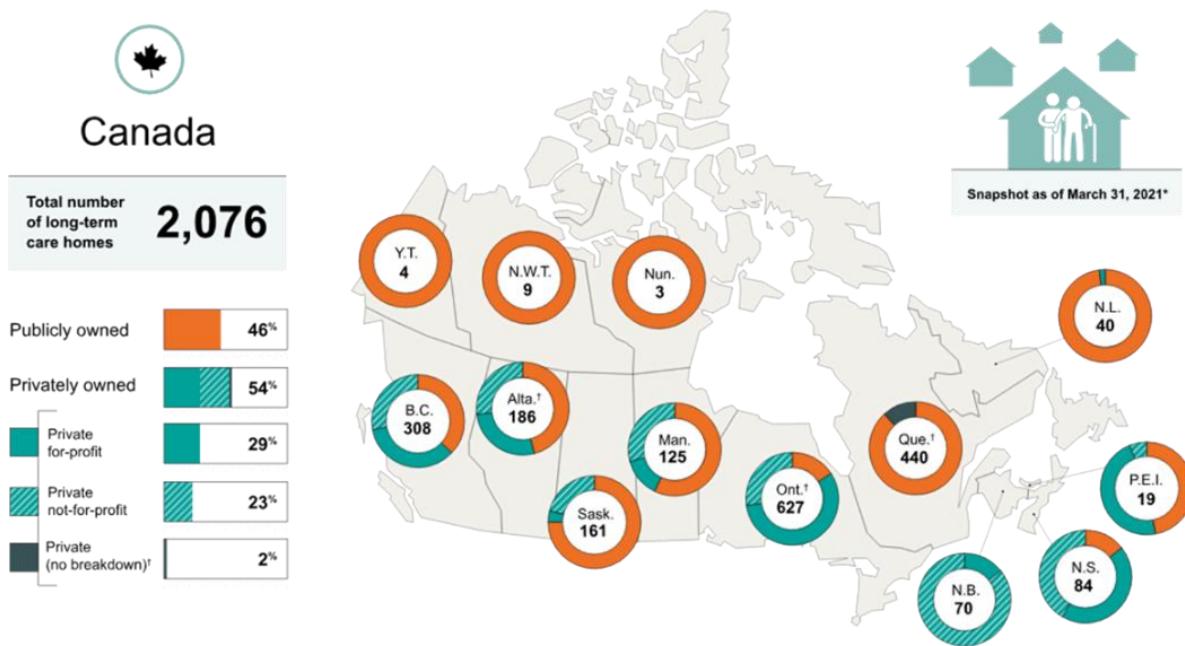


Figure 1 Percentage of population of seniors by type of dwelling by Statistics Canada (2022)

HIGHEST PERCENTAGE IN NURSING HOMES IS SENIORS 100 YEARS+

- Seniors living in collective dwellings tend to shift from senior residences to nursing care facilities as they age.
- Statistics Canada (2022) highlights that “The proportion of seniors living in facilities that provide multiple levels of care (both independent living for seniors as well as nursing care) was around 16% for those aged 85 to 89, 90 to 94, and 95 to 99. It fell to 12% for centenarians”.
- This highlights that nursing facilities are still very relevant and essential as seniors transition to more dependent support.
- Figure 1 shows the increasing percentage in nursing homes by age group, with 100 years and older being the highest.

CURRENT LANDSCAPE FOR LTC



CIHI

Figure 2: Number of long-term care homes and ownership across Canada. Source: CIHI (2021)

