

Impact of COVID-19 on the Seniors Housing Industry:

Preliminary Results from a Study of Consumers

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Thank You to Participating ASHA Companies



Executive Summary

- Prospective customers of 115 participating ASHA Member Communities (**Lead List**) and households 75+ years of age with incomes \$35,000+ living in one of the 15 MSAs of the participating ASHA Member Communities (**Purchased List**) participated in an internet survey about their awareness and opinions of retirement communities.
- Just over three fourths of households from the **Lead List** have been actively shopping for a retirement community in the past year compared to 20% of households on the **Purchased List**. The majority of **Leads** and households on the **Purchased List** are shopping for themselves (and/or for a spouse).
- The majority of prospects who responded to the survey were shopping for an independent living community while the majority of adult children responding for a parent or loved one were shopping for an assisted living or memory care community.
- Nearly all households on the **Lead List** and 80% of households on the **Purchased List** were aware of retirement communities in their area.
- 65% or more of all survey respondents find independent living communities either appealing or very appealing
- 58% or more of all survey respondents find assisted living communities either appealing or very appealing
- 42% or more of all survey respondents find memory care communities either appealing or very appealing
- In spite of the press and the news coverage of COVID-19 over the past several months, the majority of prospects have not changed their opinions of retirement communities since the onset of the pandemic.
- A greater proportion of households from the **Lead List** than the **Purchased List** strongly agree that retirement communities are safer than staying at home, and that retirement communities allow one to feel less isolated than they would staying at home.

Executive Summary

- Overall, the COVID-19 pandemic has had a negative impact on propensity to move to independent living and assisted living, although the largest decrease in the proportion of those very likely to move to independent living among all respondent groups was only 6 percentage points. In fact, COVID-19 slightly increased the proportion of assisted living lead prospects who were very likely to move. The results suggest that the most serious or hottest prospects are still planning to move, but those who were less likely to move to begin with are delaying or tabling the decision.
- Prior to the COVID-19 pandemic, prospects were more likely to take action with respect to their potential move to a retirement community. Pre-COVID, a greater proportion of prospects were looking at information, visiting communities, talking with counselors, and contacting communities online. Currently, greater proportions of prospects are in the “thinking” stage or are in a holding pattern.
- Among those households who have considered moving to a retirement community within the past year, the majority of both prospects and adult children—both from the **Lead List** and from the **Purchased List**—have not changed their timeframe for moving.
- When asked what must occur before moving to a retirement community, prospects across all three levels of care indicated that identifiable cleaning and disinfecting programs at communities as well as COVID-19 testing with rapid results accessible at communities are essential. More than half of prospects shopping for assisted living or memory care also indicated that having a primary care physician on site or via telemedicine is essential.
- Overall, these results seem to suggest a cautiously optimistic road ahead for the seniors housing industry. Though it's clear that the COVID-19 crisis has made its mark on the industry, there is still opportunity for progress and move-ins across all levels of care. The steps that consumers are asking communities to take before they feel safe moving in are not unattainable. They want to see cleaning and disinfecting programs in place, easily accessible and routine COVID-testing, CDC guidelines met and followed, and a primary care physician onsite or available via telehealth, which many communities are already doing.
- These results are preliminary—surveys are still in the field and still being collected to date. The final report of this data will also show the present results by region of the country so that the impact of the virus by its severity across regions can be measured.

Internet Survey Using Two List Sources

Lead List

Prospective customers of 115 participating ASHA Member Communities

Sales and marketing teams invited leads and/or their adult children to participate in a brief online survey about their awareness and opinions of retirement communities.

N=496

Data collected June 1– June 22, 2020
(Survey still in progress)

Purchased List

Households 75+ years of age with incomes \$35,000+ living in one of the 15 MSAs of the participating ASHA Member Communities

The goal was 100 completed surveys from Dynata's internet panel in each of 15 MSAs selected for study.

N=1,445

Data collected June 10– June 22, 2020
(Survey still in progress)

Metropolitan Statistical Areas Tested

The following MSAs were selected for inclusion among the households from the [Purchased List](#). We selected these MSAs based on the locations of the participating 115 ASHA member communities. Any MSA with three or more participating communities was included.

MSAs Included:

- Baltimore-Columbia-Towson, MD
- Charlotte-Concord-Gastonia, NC-SC
- Chicago-Naperville-Elgin, IL-IN-WI
- Cincinnati, OH-KY-IN
- Dallas-Fort Worth-Arlington, TX
- Denver-Aurora-Lakewood, CO
- Houston-The Woodlands-Sugar Land, TX
- Los Angeles-Long Beach-Anaheim, CA
- Miami-Fort Lauderdale-Pompano Beach, FL
- New York-Newark-Jersey City, NY-NJ-PA
- Philadelphia-Camden-Wilmington, PA-NJ-DE-MD
- Phoenix-Mesa-Chandler, AZ
- Portland-Vancouver-Hillsboro, OR-WA
- St. Louis, MO-IL
- Washington-Arlington-Alexandria, DC-VA-MD-WV



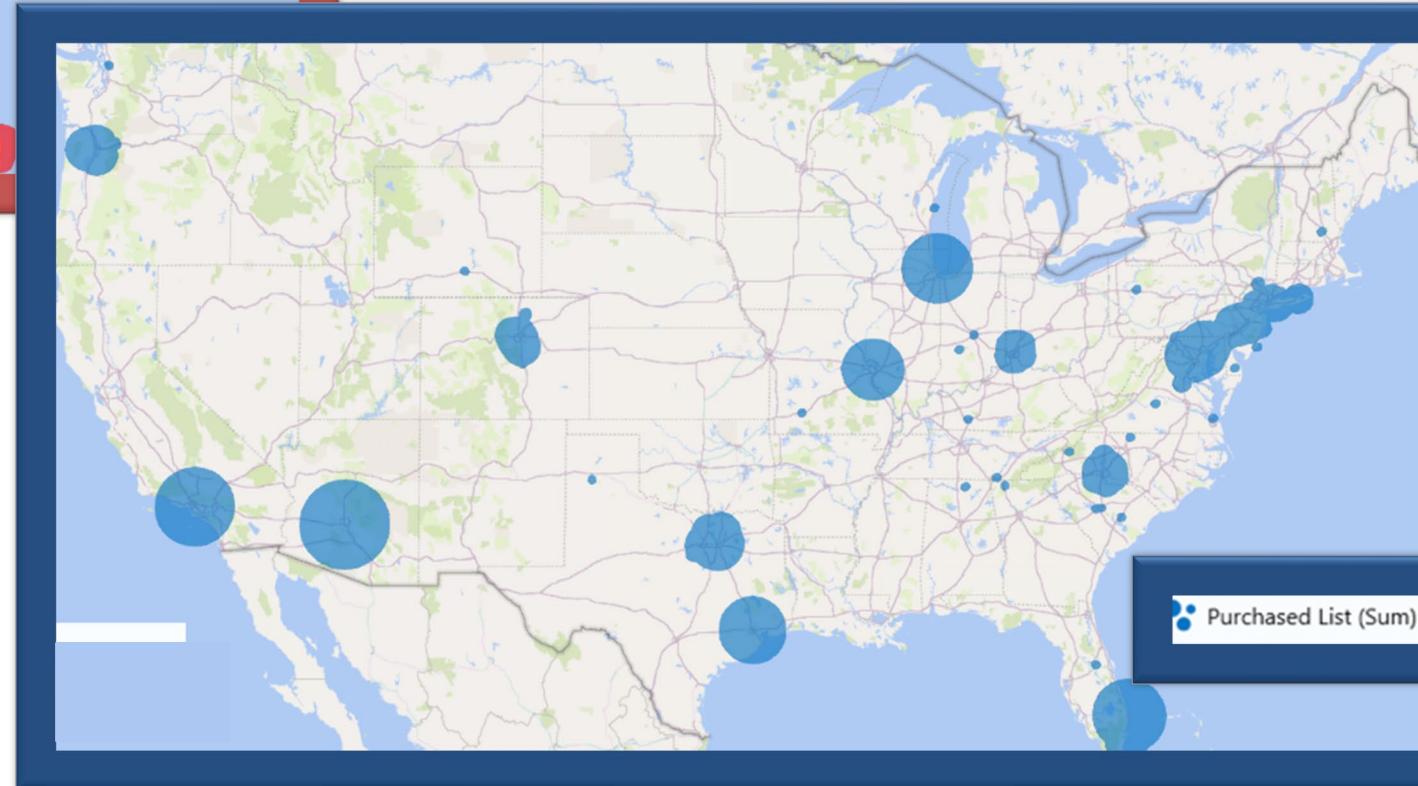
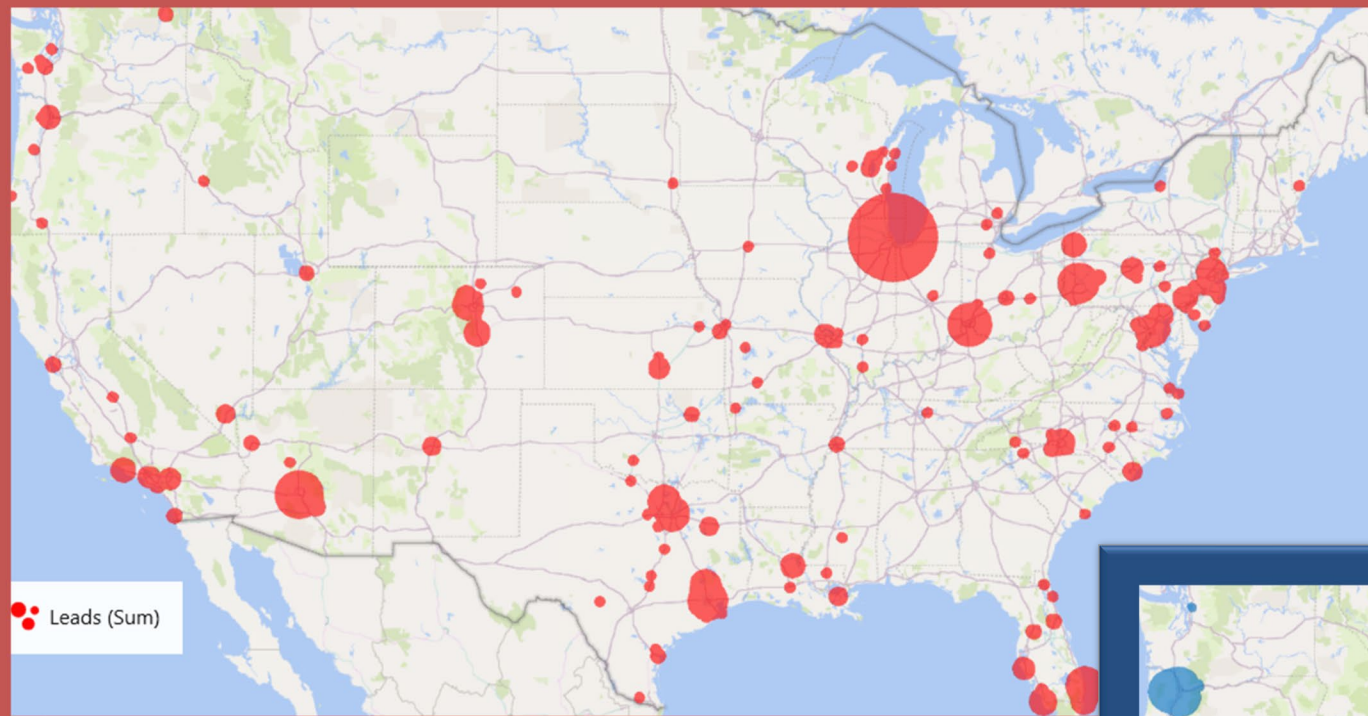
Participating Communities

One hundred fifteen communities representing four ASHA Member companies participated in the current study. The communities were located in 27 states across the country.

The participating communities varied by level of care they offered. The largest proportion (37%) were AL/MC communities, and 21% were freestanding memory care communities. The remaining communities were divided between Freestanding IL, IL/AL, IL/AL/MC, Freestanding AL, and CCRCs.

Property Types of Participating ASHA Member Communities		
Type of Property	Count	Percent
Freestanding IL	3	3%
IL/AL	13	11%
IL/AL/MC	12	10%
Freestanding AL	13	11%
AL/MC	43	37%
Freestanding MC	24	21%
CCRC	7	6%
Total	115	100%

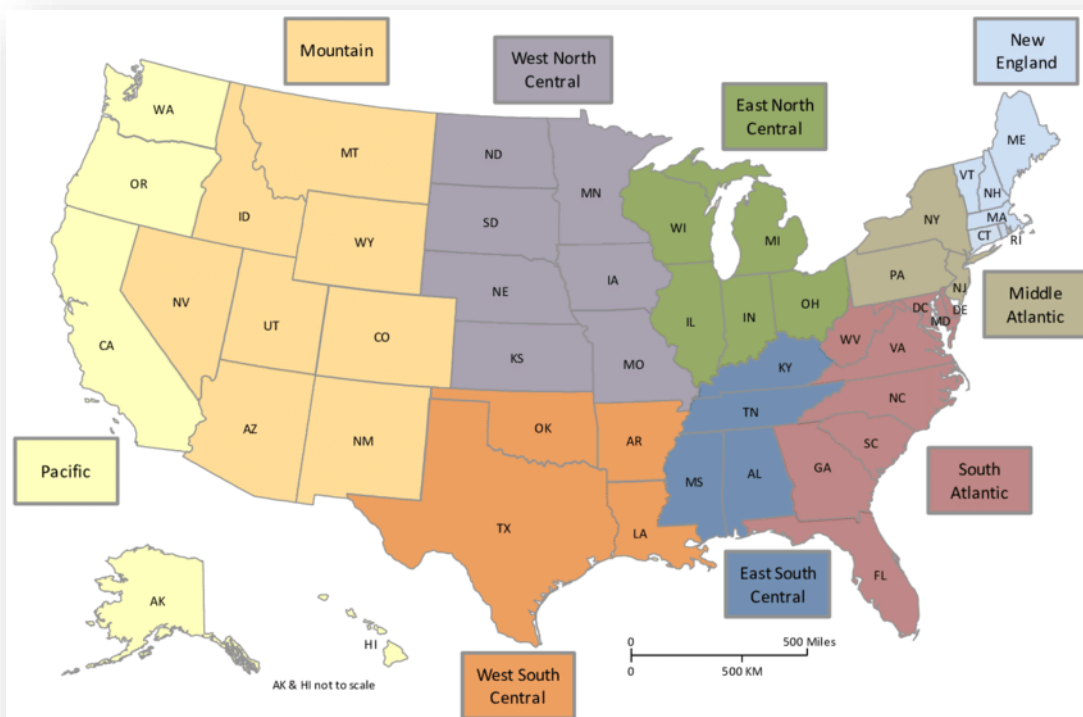
Location of Survey Participants



Location of Survey Participants

Households on participating ASHA member communities' prospect lists (**Lead List**) were contacted via email and invited to take a brief internet survey. Four hundred ninety-six leads participated in the survey to date.

When setting survey criteria for the **Purchased List**, we attempted to match the geographic distribution of a majority of households on the **Lead List**. While the percent distributions across both survey groups are not the same, there are greater numbers of survey respondents in the East North Central and South Atlantic regions.



