Impact of COVID-19 on the Seniors Housing Industry

A Study of Consumers

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Thank You to Participating ASHA Companies

JUNIPER

DISCOVERY Senior Living

Avanti LIVING

ANTHEM MEMORY CARE

SENIOR LIFESTYLE
your *life*, your *style*

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Executive Summary

- Prospective customers of 131 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 19% 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 81% of households on the Purchased List were aware of retirement communities in their area.

- 63% or more of all survey respondents find independent living communities either appealing or very appealing
- 57% 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. Across all three levels of care, those who now have a more positive opinion explain that retirement communities are practicing new policies and procedures and provide greater levels of protection for their residents against COVID-19. Those who now have a more negative opinion (across all three levels of care) explain that they feel that communities are "hot spots" for the virus.

- 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 10 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 its 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.

- Regional analyses, found in the Appendix of this report, display results for all survey questions by census region of the country and list source, when appropriate. By and large, the results from the regional analyses suggest that the impact of COVID-19 was felt across the country. Though certain regions had far more cases than others, the appeal of and the likelihood of moving to a retirement community was not significantly different by region of the country.

A Note About Statistical Significance

- Throughout the report we have indicated when there are statistically significant differences in the survey results by respondent group (i.e., prospect vs adult child and lead list vs purchased list). If there is a statistically significant difference in results between groups, a p-value is shown. As a rule of thumb in statistics, a researcher wants to obtain a p-value that is less than 0.05 in order to be confident that there is a statistically significant difference. A p-value of < 0.05 tells us that we are 95% confident that the results are different not by chance. A p-value of $<.01$ means we are 99% confident that the results are different, and so on. When the results between groups are not statistically different, an ns will be displayed at the top of the table or chart.

- This explanation of statistical significance is a vast over-simplification of fairly complex concept in statistics. To read more about statistical significance and *p-values*, here are some helpful references:
  - https://hbr.org/2016/02/a-refresher-on-statistical-significance
  - https://towardsdatascience.com/p-values-explained-by-data-scientist-f40a746cfc8
  - https://www.dummies.com/education/math/statistics/what-a-p-value-tells-you-about-statistical-data/

Internet Survey Using Two List Sources

Lead List

Prospective customers of 131 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=637

Data collected June 1– July 15, 2020

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=1,499

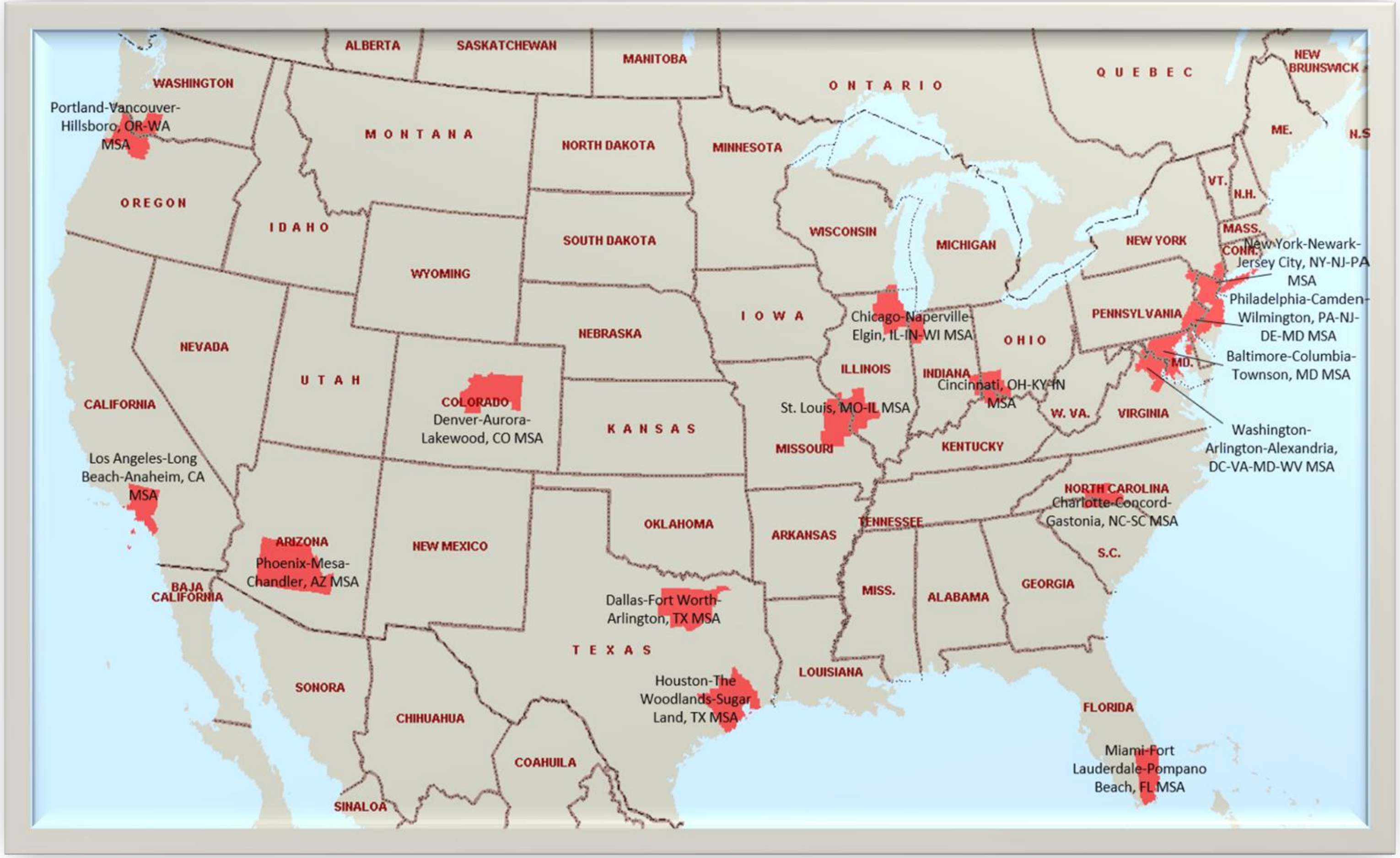
Data collected June 10– June 29, 2020

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 131 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



AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

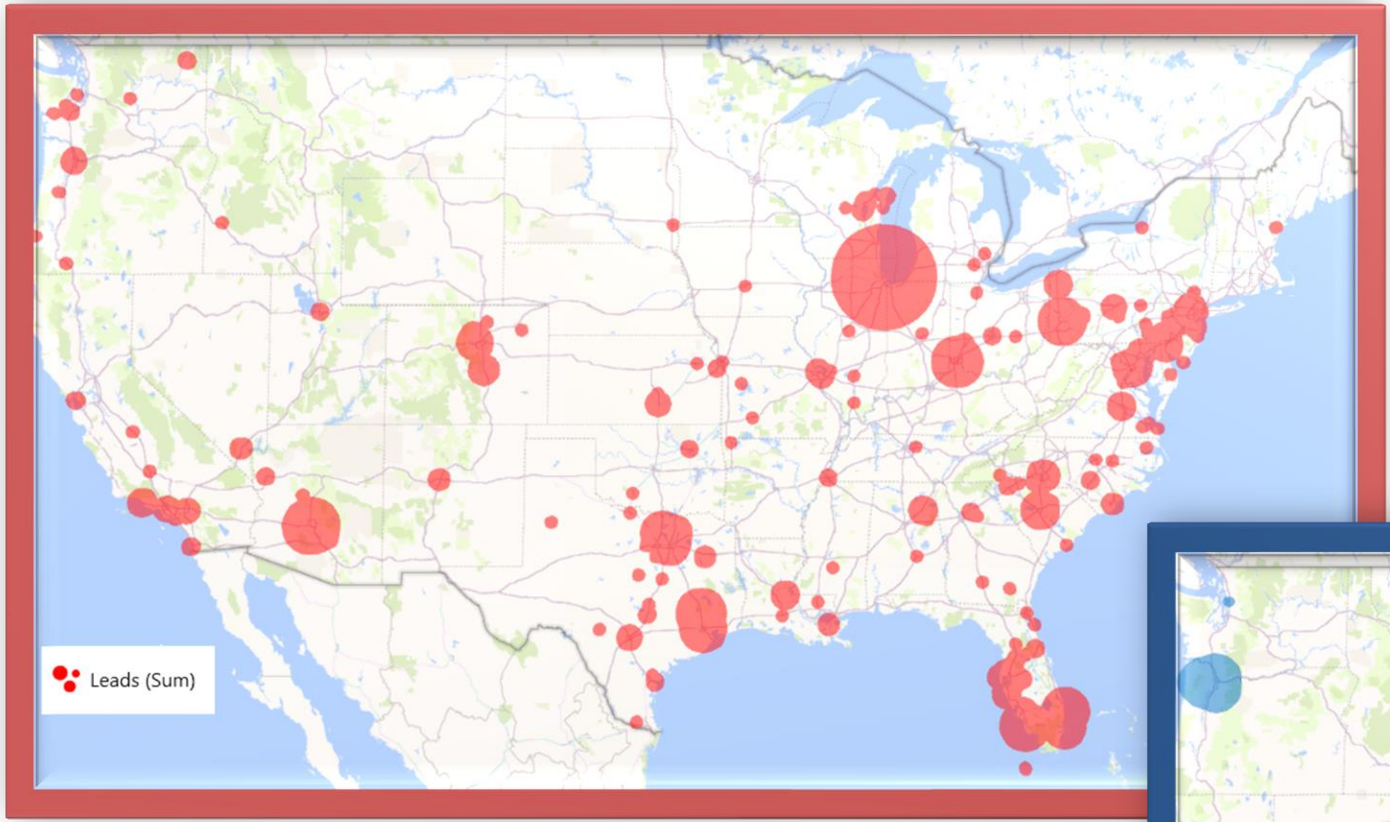
Participating Communities

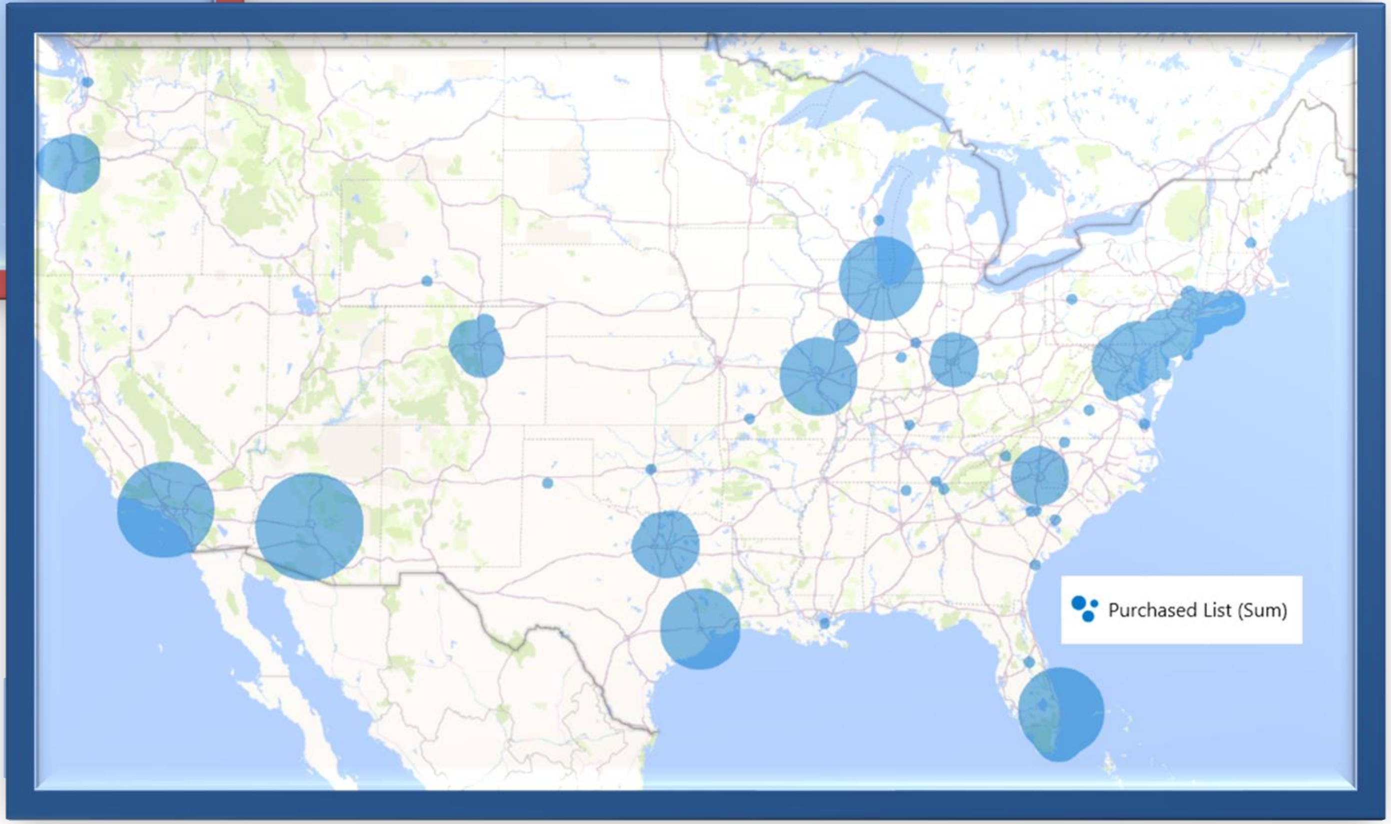
One hundred thirty-one communities representing four ASHA Member companies participated in the current study. The communities were located in 30 states across the country.