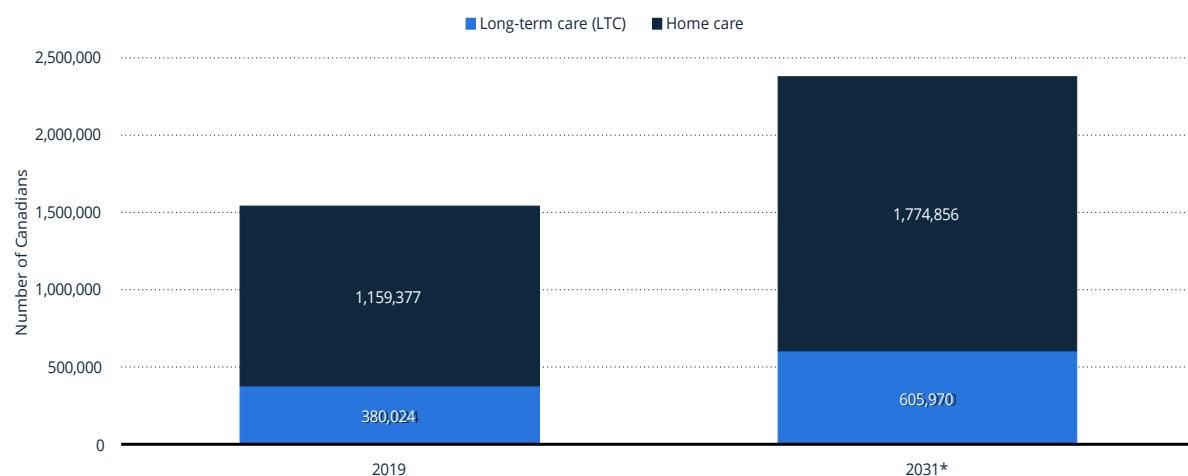
ONLY 29 BEDS PER 1,000 SENIORS AVAILABLE ACROSS CANADA

- Generally, LTC includes hospital-based ongoing care for complex health issues, also referred to as extended care, chronic care or complex continuing care (CIHI, 2021).
- According to a CIHI Report from March 31, 2021, there are 2,076 long-term care homes in Canada, 46% are publicly owned and 54% are privately owned.
- Only 308 homes are listed in British Columbia, of which private for-profit organizations own 37 %, and 28% are owned by private not-for-profit organizations (see figure 2).
- The Canadian Institute for Health Information in 2021 illustrated in Appendix 2 the demand and supply situation for long-term care in Canada, showing that out of 6,835,866 population aged 65 and older, only 2,076 long-term care homes exist and 198,220 beds. To put it into perspective, only 29 beds are available per 1000 seniors across Canada. This is far from sufficient for a population that is about to triple in the next 10 years (CIHI, July 2021).

DEMAND FOR LTC HOMES

Number of Canadians with demand for long-term care (LTC) and home care in Canada in 2019 with a forecast for 2031

Demand for LTC and home care in Canada in 2019 and 2031



6 | Description: The demand for longterm care (LTC) in Canada is forecasted to rise to 606 thousand by 2031. That is a growth of nearly 60 percent from 2019 levels. In 2019, there were 302,576 Canadians in LTC with a further 77,448 on the waitlist adding to a total of over 380 thousand needing longterm care. [Read more](#)
Note(s): Canada; 2021
Source(s): Canadian Medical Association

statista

Figure 3: Demand for LTC and home care in Canada, 2019 vs 2031. Source: Statista (2021)

DEMAND FOR LTC WILL DOUBLE BY 2031

- As seniors over 85 continue to age and require more care for chronic conditions, it is projected that capacity will need to double over the next decade.
- The demand for long-term care is anticipated to double by 2031, increasing from 380,024 in 2019 to 605,970 in 2031, as seen in Figure 3 (Statista, 2021)
- Home care as a preferred option by the elderly who want to remain at home, still has the highest demand, with nearly 2 million needed by 2031 (Statista, 2021)
- The Canadian Institute of Health and Information (CIHI) in a 2017 outlook for the senior population projected growth of 68% by 2027 and illustrated the impact by provincial territories in Figure 4