Location of Participant's Primary Residence by List Source

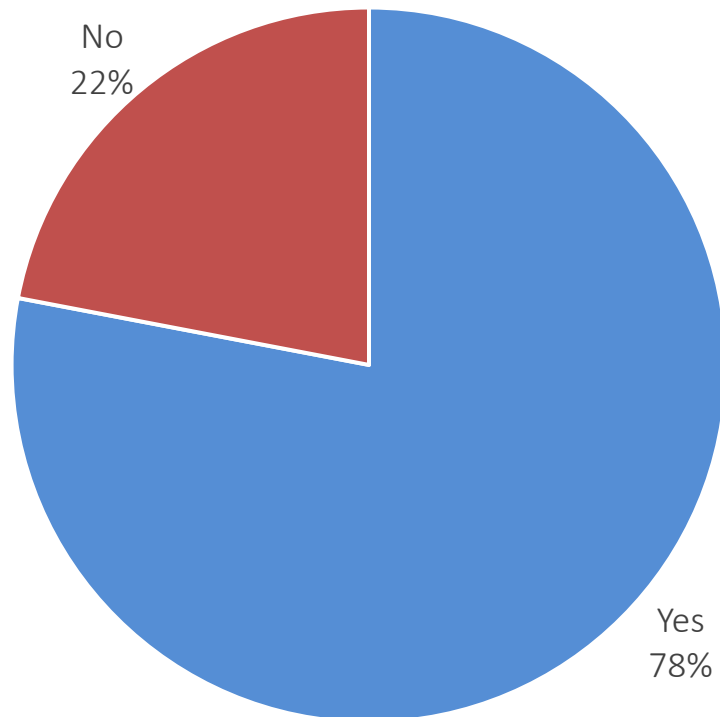
Census Region	Lead List		Purchased List	
	Count	Percent	Count	Percent
East North Central	139	28%	171	12%
East South Central	6	1%	13	1%
Middle Atlantic	63	13%	202	14%
Mountain	60	12%	187	13%
New England	1	0.2%	1	0.1%
Pacific	39	8%	196	14%
South Atlantic	87	18%	382	26%
West North Central	21	4%	74	5%
West South Central	76	15%	199	14%
Refused to disclose location	4	1%	20	1%
Total	496	100%	1,445	100%

Characteristics of Respondents

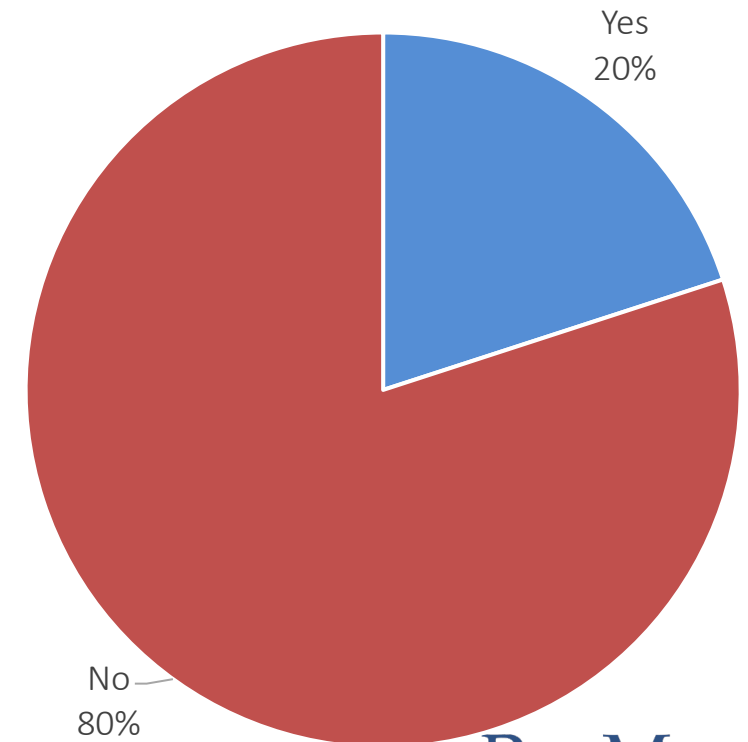
Currently Shopping for a Community

Just over three fourths of households from the **Lead List** have been actively shopping for a seniors housing community in the past year compared to 20% of household on the **Purchased List**.

Percent from the **Lead List** Who Have Considered an Independent Living, Assisted Living, or Memory Care Community in the Past Year



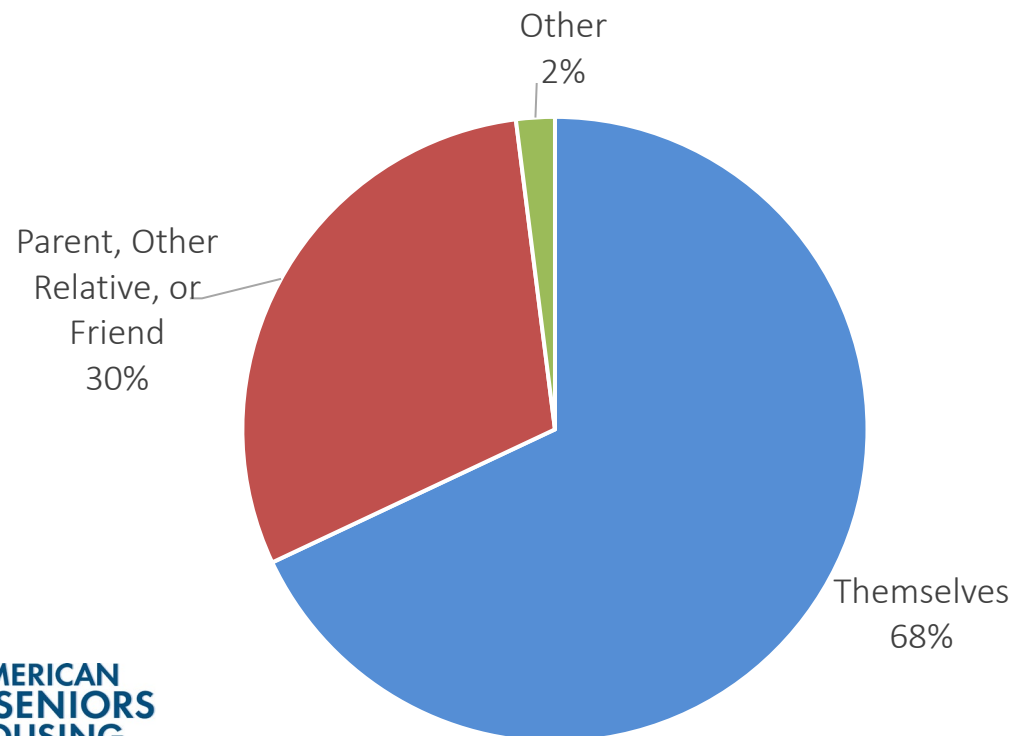
Percent from the **Purchased List** Who Have Considered an Independent Living, Assisted Living, or Memory Care Community in the Past Year



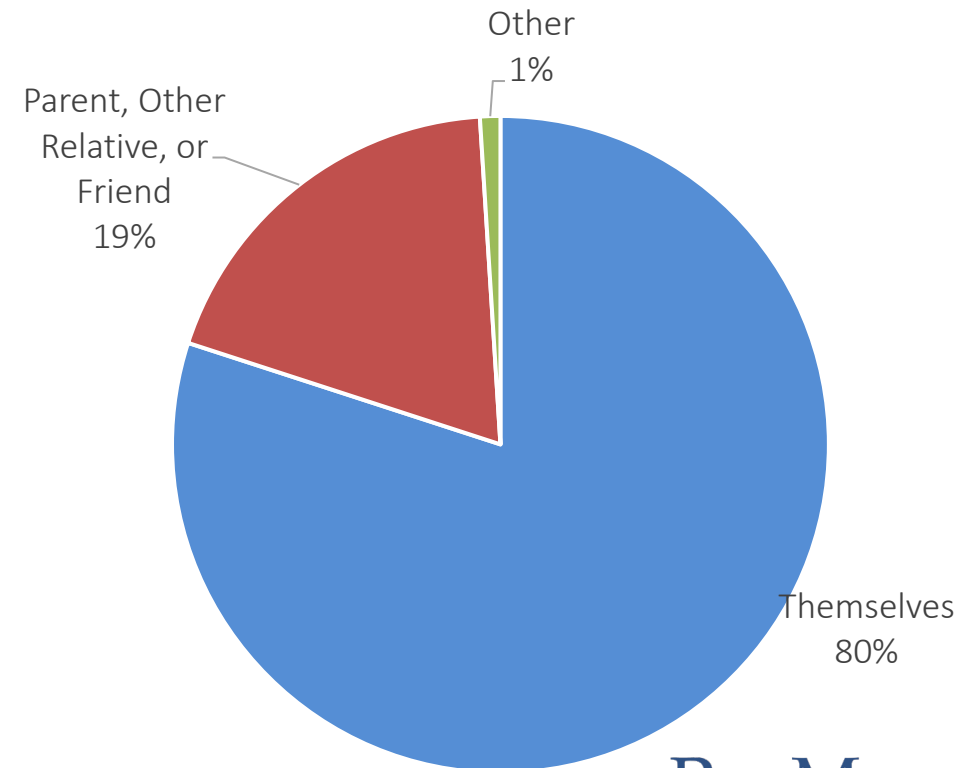
Characteristics of Respondents For Whom They Are Shopping

The majority of **Leads** and households on the **Purchased List** were shopping for themselves (and/or for a spouse).

Percent of **Lead List** by for Whom They Are Shopping



Percent of **Purchased List** by for Whom They Are Shopping

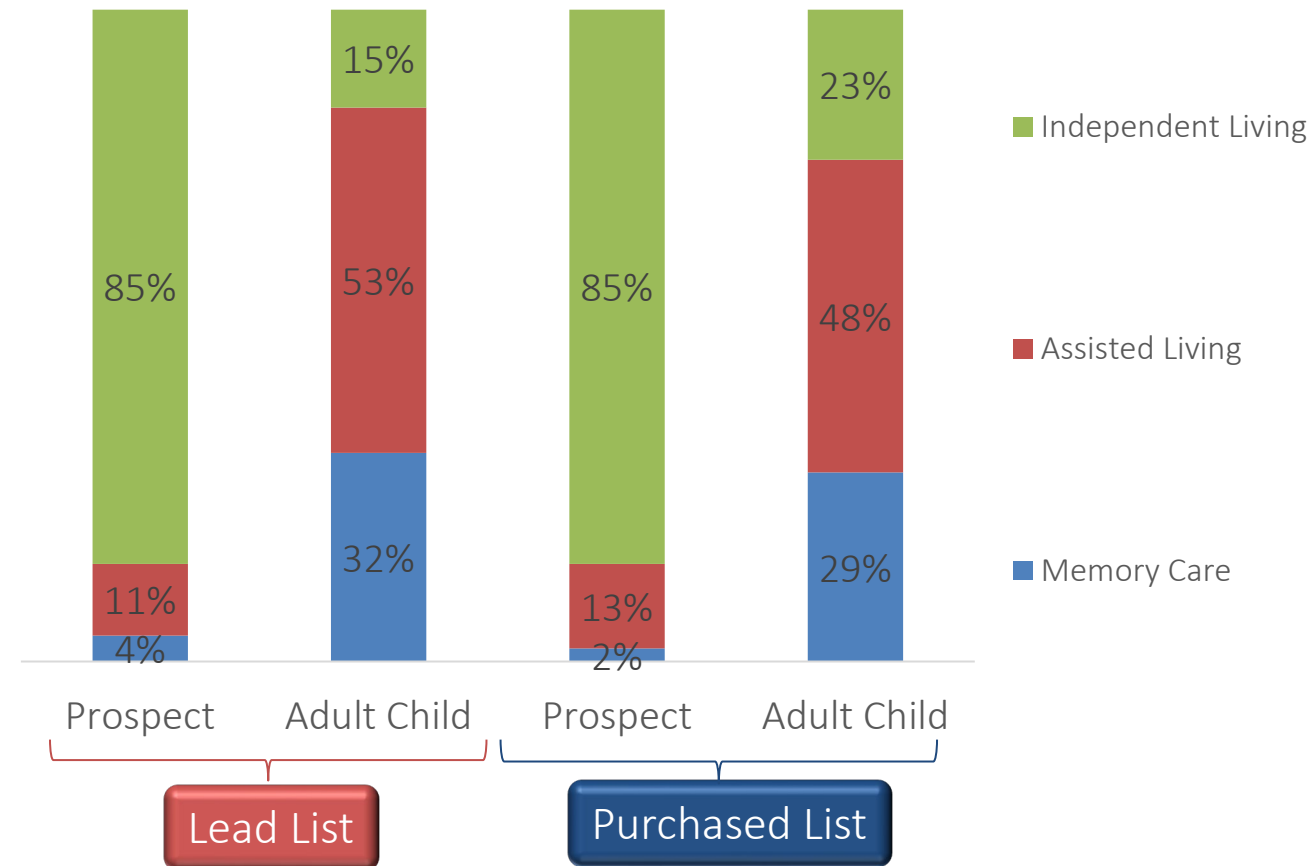


Characteristics of Respondents

Interest in Level of Care

As we would expect, the majority of prospects from the **Lead List** were interested in independent living, while the majority of Adult Child **Leads** were interested in Assisted Living or Memory Care. The same pattern of results was observed among households on the **Purchased List**.

Level of Care for Which Prospective Residents and Adult Children Were Shopping by List Source



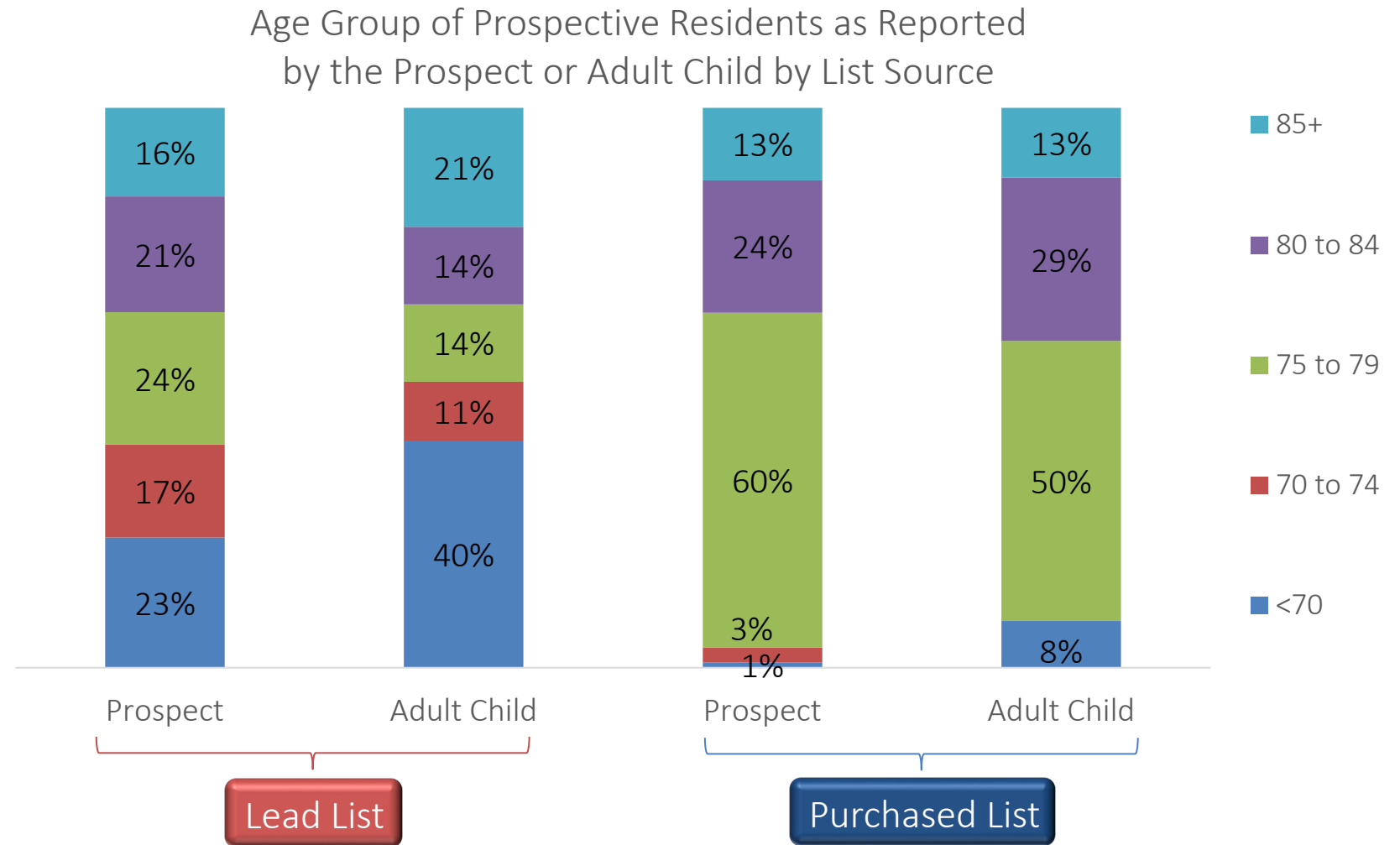
Characteristics of Respondents

Age of Prospective Residents

Forty percent of adult child respondents from the **Lead List** indicated their loved one was less than 70 years of age, a proportion nearly double that of prospects from the **Lead List** (23%)*.

The age group distributions of prospects as reported by the prospect and the adult child from the **Purchased List** were similar. Survey respondents from the **Purchased List** were required to be 75+ years of age to participate.

***Note:** Adult children were asked to answer all demographic questions on behalf of their parent or loved one, but it is possible that some may have inadvertently missed this instruction and answered about themselves instead.