The participating communities varied by level of care they offered. The largest proportion (35%) were AL/MC communities, and 18% 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	7	5%
IL/AL	13	10%
IL/AL/MC	21	16%
Freestanding AL	13	10%
AL/MC	45	35%
Freestanding MC	24	18%
CCRC	8	6%
Total	**131**	**100%**

Location of Survey Participants





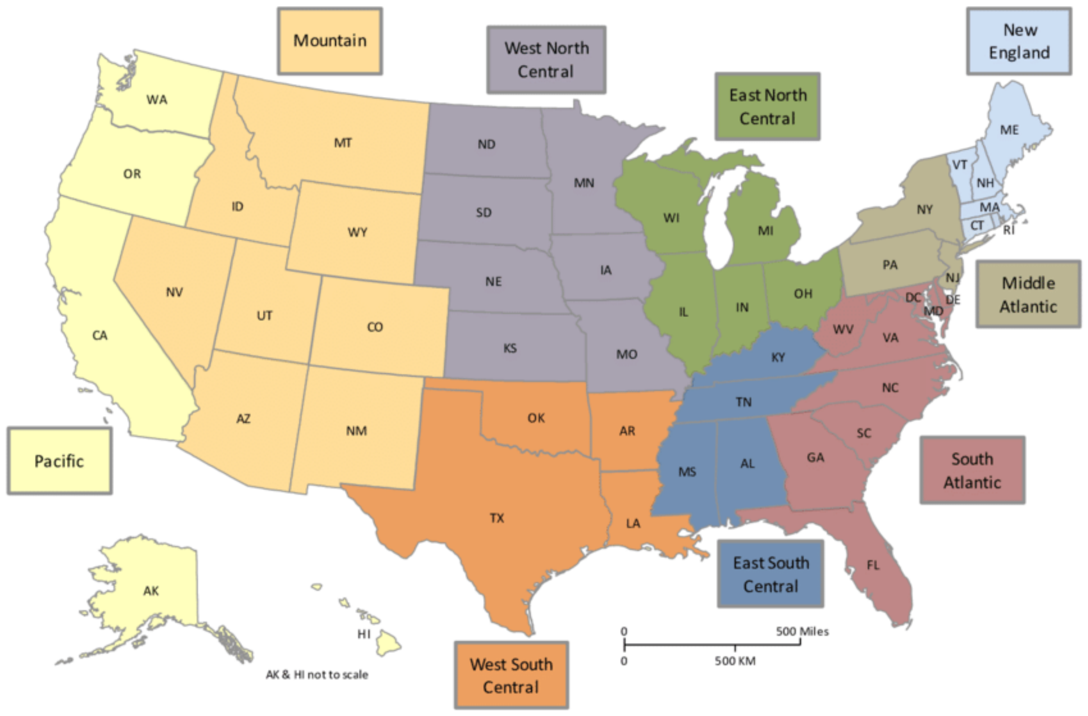
AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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. Six hundred thirty-seven leads participated in the survey.

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

	Lead List		Purchased List	
Census Region	Count	Percent	Count	Percent
East North Central	143	22%	182	12%
East South Central	13	2%	15	1%
Middle Atlantic	68	11%	198	13%
Mountain	60	9%	192	13%
New England	1	0%	1	0%
Pacific	40	6%	202	13%
South Atlantic	164	26%	406	27%
West North Central	22	3%	83	6%
West South Central	100	16%	200	13%
Refused to disclose location	26	4%	20	1%
Total	**637**	**100%**	**1,499**	**100%**

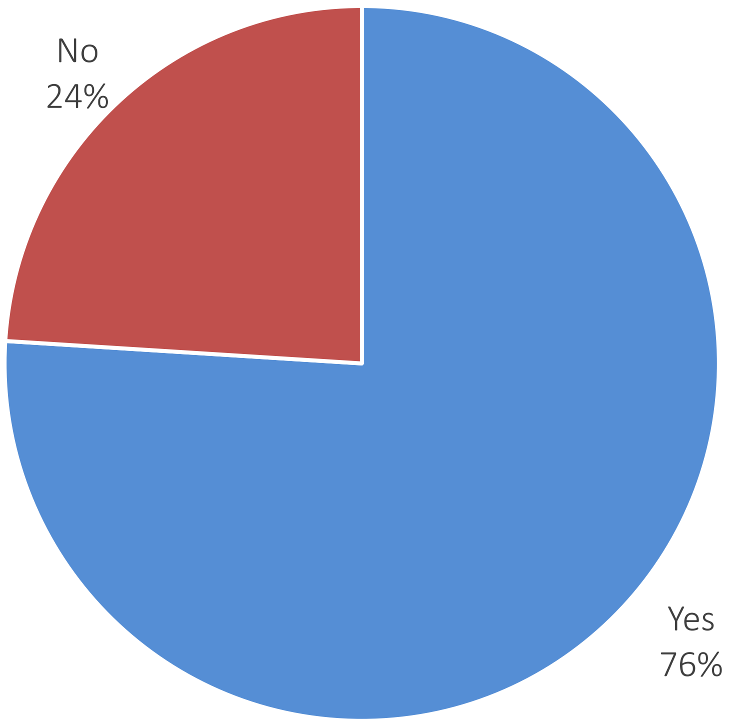
AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

Characteristics of Respondents
Currently Shopping for a Community

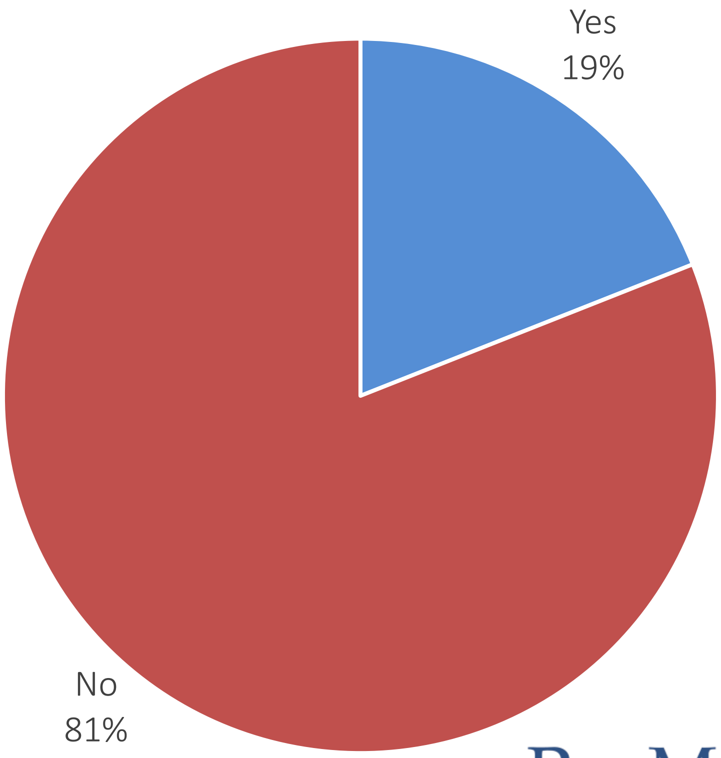
Just over three fourths of households from the Lead List have been actively shopping for a seniors housing community in the past year compared to 19% of household on the Purchased List.

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

p<.001



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



AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

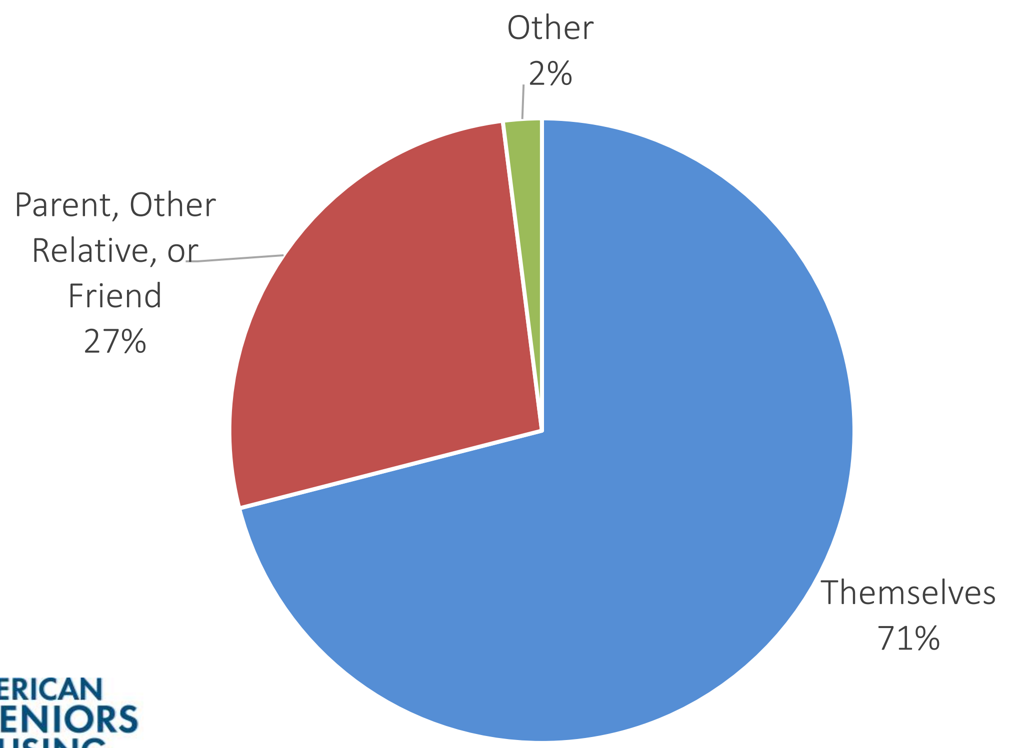
ProMatura

Characteristics of Respondents
For Whom They Are Shopping

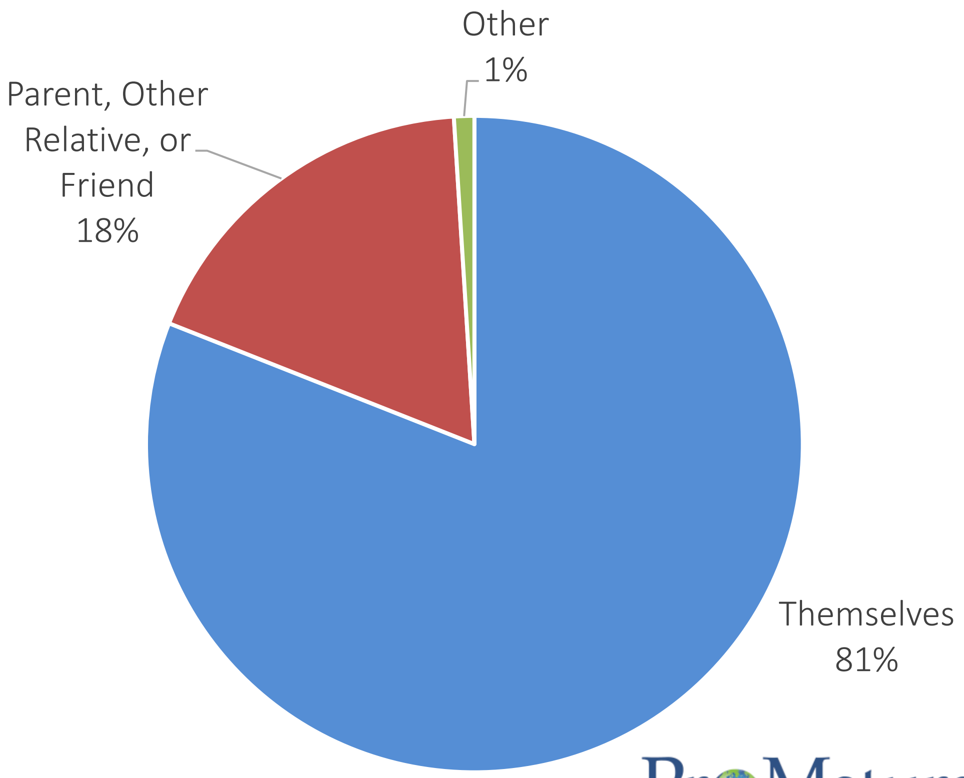
The majority of Leads and households on the Purchased List were shopping for themselves (and/or for a spouse).

p<.001

Percent of Lead List by for Whom They Are Shopping



Percent of Purchased List by for Whom They Are Shopping

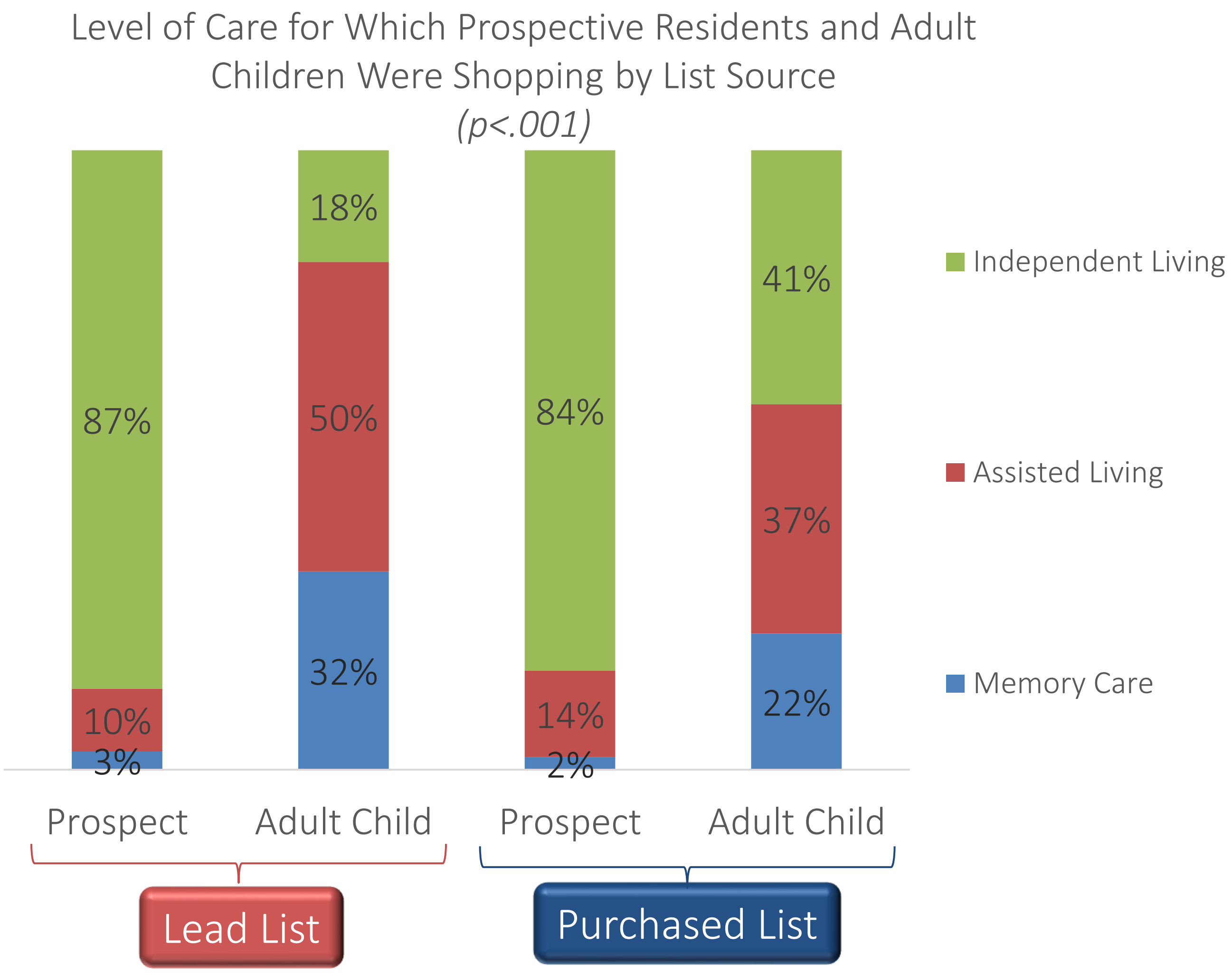


AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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.