OUTLOOK AND IMPLICATIONS

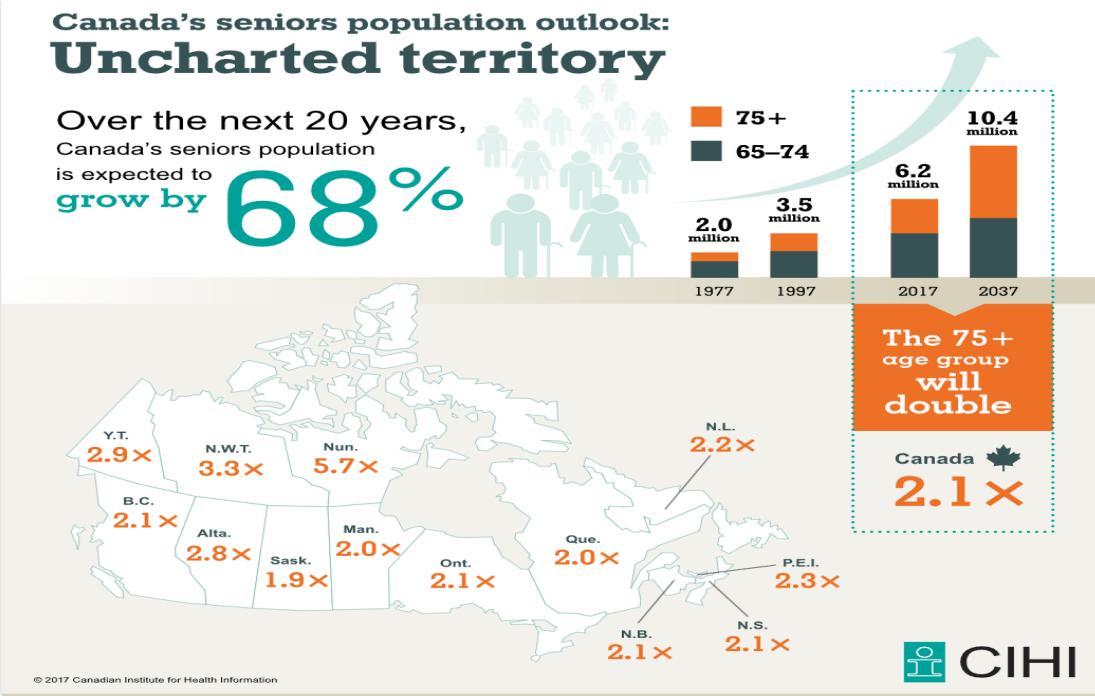


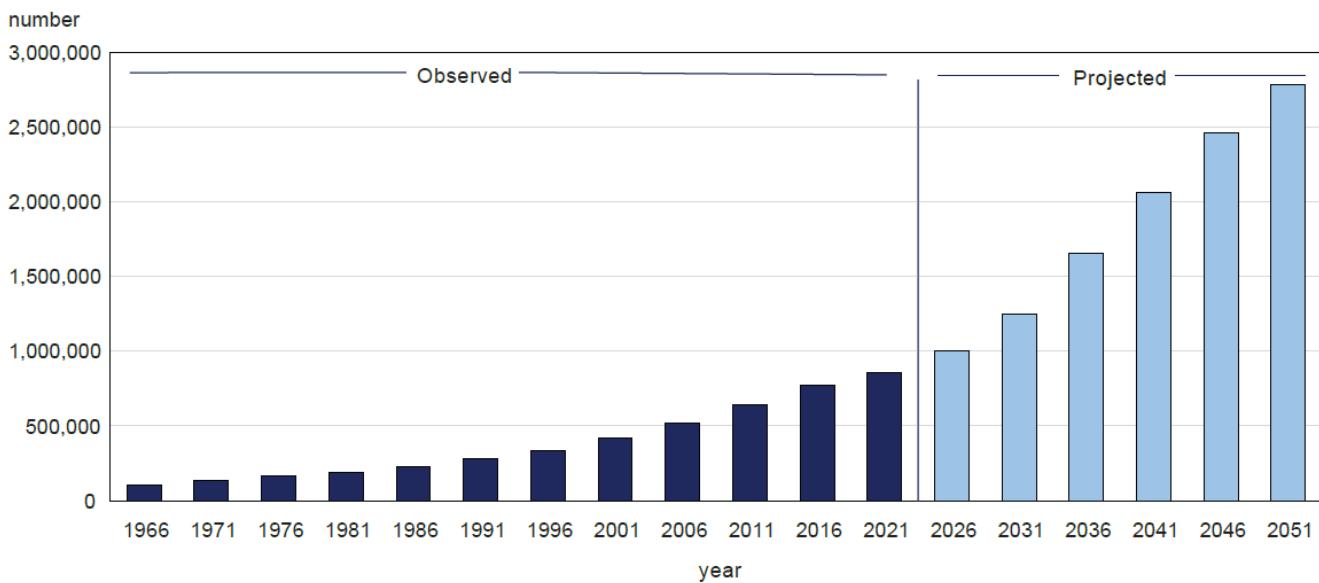
Figure 1: Canada's growing senior population by province. Source CIHI, 2021

INCREASING DEMAND FOR LTC WILL IMPACT ALL STAKEHOLDERS.

- The projected increase in the aging population has several implications for healthcare services, government priorities, immigration policies and funding.
- It also has an impact on younger generations, the workforce and families involved, particularly women who typically do the caregiving for parents and children at home.
- The physical and emotional well-being of the seniors, as well as their caregivers, needs to be protected and supported to ensure all stakeholders are taken into consideration.
- The varying proportions of seniors in large urban centres also have implications for urban planning and infrastructure. Seniors' movement or resistance to moving to established urban centres may increase the demand for workers and organizations that supply these services
- As the population ages into 85 and beyond, facing limitations and chronic health challenges, this will put increasing pressure on various government departments to ensure adequate housing, health care and home care, as well as transportation, among other things (Statistics Canada, 2022)
- Long Term Care standard, along with the Safe Long-Term Care Act, will increase scrutiny on LTC development and service provision

DEMOGRAPHIC

The number of people aged 85 and older continues to grow



Note: Data for 2026 to 2051 are population projections from the M1 medium-growth scenario and are based on the 2016 Census. For reasons of comparability, the Census net undercoverage has been removed from the projected populations presented in this graph.

