AMERICAN SENIORS HOUSING ASSOCIATION

Living Longer Better

SENIORS HOUSING CONSTRUCTION MONITOR

Winter 2019

Prepared for ASHA by National Investment Center for Seniors Housing & Care and its NIC MAP® Data Service

www.seniorshousing.org

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

January 2019

DEAR ASHA MEMBERS,

We are pleased to present a new edition of the *Seniors Housing Construction Monitor*, which is provided to the American Seniors Housing Association membership through a special licensing arrangement with the National Investment Center for Seniors Housing & Care.

ASHA would like to acknowledge the leadership and staff of NIC, with special thanks to Brian Jurutka, Beth Burnham Mace, Chuck Harry, Bill Kauffman, Brian Connolly, Amy Hein, and Ashley Woods.

ASHA wishes to thank to HTG Consultants, PRDG Architects, and The Weitz Company for their continued sponsorship support of this publication.

Warmest regards,

DAVID SCHLESS
President
American Seniors Housing Association
Washington, DC

Front cover rendering of The Village of Southampton, Houston, TX, Bridgewood Property Company.
Image courtesy of PRDG Architects.

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NIC MAP® Construction Monitor

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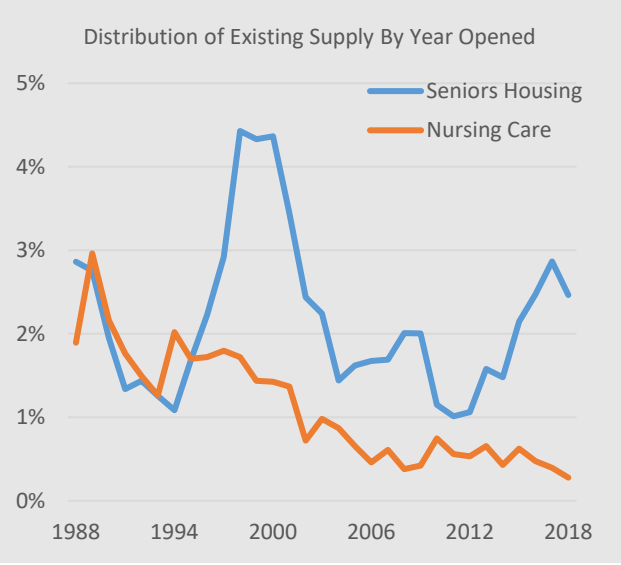
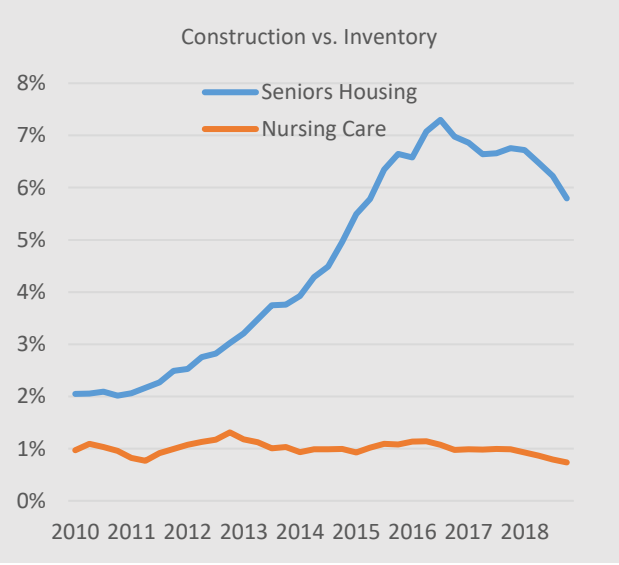
Seniors Housing & Care Construction Trends

Seniors housing construction remains elevated with construction as a share of inventory at 5.8% in the fourth quarter. Construction of nursing care units as a share of inventory remains low at 0.7%.

	Seniors Housing[1]			Majority Nursing Care[2]	Seniors Housing & Care Total
	Rental	Entrance Fee	Overall		
Number of Properties	7,091	648	7,739	6,574	14,313
Median Age (yrs)	19.3	30.0	20.0	39.0	26.8
Inventory (units)	717,525	235,420	952,945	882,989	1,835,934
Independent Living	232,524	158,758	391,282	18,145	409,427
Assisted Living	340,730	28,365	369,095	30,126	399,221
Memory Care	117,462	8,338	125,800	6,140	131,940
Nursing Care	26,809	39,959	66,768	828,578	895,346
75+ Household Penetration	8.4%	2.8%	11.2%	9.5%	20.7%
Properties Under Construction	449	44	493	79	572
New Properties	361	1	362	23	385
Expansions	88	43	131	56	187
Units Under Construction	51,799	3,417	55,216	6,496	61,712
New Properties	47,848	385	48,233	3,160	51,393
Expansions	3,951	3,032	6,983	3,336	10,319
Independent Living	18,095	1,853	19,948	740	20,688
Assisted Living	22,794	605	23,399	834	24,233
Memory Care	9,911	212	10,123	440	10,563
Nursing Care	999	747	1,746	4,482	6,228
Construction vs. Inventory	7.2%	1.5%	5.8%	0.7%	3.4%
Construction Starts (units)	4,754	308	5,062	363	5,425
Rolling 4-qtr (units)	24,623	1,370	25,993	1,934	27,927
Rolling 4-qtr vs. Inventory	3.4%	0.6%	2.7%	0.2%	1.5%





1. Includes all majority independent living and majority assisted living properties.
2. Includes all majority nursing care properties, including majority nursing care CCRCs.

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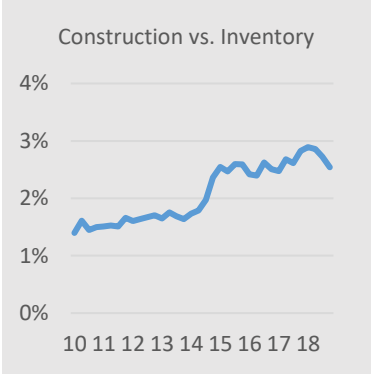
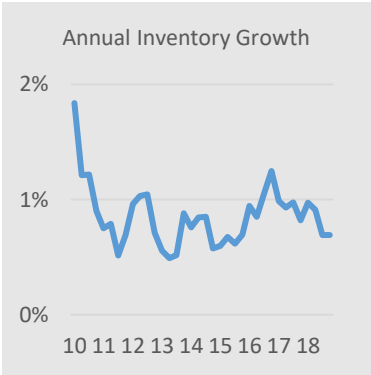
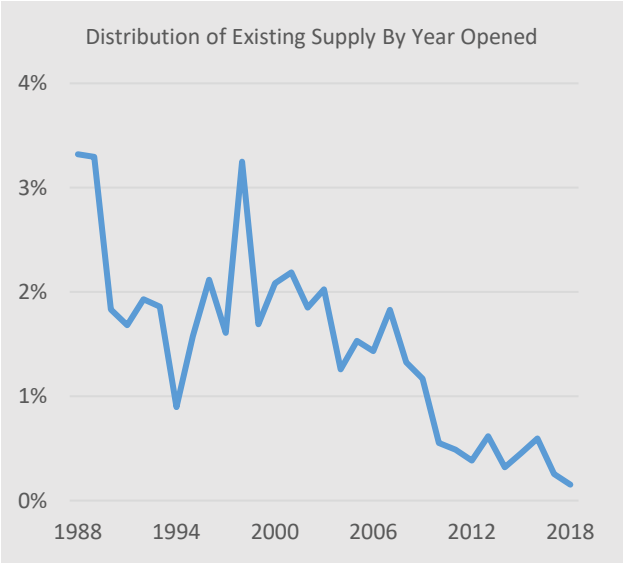
CCRC Construction Trends

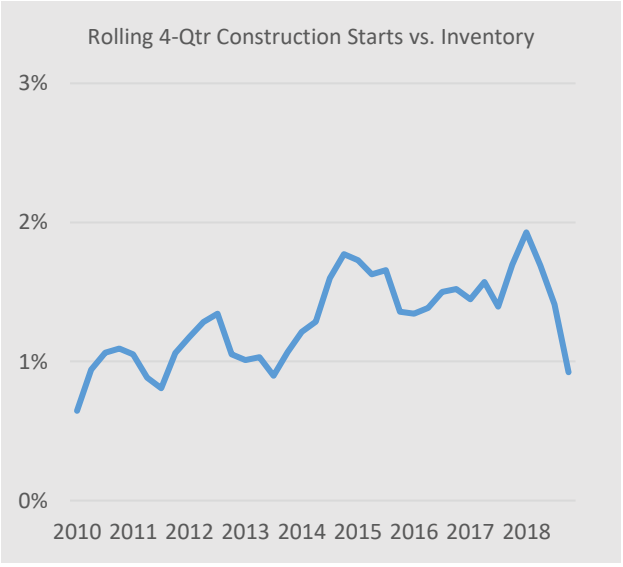
CCRC construction activity remains generally subdued, with 2.5% of stock currently under construction. Annual inventory growth is less than 1%.