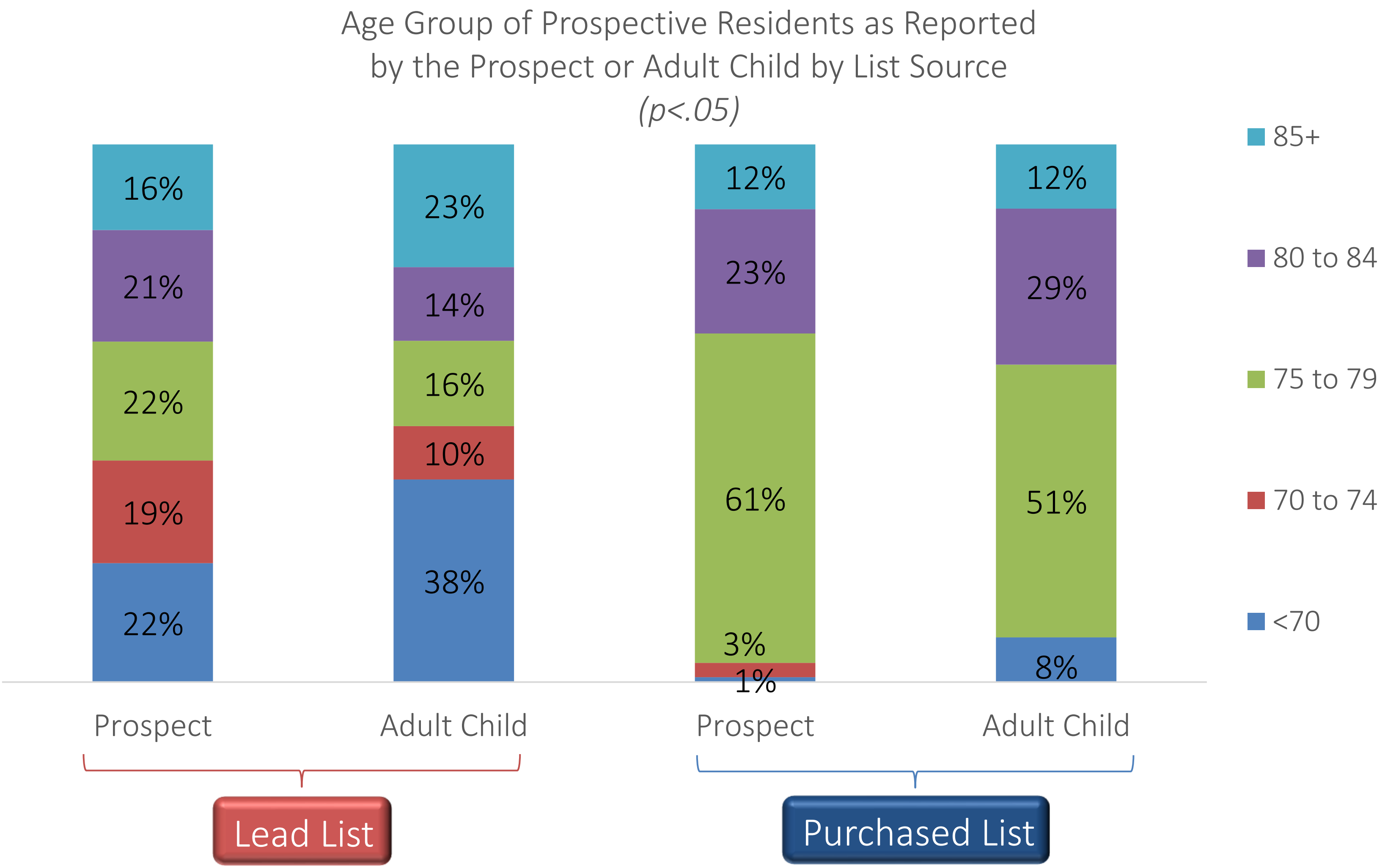


Characteristics of Respondents
Age of Prospective Residents

Thirty-eight 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 (22%)*.

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.

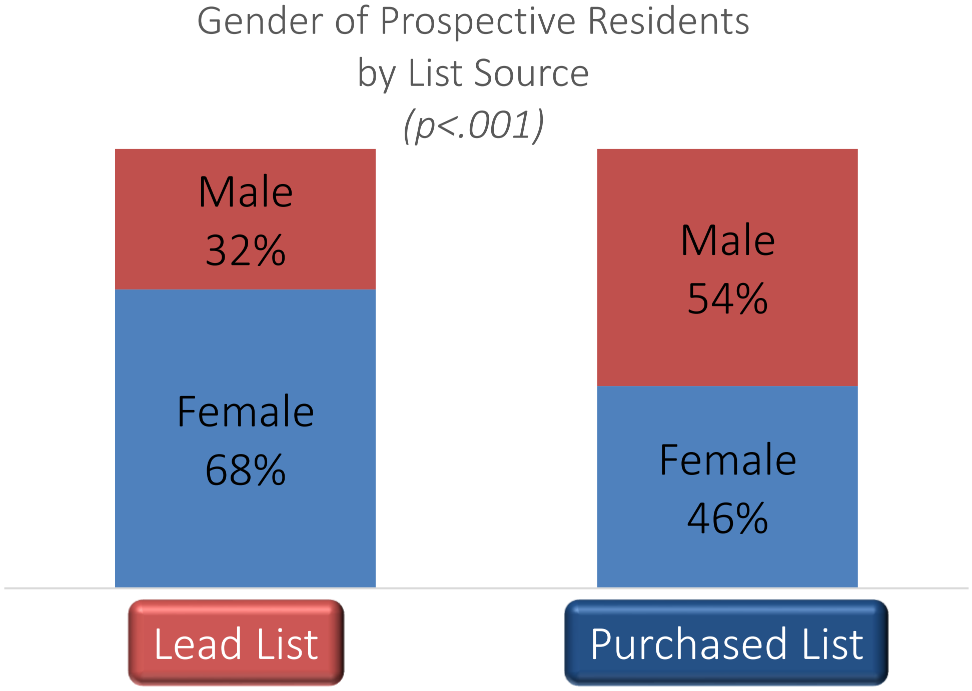
*Note: Adult children were asked to answer all demographic questions on behalf of their parent or loved one, but it is possible that some may have inadvertently missed this instruction and answered about themselves instead.

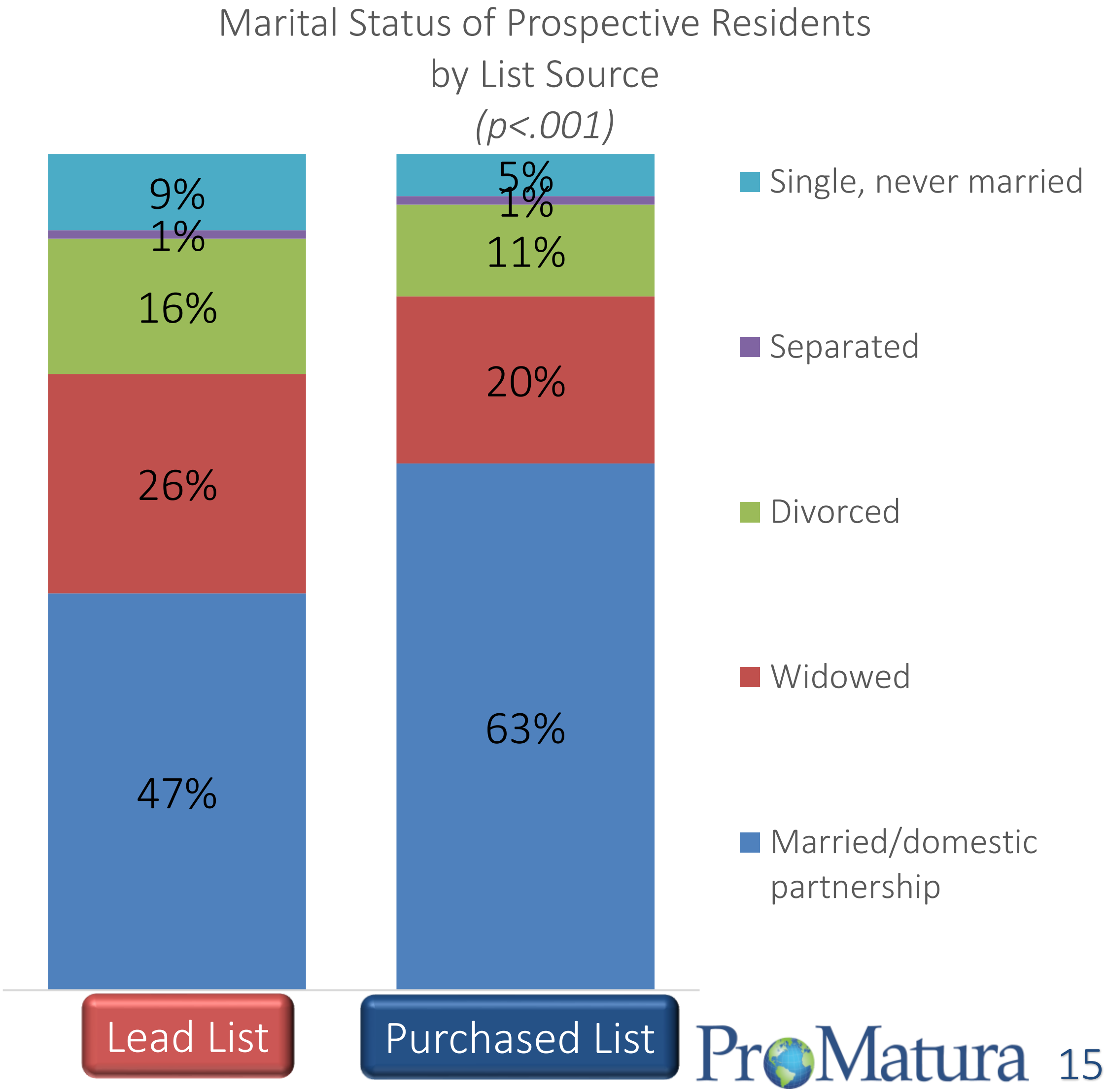


Characteristics of Respondents
Gender and Marital Status of Prospective Residents

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.



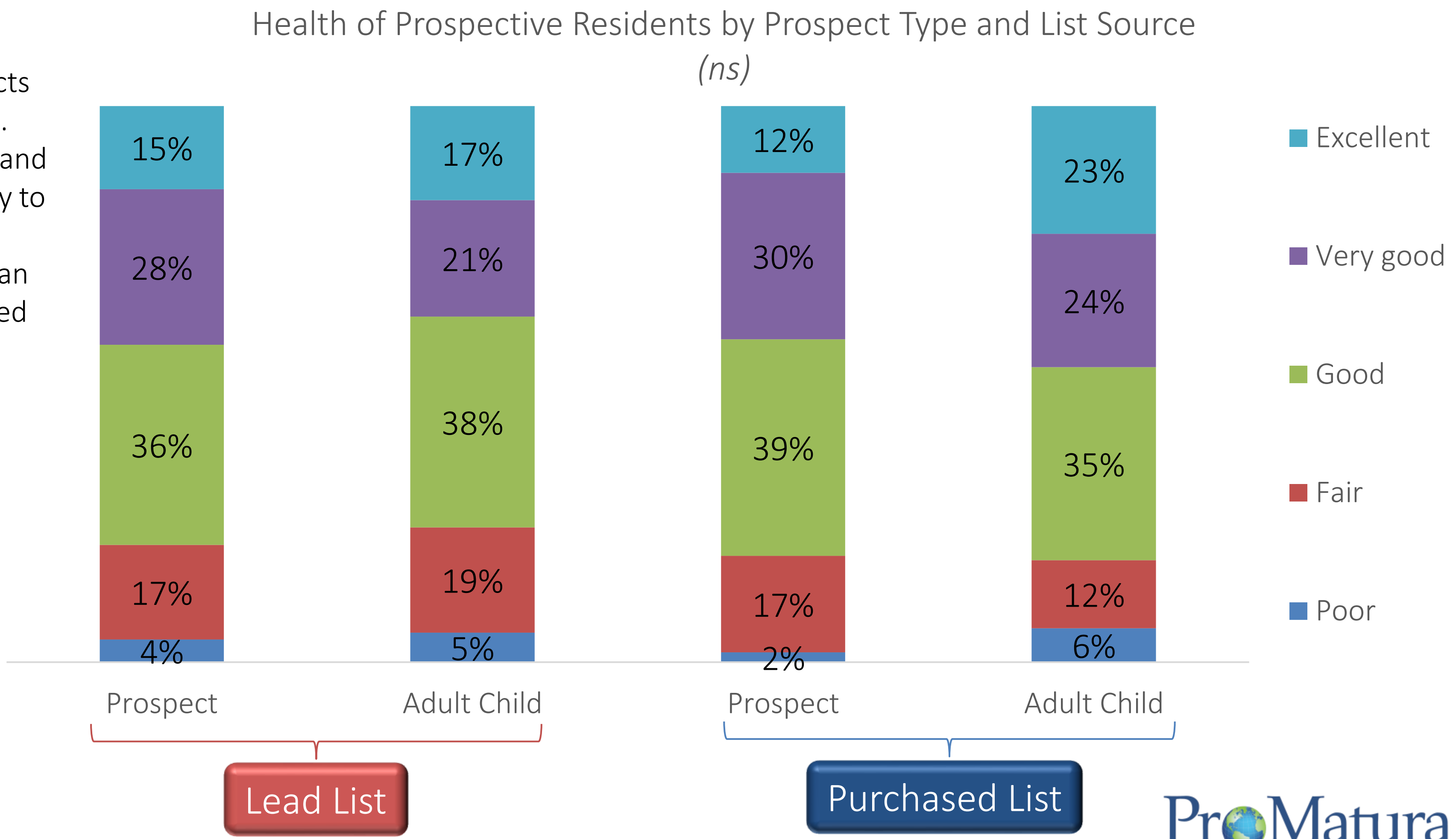


AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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.