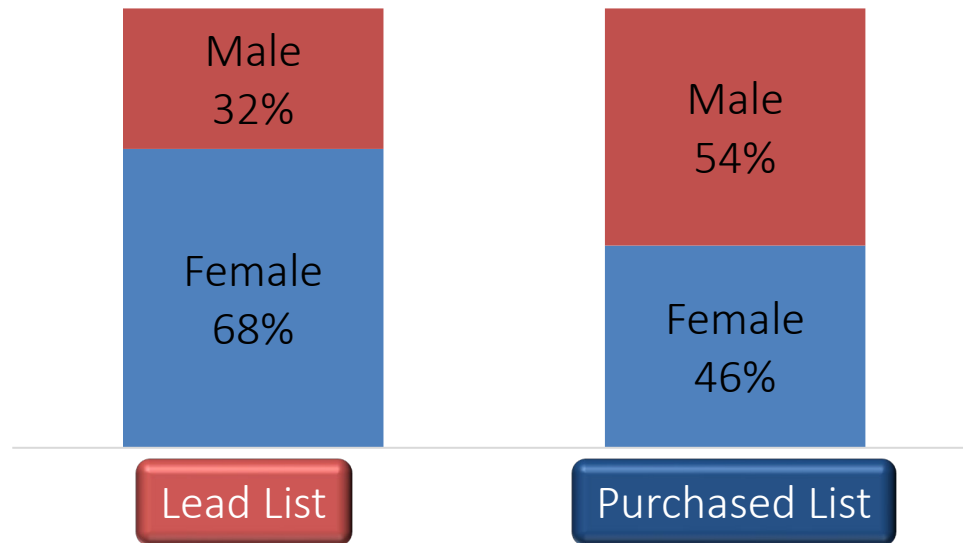
Characteristics of Respondents

Gender and Marital Status of Prospective Residents

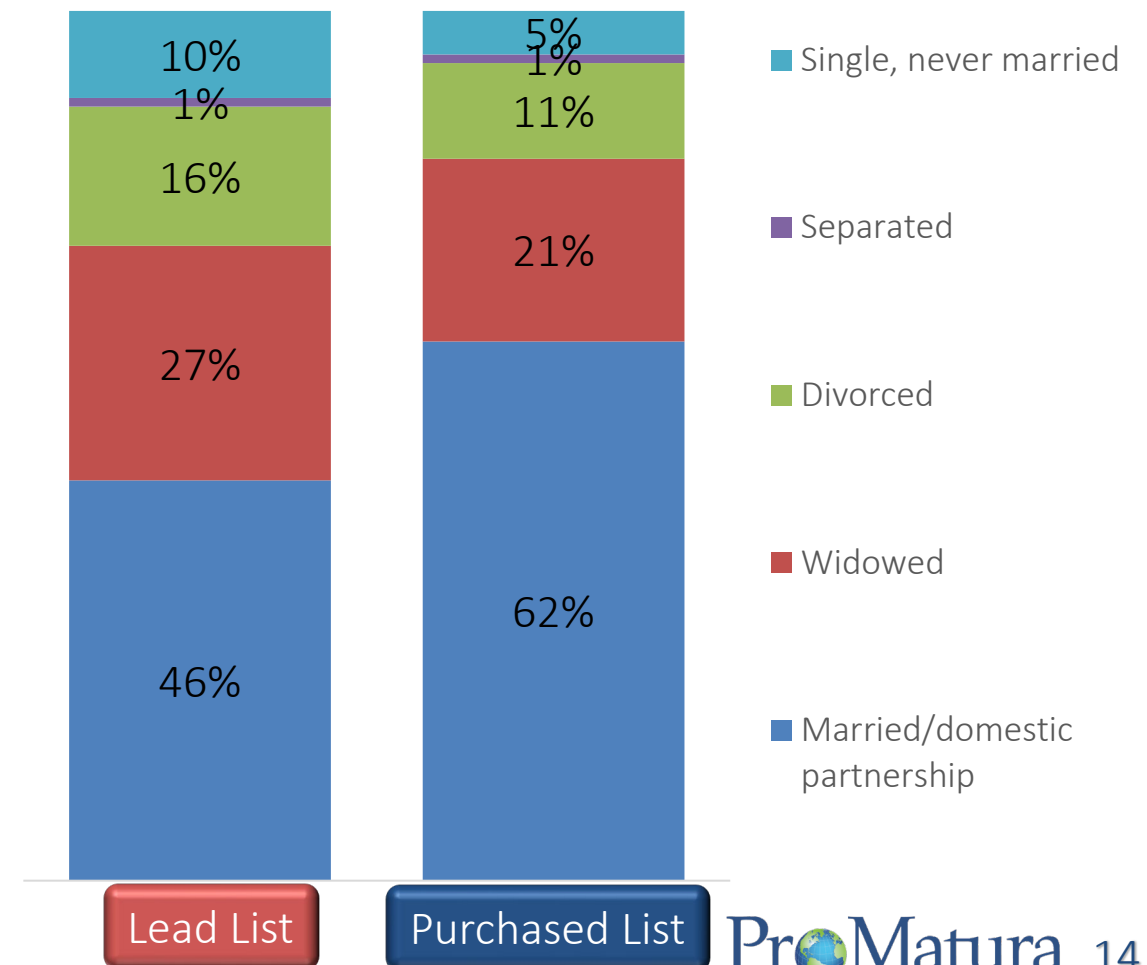
A greater proportion of survey respondents from the **Lead List** were women than households on the **Purchased List**.

Households from the **Purchased List** were more likely to be married or partnered and fewer were widowed than those on the **Lead List**.

Gender of Prospective Residents
by List Source



Marital Status of Prospective Residents
by List Source

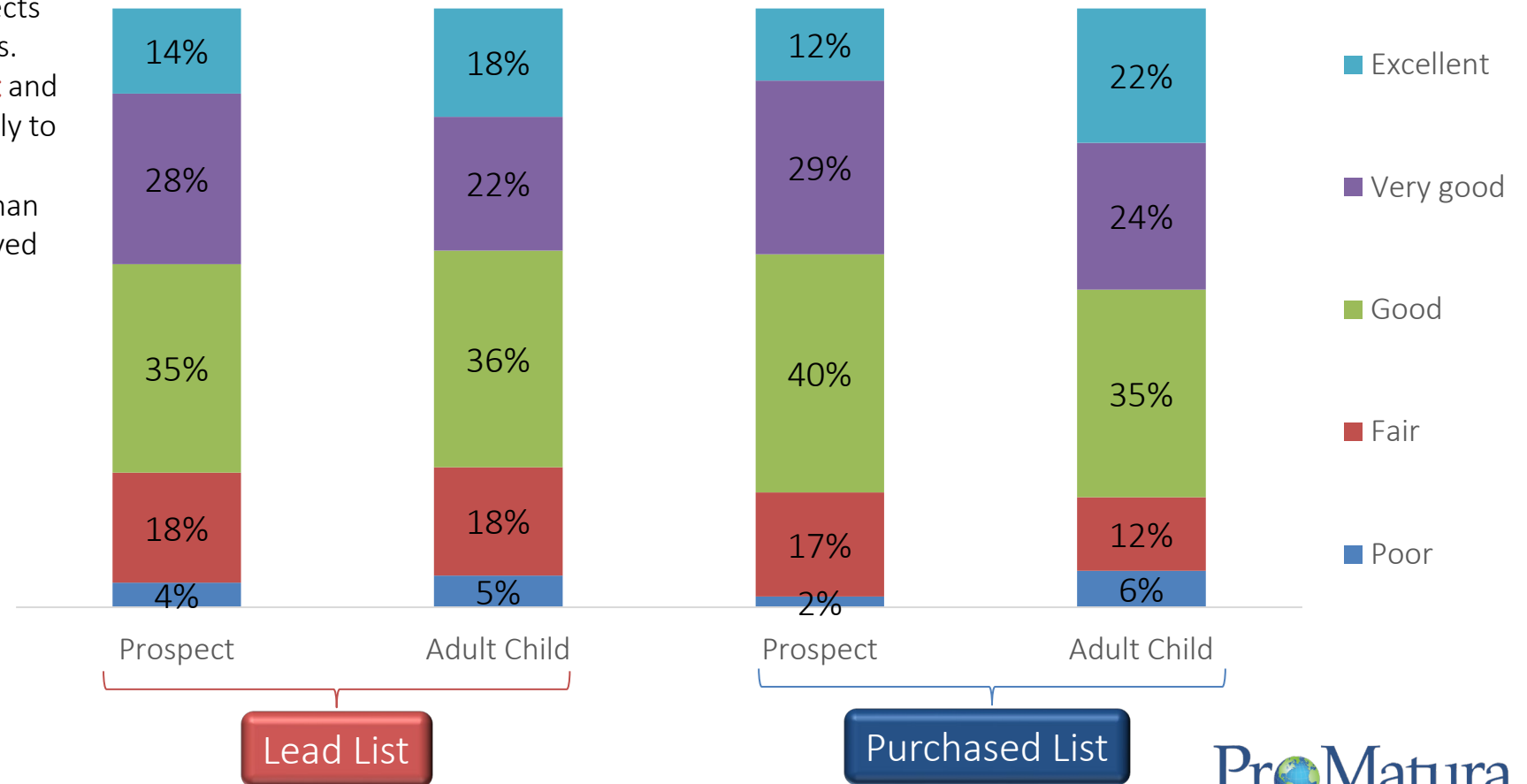


Characteristics of Respondents

Prospective Residents' Health Status Compared to Others Their Age

The health status of prospective residents as reported by the prospects was fairly similar across the two lists. Prospects among both the **Lead List** and **Purchased List** were slightly less likely to report their health as excellent and more likely to rate it as very good than adult children reporting on their loved one's health.

Health of Prospective Residents by Prospect Type and List Source

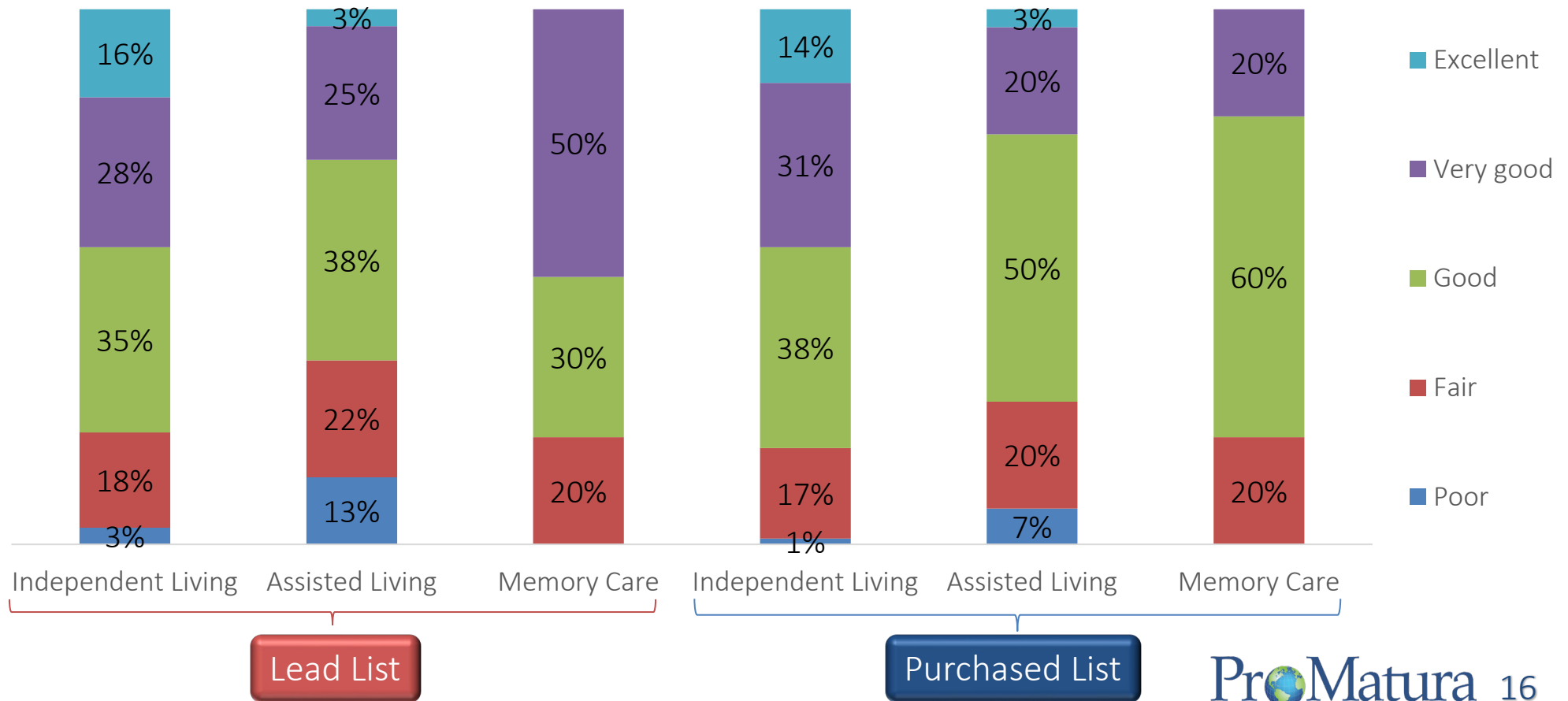


Characteristics of Respondents

Prospective Residents' Health Status Compared to Others Their Age

As we would expect, prospects interested in assisted living or memory care services were in poorer health than those shopping for independent living.

Health of Prospective Residents by Level of Care and List Source



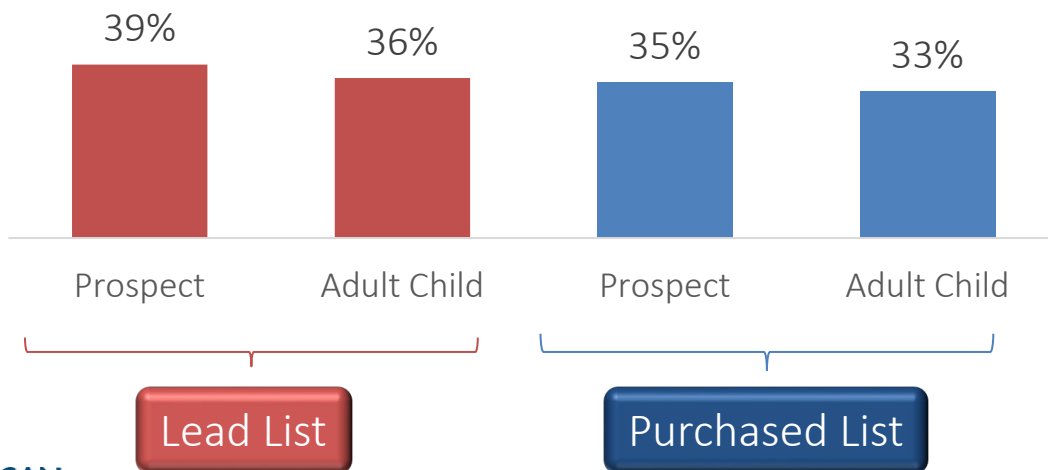
Characteristics of Respondents

Impairments or Health Problems of Prospective Residents

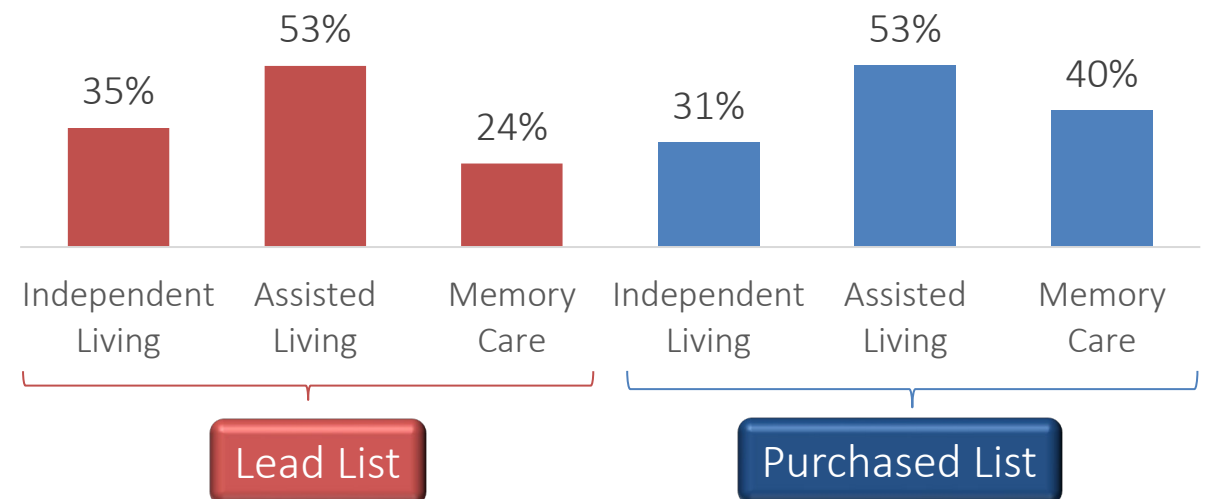
Prospects from both the **Lead List** and the **Purchased List** were slightly more likely to report having an impairment or health problem than were adult children responding for a parent or loved one.