	CCRCs		
	Entrance Fee[1]	Rental	Overall
Number of Properties	693	529	1,222
Median Age (yrs)	30.9	36.0	33.0
Inventory (units)	248,299	134,363	382,662
Independent Living	162,367	52,795	215,162
Assisted Living	30,628	22,958	53,586
Memory Care	8,803	5,243	14,046
Nursing Care	46,501	53,367	99,868
75+ Household Penetration	2.9%	1.6%	4.5%
Properties Under Construction	49	37	86
New Properties	1	15	16
Expansions	48	22	70
Units Under Construction	4,152	5,576	9,728
New Properties	385	4,812	5,197
Expansions	3,767	764	4,531
Independent Living	2,310	3,229	5,539
Assisted Living	675	1,141	1,816
Memory Care	280	437	717
Nursing Care	887	769	1,656
Construction vs. Inventory	1.7%	4.1%	2.5%
Construction Starts (units)	438	46	484
Rolling 4-qtr (units)	1,624	1,910	3,534
Rolling 4-qtr vs. Inventory	0.7%	1.4%	0.9%









1. Includes non-CCRC properties that are entrance fee.

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CCRC Construction Summary by Market (Akron - Louisville)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Akron, OH	6	1,901	5.4%	1	65	3.4%	0	65
Albany, NY	7	1,748	4.0%	0	0	0.0%	0	0
Albuquerque, NM	3	835	2.3%	0	0	0.0%	0	0
Allentown, PA	9	2,628	6.2%	0	0	0.0%	0	0
Atlanta, GA	12	3,292	2.2%	1	296	9.0%	0	0
Augusta, GA	1	374	1.6%	0	0	0.0%	0	0
Austin, TX	5	1,583	3.1%	0	0	0.0%	0	0
Bakersfield, CA	2	640	2.8%	0	0	0.0%	0	0
Baltimore, MD	19	9,251	7.8%	2	259	2.8%	0	0
Baton Rouge, LA	1	367	1.3%	0	0	0.0%	0	0
Birmingham, AL	11	3,108	6.3%	0	0	0.0%	0	0
Boise, ID	5	1,007	4.2%	0	0	0.0%	0	0
Boston, MA	26	8,867	4.2%	1	222	2.5%	0	222
Bridgeport, CT	4	1,276	3.0%	0	0	0.0%	0	0
Buffalo, NY	6	1,861	2.8%	0	0	0.0%	0	0
Charleston, SC	5	1,492	5.3%	0	0	0.0%	0	0
Charlotte, NC	18	5,076	6.0%	2	338	6.7%	0	0
Chattanooga, TN	3	1,170	4.3%	0	0	0.0%	0	0
Chicago, IL	67	19,519	5.3%	3	261	1.3%	0	65
Cincinnati, OH	26	6,832	7.6%	4	180	2.6%	0	30
Cleveland, OH	25	6,476	5.8%	2	122	1.9%	0	42
Colorado Springs, CO	4	1,167	5.0%	1	23	2.0%	0	0
Columbia, SC	8	1,538	5.1%	0	0	0.0%	0	0
Columbus, OH	17	3,720	5.0%	2	194	5.2%	3	3
Dallas, TX	21	7,146	3.7%	3	685	9.6%	0	363
Dayton, OH	13	4,227	10.1%	1	74	1.8%	0	0
Daytona Beach, FL	6	2,008	4.3%	0	0	0.0%	0	0
Denver, CO	14	4,614	4.8%	0	0	0.0%	0	0
Des Moines, IA	19	3,320	13.8%	1	40	1.2%	0	34
Detroit, MI	18	5,836	2.9%	0	0	0.0%	0	12
El Paso, TX	2	439	1.7%	0	0	0.0%	0	0
Fort Myers, FL	5	3,440	6.3%	1	55	1.6%	55	55
Fresno, CA	6	1,454	5.0%	0	0	0.0%	0	0
Grand Rapids, MI	11	3,667	8.8%	2	45	1.2%	0	22
Greensboro, NC	7	2,094	6.3%	0	0	0.0%	0	0
Greenville, SC	9	2,182	5.6%	2	30	1.4%	0	30
Harrisburg, PA	10	2,829	9.6%	0	0	0.0%	0	0
Hartford, CT	9	2,498	4.2%	1	222	8.9%	0	0
Houston, TX	16	4,760	2.8%	1	118	2.5%	0	0
Indianapolis, IN	27	7,624	10.4%	5	589	7.7%	0	200
Jackson, MS	2	727	3.4%	0	0	0.0%	0	0
Jacksonville, FL	12	3,877	6.7%	1	52	1.3%	0	91
Kansas City, MO	27	7,993	9.4%	2	202	2.5%	0	124
Knoxville, TN	2	478	1.1%	0	0	0.0%	0	0
Lakeland, FL	3	833	2.2%	0	0	0.0%	0	0
Lancaster, PA	17	9,922	36.2%	7	245	2.5%	12	57
Las Vegas, NV	1	314	0.5%	0	0	0.0%	0	0
Little Rock, AR	3	808	2.8%	0	0	0.0%	0	0
Los Angeles, CA	33	8,400	1.9%	3	667	7.9%	32	32
Louisville, KY	12	2,790	5.0%	2	50	1.8%	2	2

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CCRC Construction Summary by Market (Madison - Youngstown)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Madison, WI	9	2,476	9.9%	1	71	2.9%	0	0
McAllen, TX	1	332	1.5%	0	0	0.0%	0	0
Melbourne, FL	2	331	0.8%	0	0	0.0%	0	0
Memphis, TN	3	1,349	2.9%	1	299	22.2%	0	0
Miami, FL	26	10,563	3.3%	0	0	0.0%	0	0
Milwaukee, WI	19	6,257	8.7%	1	169	2.7%	0	169
Minneapolis, MN	39	10,723	8.1%	1	29	0.3%	29	29
Modesto, CA	2	491	2.9%	0	0	0.0%	0	0
Nashville, TN	8	1,972	3.0%	0	0	0.0%	0	0
New Haven, CT	9	2,091	5.0%	0	0	0.0%	0	0
New Orleans, LA	4	817	1.6%	0	0	0.0%	0	0
New York, NY	39	15,623	1.8%	2	554	3.5%	169	169
Ogden, UT	0	0	0.0%	0	0	-	0	0
Oklahoma City, OK	7	1,893	3.5%	1	140	7.4%	0	0
Omaha, NE	7	1,393	3.9%	0	0	0.0%	0	0
Orlando, FL	10	4,364	4.8%	0	0	0.0%	0	25
Philadelphia, PA	82	29,806	10.8%	5	413	1.4%	52	60
Phoenix, AZ	28	9,883	5.3%	3	339	3.4%	0	315
Pittsburgh, PA	20	6,543	4.4%	2	173	2.6%	0	4
Portland, ME	5	895	3.3%	0	0	0.0%	0	0
Portland, OR	20	5,039	5.6%	0	0	0.0%	0	0
Providence, RI	6	1,024	1.3%	0	0	0.0%	0	0
Raleigh, NC	6	1,862	5.1%	2	334	17.9%	0	15
Richmond, VA	9	3,354	6.6%	1	59	1.8%	0	0
Riverside, CA	8	2,137	1.5%	1	369	17.3%	0	0
Rochester, NY	7	2,137	4.1%	0	0	0.0%	0	0
Sacramento, CA	5	1,182	1.3%	0	0	0.0%	0	0
Salt Lake City, UT	1	276	0.9%	0	0	0.0%	0	0
San Antonio, TX	9	3,215	3.9%	1	68	2.1%	0	0
San Diego, CA	13	4,513	3.7%	1	510	11.3%	0	510
San Francisco, CA	20	4,606	2.4%	1	151	3.3%	0	0
San Jose, CA	11	2,780	4.3%	0	0	0.0%	0	0
Sarasota, FL	12	4,291	5.3%	1	46	1.1%	0	46
Scranton, PA	3	604	1.8%	0	0	0.0%	0	0
Seattle, WA	20	5,980	4.4%	0	0	0.0%	0	0
Springfield, MA	7	1,127	3.8%	0	0	0.0%	0	0
St. Louis, MO	32	9,391	7.2%	2	208	2.2%	0	208
Stockton, CA	2	587	2.6%	0	0	0.0%	0	0
Syracuse, NY	4	1,114	3.5%	0	0	0.0%	0	0
Tampa, FL	19	7,788	4.3%	1	274	3.5%	0	0
Toledo, OH	7	1,223	4.4%	0	0	0.0%	0	0
Tucson, AZ	7	2,230	4.2%	0	0	0.0%	0	0
Tulsa, OK	10	2,855	6.8%	2	26	0.9%	0	26
Ventura, CA	1	460	1.5%	0	0	0.0%	0	0
Virginia Beach, VA	10	3,624	5.3%	1	9	0.2%	0	0
Washington, DC	32	15,222	7.9%	3	449	2.9%	130	284
Wichita, KS	13	2,495	9.3%	0	0	0.0%	0	225
Worcester, MA	4	1,420	3.6%	0	0	0.0%	0	0
Youngstown, OH	9	2,316	6.7%	1	4	0.2%	0	0

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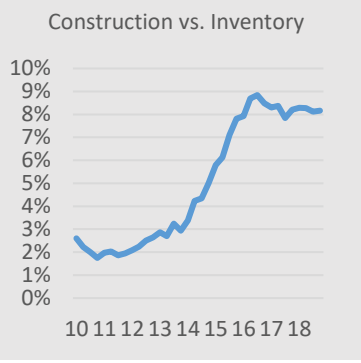
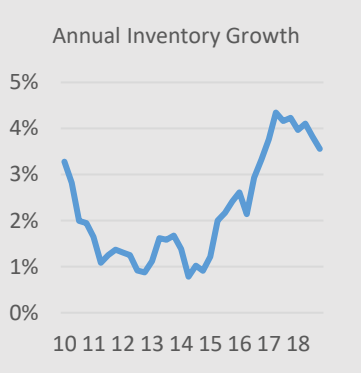
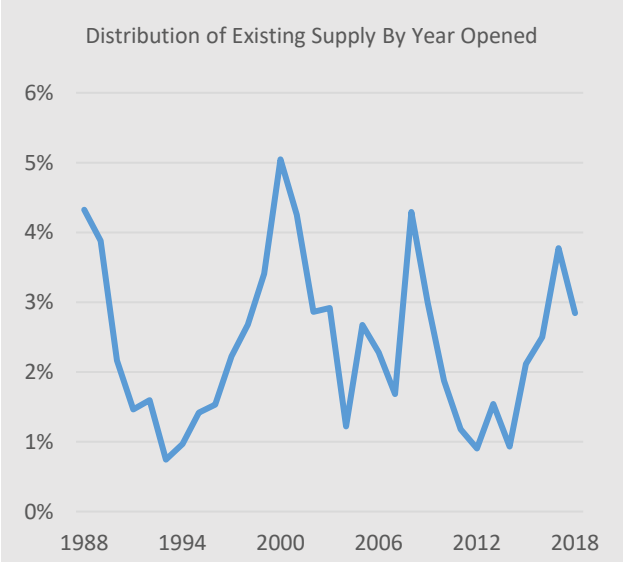
Independent Living Construction Trends

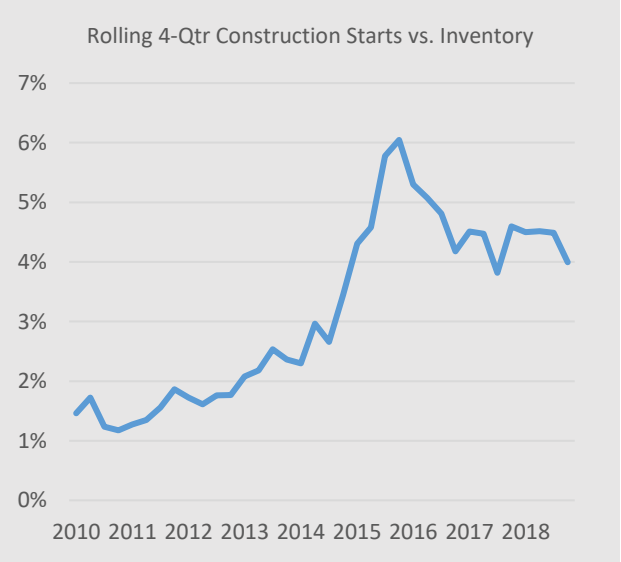
Aggregate construction in independent living remains elevated at 8.2% of existing inventory. Total inventory is growing at a 3.6% annual pace.