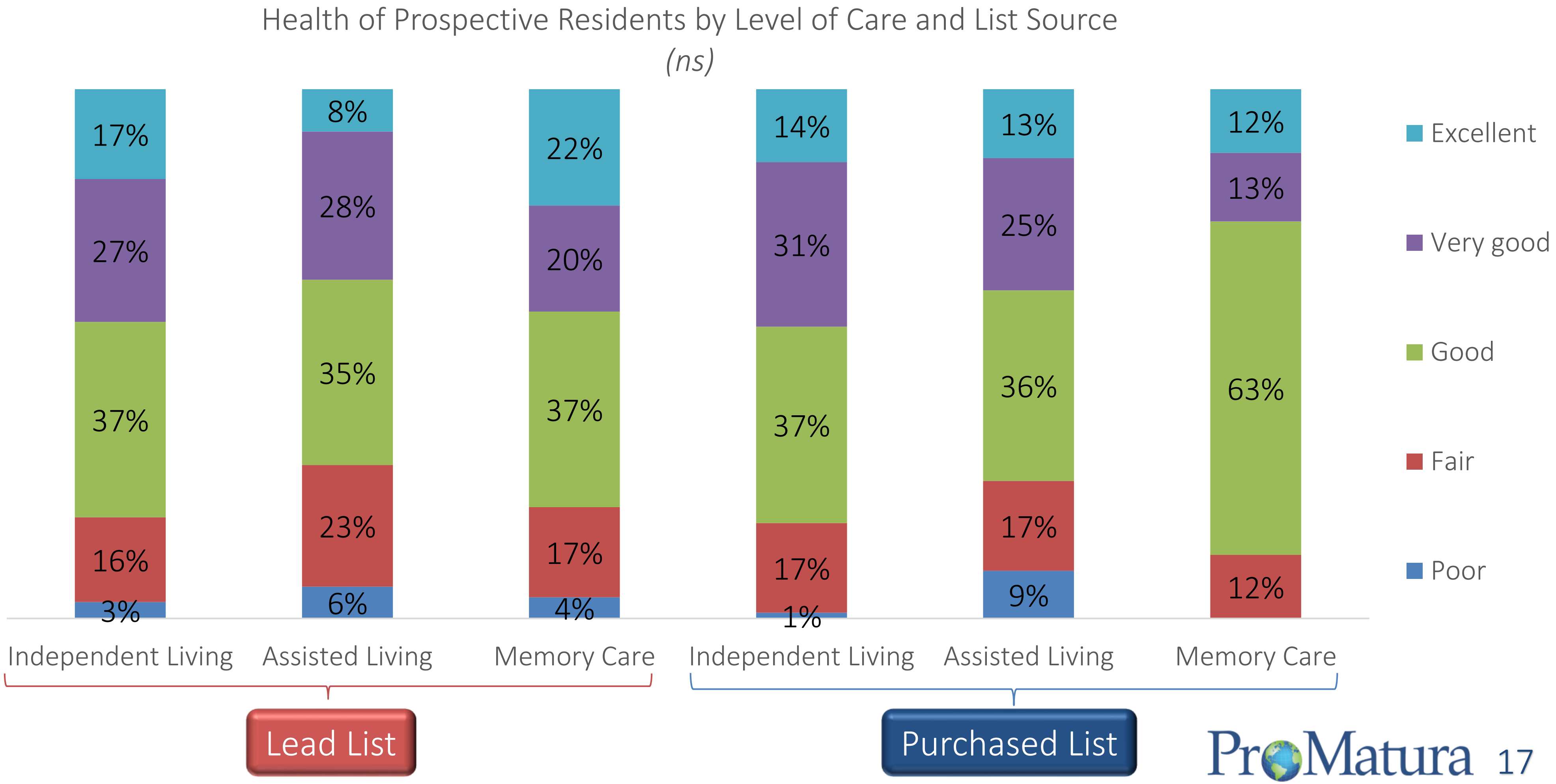


AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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.



AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

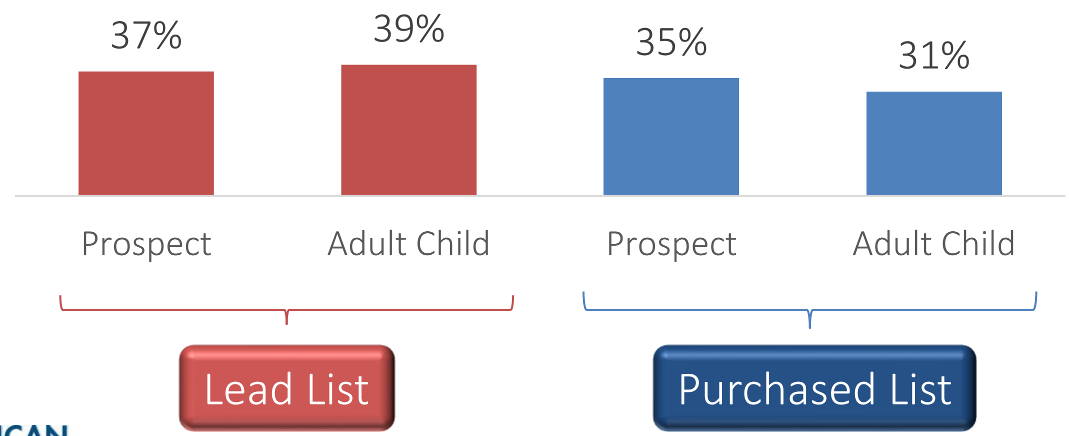
ProMatura

Characteristics of Respondents
Impairments or Health Problems of Prospective Residents

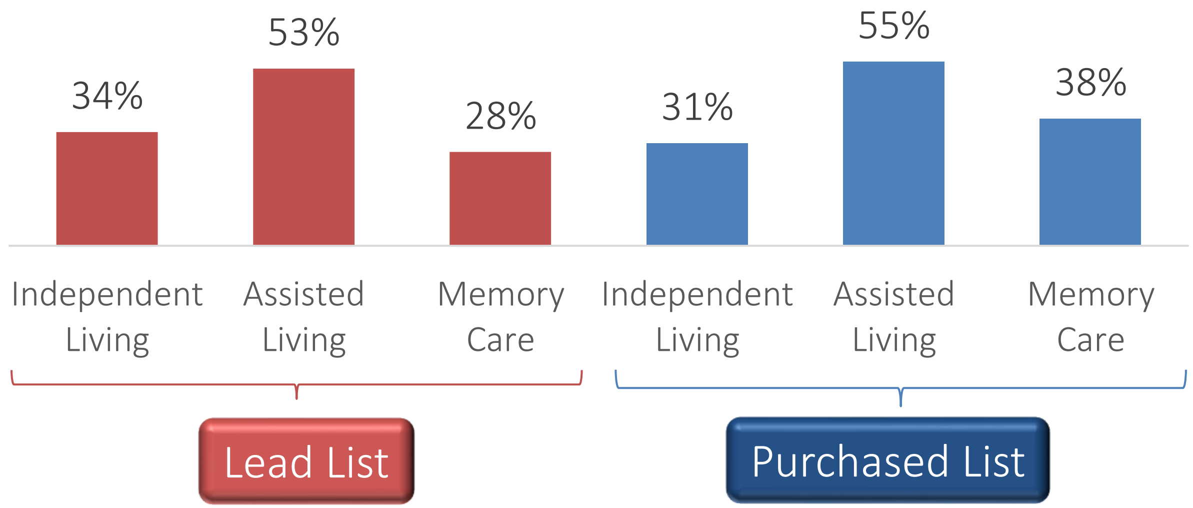
While similar proportions of prospects and adult children from the Lead List reported having an impairment or health problem, prospects from the Purchased List were slightly more likely to report having an impairment or health problem than were adult children responding for a parent or loved one.

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
(ns)



Percentage of Prospective Residents With an Impairment or Health Problem by Level of Care and List Source
(p<.01)



Characteristics of Respondents
Total Household Income of Prospective Residents

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 57% 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.

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

	Lead List *(ns)*		Purchased List *(p<.001)*	
	Prospect	**Adult Child**	**Prospect**	**Adult Child**
Less than $10,000	2%	1%	1%	6%
$10,000 to $14,999	3%	3%	1%	2%
$15,000 to $24,999	9%	5%	5%	2%
$25,000 to $34,999	10%	13%	1%	12%
$35,000 to $49,999	17%	12%	11%	14%
$50,000 to $74,999	26%	18%	26%	8%
$75,000 to $99,999	16%	21%	18%	16%
$100,000 to $149,999	9%	18%	20%	18%
$150,000 to $199,999	4%	4%	10%	14%
$200,000 or more	3%	5%	7%	6%
Total	**100%**	**100%**	**100%**	**100%**

59%

57%

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. *(ns)*

86%

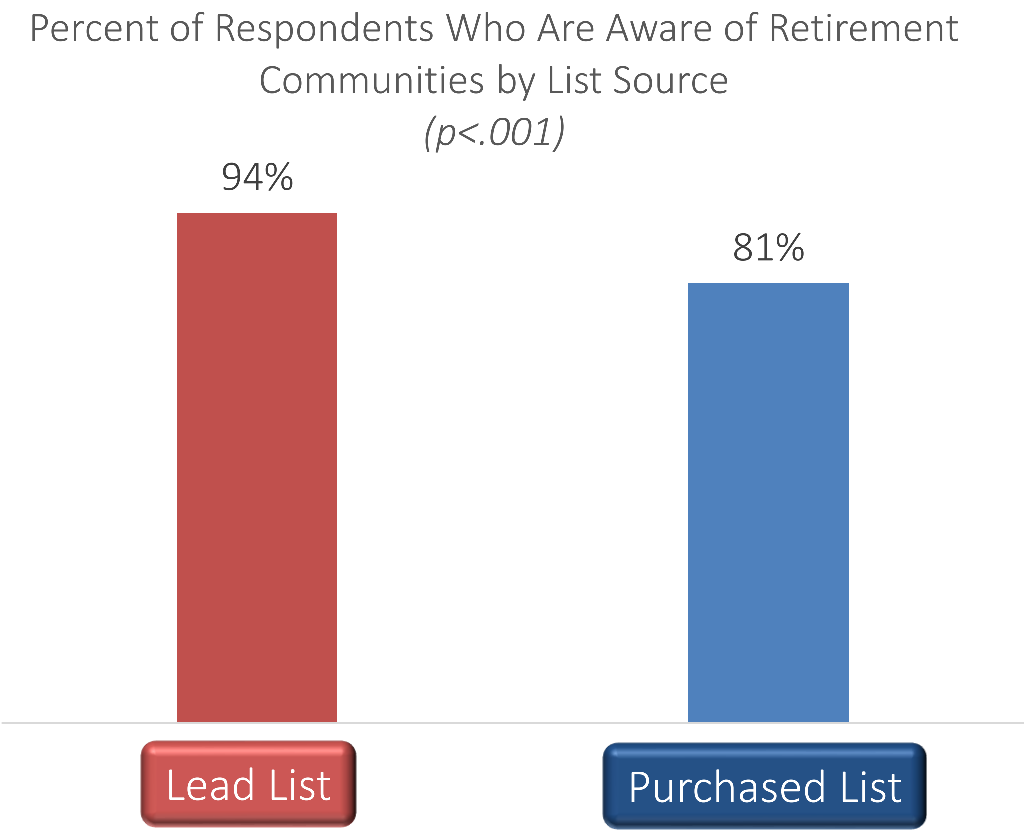
of the Prospective Residents on the Purchased List owned their current home. *(p<.05)*

Home Value of Prospective Residents by Prospect Type and List Source

	Lead List *(ns)*		**Purchased List** *(ns)*	
	Prospect	**Adult Child**	**Prospect**	**Adult Child**
Less than $150,000	14%	11%	8%	4%
$150,000 to $199,999	9%	9%	11%	7%
$200,000 to $249,999	16%	12%	9%	12%
$250,000 to $299,999	13%	16%	10%	12%
$300,000 to $349,999	11%	3%	7%	12%
$350,000 to $399,999	12%	13%	10%	15%
$400,000 to $499,999	10%	13%	15%	10%
$500,000 to $749,999	11%	15%	19%	15%
$750,000 to $999,999	3%	7%	5%	3%
$1,000,000 or more	2%	1%	6%	9%
Total	**100%**	**100%**	**100%**	**100%**

Awareness of Retirement Communities

Nearly all households on the Lead List and 81% 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.