More than half of prospects interested in assisted living services from both the **Lead List** and the **Purchased List** reported having an impairment or health problem.

Percentage of Prospective Residents
With an Impairment or Health Problem by
Prospect Type and List Source



Percentage of Prospective Residents
With an Impairment or Health Problem
by Level of Care and List Source



Characteristics of Respondents

Total Household Income of Prospective Residents

Total Household Income of Prospective Resident by Prospect Type and List Source

The incomes of the prospective residents were varied. Fifty-nine percent of prospects from the **Lead List** reported total household incomes between \$35,000 and \$100,000; while 54% of adult children reported their parent or loved one's income between \$50,000 and \$150,000.

Prospects from the **Purchased List** reported slightly higher total household incomes than those from the **Lead List**. This may be a result of the \$35,000 minimum income threshold requirement placed on the **Purchased List**.

	Lead List		Purchased List	
	Prospect	Adult Child	Prospect	Adult Child
Less than \$10,000	3%	1%	0%	6%
\$10,000 to \$14,999	3%	3%	1%	2%
\$15,000 to \$24,999	9%	4%	5%	2%
\$25,000 to \$34,999	11%	13%	0%	13%
\$35,000 to \$49,999	17%	12%	11%	15%
\$50,000 to \$74,999	25%	16%	26%	9%
\$75,000 to \$99,999	17%	19%	18%	15%
\$100,000 to \$149,999	9%	19%	20%	17%
\$150,000 to \$199,999	4%	4%	9%	15%
\$200,000 or more	4%	6%	8%	6%
Total	100%	100%	100%	100%

59%

54%

64%

Characteristics of Respondents

Home Ownership and Home Value of Prospective Residents

75%

of the Prospective Residents
on the Lead List owned their
current home.

86%

of the Prospective Residents
on the Purchased List owned
their current home.

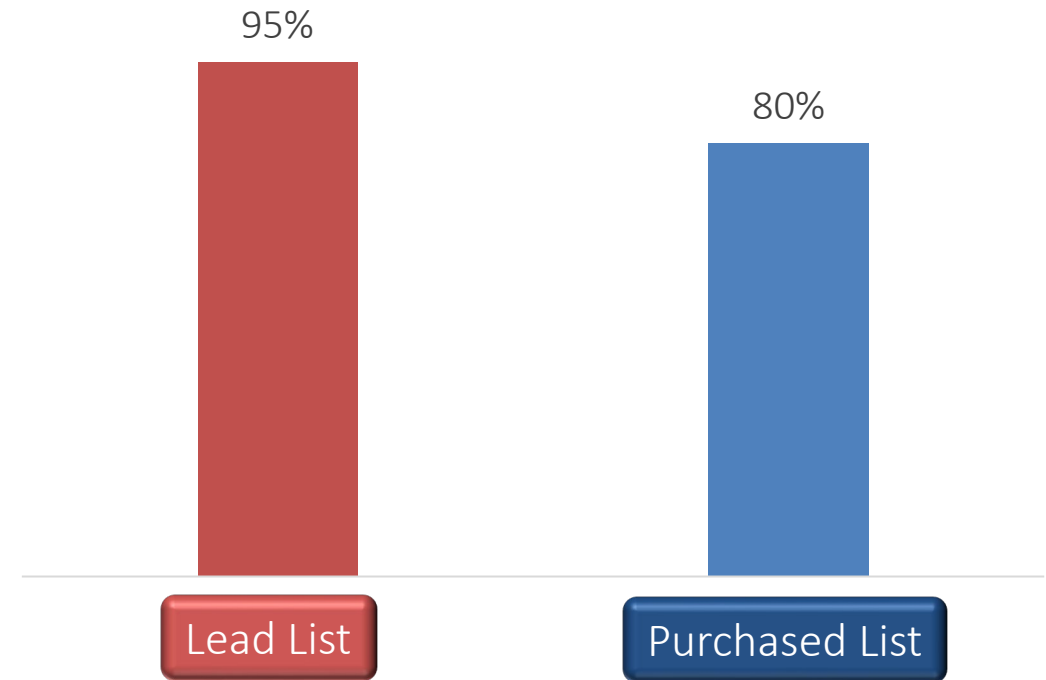
Home Value of Prospective Residents by Prospect Type and List Source

	Lead List		Purchased List	
	Prospect	Adult Child	Prospect	Adult Child
Less than \$150,000	15%	12%	6%	5%
\$150,000 to \$199,999	9%	10%	10%	8%
\$200,000 to \$249,999	12%	12%	8%	13%
\$250,000 to \$299,999	15%	13%	11%	13%
\$300,000 to \$349,999	11%	2%	8%	13%
\$350,000 to \$399,999	14%	12%	12%	15%
\$400,000 to \$499,999	7%	13%	15%	10%
\$500,000 to \$749,999	12%	17%	20%	15%
\$750,000 to \$999,999	4%	8%	5%	0%
\$1,000,000 or more	1%	2%	6%	10%
Total	100%	100%	100%	100%

Awareness of Retirement Communities

Nearly all households on the **Lead List** and 80% of household on the **Purchased List** were aware of retirement communities in their area. Survey respondents were told that retirement communities are residential communities that offer independent living residences, and some also offer assisted living and/or memory care or nursing care services. These residences provide other services such as dining, housekeeping, maintenance, transportation and social opportunities.

Percent of Respondents Who Are Aware of Retirement Communities by List Source



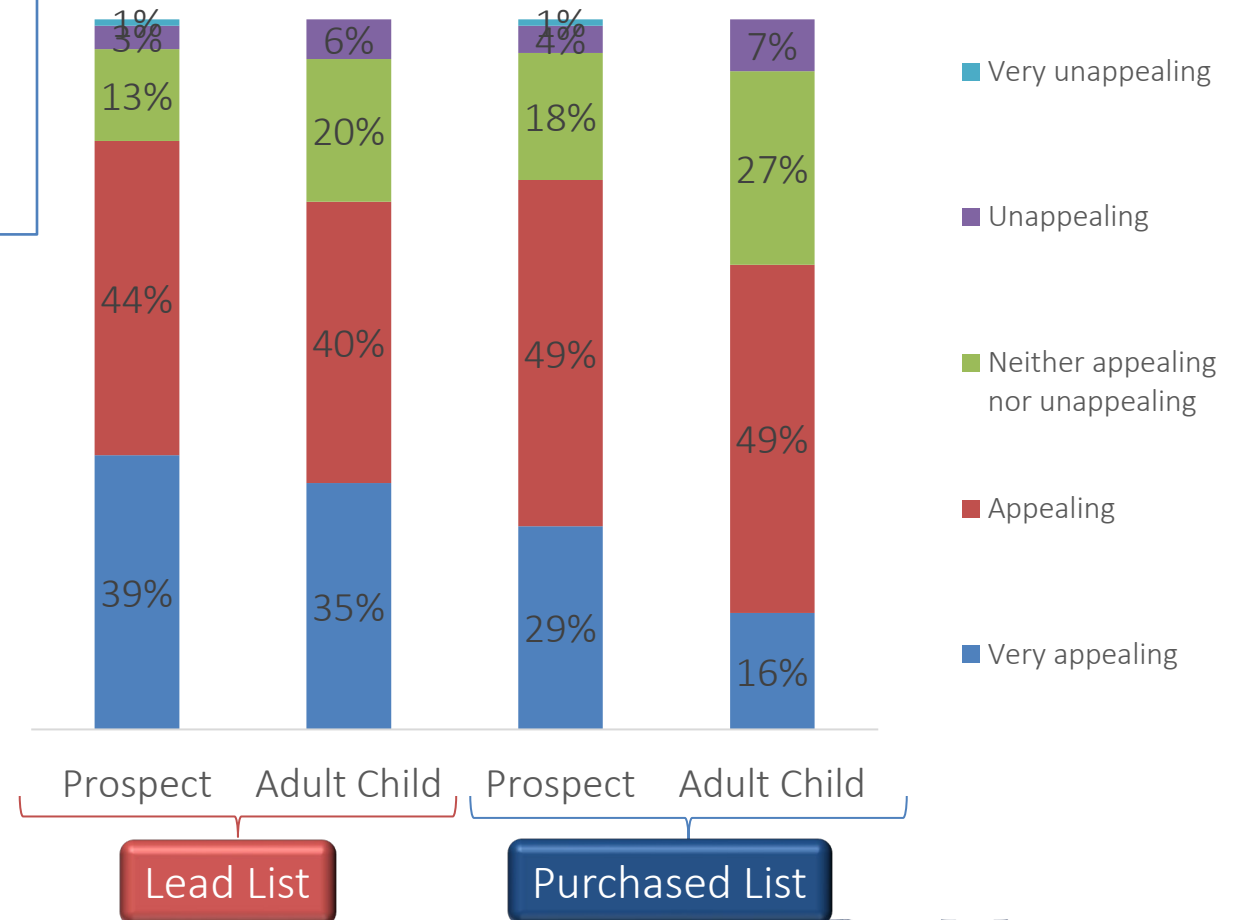
Appeal of Independent Living Communities

An **Independent Living Community** usually has apartments and sometimes has single-family homes. The individual residences usually have kitchens, but the community may have one or more dining rooms where typically most residents eat a “main meal” each day. Some form of meal plan is generally included in their monthly rents. Basic services such as housekeeping, transportation, and social, educational or recreational programs are generally provided. Some communities may offer assisted living or care for persons with Alzheimer’s Disease for those who someday may need additional help with daily activities. These communities are NOT rent-subsidized or for low-income households.

After reading the above definition, survey respondents rated their general opinion of a community that offers independent living as a place they or a loved one might live. Respondents from the **Lead List** were more likely than those from the **Purchased List** to rate independent living as very appealing. One potential explanation is that the **Leads** are more familiar with independent living communities and the benefits they offer, and as a result, find them more appealing.

Prospects from both lists were more likely than the adult children to rate independent living as very appealing.

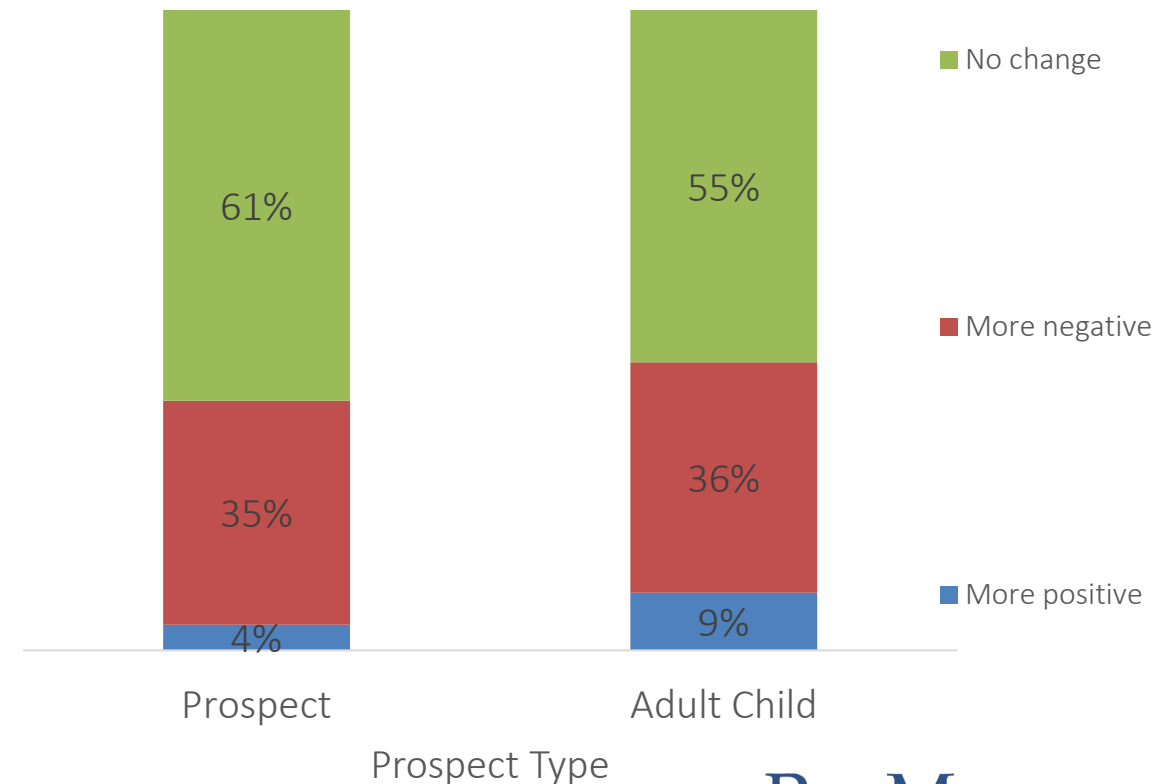
Appeal of Independent Living Communities
by Prospect Type and List Source



Change in Opinion of IL Communities Since COVID-19 Pandemic

In spite of the press and the news coverage of COVID-19 over the past several months, the majority of respondents have not changed their opinion of independent living communities since the onset of the pandemic. Those who have changed their opinion, however, have changed it for the negative.

Change in Opinion of Independent Living Communities Since COVID-19 by Prospect Type
(Question Only Asked of the Purchased List)

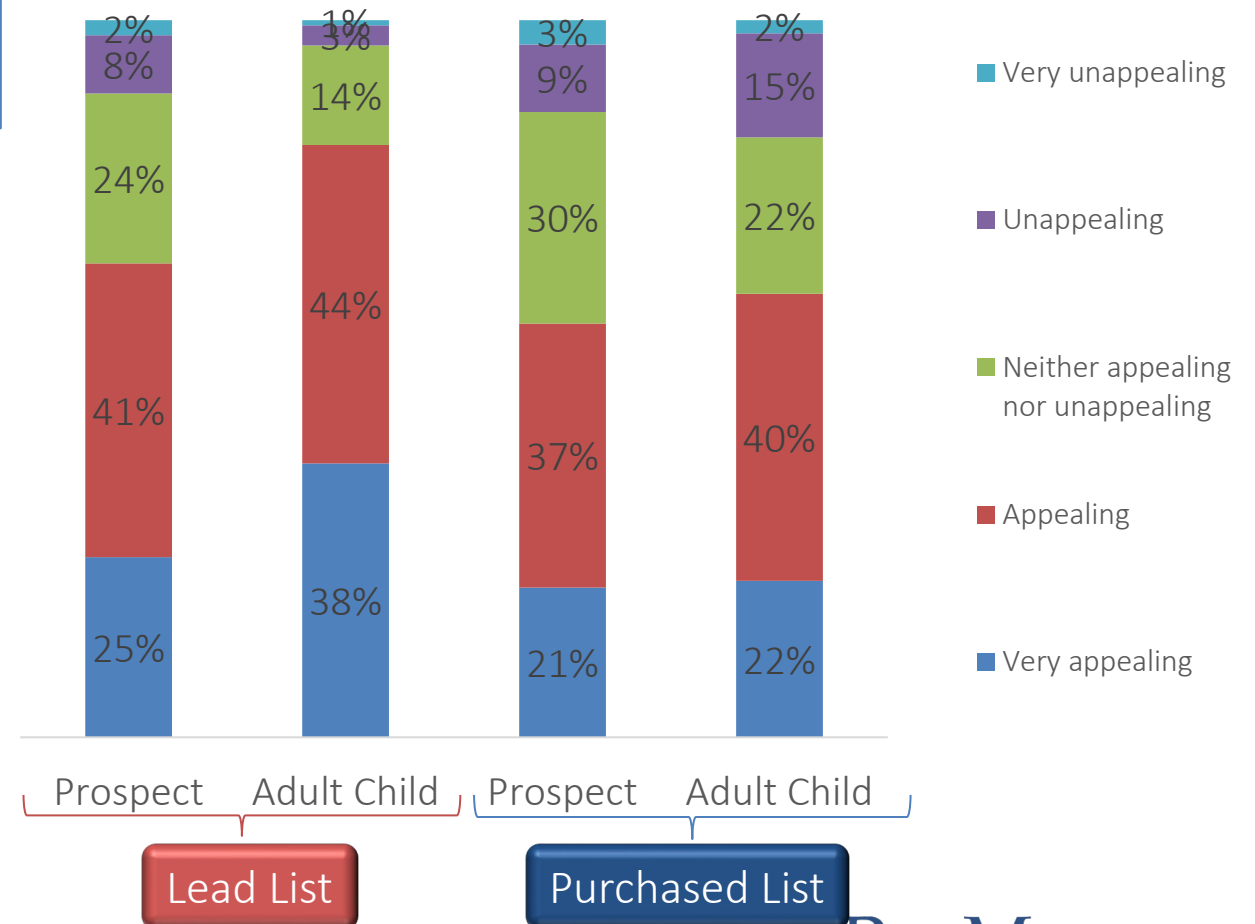


Appeal of Assisted Living Communities

An **Assisted Living Community** is an apartment-like building that provides housing and care services designed to assist people with everyday activities and provides three meals per day. Services are usually planned for each person based on his or her requirements but may include help getting from one place to another, bathing, dressing and managing medications. Fees are typically paid on a monthly basis.