Sources: Statistics Canada, Census of Population, 1966 to 2021. The custom population projections are based on the Population Projections for Canada (2018 to 2068), Provinces and Territories (2018 to 2043). Statistics Canada Catalogue no. 91-520-X.

Figure 5: Population projection for 85 and older. Source: Statistics Canada (2022)

BABY BOOMERS OVER 85 WILL TRIPLE BY 2046

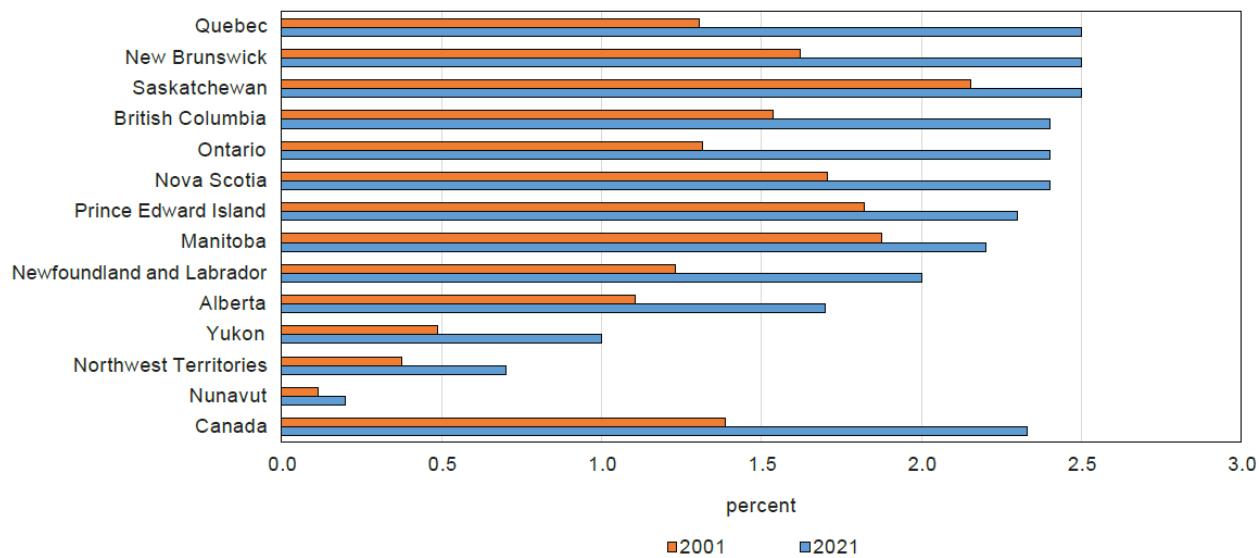
According to Statistics Canada, these are the current demographic trends and projections for Canada's aging population:

- The population aged 85 and older is said to be one of the fastest-growing cohorts, with a 12% increase from 2016.
- Currently, 2.3% of the population is aged 85 and older, which is twice as many as those counted in the 2001 census.
- Women still outnumber men. However, the ratio of women to men among people aged 85 and older is decreasing.
- The projections for the next 25 years or so indicate that this cohort (85 years plus) could triple to almost 2.5 million by 2046 (see figure 5)
- There are over 9,500 centenarians (100 years and over) currently living in Canada (Statistics Canada, 2021)

GEOGRAPHIC (PROVINCES)

The proportion of people aged 85 and older is highest in Quebec, New Brunswick, Saskatchewan and British Columbia and lowest in the territories. Twenty years ago, it was highest in Saskatchewan and Manitoba

province or territory, according to their rank in 2021



Source: Statistics Canada, Census of Population, 2001 and 2021.