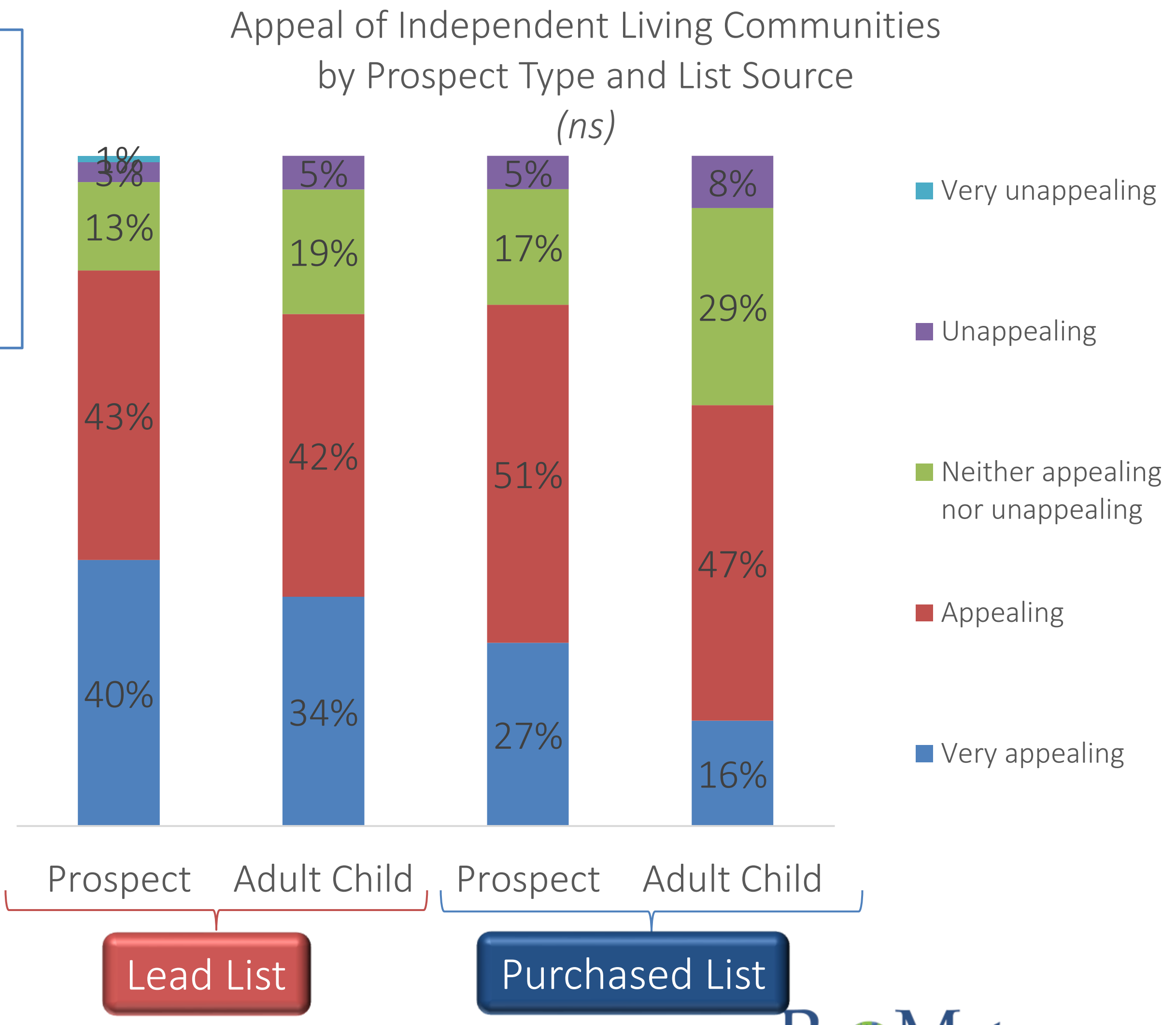


Appeal of Independent Living Communities

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.



AMERICAN SENIORS HOUSING ASSOCIATION Living Longer Better

ProMatura

Why Survey Respondents Find Independent Living Unappealing

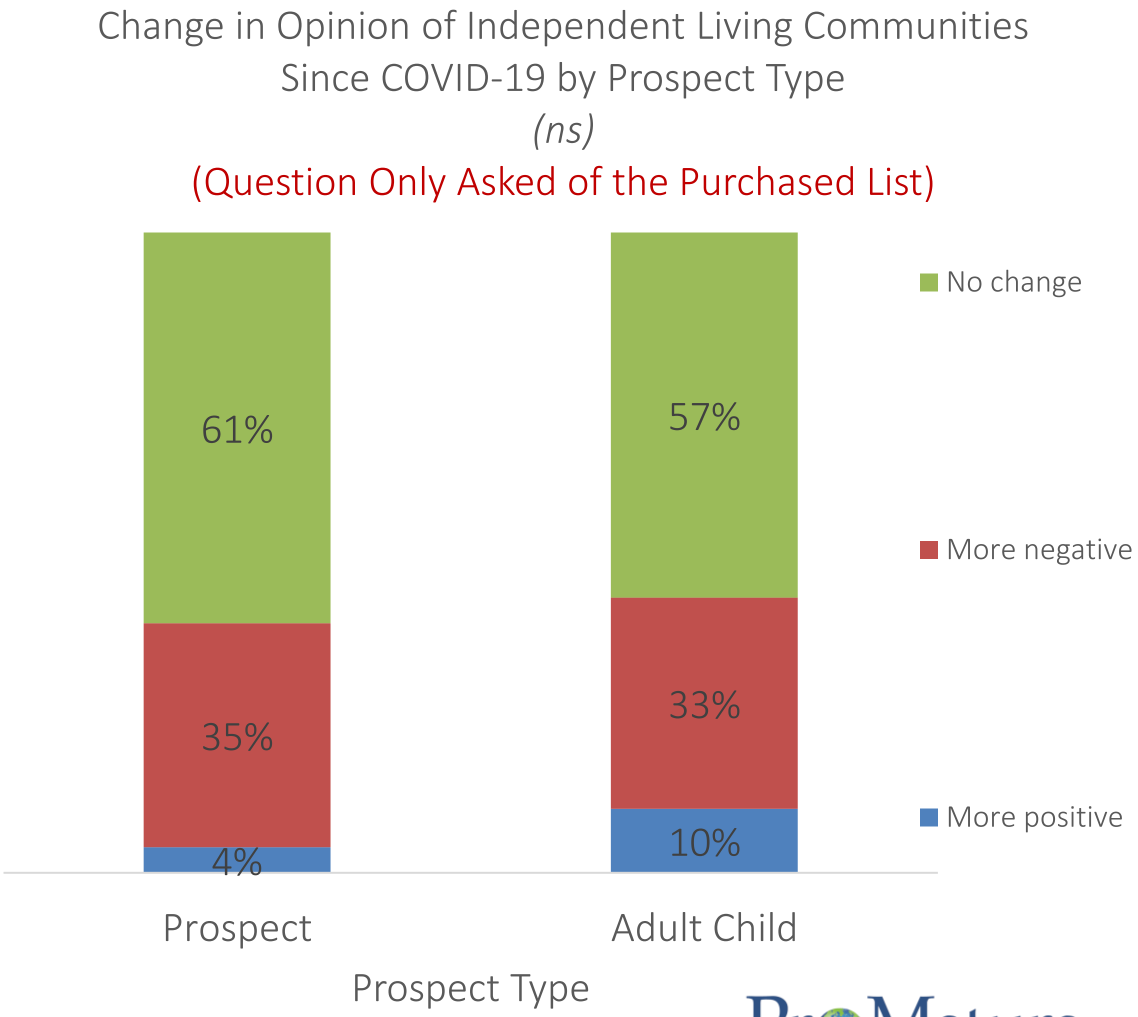
Survey respondents who rated independent living communities "unappealing" or "very unappealing" were asked the reason for their negative opinion. Their open-ended responses are listed in the adjacent table. Greater numbers of survey respondents mentioned wanting to stay in their current home or preferring to live among all age groups.

Why Survey Respondents Find Independent Living Unappealing

Comment	Count
Want to stay in my/our current home	83
Prefer to live among all ages/too many old people in these communities	55
Too expensive	32
Do not care for that lifestyle	31
Not ready /no need	31
Risk for COVID-19 spread	28
I like my freedom/independence too much	26
Too many rules/restrictions	25
Bad experience of friend/family member	14
Lack of privacy	7
High number of COVID-19 deaths	3
Can't have my pets	3
Too crowded	2
Too institutional	1

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.



Why More Positive Opinion of IL Since COVID-19 Pandemic

Survey respondents who indicated that their opinion of independent living communities is more ***positive*** now than it was prior to the COVID-19 pandemic were asked the reason for their change in opinion. Their open-ended responses are listed in the adjacent table. The most frequently provided reason for the positive change in opinions is that independent living communities are better equipped and/or prepared to handle COVID-19.

Why More Positive Opinion of IL Since COVID-19 Pandemic
(Question Only Asked of the Purchased List)

Comment	Count
They are better equipped/prepared to handle COVID-19	11
Social opportunities provided	8
Safety and security provided	5
Meals provided when you can't get to the store/cook	1

Why More Negative Opinion of IL Since COVID-19 Pandemic

Survey respondents who indicated that their opinion of independent living communities is more ***negative*** now than it was prior to the COVID-19 pandemic were asked the reason for their change in opinion. Their open-ended responses are listed in the adjacent table. The most frequently provided reasons for the negative change in opinions is that independent living communities have high numbers of COVID-19 cases and high death rates from the virus.

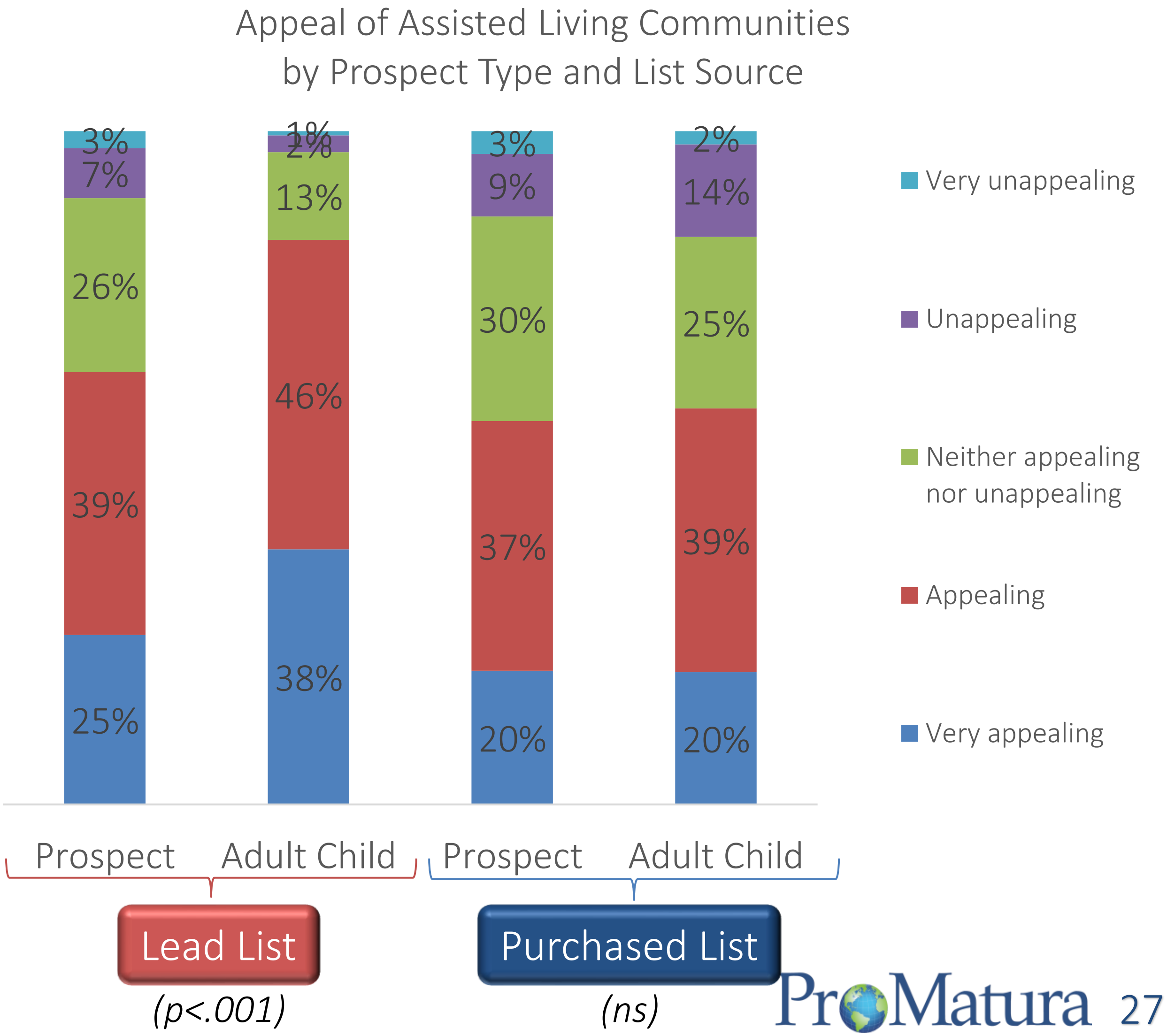
Why More Negative Opinion of IL Since COVID-19 Pandemic
(Question Only Asked of the Purchased List)

Comment	Count
High number of COVID-19 cases	107
High death rate from COVID-19	102
The risk of contacting COVID-19 in group living	68
Would not like being confined to apartment/unit 24/7	42
Many communities failed to protect their residents	29
I am safer in my own home	7
Too many rules and regulations	5
Negative news reports/Bad press	4
Understaffed	3
Unclean	1

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.