After reading the above definition, adult children from the **Lead List** had the greatest proportion who found a community that offers assisted living services very appealing, followed by prospects on the **Lead List**. Prospects and adult children from the **Purchased List** rated assisted living similarly, and gave it only slightly lower ratings than the prospects from the **Lead List**.

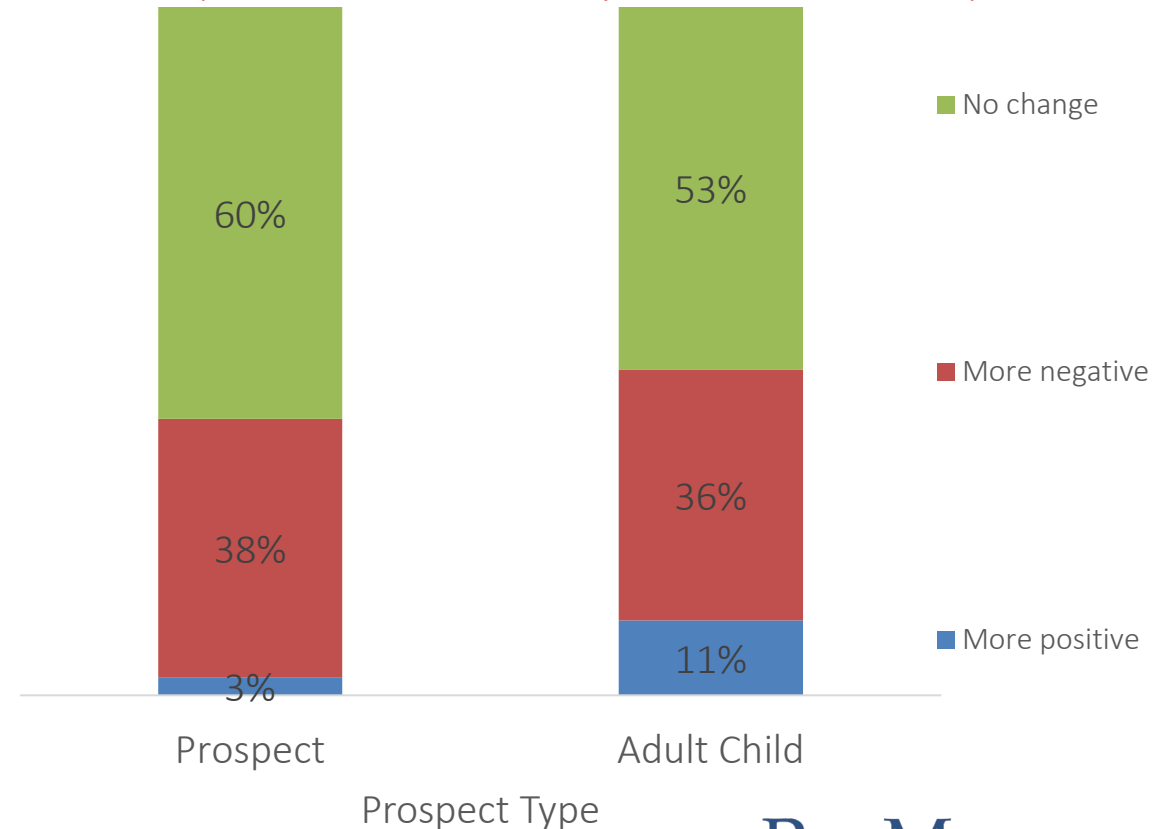
Appeal of Assisted Living Communities
by Prospect Type and List Source



Change in Opinion of AL Communities Since COVID-19 Pandemic

As with independent living, the majority of respondents have not changed their opinion of assisted living communities since the onset of the COVID-19 pandemic. Unfortunately though, those who have changed their opinion have changed it for the negative.

Change in Opinion of Assisted Living
Communities Since COVID-19 by Prospect Type
(Question Asked Only of Purchased List)



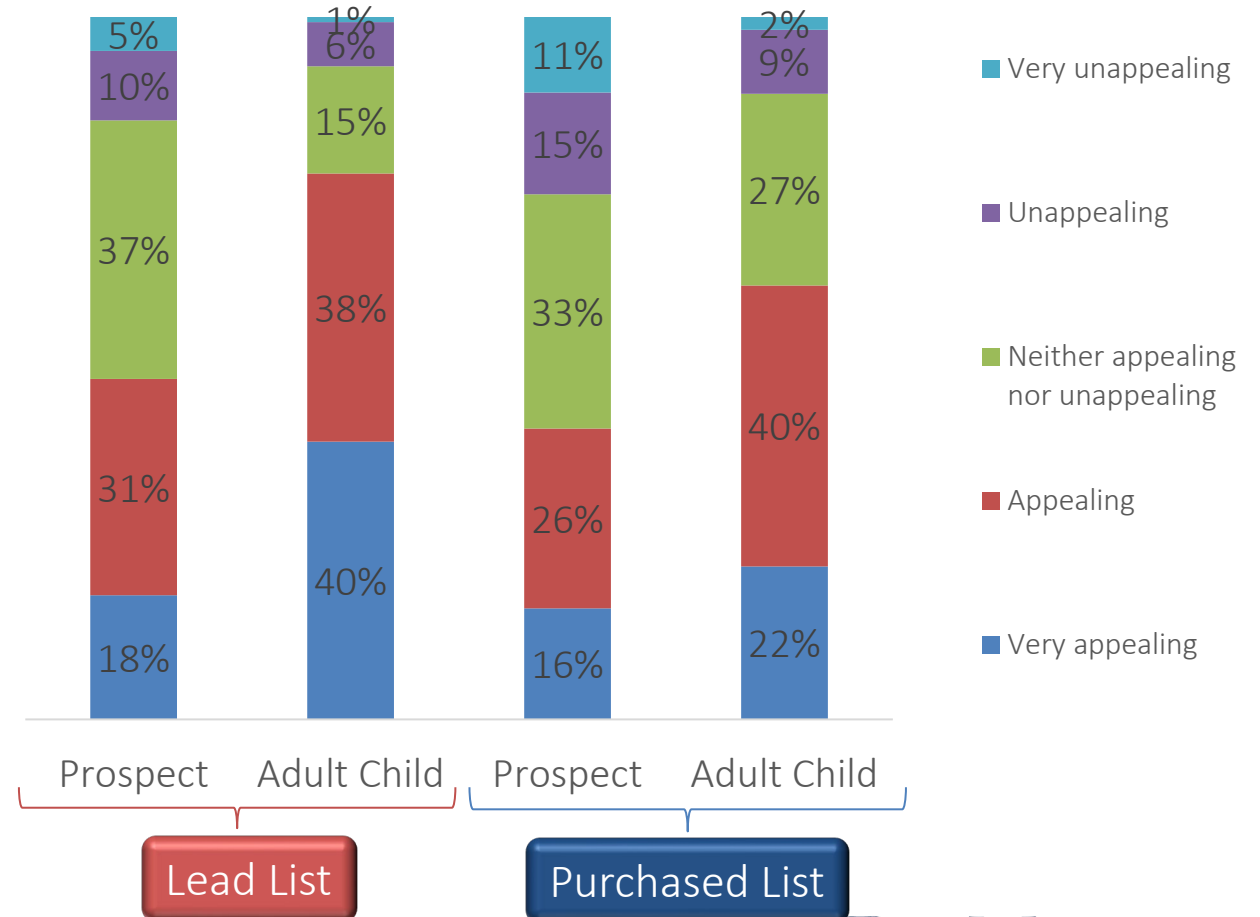
Appeal of Memory Care Communities

A **Memory Care Community** is very similar to an assisted living community with the exception that housing and care services are specifically tailored for those suffering from Alzheimer's disease and other related cognitive or memory disorders. Three meals are provided each day, and services are planned for each person based on his or her specific requirements. Fees are paid on a monthly basis.

After reading the above definition, adult children from the **Lead List** had the greatest proportion who found a community that offers memory care services very appealing, followed by adult children on the **Purchased List**.

Prospects don't really shop memory care communities as often for themselves as would an adult child for an ill parent or other relative or friend. Because of this, they may be less familiar with memory care communities and therefore not really know how to rate their appeal—thus explaining the increase in the proportion of the prospects who rated memory care communities as neither appealing nor unappealing.

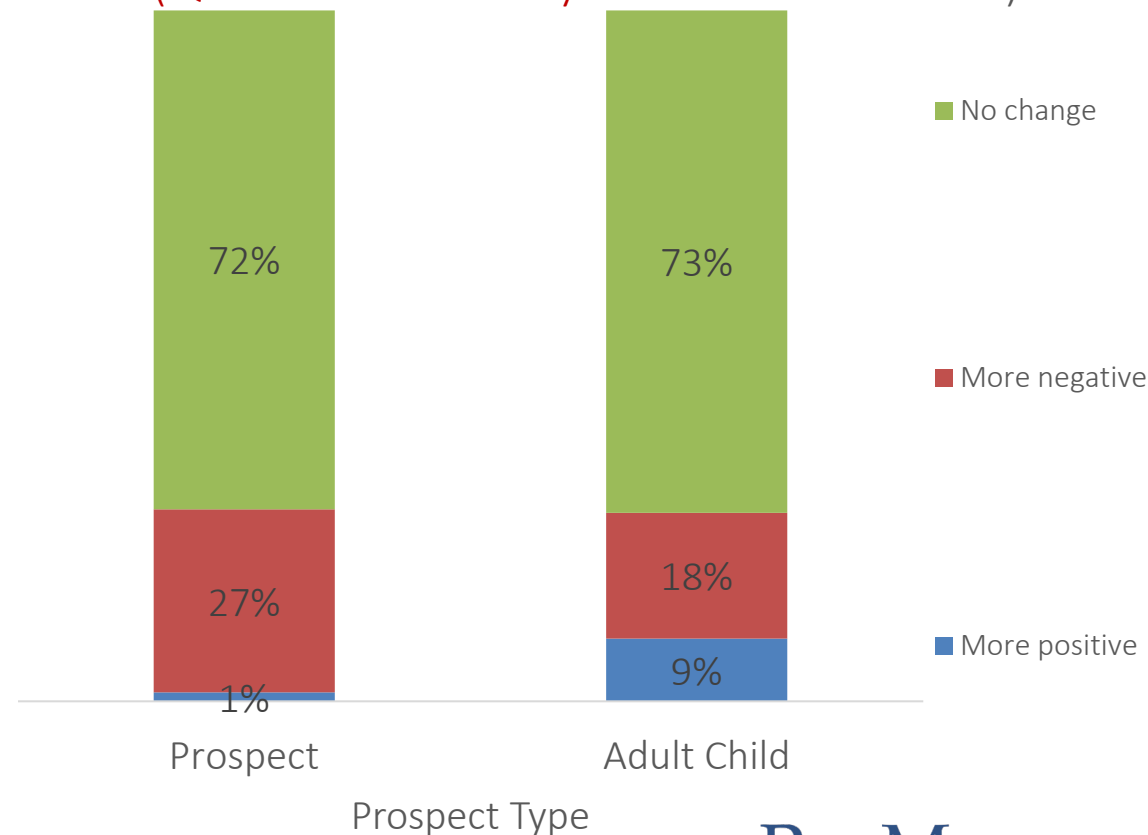
Appeal of Memory Care Communities
by Prospect Type and List Source



Change in Opinion of MC Communities Since COVID-19 Pandemic

Nearly three-fourths of both prospects and adult children responding for a parent or loved one said that the COVID-19 pandemic has not changed their opinion of memory care communities in any way.

Change in Opinion of Memory Care Communities Since COVID-19 by Prospect Type
(Question Asked Only of the Purchased List)



Moving to a Community vs. Remaining at Home

Survey respondents were asked to rate their agreement with a series of statements about the benefits of either moving to a retirement community or staying in their current residence.

Of note, a higher proportion of households from the **Lead List** than the **Purchased List** agreed that retirement communities are safer than staying at home.

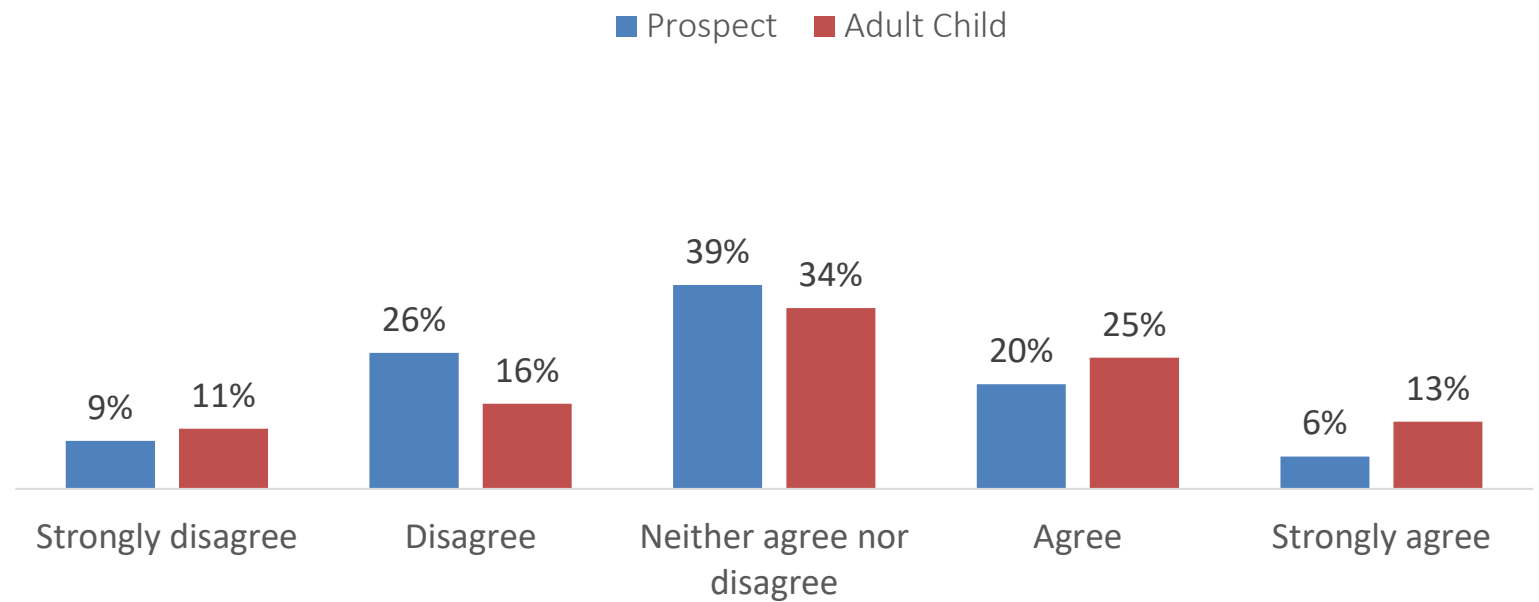
A greater proportion of households on the **Lead List** than the **Purchased List** also strongly agreed that retirement communities allow one to feel less isolated than they would staying at home.

		Lead List	Purchased List
Retirement communities are safer than staying at home.	Strongly disagree	9%	14%
	Disagree	19%	27%
	Neither agree nor disagree	36%	40%
	Agree	27%	15%
	Strongly agree	10%	4%
Retirement communities allow one to feel less isolated than they would staying at home.	Strongly disagree	3%	6%
	Disagree	7%	13%
	Neither agree nor disagree	23%	29%
	Agree	46%	44%
	Strongly agree	21%	8%
The COVID-19 outbreak has made staying at home a more appealing option than moving to a retirement community.	Strongly disagree	2%	3%
	Disagree	9%	5%
	Neither agree nor disagree	30%	25%
	Agree	29%	36%
	Strongly agree	30%	31%
The COVID-19 outbreak has made retirement communities a more appealing option than staying at home.	Strongly disagree	21%	31%
	Disagree	33%	37%
	Neither agree nor disagree	35%	27%
	Agree	8%	3%
	Strongly agree	3%	2%

Moving to a Community vs. Remaining at Home

A greater proportion of adult children than prospects strongly agreed that retirement communities are safer than staying at home. ProMatura has found throughout years of research that adult children are most interested in the care services, safety and security provided by community, while prospects on the other hand, are more interested in the lifestyle offered by the community.