Figure 6: Proportion of People 85yrs And Older by Province/Territory In Canada. Source: Statistics Canada (2022)

BC MUNICIPALITIES RANK IN THE TOP 3 FOR ELDERLY PROPORTIONS

- According to the Census Brief of 2021, the highest proportion of people aged 85 and older is in Quebec, New Brunswick, Saskatchewan and British Columbia (see figure 6), with greater than 3% of the population aged 85 and older in five large urban centres (see Appendix 1). This includes Peterborough (3.4%), Trois-Rivières (3.4%), St. Catharines–Niagara (3.2%), Victoria (3.1%) and Sherbrooke (3.1%). (Statistics Canada, 2022)
- Some downtowns have a higher proportion of seniors because these areas tend to have more services and amenities, such as hospitals, long-term care and other housing types better adapted to the specific needs of older populations (Statistics Canada, 2021)
- While a city like Vancouver indicates a low proportion of seniors, some municipalities in British Columbia rank in the top 3 of the 737 (see figure 7 below) due to very high proportions (9.3%) of the population being over 85 years (Statistics Canada, 2022)
- The municipality of Sidney has a total population of 12,320, with 9.3% (1,150) aged 85 and older, making this an ideal target geographic market, rank #1 and Duncan #2 with 470

GEOGRAPHIC – BC MUNICIPALITIES

The municipalities with the highest proportion of people aged 85 and older are in British Columbia and Quebec

Rank of Municipality (Census Subdivision) in Province or Territory	Total Population	Population 85 Years and Older number	Proportion of the Population Aged 85 and Older percent	Rank in Canada (out of 737)
				rank
British Columbia				
1. Sidney	12,320	1,150	9.3	1
2. Duncan	5,045	470	9.3	2
3. Qualicum Beach	9,305	865	9.3	3
4. Osoyoos	5,555	365	6.6	10
5. White Rock	21,940	1,435	6.5	11

Note: Yukon, the Northwest Territories, and Nunavut each only have one CSD with more than 5,000 residents. Due to random rounding, the numbers, percentages, and rankings in this table may not correspond to other data products.

Source: Statistics Canada, Census of Population, 2021.

Figure 7: British Columbia Municipalities with the highest proportion of people aged 85 and older. Source: Statistics Canada (2022)

PSYCHOGRAPHIC

91% OF SENIORS PREFER TO LIVE AT HOME

- The majority of seniors aged 85 and older suffer from chronic illnesses and therefore limited activity, 25% or more live in collective dwellings, nursing facilities or long-term care, and this proportion increases with age
- According to the National Institute on Aging (2020), 91% of seniors would prefer to live at home or in their community, close to family and loved ones.
- The seniors and their families who are open to long-term care are seeking safe, high-quality, home-like settings. (Government of Canada, 2025).
- According to Statistics Canada, the proportion of older seniors living in nursing care facilities increases with age from 40% for ages 85 to 89 to almost 60% for centenarians (100 years+). This is also indicative of their transition from collective dwellings to nursing facilities.
- On this flip side, the proportion of seniors' residences decreases with age from 40% to 24% for the same age groups, as activity limitations and health issues increase with age (Statistics Canada, 2022)

CUSTOMER PERSONAS

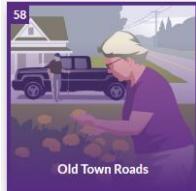
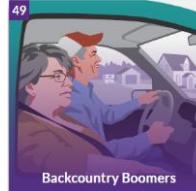
Persona	 21 Scenic Retirement	 62 Suburban Recliners	 58 Old Town Roads	 49 Backcountry Boomers
	Scenic Retirement	Suburban Recliners	Old Town Roads	Backcountry Boomers
	This segment represents 1.4% of Canada's population	This segment represents 1.38% of Canada's population	This segment represents 1.03% of Canada's population	This segment represents 2.09% of Canada's population
Geographic (Postcode)	#1 Sidney: V8L1R1	#2 Dunc: V9L 2L1 /V9L2M4	#3 Qualicum Beach: V9K1S7	#10 Osoyoos V0H1T0: Allenby
Who They Are	Scenic Retirement exemplifies one of Canada's dominant demographic trends, the aging population aged over 75 years old. They live in suburban neighbourhoods of smaller cities and stay active by curling, strolling through parks/gardens and are health-conscious.	Suburban Recliners is one of the older segments, a collection of suburban neighbourhoods surrounding smaller and mid-sized cities, including a number of retirement communities. These third-plus-generation Canadians are energetic enough to enjoy community theatres, craft shows and music festivals. Typically frugal shoppers who use coupons.	Older folks gravitate to Old Town Roads, a collection of small towns across Canada. They are over 65 and third-plus-generation Canadians who enjoy who leisure pursuits like fishing, hunting and gardening; they also attend craft shows and auto racing events. .	A collection of remote villages mainly in the Atlantic provinces. Maintainers are over 75, and like to fish, hunt and garden, for the camaraderie. Their hobbies are of the old-fashioned variety: crafts, knitting and collecting coins and stamps. Despite their remote communities, they prefer in-store shopping to e-commerce.
Demographic	Older middle-income suburbanites couples and singles	Suburban, lower-middle-income singles and couples	Older, lower-middle-income town couples and singles	Rural, lower-middle-income older couples and singles
How They Live (Behavioural)	Leisure Activities:Home shows Media:Magazine Digital:Respond to an ad Financial:Segregated funds Green Living:Support local	Leisure Activities:Curling Media:Magazine Digital:Streaming videos Financial:Credit card debt Green Living:Buy Canadian products	Leisure Activities:Craft shows Media:Radio Digital:Streaming videos Financial:Other secured lines of credit Green Living:Use alternative energy	Leisure Activities:Craft shows Media:Radio Digital:Download coupons Financial:Other secured lines of credit Green Living:Use alternative energy
How They Think (Psychographic)	"Life in the country is much more satisfying than in the city"	"I trust my own judgement in picking out my clothes"	"Life in the country is much more satisfying than in the city"	"Life in the country is much more satisfying than in the city"