Why Survey Respondents Find Assisted Living Unappealing

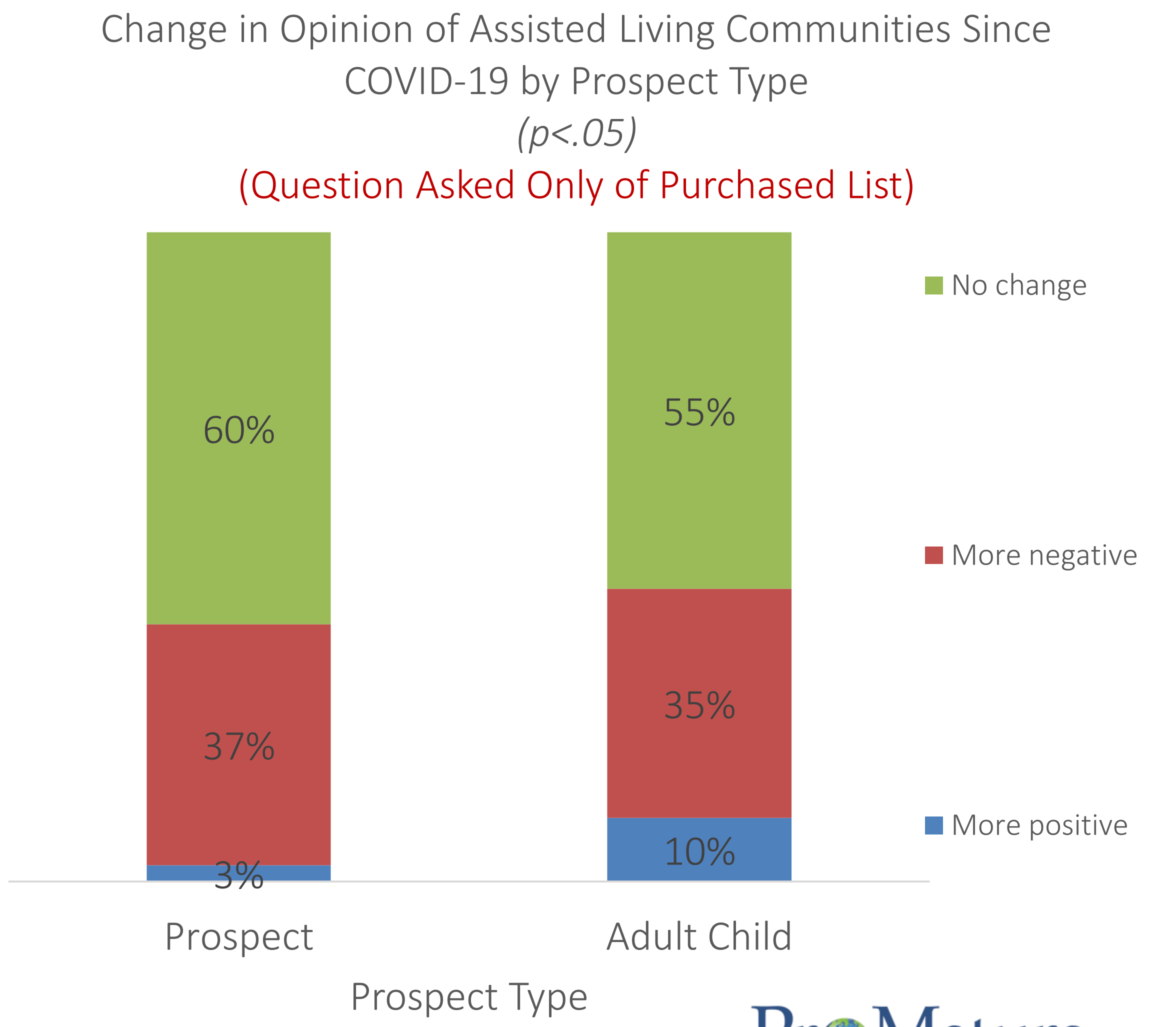
Survey respondents who rated assisted living communities "unappealing" or "very unappealing" were asked the reason for their negative opinion. Their open-ended responses are listed in the adjacent table. Greater numbers of survey respondents mentioned not needing any of the services provided by assisted living communities, or wanting to stay in their current home.

Why Survey Respondents Find Assisted Living Unappealing

Comment	Count
Do not need those services	70
Want to stay in my/our home	58
I like my independence	43
Costs too much	37
Retirement community living is not appealing to me	32
High risk of contacting COVID-19	28
Bad experience of friends/family member	22
Prefer to live among all ages/too many old people in these communities	13
Because of the high number of COVID-19 cases	11
Quality of care questionable	11
High death rate from COVID-19	10
Negative stories on news about how outbreaks were handled	5
Depressing	4
Lack of privacy	2
Can't have my pet(s)	2

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.



AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Why More Positive Opinion of AL Since COVID-19 Pandemic

Survey respondents who indicated that their opinion of assisted living communities is more ***positive*** now than it was prior to the COVID-19 pandemic were asked the reason for their change in opinion. Their open-ended responses are listed in the adjacent table. The most frequently provided reason for the positive change in opinions is that assisted living communities are using new policies and procedures to keep residents safe during the pandemic.

Why More Positive Opinion of AL Since COVID-19 Pandemic
(Question Only Asked of the Purchased List)

Comment	Count
Communities are using proper new procedures to keep residents healthy/avoid spread of COVID-19	9
Increasing age/need for help	3
Social opportunities provided	2
Have become more information about assisted living	1

Why More Negative Opinion of AL Since COVID-19 Pandemic

Survey respondents who indicated that their opinion of assisted living communities is more ***negative*** now than it was prior to the COVID-19 pandemic were asked the reason for their change in opinion. Their open-ended responses are listed in the adjacent table. The most frequently provided reason for the negative change in opinions is that assisted living communities are considered COVID-19 "hot spots."

Why More Negative Opinion of AL Since COVID-19 Pandemic
(Question Only Asked of the Purchased List)

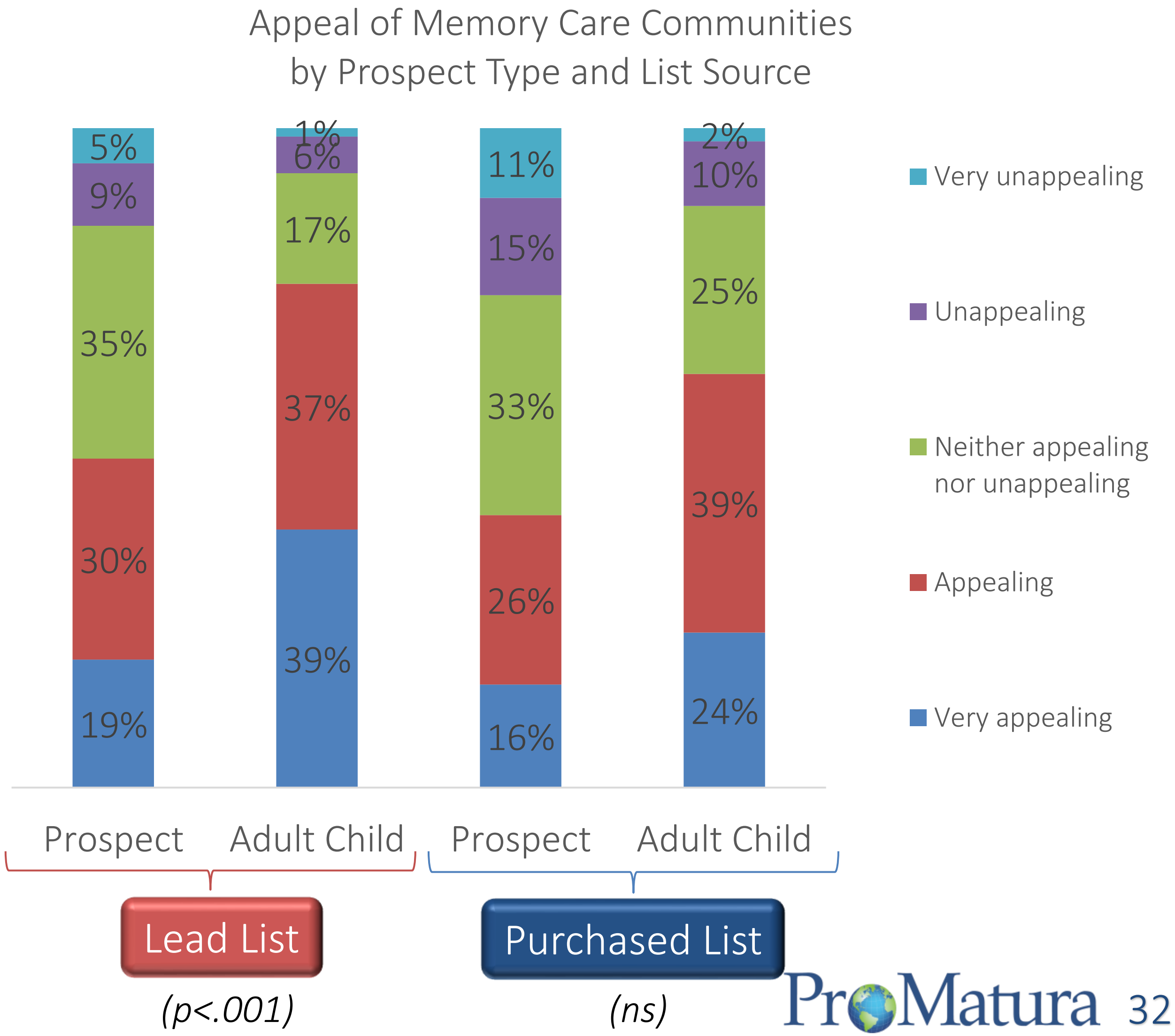
Comment	Count
COVID-19 hot spots	161
High number of COVID-19 deaths	81
Too congested for social distancing	40
Residents are isolated from loved ones	32
Communities not equipped to properly deal with an outbreak	26
Residents treated badly/had poor care during COVID-19 outbreak	7
Negative news reports/Bad press	6
Residents forced to stay in their apartments/units	2
Unclean	1

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.



Why Survey Respondents Find Memory Care Unappealing

Survey respondents who rated memory care communities “unappealing” or “very unappealing” were asked the reason for their negative opinion. Their open-ended responses are listed in the adjacent table. The majority survey respondents who find memory care unappealing or very unappealing mentioned not needing any of the services provided by memory care communities.

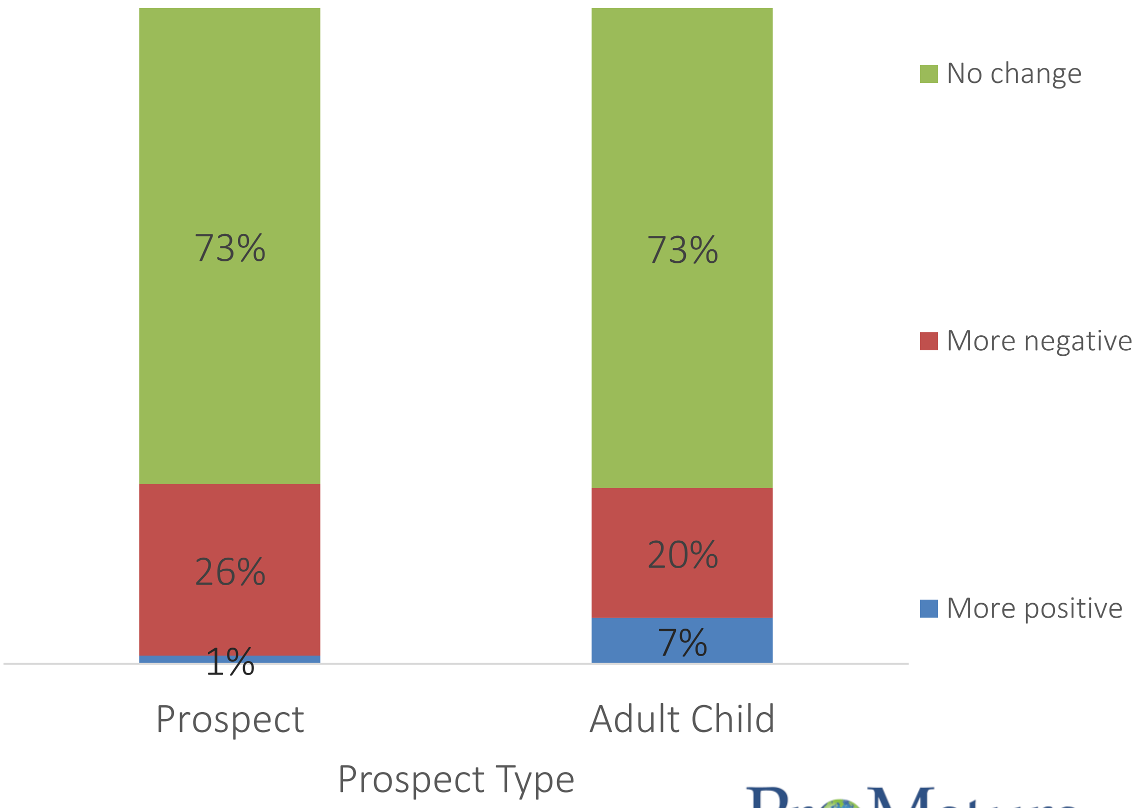
Why Survey Respondents Find Memory Care Unappealing

Comment	Count
Do not need those services	152
High risk of contacting COVID-19	38
Depressing atmosphere	30
Bad experience with family member who was in MC	26
Don't know much about them	22
Negative news reports/Bad press	20
Lose all independence	13
Too expensive	10
Isolation from loved ones	9
It is not living, it is existing	5
High death rate from COVID-19	3
Too depressing	1

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
(p<.05)
(Question Asked Only of the Purchased List)



Why More Positive Opinion of MC Since COVID-19 Pandemic

Survey respondents who indicated that their opinion of memory care communities is more ***positive*** now than it was prior to the COVID-19 pandemic were asked the reason for their change in opinion. Their open-ended responses are listed in the adjacent table. The most frequently provided reason for the positive change in opinions is that memory care communities have put policies in place to protect their residents from COVID-19.

Why More Positive Opinion of MC Since COVID-19 Pandemic
(Question Only Asked of the Purchased List)

Comment	Count
Protocols in place to protect residents from COVID-19	7
A great benefit when the need is there	5
Sense of safety and security provided	3
Because I have found more information on these over past few months	1
Family member had a good experience there	1
Superior level of care provided	1
Tested all patients for COVID-19 when it started	1

Why More Negative Opinion of MC Since COVID-19 Pandemic

Survey respondents who indicated that their opinion of memory care communities is more ***negative*** now than it was prior to the COVID-19 pandemic were asked the reason for their change in opinion. Their open-ended responses are listed in the adjacent table. Similar to the results from assisted living, the most frequently provided reason for the negative change in opinions is that memory care communities are considered COVID-19 "hot spots."