	Independent Living[1]		
	Freestanding	Combined	Overall
Number of Properties	732	643	1,375
Median Age (yrs)	20.0	19.0	19.3
Inventory (units)	91,013	120,413	211,426
Independent Living	91,013	81,933	172,946
Assisted Living	0	30,289	30,289
Memory Care	0	8,191	8,191
Nursing Care	0	0	0
75+ Household Penetration	1.1%	1.4%	2.5%
Properties Under Construction	47	71	118
New Properties	31	57	88
Expansions	16	14	30
Units Under Construction	5,599	11,651	17,250
New Properties	4,427	11,075	15,502
Expansions	1,172	576	1,748
Independent Living	4,741	6,893	11,634
Assisted Living	511	2,981	3,492
Memory Care	347	1,676	2,023
Nursing Care	0	101	101
Construction vs. Inventory	6.2%	9.7%	8.2%
Construction Starts (units)	569	1,573	2,142
Rolling 4-qtr (units)	2,264	6,181	8,445
Rolling 4-qtr vs. Inventory	2.5%	5.1%	4.0%









1. Majority independent living, excluding CCRCs and entrance fee properties.

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Independent Living Construction Summary by Market (Akron - Louisville)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Akron, OH	6	729	2.1%	1	128	17.6%	0	128
Albany, NY	7	870	2.0%	0	0	0.0%	0	0
Albuquerque, NM	9	1,297	3.6%	0	0	0.0%	0	0
Allentown, PA	4	525	1.2%	1	72	13.7%	0	32
Atlanta, GA	39	6,406	4.2%	9	1,389	21.7%	317	989
Augusta, GA	3	562	2.4%	0	0	0.0%	0	0
Austin, TX	20	3,217	6.2%	2	314	9.8%	0	0
Bakersfield, CA	2	252	1.1%	0	0	0.0%	0	0
Baltimore, MD	11	1,995	1.7%	1	158	7.9%	0	158
Baton Rouge, LA	6	752	2.6%	0	0	0.0%	0	0
Birmingham, AL	8	1,160	2.3%	1	132	11.4%	0	0
Boise, ID	6	626	2.6%	1	146	23.3%	0	0
Boston, MA	22	3,261	1.5%	1	7	0.2%	0	7
Bridgeport, CT	5	377	0.9%	1	160	42.4%	0	0
Buffalo, NY	6	749	1.1%	0	0	0.0%	0	0
Charleston, SC	5	806	2.8%	0	0	0.0%	0	0
Charlotte, NC	12	1,841	2.2%	1	232	12.6%	0	232
Chattanooga, TN	6	729	2.7%	0	0	0.0%	0	0
Chicago, IL	52	9,295	2.5%	8	1,293	13.9%	169	169
Cincinnati, OH	11	1,853	2.1%	2	240	13.0%	117	117
Cleveland, OH	12	1,461	1.3%	1	49	3.4%	0	0
Colorado Springs, CO	4	576	2.5%	1	128	22.2%	0	128
Columbia, SC	5	504	1.7%	1	187	37.1%	0	0
Columbus, OH	18	2,380	3.2%	6	592	24.9%	174	297
Dallas, TX	76	12,570	6.5%	7	1,094	8.7%	0	503
Dayton, OH	3	443	1.1%	1	248	56.0%	0	0
Daytona Beach, FL	4	599	1.3%	0	0	0.0%	0	0
Denver, CO	30	4,955	5.2%	4	623	12.6%	0	36
Des Moines, IA	5	685	2.8%	1	60	8.8%	0	60
Detroit, MI	83	11,048	5.5%	2	115	1.0%	0	30
El Paso, TX	2	263	1.0%	0	0	0.0%	0	0
Fort Myers, FL	9	2,073	3.8%	0	0	0.0%	0	0
Fresno, CA	5	843	2.9%	0	0	0.0%	0	0
Grand Rapids, MI	10	1,449	3.5%	1	98	6.8%	0	98
Greensboro, NC	5	882	2.7%	1	174	19.7%	0	174
Greenville, SC	6	632	1.6%	1	167	26.4%	0	167
Harrisburg, PA	5	568	1.9%	0	0	0.0%	0	0
Hartford, CT	10	1,026	1.7%	1	128	12.5%	0	128
Houston, TX	38	7,361	4.4%	5	1,169	15.9%	214	853
Indianapolis, IN	9	1,940	2.6%	1	180	9.3%	0	0
Jackson, MS	5	559	2.6%	0	0	0.0%	0	0
Jacksonville, FL	4	728	1.3%	2	515	70.7%	0	176
Kansas City, MO	25	3,654	4.3%	3	450	12.3%	0	258
Knoxville, TN	5	470	1.1%	0	0	0.0%	0	0
Lakeland, FL	6	956	2.5%	0	0	0.0%	0	0
Lancaster, PA	4	443	1.6%	1	54	12.2%	0	0
Las Vegas, NV	10	1,607	2.3%	1	128	8.0%	0	0
Little Rock, AR	8	880	3.1%	1	130	14.8%	0	130
Los Angeles, CA	35	4,724	1.1%	0	0	0.0%	0	0
Louisville, KY	6	988	1.8%	0	0	0.0%	0	0

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Independent Living Construction Summary by Market (Madison - Youngstown)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Madison, WI	4	613	2.5%	1	60	9.8%	0	0
McAllen, TX	2	314	1.4%	0	0	0.0%	0	0
Melbourne, FL	4	740	1.8%	0	0	0.0%	0	0
Memphis, TN	10	1,545	3.4%	1	44	2.8%	0	44
Miami, FL	28	6,225	2.0%	1	178	2.9%	0	0
Milwaukee, WI	18	2,568	3.6%	4	521	20.3%	226	382
Minneapolis, MN	44	6,667	5.1%	1	25	0.4%	25	25
Modesto, CA	2	358	2.1%	0	0	0.0%	0	0
Nashville, TN	12	1,718	2.6%	1	195	11.4%	0	195
New Haven, CT	5	840	2.0%	0	0	0.0%	0	0
New Orleans, LA	5	559	1.1%	0	0	0.0%	0	0
New York, NY	35	5,347	0.6%	3	639	12.0%	225	639
Ogden, UT	4	517	2.7%	1	57	11.0%	0	57
Oklahoma City, OK	12	1,665	3.1%	1	93	5.6%	0	0
Omaha, NE	18	1,943	5.4%	1	300	15.4%	300	300
Orlando, FL	9	1,685	1.9%	1	168	10.0%	0	0
Philadelphia, PA	15	2,260	0.8%	2	331	14.6%	0	160
Phoenix, AZ	37	7,154	3.8%	9	1,490	20.8%	235	469
Pittsburgh, PA	17	2,090	1.4%	2	256	12.2%	0	128
Portland, ME	7	1,187	4.4%	0	0	0.0%	0	0
Portland, OR	43	6,610	7.3%	1	140	2.1%	140	140
Providence, RI	5	598	0.8%	0	0	0.0%	0	0
Raleigh, NC	17	2,646	7.2%	4	414	15.6%	0	209
Richmond, VA	8	1,851	3.6%	1	148	8.0%	0	148
Riverside, CA	16	2,304	1.7%	0	0	0.0%	0	0
Rochester, NY	19	2,759	5.3%	1	55	2.0%	0	0
Sacramento, CA	26	3,319	3.8%	3	561	16.9%	0	221
Salt Lake City, UT	7	997	3.1%	1	15	1.5%	0	15
San Antonio, TX	20	3,842	4.6%	0	0	0.0%	0	0
San Diego, CA	18	2,902	2.4%	1	200	6.9%	0	0
San Francisco, CA	17	2,576	1.4%	0	0	0.0%	0	0
San Jose, CA	11	1,655	2.5%	0	0	0.0%	0	0
Sarasota, FL	9	1,781	2.2%	0	0	0.0%	0	0
Scranton, PA	2	176	0.5%	0	0	0.0%	0	0
Seattle, WA	53	6,766	5.0%	0	0	0.0%	0	57
Springfield, MA	4	535	1.8%	0	0	0.0%	0	0
St. Louis, MO	26	3,510	2.7%	3	419	11.9%	0	214
Stockton, CA	3	350	1.6%	1	142	40.6%	0	0
Syracuse, NY	6	557	1.8%	0	0	0.0%	0	0
Tampa, FL	16	3,715	2.1%	0	0	0.0%	0	0
Toledo, OH	5	641	2.3%	1	72	11.2%	0	5
Tucson, AZ	13	2,999	5.7%	1	167	5.6%	0	167
Tulsa, OK	10	1,350	3.2%	0	0	0.0%	0	0
Ventura, CA	6	779	2.5%	0	0	0.0%	0	0
Virginia Beach, VA	14	1,991	2.9%	0	0	0.0%	0	0
Washington, DC	14	2,135	1.1%	0	0	0.0%	0	0
Wichita, KS	7	932	3.5%	0	0	0.0%	0	0
Worcester, MA	4	465	1.2%	0	0	0.0%	0	0
Youngstown, OH	1	121	0.3%	0	0	0.0%	0	0