Figure 8 Canadian Sample Profiles by postal code. Source: Environics Analytics. (n.d.).

TARGET MARKET

Upon conducting the market research and understanding the various segments in terms of demographics (elderly aged over 85), the geographic locations, particularly in top municipalities of British Columbia (i.e. Sidney, Duncan, Qualicum Beach, and Osoyoos), it is possible to identify potential customers. Further research into PRIZM neighbourhood insights by filtering through postcodes of these municipalities helped to identify unique personas for the target market. The aim is to target a central area where the support will be most needed to increase the capacity over the next decade.

PRIMARY TARGET

Therefore, the primary target market has been established as the aging population (85 and older) of Sidney, BC (e.g. post code V8L1R1). Dubbed “Scenic Retirement” persona (Environics Analytics, n.d.). this segment is ranked #1 in terms of proportion of elderly 85 and older at 9.3% of the total Sidney population of 12,320 (Statista, Census, 2021). These Older middle-income suburbanite couples and singles are health-conscious and try to stay active. However, we know that as they age, health complications start to set in, and they desire a comfortable living and are concerned about quality of care in a nice, quiet location.

SECONDARY TARGET

The secondary target market is the “Suburban Recliners” who are lower-middle-income singles and couples living in suburban areas and retirement communities of Duncan municipality (e.g. postcodes V9L 2L1 /V9L2M4). Duncan is an ideal secondary geographic market ranked #2 with 470 of its 5,045 population. This elderly segment represents 1.38% of Canada's population; third-generation-plus Canadians who are considered frugal shoppers, maximizing on coupons and second-hand stores. (Environics Analytics, n.d.).



Goals



Partnerships



Growth

To provide comprehensive quality LTC facilities for seniors 85 years plus, where they are most needed in BC municipalities of Sidney and Duncan by 2030.

Partners with Canada's federal, provincial and territorial governments and health authorities to ensure senior Canadians live comfortably and safely in long-term care facilities.

As we move into the next decade, remain focused on innovation, growth, and sustainability to meet the growing demand for LTC.

VALUE PROPOSITION

The privately owned LTC home will offer a comprehensive person-centred care facility for the elderly with modern green living design in a safe, comfortable and secure environment that reflects the diverse needs of its residents and integration within the community. The home-like facilities incorporate design and operations that blend human touch with technological support to optimize service and focus on quality of life and meaningful engagement involving staff, family and community.

Taking thoughtful consideration of senior citizens preferring to live at home as long as possible due to personal comforts and community connection, as well the Canadian Government mandating for better standards of care with the introduction of Long-Term Care Act; this facility in Sidney BC will provide high standard of care in building design and operations inclusive of the following:

COMPREHENSIVE 24 HOUR CARE

Comprehensive Care with 24-hour nursing and personal care intended to meet the diverse needs of residents, including conditions like dementia and chronic illnesses

AUTONOMY AND DIGNITY

Fostering Autonomy and dignity, offering individual en-suite rooms, on-site entertainment, online shopping facilities, indoor/outdoor activities such as curling, a beauty salon and a music room.

STRATEGIC LOCATION

Strategic Location and accessibility are paramount, and therefore, proximity to essential services such as hospitals and community recreational centre ensure access to cultural and social activities.

TECHNOLOGY INTEGRATION

The company has embraced cutting-edge technology to drive operational success. The implementation of AI and machine learning will optimize administration, medical inventory levels, and improve customer service. Additionally, the integration of IoT devices has provided real-time data insights, allowing for collaboration for staff to focus on people-centred care and fewer administrative tasks.