Why More Negative Opinion of MC Since COVID-19 Pandemic
(Question Only Asked of the Purchased List)

Comment	Count
COVID-19 hot spots	91
High number of COVID-19 deaths	51
Too congested for social distancing	17
Residents are isolated from loved ones	16
Understaffed	15
Communities not equipped to properly deal with an outbreak	4
Unclean	1

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.

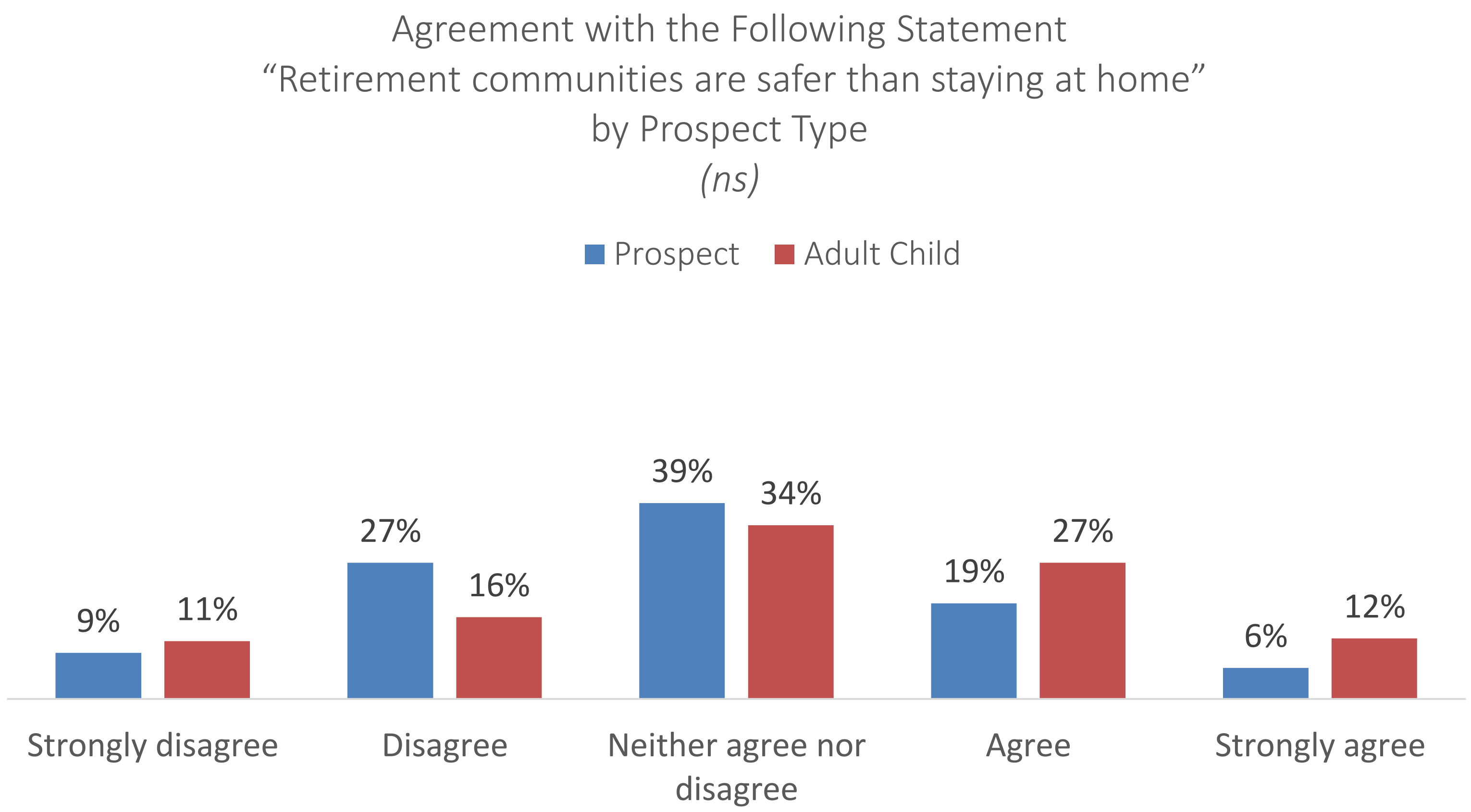
Statement	Response	Lead List	Purchased List
Retirement communities are safer than staying at home. *(p<.001)*	Strongly disagree	9%	14%
	Disagree	20%	27%
	Neither agree nor disagree	36%	40%
	Agree	27%	15%
	Strongly agree	8%	4%
Retirement communities allow one to feel less isolated than they would staying at home. *(p<.001)*	Strongly disagree	2%	6%
	Disagree	7%	13%
	Neither agree nor disagree	24%	29%
	Agree	47%	44%
	Strongly agree	20%	8%
The COVID-19 outbreak has made staying at home a more appealing option than moving to a retirement community. *(p<.001)*	Strongly disagree	1%	3%
	Disagree	9%	6%
	Neither agree nor disagree	30%	25%
	Agree	30%	36%
	Strongly agree	29%	31%
The COVID-19 outbreak has made retirement communities a more appealing option than staying at home. *(p<.001)*	Strongly disagree	20%	30%
	Disagree	35%	37%
	Neither agree nor disagree	35%	28%
	Agree	8%	4%
	Strongly agree	2%	2%

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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.



AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

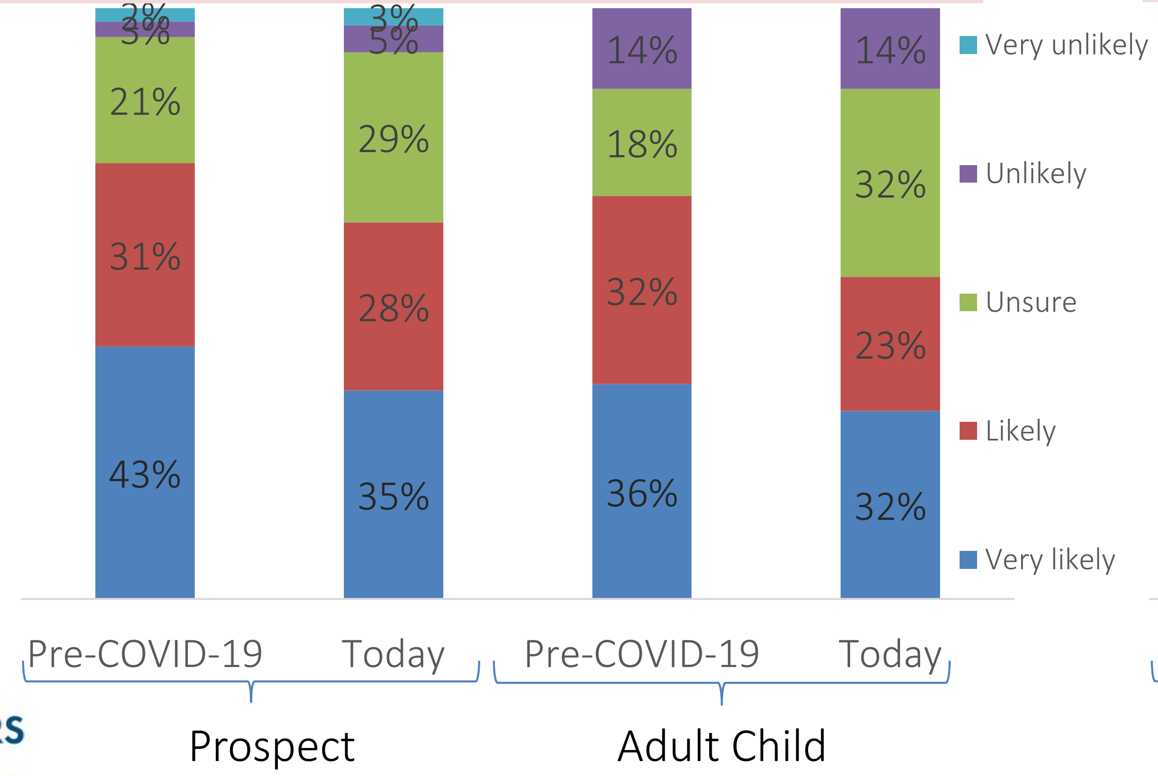
Please Note:

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.

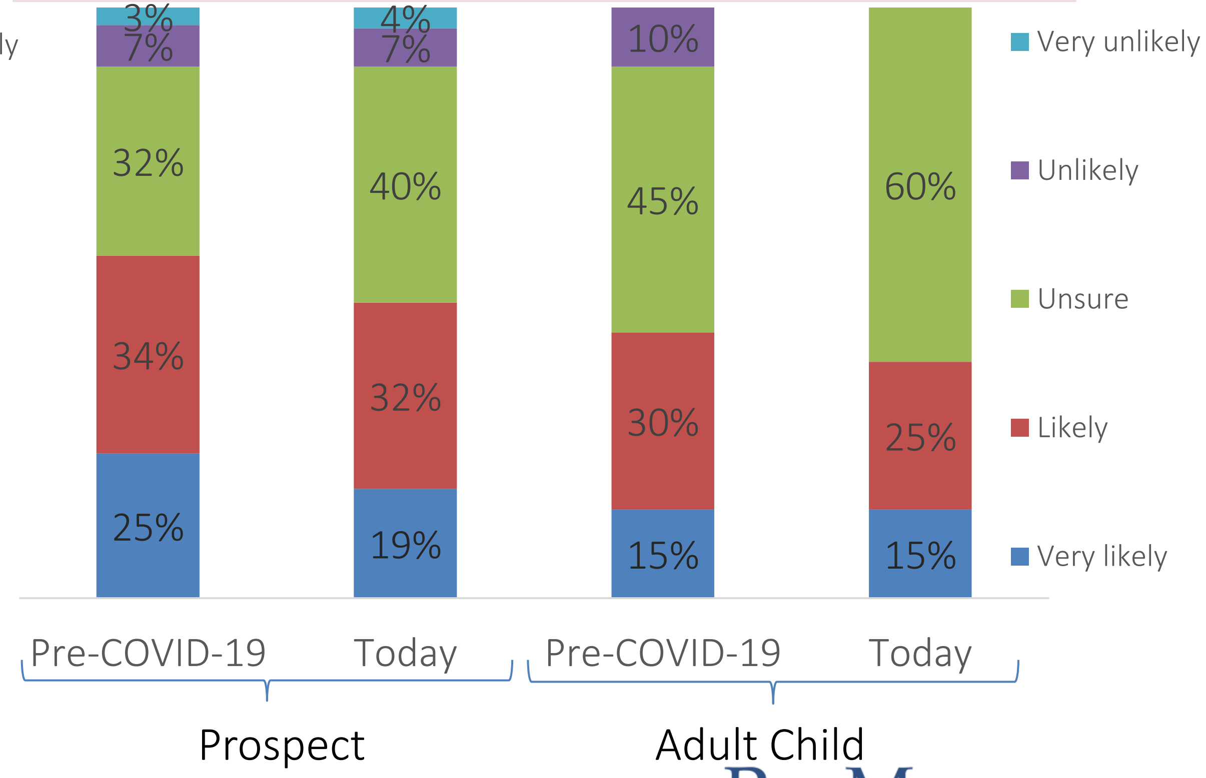
Likelihood of Moving to an IL Community

Today, 35% of independent living prospects from the Lead List and 32% 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 8 percentage points among prospects and 4 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 (n=331, *ns*)



Likelihood of Purchased List Respondents Moving to an Independent Living Community Prior to COVID-19 and Today by Prospect Type (n=220, *ns*)



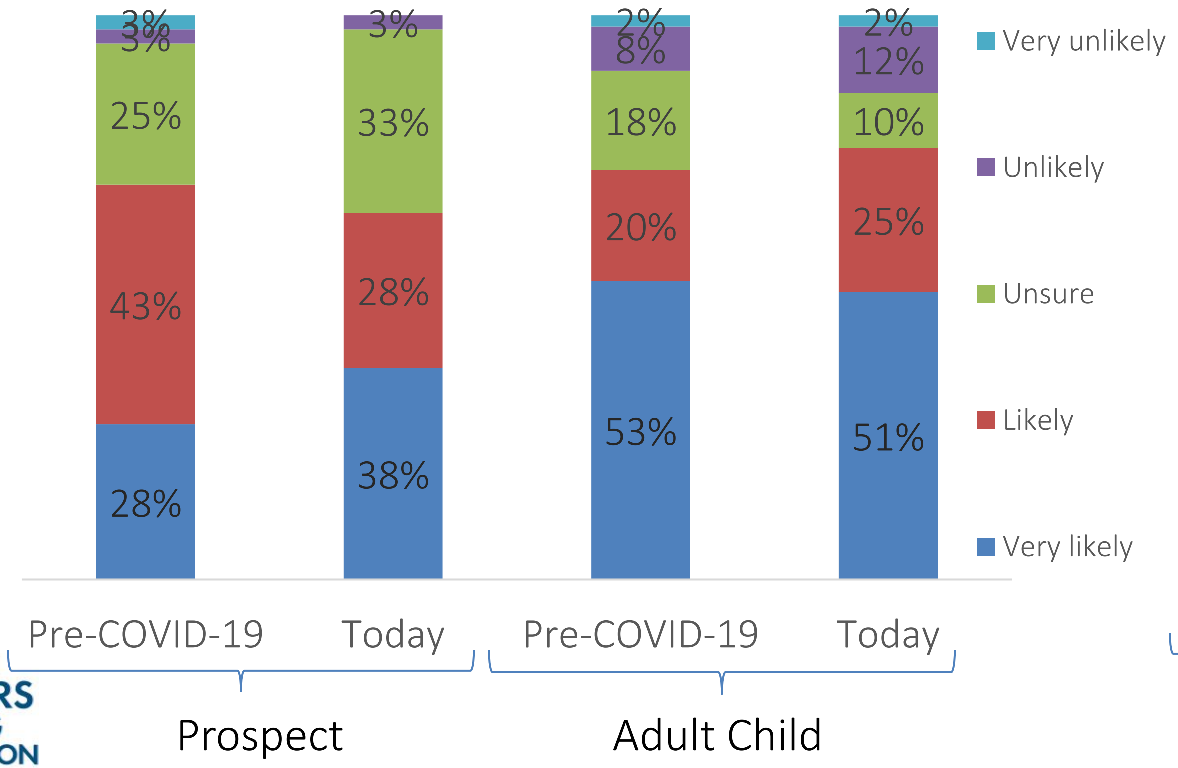
AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