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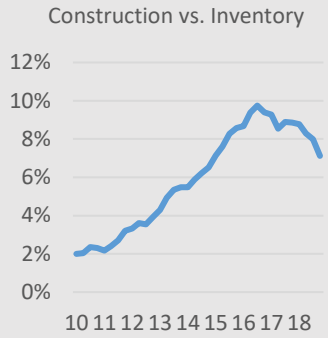
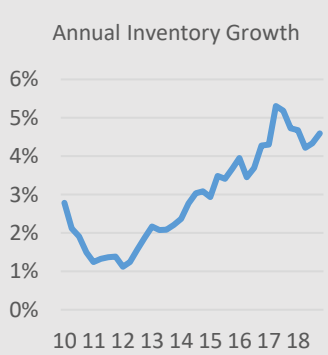
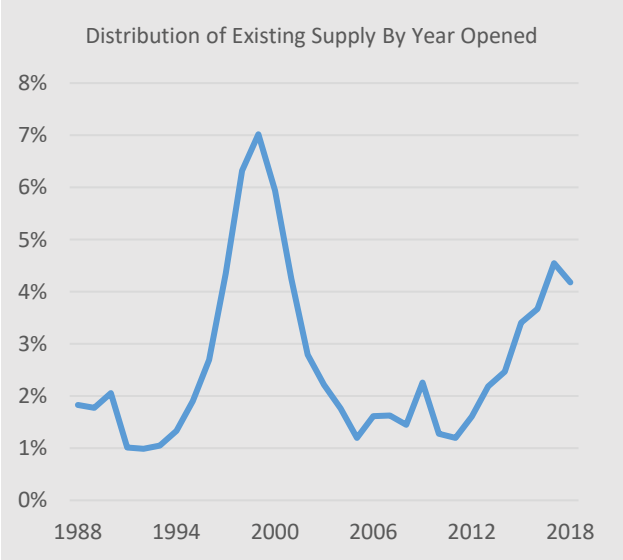
Assisted Living Construction Trends

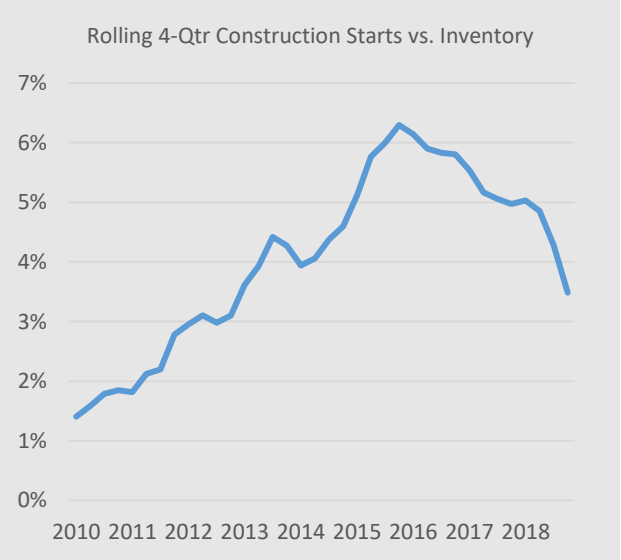
Construction as a share of existing assisted living inventory remains elevated at 7.1%. Total inventory is growing at a 4.6% annual pace.

	Assisted Living[1]		
	Freestanding	Combined	Overall
Number of Properties	1,737	2,945	4,682
Median Age (yrs)	22.0	18.0	19.6
Inventory (units)	106,267	288,463	394,730
Independent Living	58	21,261	21,319
Assisted Living	106,112	189,711	295,823
Memory Care	97	69,297	69,394
Nursing Care	0	8,194	8,194
75+ Household Penetration	1.2%	3.4%	4.6%
Properties Under Construction	52	228	280
New Properties	39	199	238
Expansions	13	29	42
Units Under Construction	4,279	23,833	28,112
New Properties	3,834	22,584	26,418
Expansions	445	1,249	1,694
Independent Living	91	3,246	3,337
Assisted Living	4,026	14,247	18,273
Memory Care	141	6,165	6,306
Nursing Care	21	175	196
Construction vs. Inventory	4.0%	8.3%	7.1%
Construction Starts (units)	484	2,020	2,504
Rolling 4-qtr (units)	2,477	11,268	13,745
Rolling 4-qtr vs. Inventory	2.3%	3.9%	3.5%









1. Majority assisted living, excluding freestanding memory care, CCRCs, and entrance fee properties.

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Assisted Living Construction Summary by Market (Akron - Louisville)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Akron, OH	19	1,818	5.2%	0	0	0.0%	0	0
Albany, NY	19	1,421	3.2%	3	387	27.2%	0	291
Albuquerque, NM	16	1,176	3.3%	0	0	0.0%	0	0
Allentown, PA	32	2,935	6.9%	0	0	0.0%	0	0
Atlanta, GA	152	10,677	7.0%	14	1,313	12.3%	0	215
Augusta, GA	15	854	3.6%	0	0	0.0%	0	16
Austin, TX	34	2,878	5.6%	3	417	14.5%	86	187
Bakersfield, CA	8	655	2.9%	1	68	10.4%	0	68
Baltimore, MD	54	3,941	3.3%	5	364	9.2%	0	132
Baton Rouge, LA	11	847	2.9%	2	210	24.8%	0	0
Birmingham, AL	13	767	1.5%	0	0	0.0%	0	0
Boise, ID	35	2,607	10.8%	4	336	12.9%	0	336
Boston, MA	126	10,185	4.8%	7	769	7.6%	140	377
Bridgeport, CT	20	1,881	4.4%	6	629	33.4%	0	337
Buffalo, NY	28	2,965	4.5%	1	42	1.4%	0	42
Charleston, SC	19	1,309	4.6%	0	0	0.0%	0	0
Charlotte, NC	85	6,056	7.2%	2	197	3.3%	88	197
Chattanooga, TN	21	1,303	4.7%	1	16	1.2%	0	16
Chicago, IL	139	14,851	4.1%	14	1,468	9.9%	183	666
Cincinnati, OH	34	3,333	3.7%	4	413	12.4%	100	352
Cleveland, OH	56	5,246	4.7%	3	287	5.5%	0	0
Colorado Springs, CO	21	1,697	7.2%	0	0	0.0%	0	0
Columbia, SC	27	1,948	6.5%	2	188	9.7%	81	81
Columbus, OH	51	4,040	5.5%	4	438	10.8%	0	190
Dallas, TX	151	11,800	6.1%	8	438	3.7%	153	265
Dayton, OH	23	1,766	4.2%	2	130	7.4%	20	20
Daytona Beach, FL	29	2,086	4.5%	0	0	0.0%	0	0
Denver, CO	59	5,751	6.0%	8	1,036	18.0%	0	342
Des Moines, IA	18	1,112	4.6%	0	0	0.0%	0	0
Detroit, MI	68	5,570	2.8%	12	1,061	19.0%	280	420
El Paso, TX	5	485	1.8%	0	0	0.0%	0	0
Fort Myers, FL	20	1,941	3.5%	5	611	31.5%	100	230
Fresno, CA	12	1,104	3.8%	0	0	0.0%	0	0
Grand Rapids, MI	42	3,698	8.9%	1	116	3.1%	0	0
Greensboro, NC	27	1,807	5.5%	0	0	0.0%	0	0
Greenville, SC	39	2,547	6.5%	4	355	13.9%	0	133
Harrisburg, PA	11	1,242	4.2%	0	0	0.0%	0	0
Hartford, CT	29	2,370	4.0%	1	126	5.3%	0	0
Houston, TX	74	6,598	3.9%	3	296	4.5%	0	179
Indianapolis, IN	52	4,994	6.8%	4	429	8.6%	50	305
Jackson, MS	9	735	3.5%	0	0	0.0%	0	0
Jacksonville, FL	43	3,259	5.6%	4	434	13.3%	0	102
Kansas City, MO	55	3,733	4.4%	3	129	3.5%	0	0
Knoxville, TN	39	2,463	5.7%	0	0	0.0%	0	0
Lakeland, FL	23	1,677	4.4%	0	0	0.0%	0	0
Lancaster, PA	15	1,012	3.7%	0	0	0.0%	0	0
Las Vegas, NV	19	1,970	2.8%	1	9	0.5%	0	9
Little Rock, AR	12	915	3.2%	0	0	0.0%	0	0
Los Angeles, CA	214	20,649	4.6%	8	757	3.7%	100	355
Louisville, KY	30	2,343	4.2%	2	229	9.8%	0	0

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Assisted Living Construction Summary by Market (Madison - Youngstown)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Madison, WI	40	2,278	9.1%	2	136	6.0%	0	100
McAllen, TX	3	105	0.5%	1	21	20.0%	0	21
Melbourne, FL	23	1,904	4.6%	1	88	4.6%	88	88
Memphis, TN	22	1,430	3.1%	1	123	8.6%	0	123
Miami, FL	93	8,486	2.7%	7	1,126	13.3%	84	1,039
Milwaukee, WI	71	5,881	8.2%	7	689	11.7%	232	434
Minneapolis, MN	162	14,956	11.3%	13	1,582	10.6%	84	1,083
Modesto, CA	14	943	5.5%	0	0	0.0%	0	0
Nashville, TN	60	4,319	6.6%	6	635	14.7%	90	237
New Haven, CT	16	1,581	3.8%	1	109	6.9%	109	109
New Orleans, LA	16	1,347	2.7%	3	282	20.9%	0	282
New York, NY	231	23,104	2.7%	14	1,781	7.7%	0	349
Ogden, UT	20	1,551	8.2%	0	0	0.0%	0	0
Oklahoma City, OK	39	2,721	5.0%	2	122	4.5%	0	112
Omaha, NE	36	2,948	8.2%	1	114	3.9%	0	0
Orlando, FL	58	4,980	5.5%	2	232	4.7%	0	232
Philadelphia, PA	110	9,038	3.3%	11	1,077	11.9%	106	535
Phoenix, AZ	82	8,486	4.6%	9	1,132	13.3%	94	566
Pittsburgh, PA	102	6,506	4.4%	0	0	0.0%	0	0
Portland, ME	22	1,396	5.1%	1	10	0.7%	0	0
Portland, OR	102	8,335	9.3%	6	654	7.8%	0	231
Providence, RI	46	4,072	5.2%	0	0	0.0%	0	0
Raleigh, NC	36	2,283	6.2%	0	0	0.0%	0	0
Richmond, VA	36	3,452	6.7%	2	119	3.4%	0	99
Riverside, CA	58	5,626	4.1%	5	491	8.7%	124	482
Rochester, NY	29	2,604	5.0%	0	0	0.0%	0	0
Sacramento, CA	61	5,471	6.2%	4	567	10.4%	0	320
Salt Lake City, UT	32	3,013	9.4%	0	0	0.0%	0	0
San Antonio, TX	34	2,482	3.0%	0	0	0.0%	0	0
San Diego, CA	56	6,026	5.0%	1	49	0.8%	0	0
San Francisco, CA	97	8,914	4.7%	2	143	1.6%	0	0
San Jose, CA	23	1,917	2.9%	0	0	0.0%	0	0
Sarasota, FL	44	4,113	5.1%	4	509	12.4%	0	457
Scranton, PA	25	1,868	5.4%	0	0	0.0%	0	0
Seattle, WA	112	10,442	7.7%	5	324	3.1%	11	131
Springfield, MA	16	1,337	4.5%	0	0	0.0%	0	0
St. Louis, MO	84	5,446	4.2%	4	211	3.9%	0	89
Stockton, CA	16	1,336	6.0%	0	0	0.0%	0	0
Syracuse, NY	13	1,193	3.8%	0	0	0.0%	0	0
Tampa, FL	114	9,875	5.5%	4	339	3.4%	0	237
Toledo, OH	14	1,520	5.5%	3	128	8.4%	0	68
Tucson, AZ	20	1,785	3.4%	2	112	6.3%	0	0
Tulsa, OK	22	1,651	3.9%	0	0	0.0%	0	0
Ventura, CA	20	2,128	6.7%	2	186	8.7%	101	186
Virginia Beach, VA	41	2,959	4.3%	1	60	2.0%	0	60
Washington, DC	95	7,876	4.1%	11	1,263	16.0%	0	212
Wichita, KS	23	1,410	5.2%	0	0	0.0%	0	0
Worcester, MA	20	1,378	3.5%	0	0	0.0%	0	0
Youngstown, OH	20	1,241	3.6%	0	0	0.0%	0	0