DIVERSITY, EQUITY, AND INCLUSION

The company intends to launch several initiatives aimed at enhancing employee satisfaction and productivity. These include professional development programs, wellness initiatives, and a revamped employee recognition system that will ensure inclusion and equity. Diversity, Equity, and Inclusion (DEI) practices will ensure all our residents and staff feel seen, included and heard.

SAFE ENVIRONMENT

The environment is safe physically, socially, culturally, linguistically, emotionally and spiritually.

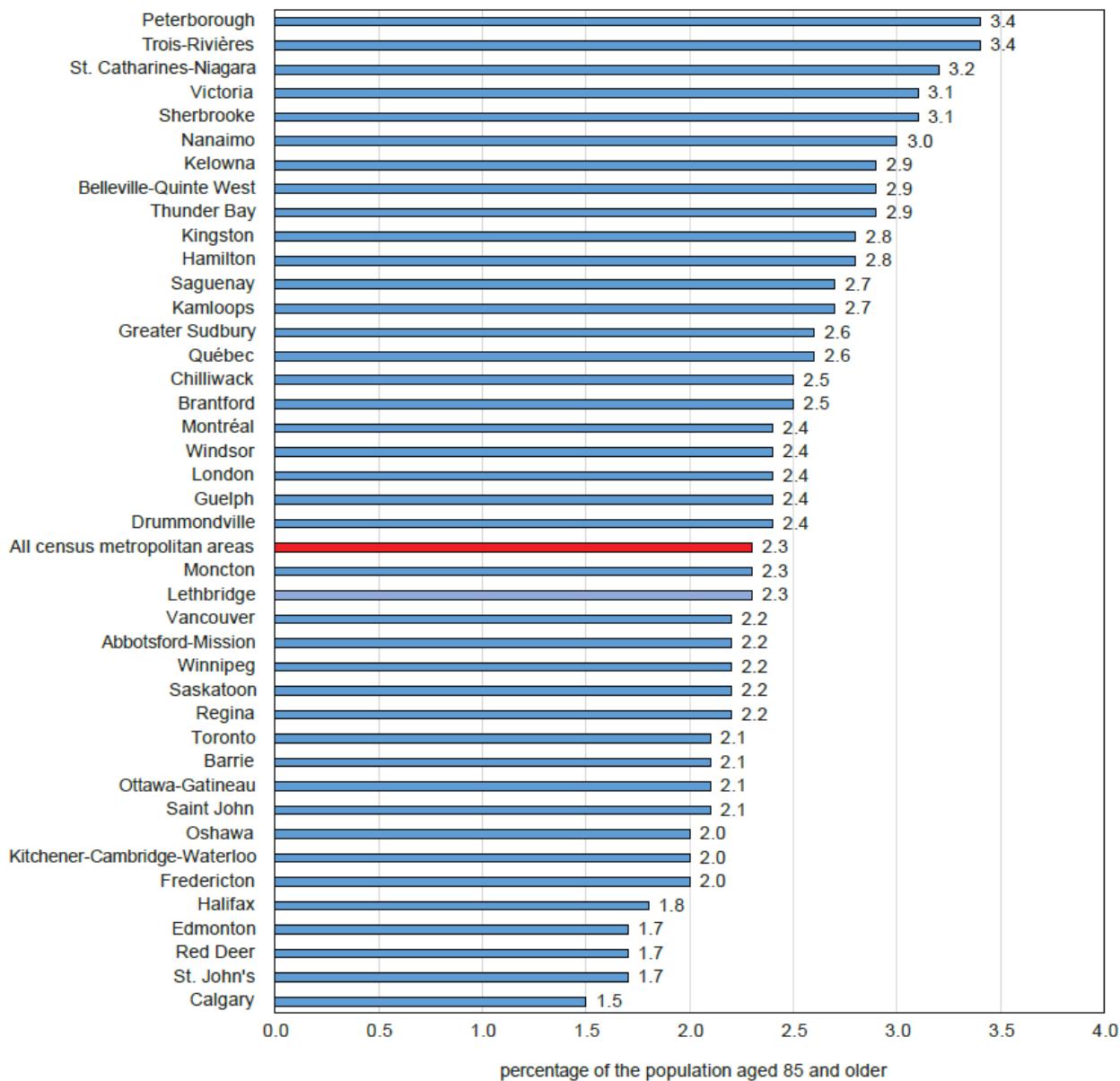
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APPENDIX 1

The large urban areas with the highest proportion of people aged 85 and older are in Quebec, Ontario and British Columbia