Agreement with the Following Statement
“Retirement communities are safer than staying at home”
by Prospect Type



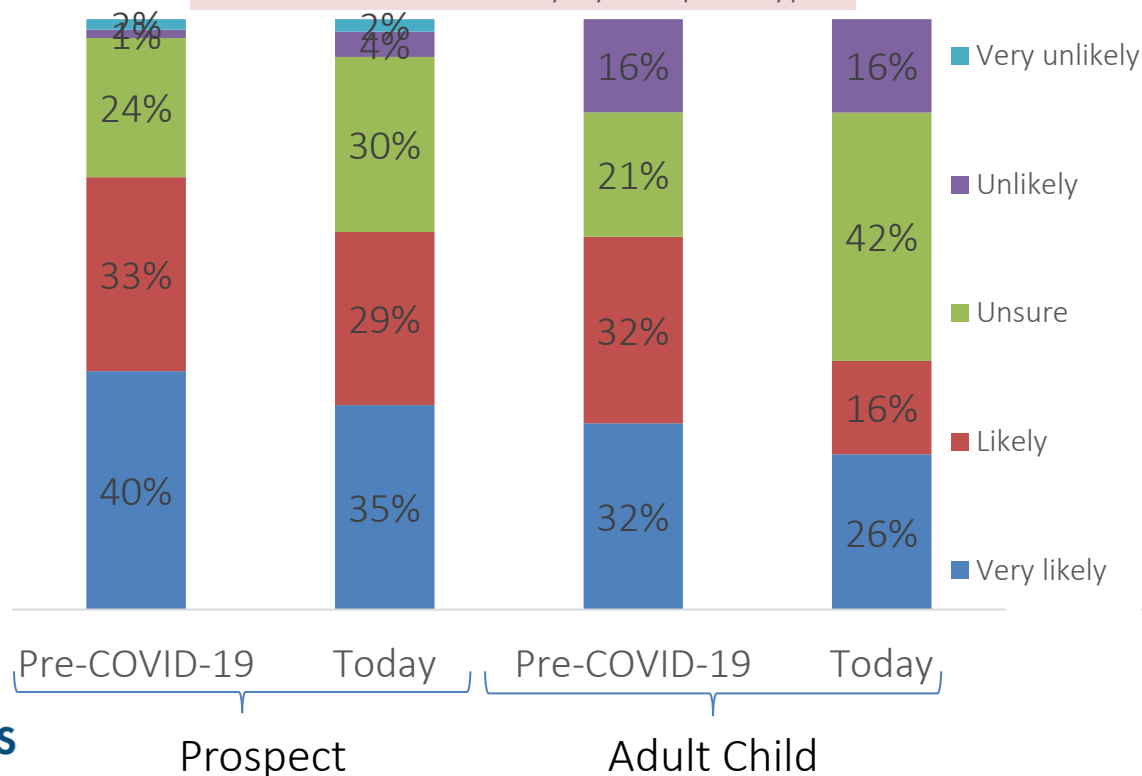
Please Note:

The remaining survey questions presented in this report were asked only of respondents who, within the past year, have considered an independent living, assisted living, or memory care community as a place they or a loved one might one day move.

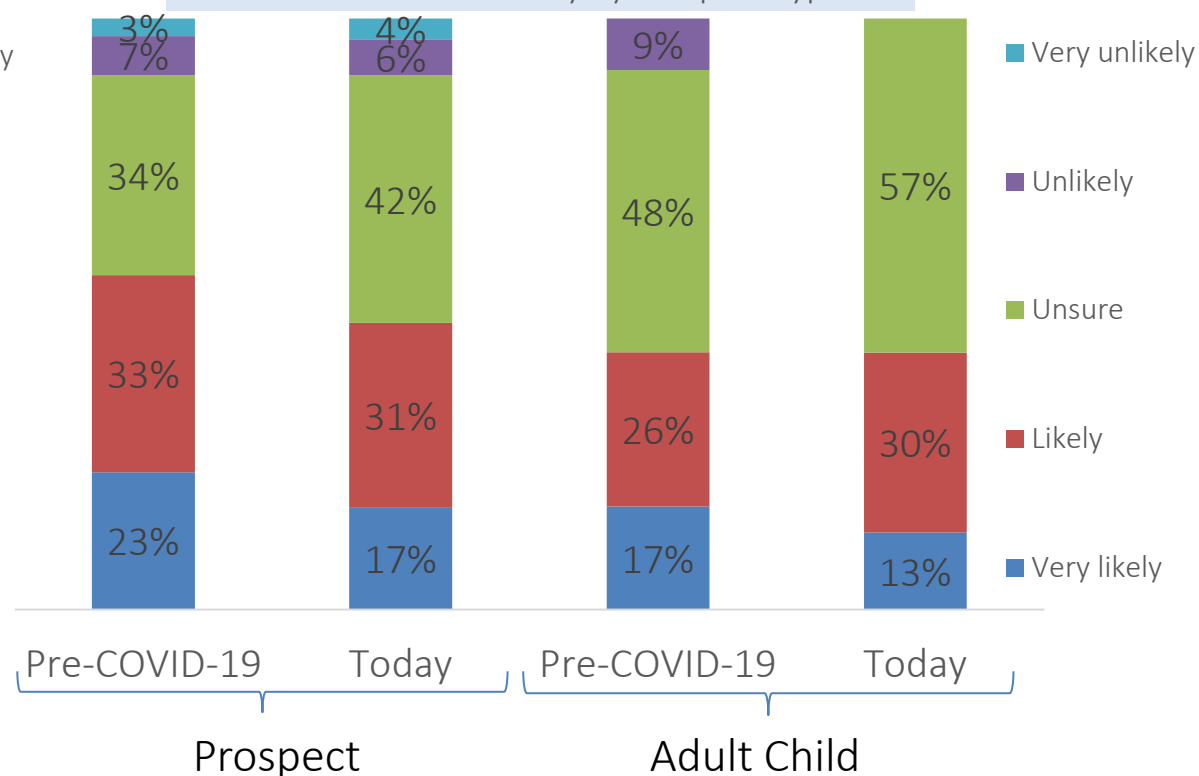
Likelihood of Moving to an IL Community

Today, 35% of independent living prospects from the **Lead List** and 26% of adult children responding for a parent or loved one say they are very likely to move to a community that offers independent living services. The impact of the COVID-19 pandemic on propensity to move was measurable but only decreased the proportion who were very likely to move 5 percentage points among prospects and 6 percentage points among adult children on the **Lead List**. The pattern of results was similar among households on the **Purchased List**, with overall propensity to move slightly lower than that of the **Lead List**.

Likelihood of **Lead List** Respondents Moving to an Independent Living Community Prior to COVID-19 and Today by Prospect Type



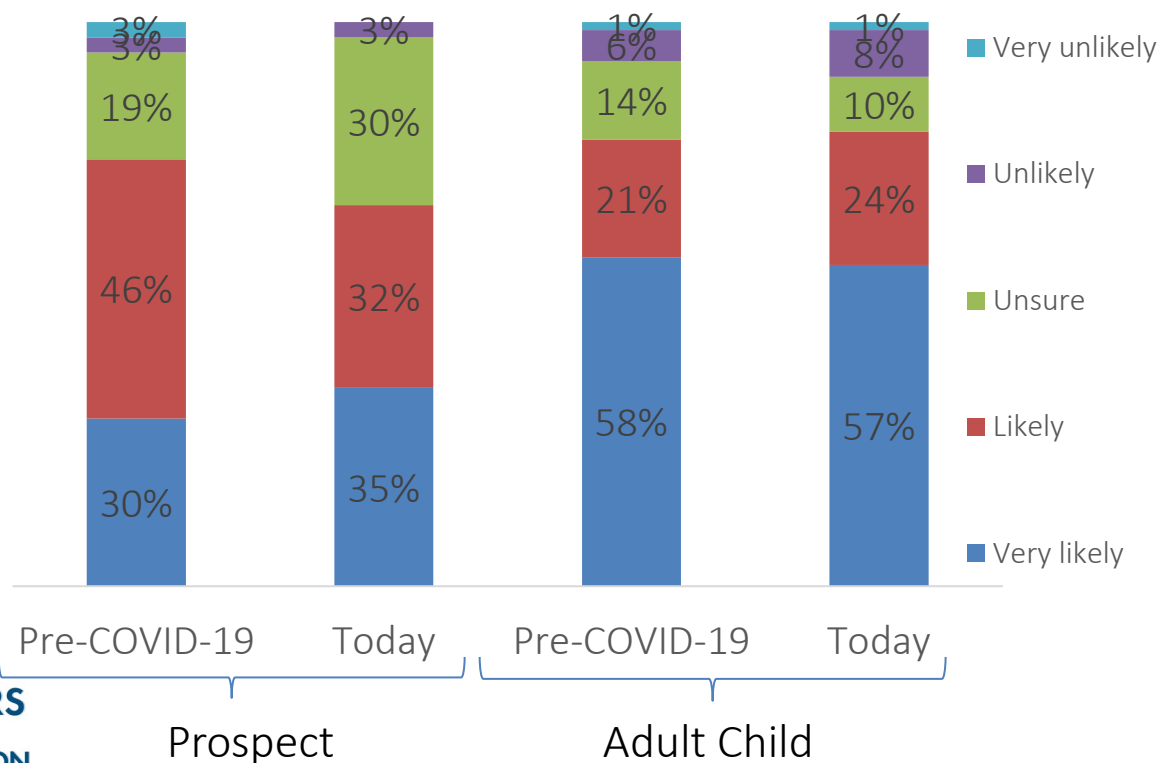
Likelihood of **Purchased List** Respondents Moving to an Independent Living Community Prior to COVID-19 and Today by Prospect Type



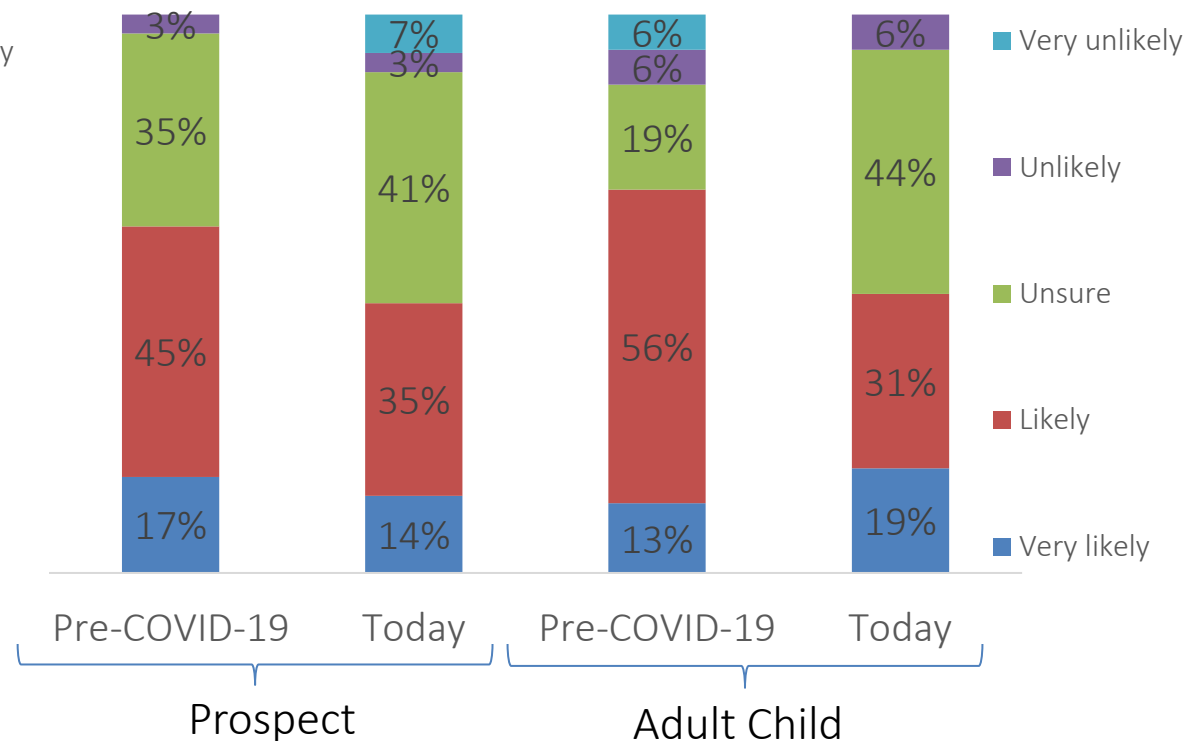
Likelihood of Moving to an AL Community

Thirty-five percent of assisted living prospects and 57% of adult children from the **Lead List** said they were very likely to move to a community that offers assisted living services. This proportion is actually up 5 percentage points from pre-COVID among **Lead List** prospects, and only down 1 percentage point among adult children. Households on the **Purchased List** were less likely to move to assisted living, and the COVID pandemic had a more negative impact on their moving than it did on the **Lead List**.

Likelihood of **Lead List** Respondents Moving to an Assisted Living Community Prior to COVID-19 and Today by Prospect Type



Likelihood of **Purchased List** Respondents Moving to an Assisted Living Community Prior to COVID-19 and Today by Prospect Type