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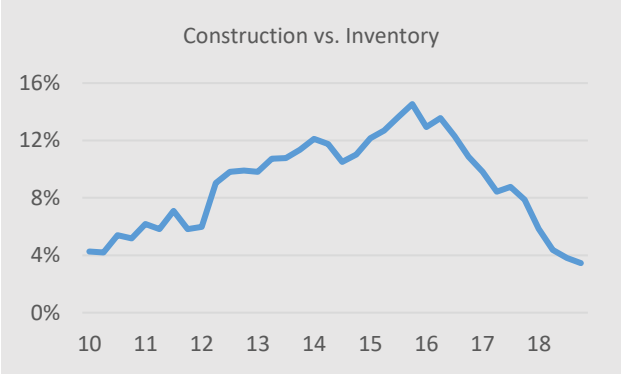
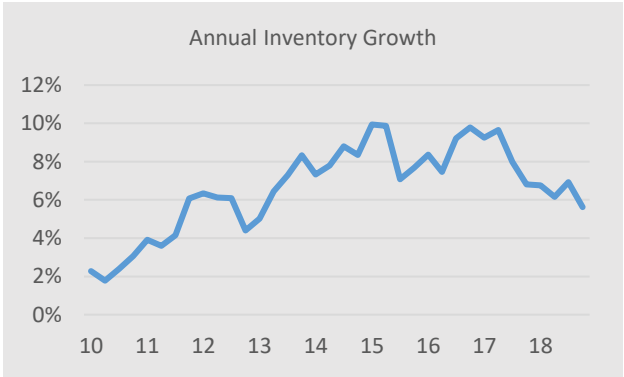
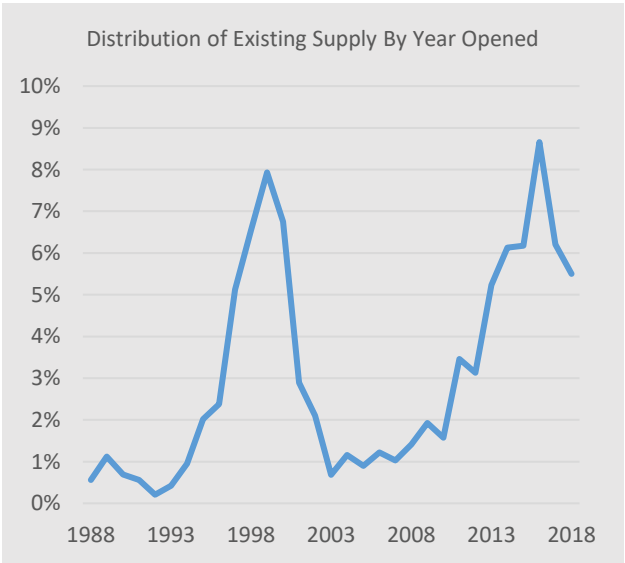
Freestanding Memory Care Construction Trends

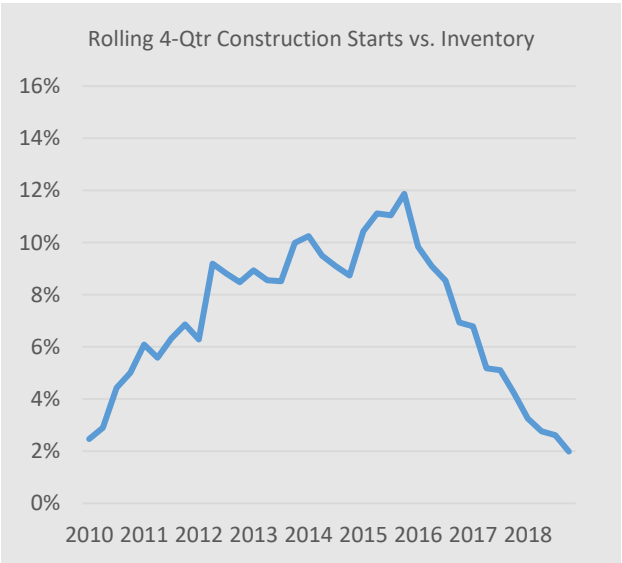
Aggregate construction activity in freestanding memory care currently represents 3.5% of existing inventory. Rolling 4-qtr construction starts as a percentage of supply has decreased from a peak of 11.9% in 4Q15 to 2.0% in the current quarter.

	Freestanding Memory Care
Number of Properties	763
Median Age (yrs)	13.9
Inventory (units)	36,604
Independent Living	0
Assisted Living	0
Memory Care	36,604
Nursing Care	0
75+ Household Penetration	0.4%
Properties Under Construction	26
New Properties	20
Expansions	6
Units Under Construction	1,264
New Properties	1,116
Expansions	148
Independent Living	0
Assisted Living	0
Memory Care	1,264
Nursing Care	0
Construction vs. Inventory	3.5%
Construction Starts (units)	93
Rolling 4-qtr (units)	727
Rolling 4-qtr vs. Inventory	2.0%









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Freestanding Memory Care Construction Summary by Market (Akron - Louisville)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Akron, OH	3	174	0.5%	0	0	0.0%	0	0
Albany, NY	4	209	0.5%	0	0	0.0%	0	0
Albuquerque, NM	2	97	0.3%	0	0	0.0%	0	0
Allentown, PA	4	267	0.6%	0	0	0.0%	0	0
Atlanta, GA	18	856	0.6%	0	0	0.0%	0	0
Augusta, GA	1	46	0.2%	0	0	0.0%	0	0
Austin, TX	20	852	1.7%	0	0	0.0%	0	0
Bakersfield, CA	1	42	0.2%	0	0	0.0%	0	0
Baltimore, MD	3	108	0.1%	0	0	0.0%	0	0
Baton Rouge, LA	1	48	0.2%	0	0	0.0%	0	0
Birmingham, AL	2	55	0.1%	0	0	0.0%	0	0
Boise, ID	4	168	0.7%	0	0	0.0%	0	0
Boston, MA	21	1,050	0.5%	1	72	6.9%	0	0
Bridgeport, CT	4	241	0.6%	0	0	0.0%	0	0
Buffalo, NY	2	92	0.1%	0	0	0.0%	0	0
Charleston, SC	2	98	0.3%	0	0	0.0%	0	0
Charlotte, NC	7	279	0.3%	0	0	0.0%	0	0
Chattanooga, TN	1	42	0.2%	0	0	0.0%	0	0
Chicago, IL	41	2,217	0.6%	0	0	0.0%	0	0
Cincinnati, OH	5	308	0.3%	0	0	0.0%	0	0
Cleveland, OH	9	505	0.5%	0	0	0.0%	0	0
Colorado Springs, CO	3	156	0.7%	0	0	0.0%	0	0
Columbia, SC	2	94	0.3%	0	0	0.0%	0	0
Columbus, OH	2	130	0.2%	1	54	41.5%	0	54
Dallas, TX	49	2,211	1.1%	2	48	2.2%	21	48
Dayton, OH	2	110	0.3%	1	50	45.5%	0	50
Daytona Beach, FL	3	164	0.4%	0	0	0.0%	0	0
Denver, CO	15	720	0.8%	0	0	0.0%	0	0
Des Moines, IA	2	68	0.3%	0	0	0.0%	0	0
Detroit, MI	12	757	0.4%	0	0	0.0%	0	0
El Paso, TX	2	62	0.2%	0	0	0.0%	0	0
Fort Myers, FL	6	306	0.6%	0	0	0.0%	0	0
Fresno, CA	3	132	0.5%	0	0	0.0%	0	0
Grand Rapids, MI	1	39	0.1%	0	0	0.0%	0	0
Greensboro, NC	1	85	0.3%	0	0	0.0%	0	0
Greenville, SC	4	214	0.5%	0	0	0.0%	0	0
Harrisburg, PA	2	128	0.4%	0	0	0.0%	0	0
Hartford, CT	6	385	0.7%	0	0	0.0%	0	0
Houston, TX	38	1,373	0.8%	1	21	1.5%	0	0
Indianapolis, IN	2	92	0.1%	1	36	39.1%	0	36
Jackson, MS	0	0	0.0%	0	0	-	0	0
Jacksonville, FL	8	395	0.7%	0	0	0.0%	0	0
Kansas City, MO	7	346	0.4%	0	0	0.0%	0	0
Knoxville, TN	5	224	0.5%	0	0	0.0%	0	0
Lakeland, FL	1	32	0.1%	0	0	0.0%	0	0
Lancaster, PA	1	34	0.1%	0	0	0.0%	0	0
Las Vegas, NV	4	238	0.3%	0	0	0.0%	0	0
Little Rock, AR	2	133	0.5%	0	0	0.0%	0	0
Los Angeles, CA	27	1,538	0.3%	3	148	9.6%	72	148
Louisville, KY	5	212	0.4%	0	0	0.0%	0	0