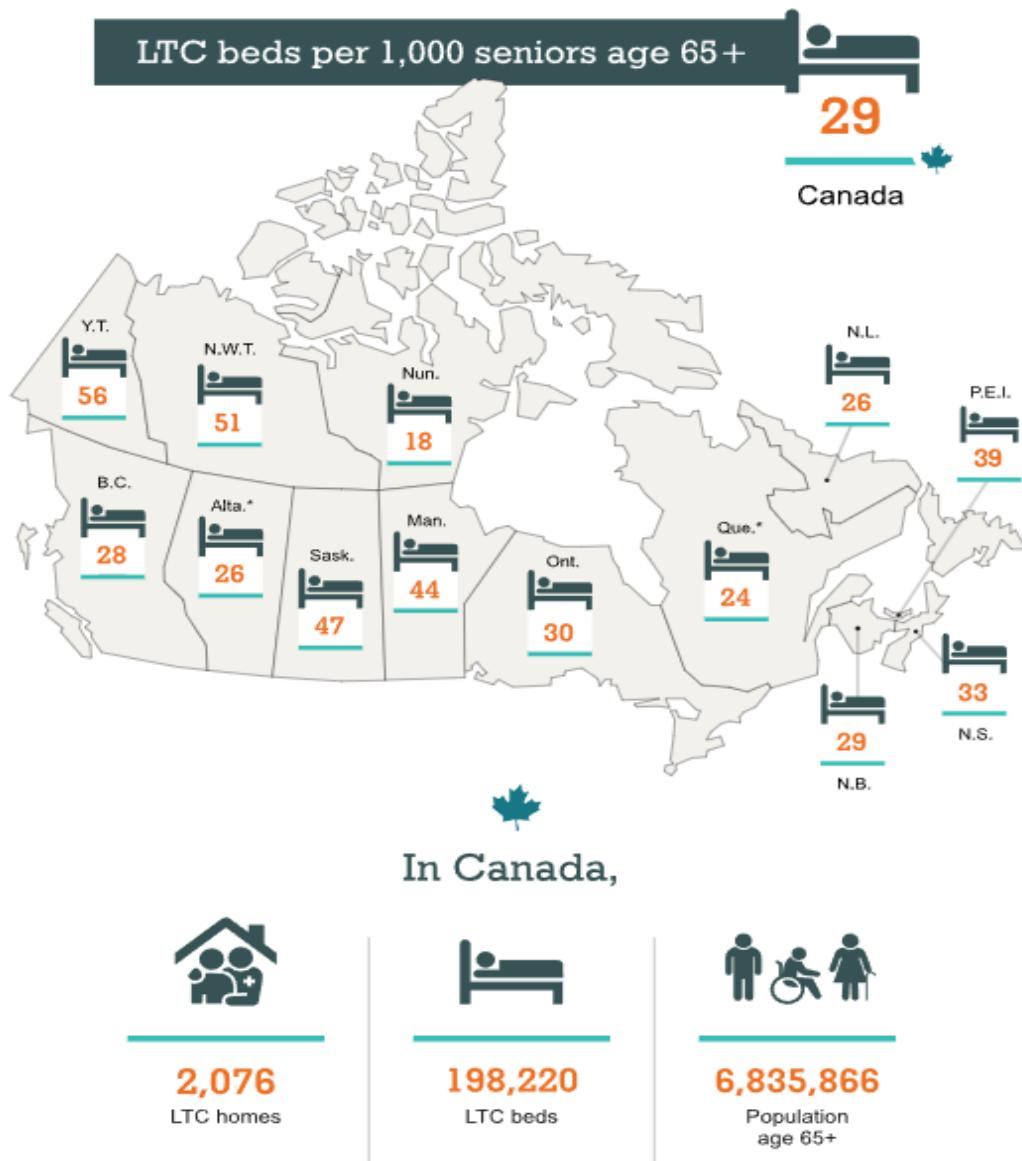
census metropolitan area



Source: Statistics Canada, Census of Population, 2021.

How many long-term care beds are there in Canada?

Snapshot as of March 31, 2021*

**Notes**

* Data for all jurisdictions is as of March 31, 2021, except Quebec (as of April 1, 2021) and Alberta (as of February 28, 2021).

Long-term care facilities are required to provide nursing care. Some residential care homes, provide a wide range of health and personal care services for Canadians with medical or physical needs who require access to 24-hour nursing care, personal care and other therapeutic and support services. Jurisdictional health care delivery models (which include long-term care, assisted living, home care and other types of care) influence decisions about the number of LTC beds in any given jurisdiction; comparisons should therefore be interpreted with caution.