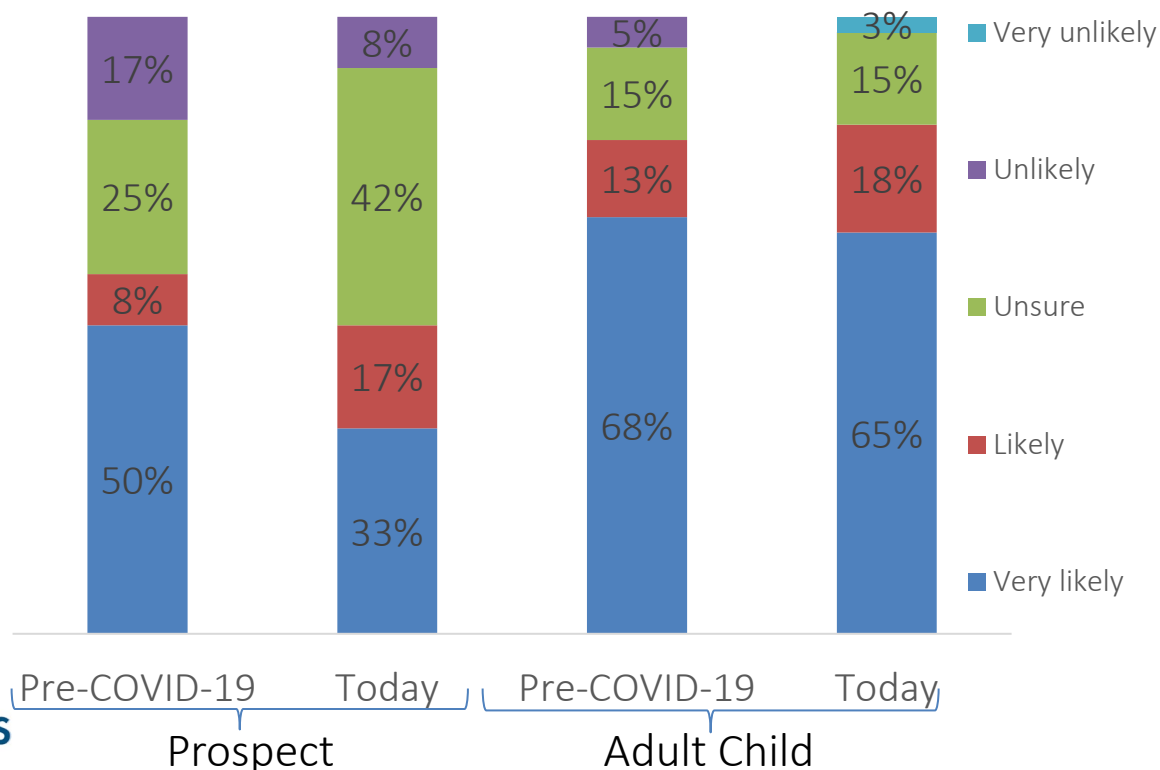


Likelihood of Moving to an MC Community

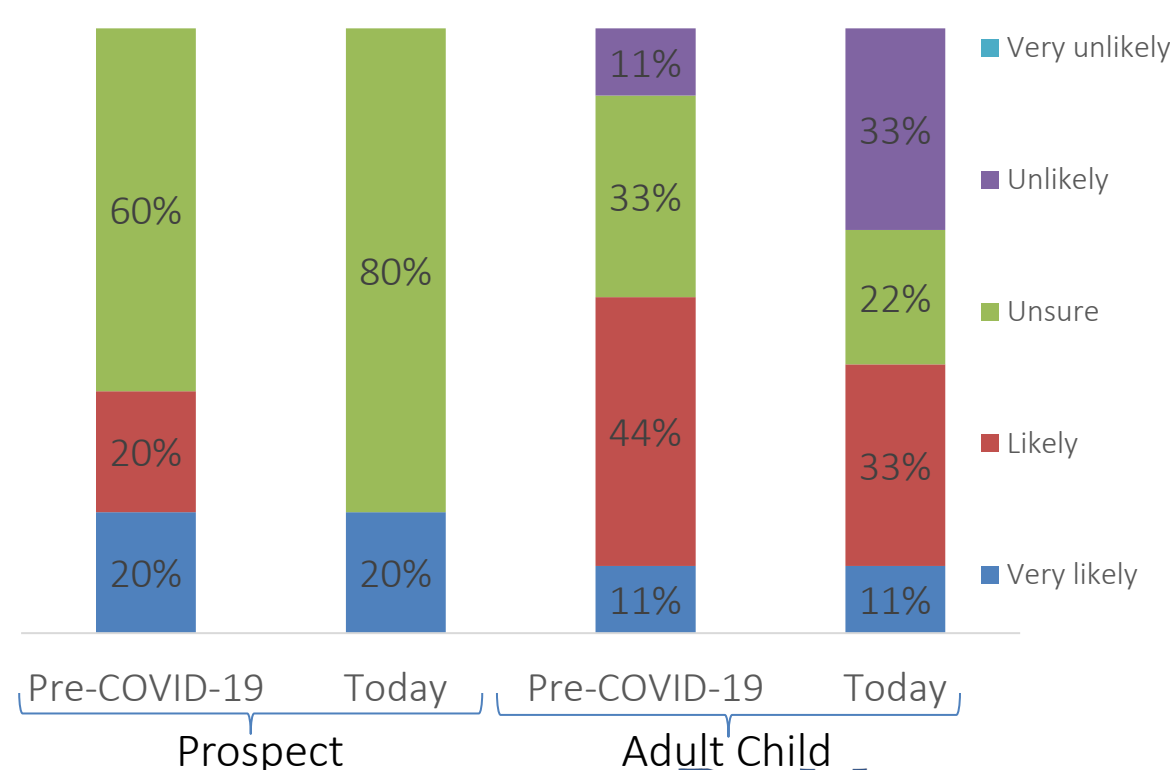
Caution should be taken when interpreting results for likelihood of moving to memory care as the sample sizes for these survey questions were small.

The pattern of results seems to suggest that the COVID-19 pandemic has had essentially no impact on the propensity to move to a memory care community according to the adult children on the **Lead List**. Likelihood of moving to a memory care community decreased slightly since COVID among the prospects from the **Lead List** and among both prospects and adult children on the **Purchased List**.

Likelihood of **Lead List** Respondents Moving to an Memory Care Community Prior to COVID-19 and Today by Prospect Type



Likelihood of **Purchased List** Respondents Moving to an Memory Care Community Prior to COVID-19 and Today by Prospect Type



Current Stage of Moving to a Community

As we might expect, a greater proportion of households from the **Lead List** than the **Purchased List** are currently looking at information about communities and planning for a move; or have visited, talked with, or contacted communities online. More households from the **Purchased List** are currently in the “Thinking” stage of the moving process.

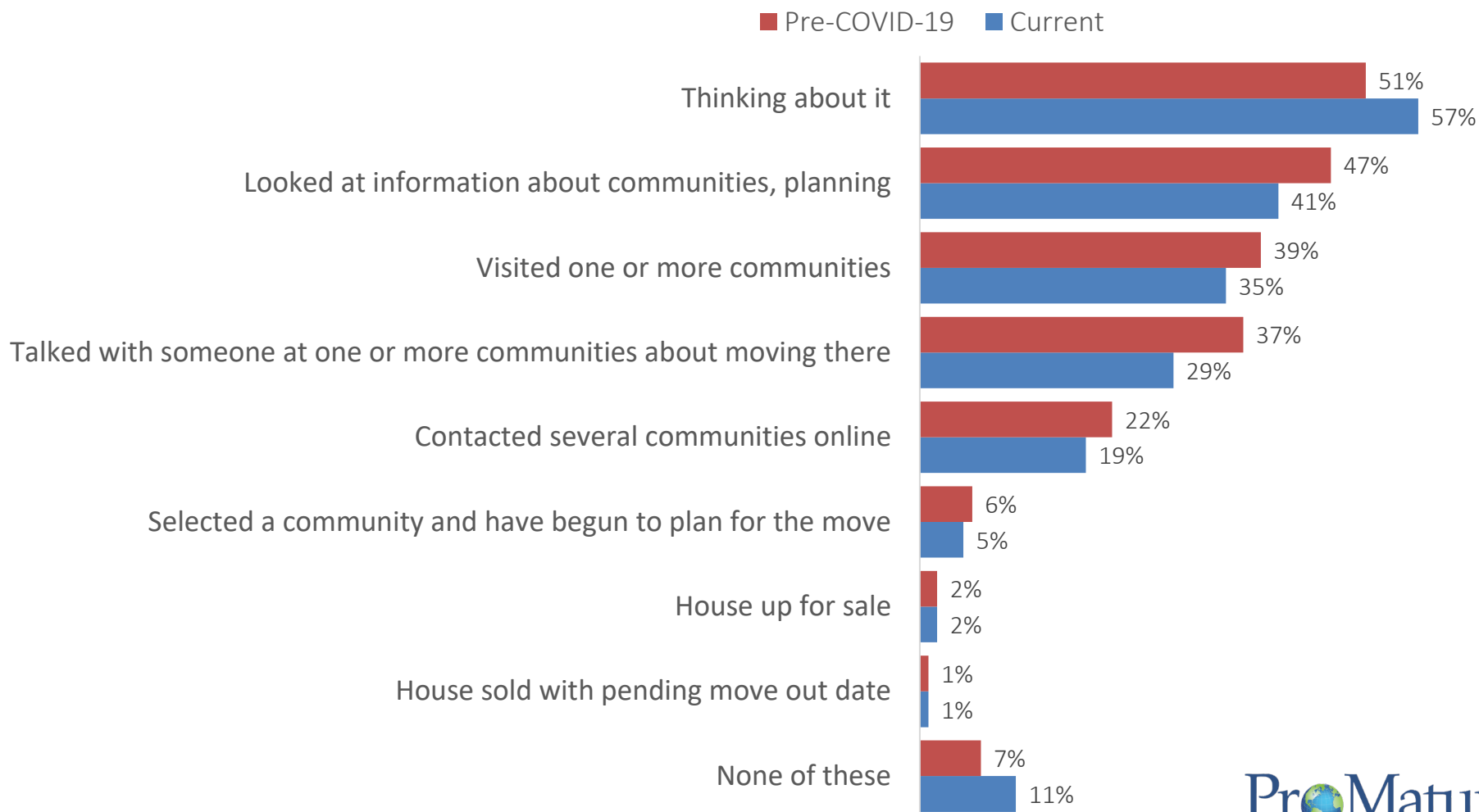
Current Stage of Moving by List Source (Multiple Responses Allowed)



Current Stage of Moving to a Community

Prior to the COVID-19 pandemic, prospects were more likely to have taken action with respect to their potential move to a retirement community. Pre-COVID, a higher proportion of prospects were looking at information, visiting communities, talking with counselors, and contacting communities online. Currently, more prospects are in the “thinking” stage or are in a holding pattern—doing “none of these.”

Pre-COVID-19 and Current Stage of Moving by List Source Among All Respondents
(Multiple Responses Allowed)



Current Timeframe for Moving to an IL Community by Likelihood of Moving

About one-fourth of the **Lead List** and 7% of the **Purchased List** were very likely or likely to move to independent living within the next 12 months. Twelve percent of the **Lead List** and 4% of the **Purchased List** said they were very likely or likely to move in the next 6 months.

Timeframe for Moving to an IL Community by Likelihood of Moving – Lead List

Timeframe for Moving to an IL Community	Likelihood of Moving to an IL Community					Total
	Very likely	Likely	Unsure	Unlikely	Very unlikely	
In the next 3 months	4%	1%	1%			6%
4 to 6 months	6%	1%				7%
7 to 12 months	7%	7%	3%			17%
1 to 2 years	12%	12%	9%	1%		33%
3 years or more	5%	8%	12%			25%
No longer planning to move	1%	1%	6%	3%	1%	12%
Total	35%	30%	30%	4%	1%	100%

Timeframe for Moving to an IL Community by Likelihood of Moving – Purchased List

Timeframe for Moving to an IL Community	Likelihood of Moving to an IL Community					Total
	Very likely	Likely	Unsure	Unlikely	Very unlikely	
In the next 3 months	2%		1%			3%
4 to 6 months	1%	1%	1%			2%
7 to 12 months	1%	2%	1%		1%	5%
1 to 2 years	4%	12%	11%	1%		28%
3 years or more	8%	17%	25%		1%	50%
No longer planning to move	1%	1%	6%	1%	1%	11%
Total	17%	33%	46%	2%	2%	100%

Current Timeframe for Moving to an AL Community by Likelihood of Moving

As we would expect, the timeframe for moving to assisted living is shorter than it is for independent living.

Thirty-six percent of the **Lead List** and 12% of the **Purchased List** reported they were very likely or likely to move to assisted living within the next 12 months. Thirty-one percent of the **Lead List** and 8% of the **Purchased List** were very likely or likely to move in the next 6 months.

Timeframe for Moving to an AL Community by Likelihood of Moving – Lead List

Timeframe for Moving to an AL Community	Likelihood of Moving to an AL Community					Total
	Very likely	Likely	Unsure	Unlikely	Very unlikely	
In the next 3 months	20%	6%	2%	1%		29%
4 to 6 months	2%	3%	2%			7%
7 to 12 months	3%	2%	4%			9%
1 to 2 years	8%	7%	5%			21%
3 years or more	6%	9%	2%			18%
No longer planning to move	7%	4%	3%	1%		16%
Total	47%	32%	19%	2%		100%

Timeframe for Moving to an AL Community by Likelihood of Moving – Purchased List

Timeframe for Moving to an AL Community	Likelihood of Moving to an AL Community					Total
	Very likely	Likely	Unsure	Unlikely	Very unlikely	
In the next 3 months	2%	4%	2%		2%	11%
4 to 6 months	2%		4%			7%
7 to 12 months	2%	2%	4%			9%
1 to 2 years	4%	11%	2%			18%
3 years or more	2%	13%	18%			33%
No longer planning to move	2%	2%	13%	2%	2%	22%
Total	16%	33%	44%	2%	4%	100%

Current Timeframe for Moving to a MC Community by Likelihood of Moving

Leads of memory care communities had the shortest time frame for moving of all respondent groups. Forty-one percent of the households on the **Lead List** for memory care reported they were very likely or likely to move in the next 12 months, and 30% were very likely or likely to move in the next six months.

Among the **Purchased List**, 28% were very likely or likely to move to a memory care community in 12 months, and 14% were very likely or likely to move within 6 months.

Timeframe for Moving to a MC Community by Likelihood of Moving – Lead List

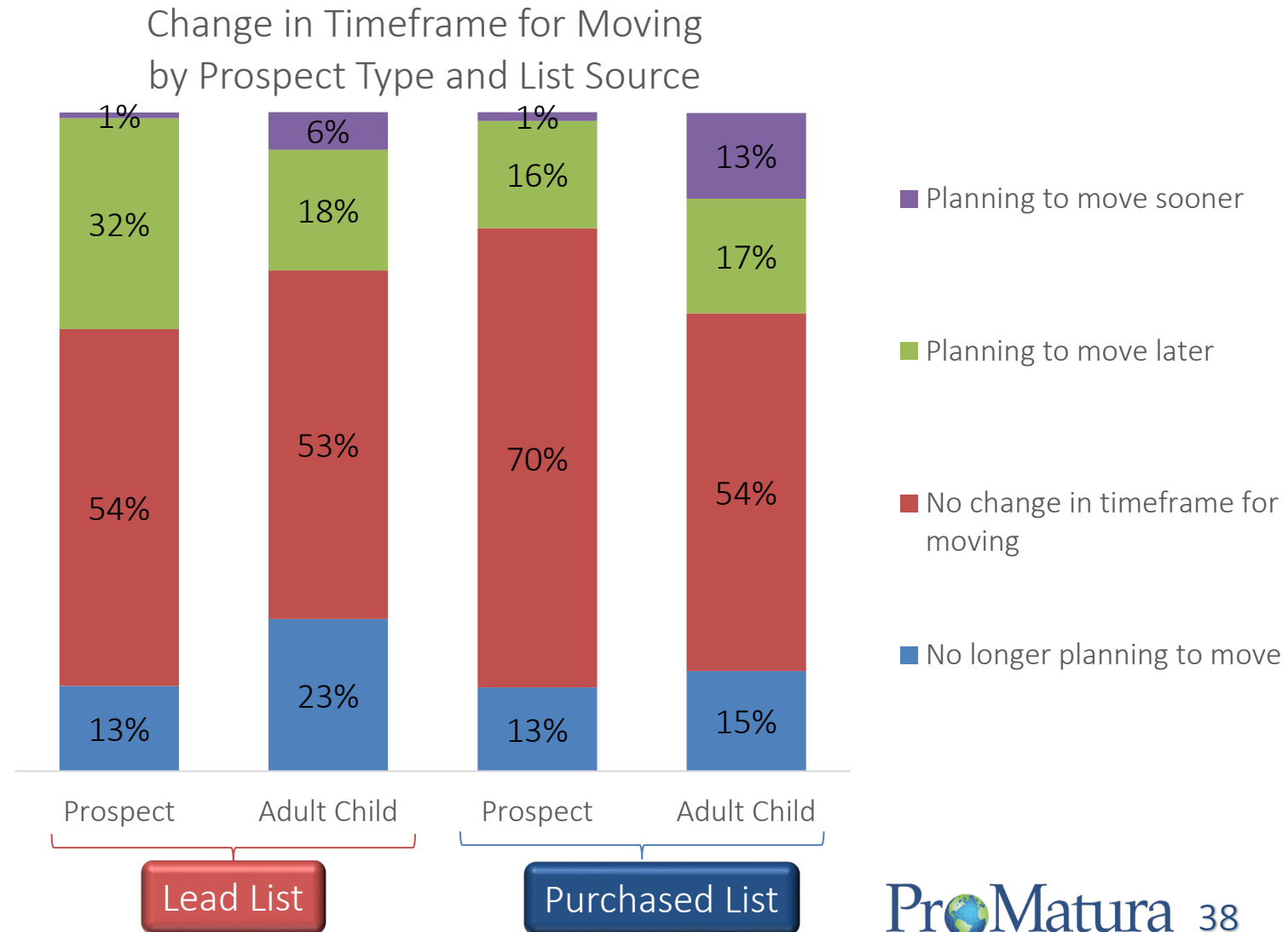
Timeframe for Moving to a MC Community	Likelihood of Moving to a MC Community					Total
	Very likely	Likely	Unsure	Unlikely	Very unlikely	
In the next 3 months	22%	4%				26%
4 to 6 months	2%	2%				4%
7 to 12 months	2%	9%	2%			13%
1 to 2 years	9%	2%	7%			17%
3 years or more			7%			7%
No longer planning to move	17%	4%	9%		2%	33%
Total	52%	22%	24%		2%	100%

Timeframe for Moving to a MC Community by Likelihood of Moving – Purchased List

Timeframe for Moving to a MC Community	Likelihood of Moving to a MC Community					Total
	Very likely	Likely	Unsure	Unlikely	Very unlikely	
In the next 3 months	7%	7%				14%
4 to 6 months						
7 to 12 months	7%	7%	7%			21%
1 to 2 years		7%	14%	14%		36%
3 years or more			14%			14%
No longer planning to move		7%	7%			14%
Total	14%	29%	43%	14%		100%