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Freestanding Memory Care Construction Summary by Market (Madison - Youngstown)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Madison, WI	7	190	0.8%	0	0	0.0%	0	0
McAllen, TX	0	0	0.0%	0	0	-	0	0
Melbourne, FL	4	214	0.5%	0	0	0.0%	0	0
Memphis, TN	2	105	0.2%	0	0	0.0%	0	0
Miami, FL	12	565	0.2%	0	0	0.0%	0	0
Milwaukee, WI	16	662	0.9%	2	75	11.3%	0	25
Minneapolis, MN	19	879	0.7%	2	74	8.4%	0	30
Modesto, CA	1	70	0.4%	0	0	0.0%	0	0
Nashville, TN	3	121	0.2%	0	0	0.0%	0	0
New Haven, CT	2	124	0.3%	0	0	0.0%	0	0
New Orleans, LA	1	40	0.1%	0	0	0.0%	0	0
New York, NY	11	619	0.1%	3	200	32.3%	0	200
Ogden, UT	1	66	0.3%	0	0	0.0%	0	0
Oklahoma City, OK	6	274	0.5%	0	0	0.0%	0	0
Omaha, NE	2	104	0.3%	0	0	0.0%	0	0
Orlando, FL	5	223	0.2%	0	0	0.0%	0	0
Philadelphia, PA	11	594	0.2%	2	136	22.9%	0	0
Phoenix, AZ	27	1,471	0.8%	0	0	0.0%	0	0
Pittsburgh, PA	8	448	0.3%	0	0	0.0%	0	0
Portland, ME	7	374	1.4%	0	0	0.0%	0	0
Portland, OR	23	1,005	1.1%	0	0	0.0%	0	0
Providence, RI	4	202	0.3%	0	0	0.0%	0	0
Raleigh, NC	3	109	0.3%	0	0	0.0%	0	0
Richmond, VA	6	293	0.6%	1	16	5.5%	0	0
Riverside, CA	14	640	0.5%	0	0	0.0%	0	0
Rochester, NY	3	150	0.3%	0	0	0.0%	0	0
Sacramento, CA	11	434	0.5%	2	124	28.6%	0	64
Salt Lake City, UT	5	220	0.7%	0	0	0.0%	0	0
San Antonio, TX	16	626	0.8%	0	0	0.0%	0	0
San Diego, CA	21	1,046	0.9%	0	0	0.0%	0	0
San Francisco, CA	22	894	0.5%	0	0	0.0%	0	0
San Jose, CA	4	91	0.1%	0	0	0.0%	0	0
Sarasota, FL	10	462	0.6%	1	54	11.7%	0	0
Scranton, PA	3	126	0.4%	0	0	0.0%	0	0
Seattle, WA	25	1,107	0.8%	0	0	0.0%	0	0
Springfield, MA	1	44	0.1%	0	0	0.0%	0	0
St. Louis, MO	13	573	0.4%	1	34	5.9%	0	0
Stockton, CA	4	227	1.0%	0	0	0.0%	0	0
Syracuse, NY	2	101	0.3%	0	0	0.0%	0	0
Tampa, FL	17	969	0.5%	1	50	5.2%	0	0
Toledo, OH	1	108	0.4%	0	0	0.0%	0	0
Tucson, AZ	7	309	0.6%	0	0	0.0%	0	0
Tulsa, OK	6	290	0.7%	0	0	0.0%	0	0
Ventura, CA	3	130	0.4%	0	0	0.0%	0	0
Virginia Beach, VA	4	206	0.3%	0	0	0.0%	0	0
Washington, DC	16	794	0.4%	1	72	9.1%	0	72
Wichita, KS	3	141	0.5%	0	0	0.0%	0	0
Worcester, MA	0	0	0.0%	0	0	-	0	0
Youngstown, OH	1	32	0.1%	0	0	0.0%	0	0

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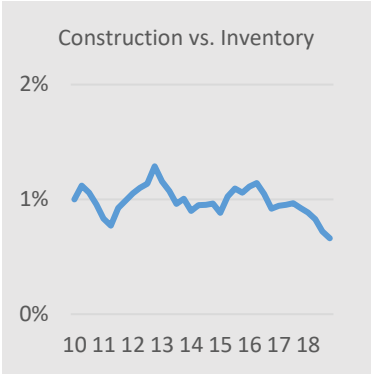
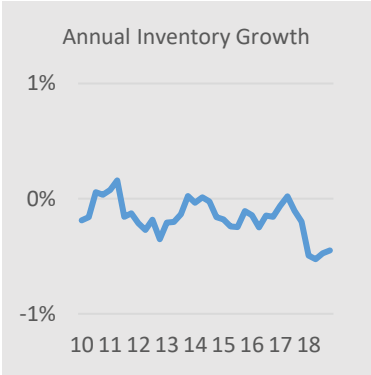
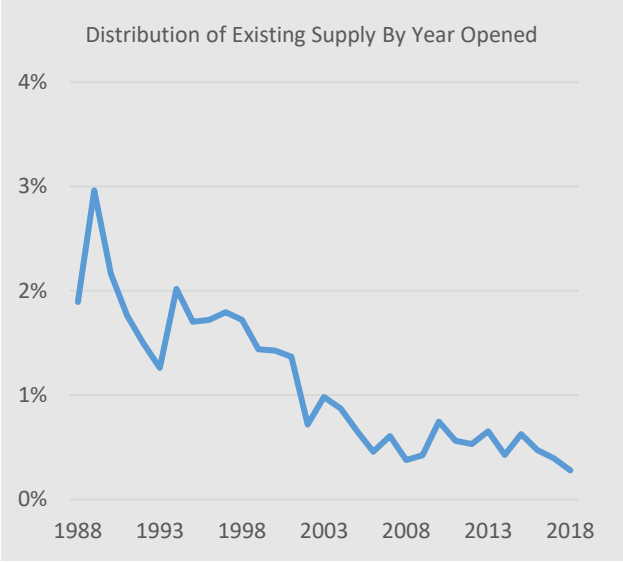
Nursing Care Construction Trends

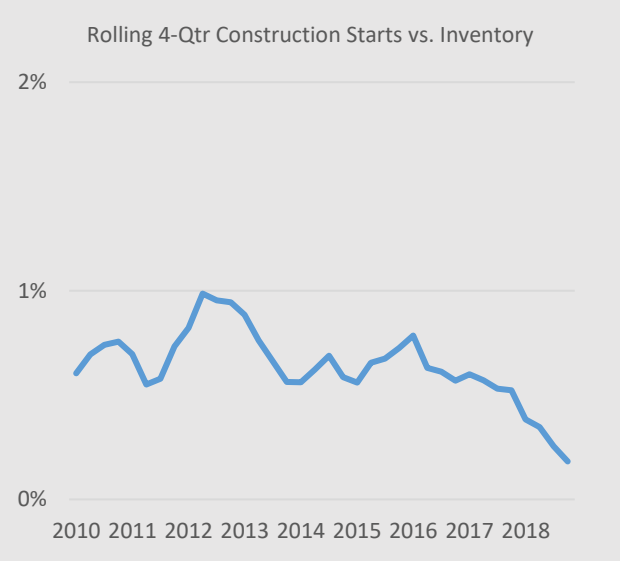
Nursing care construction activity continues to slow as construction as a share of existing inventory reached 0.7% in the fourth quarter. Annual inventory growth is -0.4%.

	Nursing Care[1]		
	Freestanding	Combined	Overall
Number of Properties	5,737	534	6,271
Median Age (yrs)	39.4	33.7	39.0
Inventory (units)	728,335	82,177	810,512
Independent Living	0	0	0
Assisted Living	0	19,523	19,523
Memory Care	0	3,705	3,705
Nursing Care	728,335	58,949	787,284
75+ Household Penetration	8.5%	1.0%	9.5%
Properties Under Construction	50	12	62
New Properties	18	5	23
Expansions	32	7	39
Units Under Construction	4,266	1,092	5,358
New Properties	2,352	808	3,160
Expansions	1,914	284	2,198
Independent Living	148	30	178
Assisted Living	392	260	652
Memory Care	55	198	253
Nursing Care	3,671	604	4,275
Construction vs. Inventory	0.6%	1.3%	0.7%
Construction Starts (units)	196	6	202
Rolling 4-qtr (units)	1,088	388	1,476
Rolling 4-qtr vs. Inventory	0.1%	0.5%	0.2%









1. Majority nursing care, excluding CCRCs and entrance fee properties.

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Nursing Care Construction Summary by Market (Akron - Louisville)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Akron, OH	39	4,246	12.2%	1	30	0.7%	0	30
Albany, NY	23	4,165	9.4%	0	0	0.0%	0	0
Albuquerque, NM	16	2,071	5.7%	0	0	0.0%	0	0
Allentown, PA	26	4,589	10.8%	0	0	0.0%	0	0
Atlanta, GA	93	12,629	8.3%	2	256	2.0%	0	4
Augusta, GA	20	2,312	9.8%	0	0	0.0%	0	0
Austin, TX	54	6,616	12.8%	1	12	0.2%	0	12
Bakersfield, CA	14	1,611	7.1%	1	140	8.7%	0	0
Baltimore, MD	85	11,476	9.6%	2	105	0.9%	0	105
Baton Rouge, LA	33	4,403	15.3%	0	0	0.0%	0	0
Birmingham, AL	35	3,768	7.6%	0	0	0.0%	0	0
Boise, ID	18	1,750	7.3%	0	0	0.0%	0	0
Boston, MA	220	26,501	12.5%	1	6	0.0%	0	0
Bridgeport, CT	34	5,223	12.2%	0	0	0.0%	0	0
Buffalo, NY	42	6,782	10.3%	0	0	0.0%	0	0
Charleston, SC	13	1,573	5.5%	0	0	0.0%	0	0
Charlotte, NC	64	7,338	8.7%	0	0	0.0%	0	0
Chattanooga, TN	16	1,859	6.8%	1	27	1.5%	0	27
Chicago, IL	307	49,592	13.6%	3	233	0.5%	0	13
Cincinnati, OH	116	12,691	14.2%	2	167	1.3%	0	33
Cleveland, OH	119	14,531	13.0%	2	84	0.6%	6	6
Colorado Springs, CO	18	1,831	7.8%	0	0	0.0%	0	0
Columbia, SC	19	2,825	9.4%	0	0	0.0%	0	0
Columbus, OH	80	8,497	11.5%	1	18	0.2%	0	18
Dallas, TX	217	27,773	14.3%	6	681	2.5%	40	218
Dayton, OH	45	4,693	11.2%	1	30	0.6%	0	0
Daytona Beach, FL	26	3,130	6.7%	0	0	0.0%	0	0
Denver, CO	71	7,915	8.3%	0	0	0.0%	0	0
Des Moines, IA	29	2,474	10.2%	1	13	0.5%	0	0
Detroit, MI	127	16,964	8.5%	8	912	5.4%	0	148
El Paso, TX	17	2,066	7.9%	0	0	0.0%	0	0
Fort Myers, FL	14	1,747	3.2%	1	113	6.5%	0	113
Fresno, CA	22	2,064	7.1%	0	0	0.0%	0	0
Grand Rapids, MI	26	2,650	6.4%	0	0	0.0%	0	0
Greensboro, NC	24	3,130	9.5%	0	0	0.0%	0	0
Greenville, SC	25	3,110	7.9%	0	0	0.0%	0	0
Harrisburg, PA	17	2,373	8.1%	0	0	0.0%	0	0
Hartford, CT	71	8,998	15.2%	0	0	0.0%	0	0
Houston, TX	137	17,044	10.1%	1	104	0.6%	0	0
Indianapolis, IN	97	10,363	14.1%	1	7	0.1%	0	0
Jackson, MS	27	3,053	14.5%	0	0	0.0%	0	0
Jacksonville, FL	42	5,511	9.5%	2	236	4.3%	116	116
Kansas City, MO	103	11,024	13.0%	2	308	2.8%	0	16
Knoxville, TN	33	4,256	9.9%	1	64	1.5%	0	64
Lakeland, FL	21	2,839	7.4%	0	0	0.0%	0	0
Lancaster, PA	14	1,915	7.0%	0	0	0.0%	0	0
Las Vegas, NV	20	3,179	4.6%	1	123	3.9%	0	0
Little Rock, AR	35	3,824	13.5%	0	0	0.0%	0	0
Los Angeles, CA	357	39,688	8.9%	1	44	0.1%	0	44
Louisville, KY	62	7,088	12.8%	0	0	0.0%	0	0