Change in Timeframe for Moving Since COVID-19 Pandemic

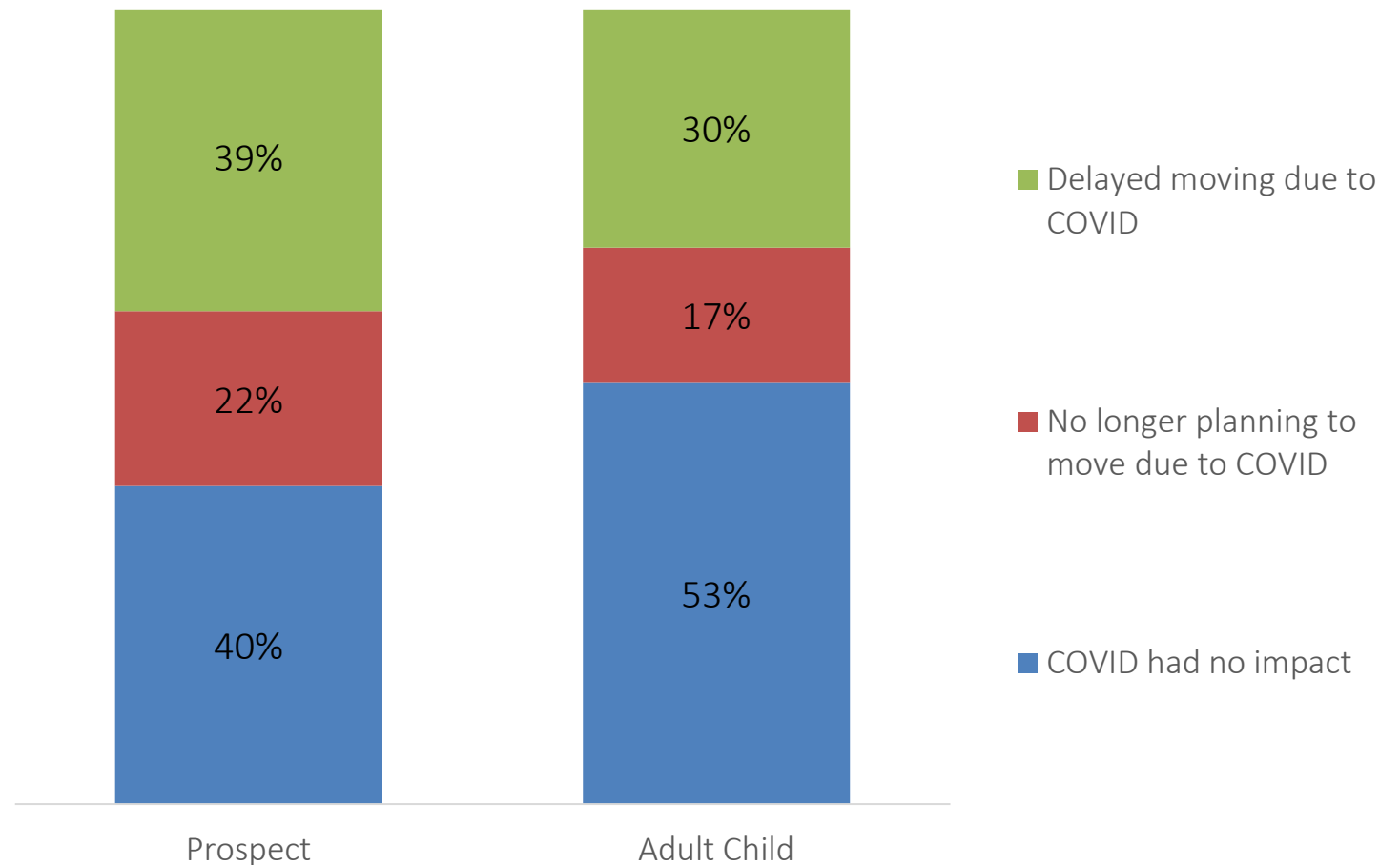
Among those households who have considered moving to a retirement community within the past year, the majority of both prospects and adult children—both from the **Lead List** and from the **Purchased List**—have not changed their timeframe for moving. Those who have changed their timeframe are divided between planning to move later and no longer planning to move, though fewer than one third of prospects from any survey group reported either of these options.



Delayed or Halted Moving due to COVID-19 Pandemic

Among those households who delayed or who were no longer considering moving, the majority of prospects said that they delayed the move due to the COVID-19 pandemic. Sixty percent of prospects and 47% of adult child have delayed or are no longer moving because of COVID-19.

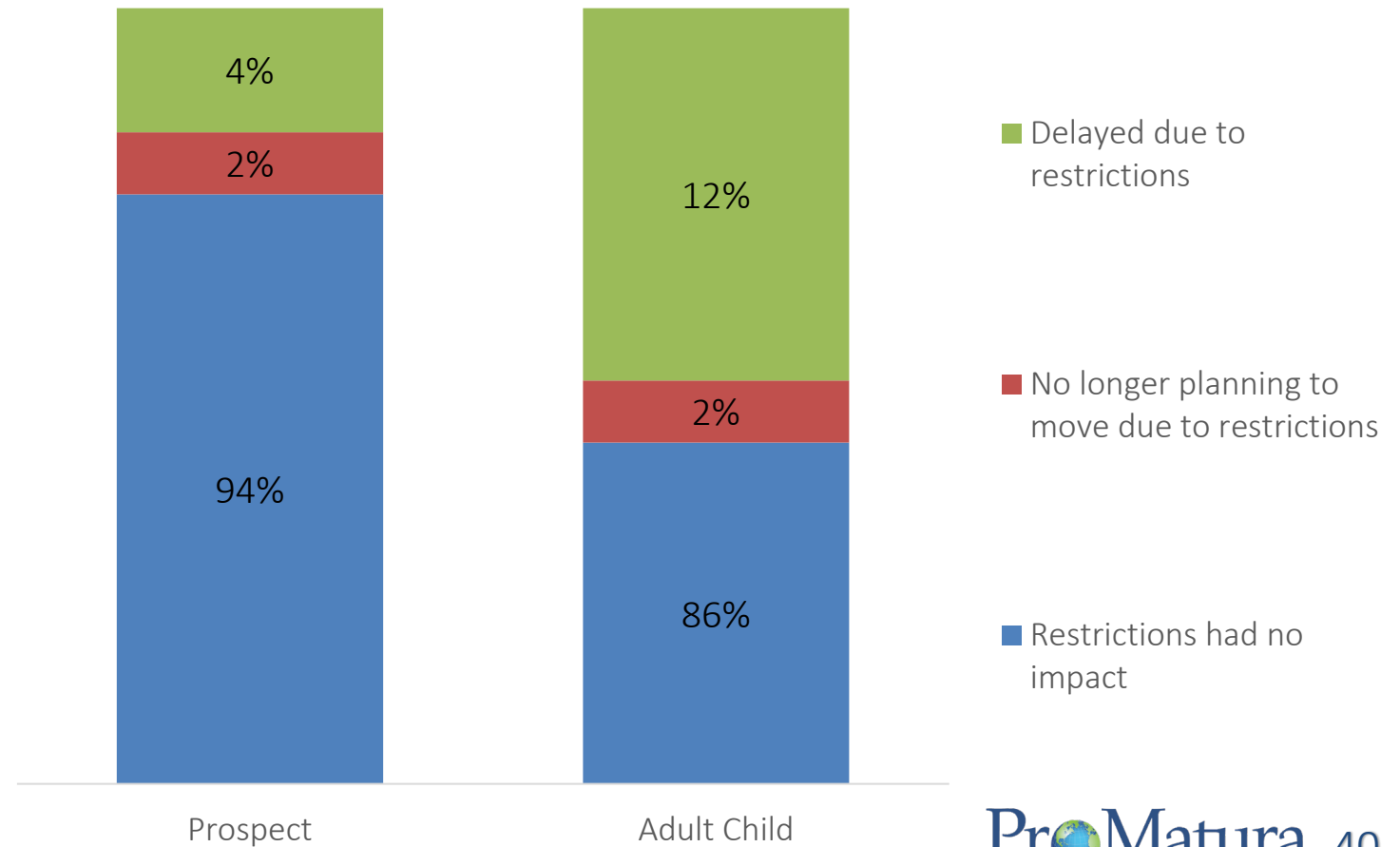
Delayed or Halted Moving by Prospect Type



Delayed or Halted Moving due to Community Restrictions from COVID-19

Community restrictions from COVID-19 had minimal impact on prospects decision to delay or no longer consider a move. Six percent of prospects and 14% of adult children have delayed or are no longer moving because of community restrictions due to COVID-19.

Delayed or Halted Moving due to Community Restrictions by Prospect Type



What Must Occur Before Moving to a Retirement Community – IL

Survey respondents were asked what has to happen or what they need to know before they would feel confident about moving to a community. Their open-ended responses, segmented by their preferred level of care, are listed here and on the following pages.

What Must Occur Before Moving to a Retirement Community—Independent Living
(Comments mentioned by 2 or more respondents)

Comment	Count
A cure for Covid-19/elimination of Covid-19	63
Health condition of myself/loved one deteriorates	49
Affordability	41
Need to know costs	36
I would have to see what policies were in place to prevent future infection	33
Unable to maintain home/cook meals	26
Sell our house	18
Financial stability & basic cash flow	14
History of covid-19 in the community	10
Need to be able to visit family member daily/no visitor restrictions	6
Need to know if there is continuing care available	6
I would need freedom to come and go at will/no lockdowns	6
Death of spouse	5
Family agreement/spouse has to agree	3
Need to downsize	2
I would need to be unable to drive	2

What Must Occur Before Moving to a Retirement Community – AL

What Must Occur Before Moving to a Retirement Community—Assisted Living (Comments mentioned by 3 or more respondents)	
Comment	Count
Health condition of myself/loved one deteriorates	26
A cure for Covid-19/elimination of Covid-19	13
Need to know costs	9
Need to be able to visit family member daily/no visitor restrictions	7
Unable to maintain home/cook meals	6
I would have to see what policies were in place to prevent future infection	6
Services, including social amenities	5
I would have to have enough money to afford one	5
Routine Covid-19 testing for staff and residents	5
Family agreement/spouse has to agree	4
Better hygiene/cleaner environment	3

What Must Occur Before Moving to a Retirement Community – MC

What Must Occur Before Moving to a Retirement Community—Memory Care (Comments mentioned by 2 or more respondents)

Comment	Count
A cure for Covid-19/elimination of Covid-19	7
Health condition of myself/loved one deteriorates	6
Engaging, high level of care	3
I would have to see what policies were in place to prevent future infection	3
Community needs to be affordable	2
Better hygiene/cleaner environment	2
Family agreement/spouse has to agree	2
Need to be able to visit family member daily/no visitor restrictions	2
Sell our house	2

What Must Occur Before Moving to a Retirement Community – Lead List

	Do not need	Indifferent	Desirable	Essential
Identifiable cleaning and disinfecting programs are in place at retirement communities	5%	6%	17%	72%
COVID-19 testing with rapid results is accessible at all retirement communities	8%	9%	27%	55%
A primary care physician is on-site or via telemedicine at retirement communities	8%	13%	33%	46%
The virus is contained locally but not statewide, with no new cases confirmed in 14 days	10%	15%	28%	46%
Safe, physically distant social engagement activities are available at retirement communities	7%	13%	38%	42%
Residents are able to eat with other residents in dining rooms and restaurants on-site at safe, social distances	8%	10%	41%	40%
A vaccine exists and has become readily available for consumers	13%	12%	40%	36%
The virus is contained statewide with no new cases confirmed in 14 days	12%	16%	35%	36%
The virus is contained nationwide with no new cases confirmed in 14 days	13%	21%	40%	25%

After providing open-ended responses, survey respondents were asked to rate the importance of several events occurring before they or a loved one moves to a retirement community. Nearly three-fourths of households on the **Lead List** indicated that it is essential that identifiable cleaning and disinfecting programs are in place before they or a loved one moves to a community. Just over half rated COVID-19 testing with rapid results accessible at retirement communities as essential.

What Must Occur Before Moving to a Retirement Community – Purchased List

	Do not need	Indifferent	Desirable	Essential
Identifiable cleaning and disinfecting programs are in place at retirement communities	6%	4%	21%	69%
COVID-19 testing with rapid results is accessible at all retirement communities	7%	8%	31%	54%
A primary care physician is on-site or via telemedicine at retirement communities	9%	9%	37%	46%
A vaccine exists and has become readily available for consumers	8%	5%	42%	45%
Safe, physically distant social engagement activities are available at retirement communities	7%	12%	36%	44%
The virus is contained locally but not statewide, with no new cases confirmed in 14 days	14%	11%	32%	43%
Residents are able to eat with other residents in dining rooms and restaurants on-site at safe, social distances	6%	9%	47%	39%
The virus is contained statewide with no new cases confirmed in 14 days	14%	13%	37%	36%
The virus is contained nationwide with no new cases confirmed in 14 days	15%	14%	41%	29%

Mirroring the results from the **Lead List**, households from the **Purchased List** were also most concerned with identifiable cleaning and disinfecting programs and COVID-19 testing with rapid results accessible at retirement communities.

What Must Occur Before Moving to a Retirement Community – by Level of Care

	Independent Living: Essential	Assisted Living: Essential	Memory Care: Essential
Identifiable cleaning and disinfecting programs are in place at retirement communities	69%	76%	78%
Covid-19 testing with rapid results is accessible at all retirement communities	54%	54%	62%
The virus is contained locally but not statewide, with no new cases confirmed in 14 days	44%	45%	46%
A vaccine exists and has become readily available for consumers	43%	34%	30%
A primary care physician is on-site or via telemedicine at retirement communities	43%	51%	58%
Safe, physically distant social engagement activities are available at retirement communities	42%	46%	42%
Residents are able to eat with other residents in dining rooms and restaurants on-site at safe, social distances	41%	38%	42%
The virus is contained statewide with no new cases confirmed in 14 days	37%	32%	40%
The virus is contained nationwide with no new cases confirmed in 14 days	29%	20%	24%

Survey respondents across all three levels of care indicated that identifiable cleaning and disinfecting programs at communities as well as COVID-19 testing with rapid results accessible at communities are essential. More than half of respondents shopping for assisted living or memory care also indicated that having a primary care physician on site or via telemedicine is essential.

Trusted Source of Information Regarding Moving to a Retirement Community

Survey respondents were asked who they consider to be a trusted source of information regarding the decision to move to a retirement community. Their responses are summarized in the adjacent tables, separated by level of care.

Trusted Source of Information: Independent Living	
Source	Count
Myself/my own research	60
My children/family	59
Doctor	37
Local government	32
Current residents	30
Spouse	21
Friends	20
CDC	14
Online ratings	8
AARP	3
A Place for Mom	3
Lawyer	2
News	2

Trusted Source of Information: Assisted Living	
Source	Count
Doctor	22
My children/family	19
Myself/my own research	18
Local government	9
Current residents	9
Spouse	5
Friends	5
Online ratings	5
CDC	4
AARP	1
A Place for Mom	1
Lawyer	1
News	1

Trusted Source of Information: Memory Care	
Source	Count
Doctor	9
Myself/my own research	9
My children/family	6
Local government	6
Current residents	2
CDC	2
Friends	1
Online ratings	1
Lawyer	1
News	1

What Retirement Communities Must Do to be Considered Safe and Healthy - IL

Survey respondents were asked what a community must do for them to consider it a safe and healthy environment. Their open-ended responses, segmented by their preferred level of care, are listed here and on the following pages.

What Retirement Communities Must Do to be Considered Safe and Healthy – Independent Living

Comment	Count
Cleanliness/strict cleaning procedures	31
Follow CDC guidelines	25
Routine Covid-19 testing of staff and residents	23
No positive cases in the facility	14
All people that enter the retirement community should wear mask.	14
Federal as well as state inspections of communities.	13
Regular updates regarding Covid-19 at the facility/honesty/communication	13
There will have to be a trusted vaccine for Covid-19.	11
Good track record of dealing with the virus to date.	11
My own visual checks for safety/visit to facility	11
Social distancing	10
Having a plan in place for any potential future epidemic episodes.	9
Adequate staff	7
Covid-19 completely eliminated	6
24 hour security	3

What Retirement Communities Must Do to be Considered Safe and Healthy - AL

What Retirement Communities Must Do to be Considered Safe and Healthy – Assisted Living	
Comment	Count
Follow CDC guidelines	10
Adequate staff	7
Routine Covid-19 testing of staff and residents	6
Good track record of dealing with the virus to date.	5
Regular updates regarding Covid-19 at the facility/honesty/communication	4
My own visual checks for safety/visit to facility	4
Covid-19 vaccine readily available	3
Visitors need to be allowed	3
Federal as well as state inspections of communities.	3
Covid-19 completely eliminated	3
On site RN necessary 24/7	3

What Retirement Communities Must Do to be Considered Safe and Healthy - MC

What Retirement Communities Must Do to be Considered Safe and Healthy – Memory Care	
Comment	Count
Adequate staff	7
Follow CDC guidelines	5
Routine Covid-19 testing of staff and residents	4
Regular updates regarding Covid-19 at the facility/honesty/communication	3
Visitors need to be allowed	2
On site RN necessary 24/7	2