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Nursing Care Construction Summary by Market (Madison - Youngstown)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Madison, WI	21	1,700	6.8%	0	0	0.0%	0	0
McAllen, TX	19	2,413	10.9%	0	0	0.0%	0	0
Melbourne, FL	19	2,472	6.0%	1	23	0.9%	0	41
Memphis, TN	38	4,711	10.3%	0	0	0.0%	0	0
Miami, FL	111	15,829	5.0%	2	371	2.3%	0	0
Milwaukee, WI	41	4,723	6.6%	1	144	3.0%	0	176
Minneapolis, MN	95	9,866	7.5%	1	20	0.2%	0	0
Modesto, CA	16	1,775	10.4%	0	0	0.0%	0	0
Nashville, TN	56	6,906	10.6%	0	0	0.0%	0	0
New Haven, CT	47	5,469	13.0%	0	0	0.0%	0	20
New Orleans, LA	39	5,458	10.9%	1	40	0.7%	40	40
New York, NY	511	101,338	11.7%	0	0	0.0%	0	40
Ogden, UT	18	1,658	8.8%	0	0	0.0%	0	0
Oklahoma City, OK	58	5,604	10.3%	0	0	0.0%	0	0
Omaha, NE	37	3,965	11.0%	2	109	2.7%	0	69
Orlando, FL	53	6,865	7.6%	1	34	0.5%	0	0
Philadelphia, PA	174	27,916	10.1%	1	263	0.9%	0	96
Phoenix, AZ	46	5,918	3.2%	1	5	0.1%	0	5
Pittsburgh, PA	91	13,073	8.8%	1	36	0.3%	0	0
Portland, ME	25	2,310	8.5%	0	0	0.0%	0	0
Portland, OR	52	4,240	4.7%	1	101	2.4%	0	0
Providence, RI	113	12,782	16.3%	0	0	0.0%	0	0
Raleigh, NC	26	3,111	8.5%	0	0	0.0%	0	0
Richmond, VA	31	4,368	8.5%	0	0	0.0%	0	0
Riverside, CA	76	8,088	5.9%	2	242	3.0%	0	0
Rochester, NY	44	5,462	10.4%	0	0	0.0%	0	0
Sacramento, CA	51	5,573	6.3%	0	0	0.0%	0	0
Salt Lake City, UT	27	2,151	6.7%	0	0	0.0%	0	0
San Antonio, TX	88	10,442	12.6%	0	0	0.0%	0	0
San Diego, CA	56	6,935	5.7%	0	0	0.0%	0	0
San Francisco, CA	114	11,289	5.9%	1	190	1.7%	0	0
San Jose, CA	39	4,367	6.7%	0	0	0.0%	0	0
Sarasota, FL	29	3,626	4.5%	0	0	0.0%	0	0
Scranton, PA	38	5,370	15.6%	0	0	0.0%	0	0
Seattle, WA	66	7,512	5.6%	2	22	0.3%	0	22
Springfield, MA	34	3,886	13.1%	0	0	0.0%	0	0
St. Louis, MO	154	18,810	14.5%	0	0	0.0%	0	0
Stockton, CA	23	2,524	11.3%	0	0	0.0%	0	0
Syracuse, NY	16	3,293	10.5%	0	0	0.0%	0	0
Tampa, FL	98	11,906	6.6%	1	45	0.4%	0	0
Toledo, OH	42	4,060	14.6%	0	0	0.0%	0	0
Tucson, AZ	16	2,088	4.0%	0	0	0.0%	0	0
Tulsa, OK	44	4,821	11.5%	0	0	0.0%	0	0
Ventura, CA	16	1,624	5.1%	0	0	0.0%	0	0
Virginia Beach, VA	47	5,757	8.5%	0	0	0.0%	0	0
Washington, DC	99	14,483	7.5%	0	0	0.0%	0	0
Wichita, KS	33	2,832	10.5%	0	0	0.0%	0	0
Worcester, MA	57	6,801	17.2%	0	0	0.0%	0	0
Youngstown, OH	44	4,592	13.2%	0	0	0.0%	0	0

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CCRC Construction Summary (Supplemental Data)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Ann Arbor, MI	2	503	4.0%	0	0	0.0%	0	0
Asheville, NC	2	708	2.5%	0	0	0.0%	0	0
Boulder, CO	1	107	1.0%	0	0	0.0%	0	0
Burlington, NC	1	134	1.6%	0	0	0.0%	0	0
Durham, NC	6	2,700	12.9%	2	82	3.0%	0	24
Flint, MI	0	0	0.0%	0	0	-	0	0
Gettysburg, PA	3	1,322	26.4%	1	28	2.1%	0	0
Hammond, LA	0	0	0.0%	0	0	-	0	0
Hanford, CA	0	0	0.0%	0	0	-	0	0
Honolulu, HI	5	1,352	3.1%	0	0	0.0%	0	0
Janesville, WI	1	254	3.4%	0	0	0.0%	0	0
Lansing, MI	1	320	1.7%	0	0	0.0%	0	0
Lebanon, PA	4	1,426	18.2%	1	15	1.1%	0	0
Lexington, KY	3	895	4.8%	0	0	0.0%	0	0
Longview, WA	0	0	0.0%	0	0	-	0	0
Madera, CA	0	0	0.0%	0	0	-	0	0
Merced, CA	0	0	0.0%	0	0	-	0	0
Monroe, MI	1	215	3.3%	0	0	0.0%	0	0
Napa, CA	1	280	3.9%	1	92	32.9%	0	92
Naples, FL	4	1,763	5.2%	0	0	0.0%	0	0
Norwich, CT	1	322	2.5%	0	0	0.0%	0	0
Pittsfield, MA	2	515	6.0%	0	0	0.0%	0	0
Port St. Lucie, FL	1	281	0.8%	0	0	0.0%	0	0
Porterville, CA	0	0	0.0%	0	0	-	0	0
Provo, UT	0	0	0.0%	0	0	-	0	0
Punta Gorda, FL	1	682	3.3%	0	0	0.0%	0	0
Racine, WI	0	0	0.0%	0	0	-	0	0
Reading, PA	2	890	4.5%	0	0	0.0%	0	0
Rockford, IL	0	0	0.0%	0	0	-	0	0
Saginaw, MI	0	0	0.0%	0	0	-	0	0
Santa Rosa, CA	2	544	2.3%	0	0	0.0%	0	0
Sebastian, FL	2	863	5.5%	0	0	0.0%	0	0
Sebring, FL	0	0	0.0%	0	0	-	0	0
Spartanburg, SC	4	935	6.3%	0	0	0.0%	0	0
Spokane, WA	4	826	3.2%	1	20	2.4%	0	0
The Villages, FL	1	458	3.7%	0	0	0.0%	0	0
Trenton, NJ	1	364	2.3%	0	0	0.0%	0	0
Utica, NY	0	0	0.0%	0	0	-	0	0
Vallejo, CA	1	477	3.3%	1	70	14.7%	0	70
Winston-Salem, NC	4	1,108	3.6%	1	56	5.1%	0	56
York, PA	5	1,499	7.4%	0	0	0.0%	0	0

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Independent Living Construction Summary (Supplemental Data)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Ann Arbor, MI	5	592	4.8%	0	0	0.0%	0	0
Asheville, NC	5	662	2.3%	0	0	0.0%	0	0
Boulder, CO	9	932	8.4%	0	0	0.0%	0	0
Burlington, NC	1	120	1.5%	0	0	0.0%	0	0
Durham, NC	6	580	2.8%	0	0	0.0%	0	0
Flint, MI	9	1,011	5.2%	0	0	0.0%	0	0
Gettysburg, PA	0	0	0.0%	0	0	-	0	0
Hammond, LA	0	0	0.0%	0	0	-	0	0
Hanford, CA	1	118	3.3%	0	0	0.0%	0	0
Honolulu, HI	1	372	0.8%	0	0	0.0%	0	0
Janesville, WI	0	0	0.0%	0	0	-	0	0
Lansing, MI	4	500	2.6%	0	0	0.0%	0	0
Lebanon, PA	1	131	1.7%	0	0	0.0%	0	0
Lexington, KY	1	120	0.6%	0	0	0.0%	0	0
Longview, WA	1	102	1.8%	0	0	0.0%	0	0
Madera, CA	0	0	0.0%	0	0	-	0	0
Merced, CA	1	115	1.6%	0	0	0.0%	0	0
Monroe, MI	1	45	0.7%	0	0	0.0%	0	0
Napa, CA	2	201	2.8%	0	0	0.0%	0	0
Naples, FL	8	1,782	5.2%	0	0	0.0%	0	0
Norwich, CT	1	162	1.2%	0	0	0.0%	0	0
Pittsfield, MA	2	239	2.8%	0	0	0.0%	0	0
Port St. Lucie, FL	4	773	2.1%	0	0	0.0%	0	0
Porterville, CA	3	316	2.6%	0	0	0.0%	0	0
Provo, UT	4	399	3.4%	0	0	0.0%	0	0
Punta Gorda, FL	0	0	0.0%	0	0	-	0	0
Racine, WI	2	465	5.3%	0	0	0.0%	0	0
Reading, PA	3	337	1.7%	0	0	0.0%	0	0
Rockford, IL	2	102	0.7%	0	0	0.0%	0	0
Saginaw, MI	1	120	1.1%	0	0	0.0%	0	0
Santa Rosa, CA	6	942	4.0%	0	0	0.0%	0	0
Sebastian, FL	3	475	3.0%	0	0	0.0%	0	0
Sebring, FL	0	0	0.0%	0	0	-	0	0
Spartanburg, SC	0	0	0.0%	0	0	-	0	0
Spokane, WA	7	995	3.9%	0	0	0.0%	0	0
The Villages, FL	5	804	6.5%	0	0	0.0%	0	0
Trenton, NJ	2	444	2.8%	0	0	0.0%	0	0
Utica, NY	8	562	3.4%	0	0	0.0%	0	0
Vallejo, CA	2	313	2.1%	0	0	0.0%	0	0
Winston-Salem, NC	6	621	2.0%	0	0	0.0%	0	0
York, PA	1	80	0.4%	0	0	0.0%	0	0

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Assisted Living Construction Summary (Supplemental Data)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Ann Arbor, MI	5	371	3.0%	0	0	0.0%	0	54
Asheville, NC	5	268	0.9%	0	0	0.0%	0	0
Boulder, CO	11	730	6.6%	0	0	0.0%	0	0
Burlington, NC	4	247	3.0%	0	0	0.0%	0	0
Durham, NC	12	897	4.3%	0	0	0.0%	0	0
Flint, MI	10	750	3.8%	0	0	0.0%	0	0
Gettysburg, PA	2	73	1.5%	0	0	0.0%	0	0
Hammond, LA	1	44	0.9%	0	0	0.0%	0	0
Hanford, CA	2	120	3.4%	0	0	0.0%	0	0
Honolulu, HI	8	903	2.1%	1	145	16.1%	145	0
Janesville, WI	8	379	5.1%	0	0	0.0%	0	0
Lansing, MI	10	548	2.9%	0	0	0.0%	0	0
Lebanon, PA	8	412	5.3%	0	0	0.0%	0	0
Lexington, KY	10	803	4.3%	0	0	0.0%	0	0
Longview, WA	3	202	3.6%	0	0	0.0%	0	0
Madera, CA	2	134	2.7%	0	0	0.0%	0	0
Merced, CA	4	277	3.9%	0	0	0.0%	0	0
Monroe, MI	3	156	2.4%	0	0	0.0%	0	0
Napa, CA	3	154	2.2%	1	173	112.3%	0	0
Naples, FL	8	977	2.9%	4	482	49.3%	0	0
Norwich, CT	4	430	3.3%	0	0	0.0%	0	0
Pittsfield, MA	3	217	2.5%	0	0	0.0%	0	0
Port St. Lucie, FL	14	1,383	3.8%	0	0	0.0%	0	128
Porterville, CA	3	197	1.6%	0	0	0.0%	0	0
Provo, UT	16	1,126	9.6%	0	0	0.0%	0	0
Punta Gorda, FL	12	999	4.8%	0	0	0.0%	0	126
Racine, WI	12	709	8.1%	0	0	0.0%	0	0
Reading, PA	18	1,620	8.1%	0	0	0.0%	0	0
Rockford, IL	8	627	4.0%	0	0	0.0%	0	0
Saginaw, MI	12	852	8.1%	1	20	2.3%	0	0
Santa Rosa, CA	9	822	3.5%	0	0	0.0%	0	0
Sebastian, FL	8	607	3.9%	0	0	0.0%	0	0
Sebring, FL	6	716	6.1%	0	0	0.0%	0	0
Spartanburg, SC	11	762	5.2%	1	28	3.7%	0	0
Spokane, WA	10	835	3.3%	0	0	0.0%	0	0
The Villages, FL	6	676	5.4%	0	0	0.0%	0	0
Trenton, NJ	5	452	2.9%	1	111	24.6%	111	0
Utica, NY	3	206	1.2%	0	0	0.0%	0	0
Vallejo, CA	5	584	4.0%	0	0	0.0%	0	0
Winston-Salem, NC	17	1,326	4.3%	0	0	0.0%	0	0
York, PA	12	1,395	6.9%	0	0	0.0%	0	0

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Memory Care Construction Summary (Supplemental Data)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Ann Arbor, MI	2	101	0.8%	0	0	0.0%	0	0
Asheville, NC	2	92	0.3%	0	0	0.0%	0	0
Boulder, CO	2	104	0.9%	0	0	0.0%	0	0
Burlington, NC	1	31	0.4%	0	0	0.0%	0	0
Durham, NC	3	212	1.0%	0	0	0.0%	0	0
Flint, MI	0	0	0.0%	0	0	-	0	0
Gettysburg, PA	0	0	0.0%	0	0	-	0	0
Hammond, LA	0	0	0.0%	0	0	-	0	0
Hanford, CA	0	0	0.0%	0	0	-	0	0
Honolulu, HI	1	26	0.1%	0	0	0.0%	0	0
Janesville, WI	0	0	0.0%	0	0	-	0	0
Lansing, MI	3	101	0.5%	1	66	65.3%	0	0
Lebanon, PA	0	0	0.0%	0	0	-	0	0
Lexington, KY	0	0	0.0%	0	0	-	0	0
Longview, WA	0	0	0.0%	0	0	-	0	0
Madera, CA	0	0	0.0%	0	0	-	0	0
Merced, CA	0	0	0.0%	0	0	-	0	0
Monroe, MI	0	0	0.0%	0	0	-	0	0
Napa, CA	1	19	0.3%	0	0	0.0%	0	0
Naples, FL	5	345	1.0%	2	137	39.7%	0	0
Norwich, CT	0	0	0.0%	0	0	-	0	0
Pittsfield, MA	0	0	0.0%	0	0	-	0	0
Port St. Lucie, FL	2	54	0.1%	0	0	0.0%	0	0
Porterville, CA	0	0	0.0%	0	0	-	0	0
Provo, UT	0	0	0.0%	0	0	-	0	0
Punta Gorda, FL	0	0	0.0%	0	0	-	0	0
Racine, WI	0	0	0.0%	0	0	-	0	0
Reading, PA	0	0	0.0%	0	0	-	0	0
Rockford, IL	2	80	0.5%	0	0	0.0%	0	0
Saginaw, MI	0	0	0.0%	0	0	-	0	0
Santa Rosa, CA	4	123	0.5%	0	0	0.0%	0	0
Sebastian, FL	1	32	0.2%	0	0	0.0%	0	0
Sebring, FL	1	54	0.5%	0	0	0.0%	0	0
Spartanburg, SC	0	0	0.0%	0	0	-	0	0
Spokane, WA	2	84	0.3%	0	0	0.0%	0	0
The Villages, FL	1	45	0.4%	0	0	0.0%	0	0
Trenton, NJ	2	108	0.7%	0	0	0.0%	0	0
Utica, NY	1	36	0.2%	0	0	0.0%	0	0
Vallejo, CA	3	194	1.3%	0	0	0.0%	0	0
Winston-Salem, NC	2	97	0.3%	0	0	0.0%	0	0
York, PA	0	0	0.0%	0	0	-	0	0

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Nursing Care Construction Summary (Supplemental Data)

	Inventory			Construction				
	Properties	Units	Penetration	Properties	Units	vs. Inventory	Units Started	TTM Starts
Ann Arbor, MI	6	632	5.1%	0	0	0.0%	0	0
Asheville, NC	19	1,966	6.8%	0	0	0.0%	0	0
Boulder, CO	8	1,044	9.4%	0	0	0.0%	0	0
Burlington, NC	0	0	0.0%	0	0	-	0	0
Durham, NC	10	1,188	5.7%	0	0	0.0%	0	0
Flint, MI	11	1,310	6.7%	2	50	3.8%	20	50
Gettysburg, PA	3	347	6.9%	0	0	0.0%	0	0
Hammond, LA	6	703	14.9%	2	240	34.1%	0	100
Hanford, CA	3	296	8.4%	0	0	0.0%	0	0
Honolulu, HI	9	770	1.8%	0	0	0.0%	0	0
Janesville, WI	6	578	7.7%	0	0	0.0%	0	0
Lansing, MI	10	1,361	7.1%	0	0	0.0%	0	0
Lebanon, PA	3	482	6.2%	0	0	0.0%	0	0
Lexington, KY	14	1,527	8.3%	0	0	0.0%	0	0
Longview, WA	5	370	6.5%	0	0	0.0%	0	0
Madera, CA	4	332	6.7%	0	0	0.0%	0	0
Merced, CA	6	428	6.0%	0	0	0.0%	0	0
Monroe, MI	6	638	9.8%	0	0	0.0%	0	0
Napa, CA	2	207	2.9%	0	0	0.0%	0	0
Naples, FL	5	544	1.6%	0	0	0.0%	0	0
Norwich, CT	11	1,376	10.5%	0	0	0.0%	0	0
Pittsfield, MA	12	1,400	16.3%	0	0	0.0%	0	0
Port St. Lucie, FL	12	1,487	4.0%	0	0	0.0%	0	0
Porterville, CA	4	359	2.9%	0	0	0.0%	0	0
Provo, UT	12	932	7.9%	0	0	0.0%	0	0
Punta Gorda, FL	6	861	4.1%	0	0	0.0%	0	0
Racine, WI	5	633	7.2%	0	0	0.0%	0	0
Reading, PA	10	1,852	9.3%	0	0	0.0%	0	0
Rockford, IL	1	124	0.8%	0	0	0.0%	0	0
Saginaw, MI	8	863	8.2%	0	0	0.0%	0	0
Santa Rosa, CA	3	227	1.0%	0	0	0.0%	0	0
Sebastian, FL	3	362	2.3%	0	0	0.0%	0	0
Sebring, FL	4	478	4.1%	0	0	0.0%	0	0
Spartanburg, SC	10	900	6.1%	0	0	0.0%	0	0
Spokane, WA	10	832	3.2%	0	0	0.0%	0	0
The Villages, FL	2	240	1.9%	0	0	0.0%	0	0
Trenton, NJ	13	1,937	12.2%	0	0	0.0%	0	0
Utica, NY	21	3,170	19.0%	0	0	0.0%	0	8
Vallejo, CA	0	0	0.0%	0	0	-	0	0
Winston-Salem, NC	17	1,920	6.2%	0	0	0.0%	0	0
York, PA	8	1,358	6.7%	0	0	0.0%	0	0

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