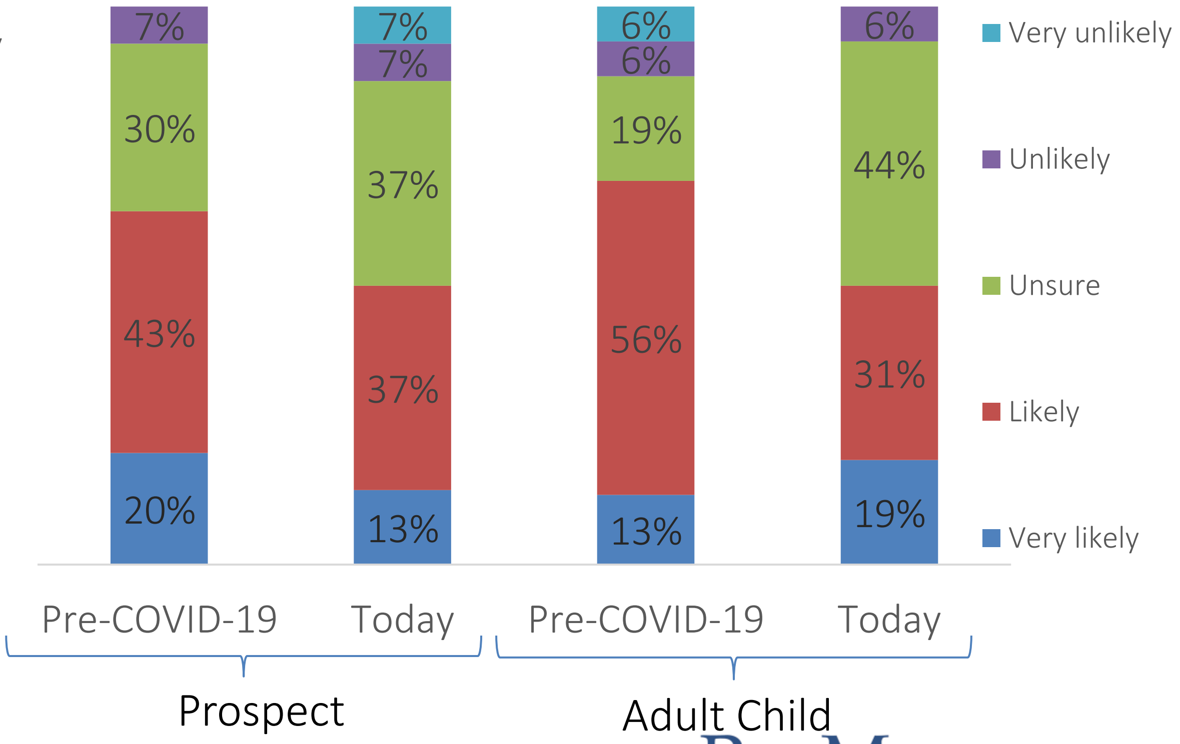
Likelihood of Moving to an AL Community

Thirty-eight percent of assisted living prospects and 51% 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 10 percentage points from pre-COVID among Lead List prospects, and only down 2 percentage points 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 (n=91, *p*<.05)



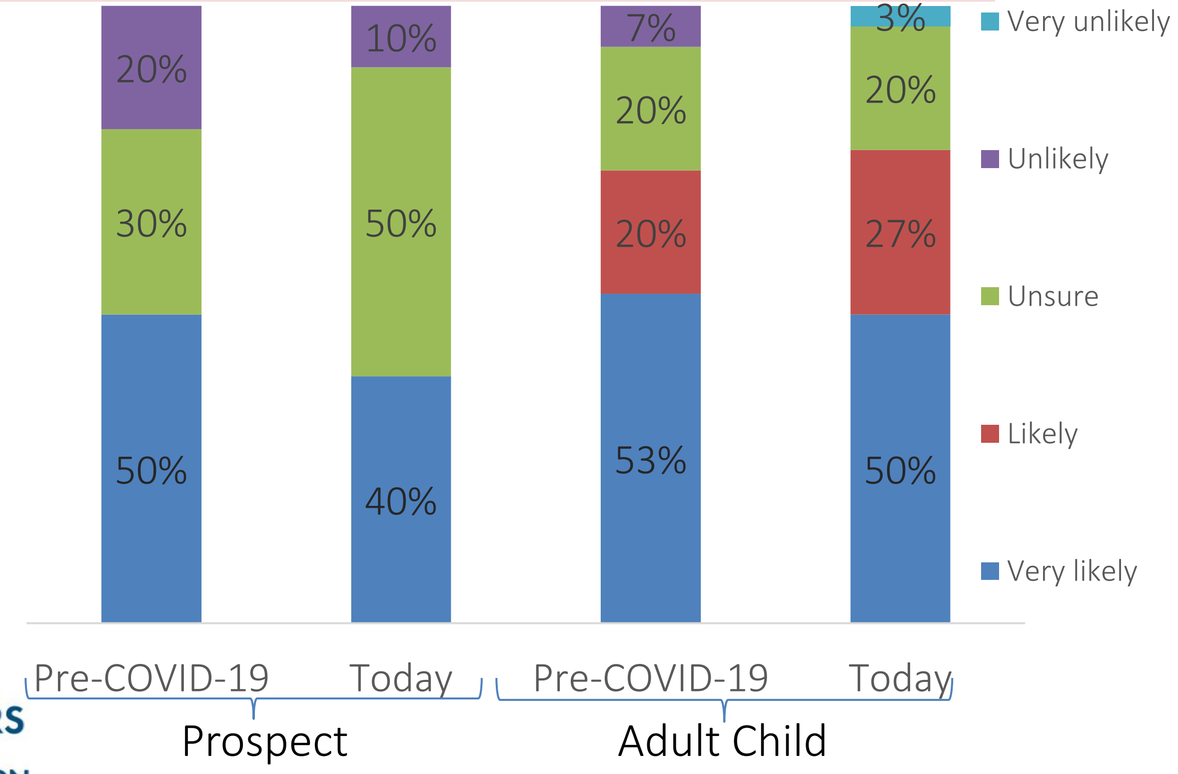
Likelihood of Purchased List Respondents Moving to an Assisted Living Community Prior to COVID-19 and Today by Prospect Type (n=46, *ns*)



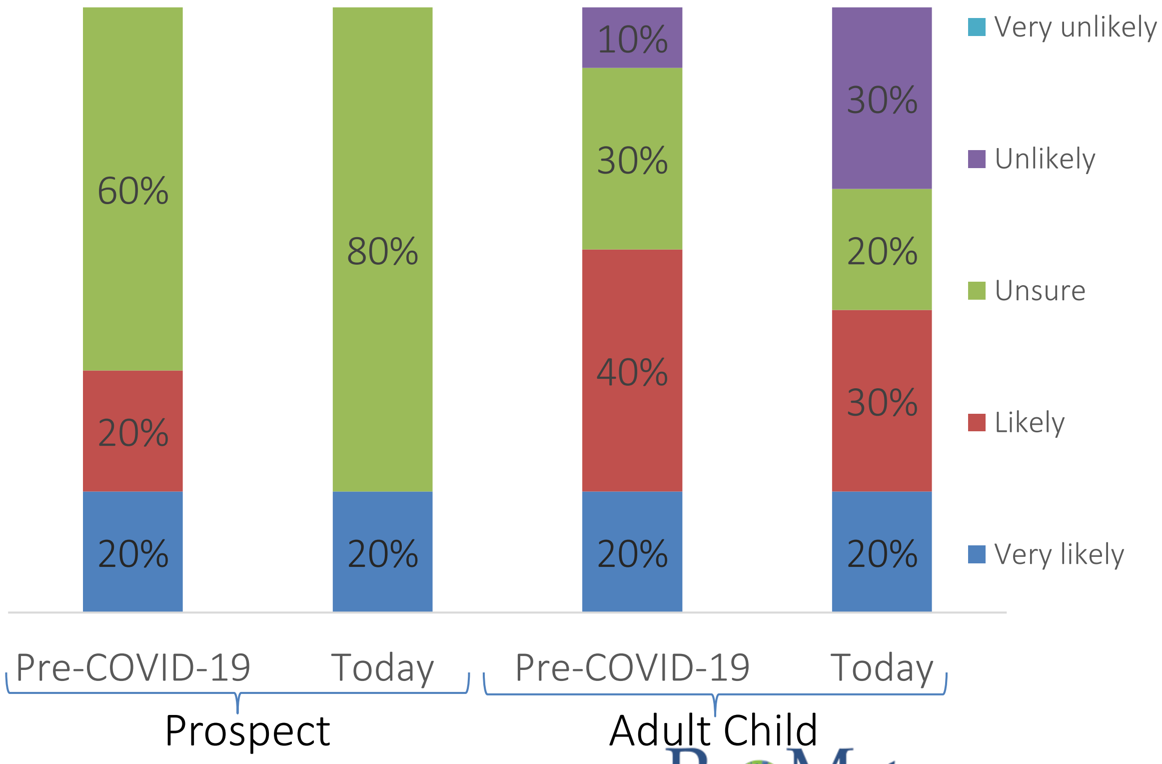
Likelihood of Moving to an MC Community

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 suggests that the pandemic had an impact on the propensity to move to memory care among survey respondents from the Lead List who indicated they were very likely to move. Though the sample size is small, and caution should be taken when interpreting results from households on the Purchased List who were considering memory care, COVID-19 appeared to have no impact on those very likely to consider a move.

Likelihood of Lead List Respondents Moving to an Memory Care Community Prior to COVID-19 and Today by Prospect Type (n=40, *ns*)

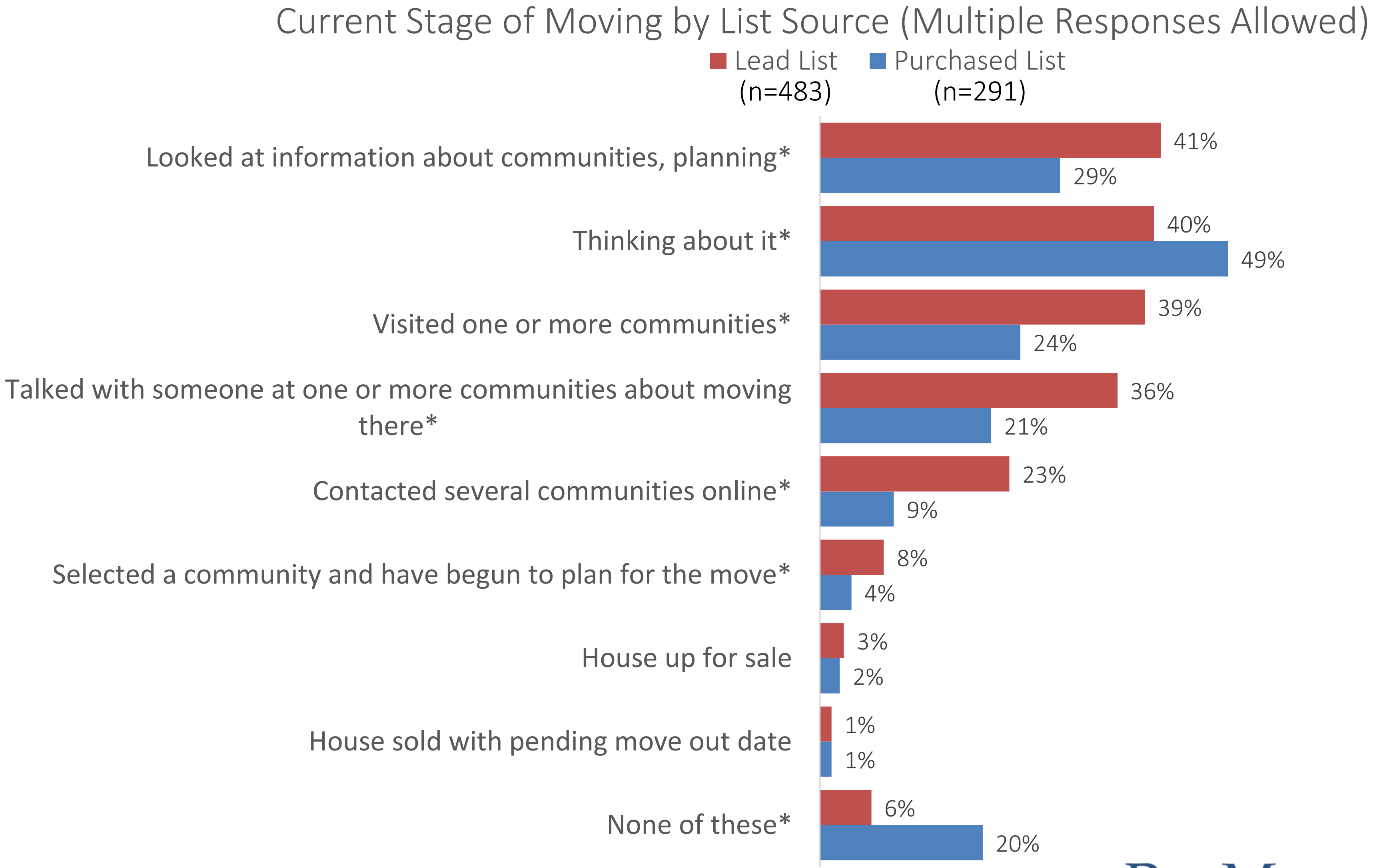


Likelihood of Purchased List Respondents Moving to an Memory Care Community Prior to COVID-19 and Today by Prospect Type (n=15, *ns*)



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.



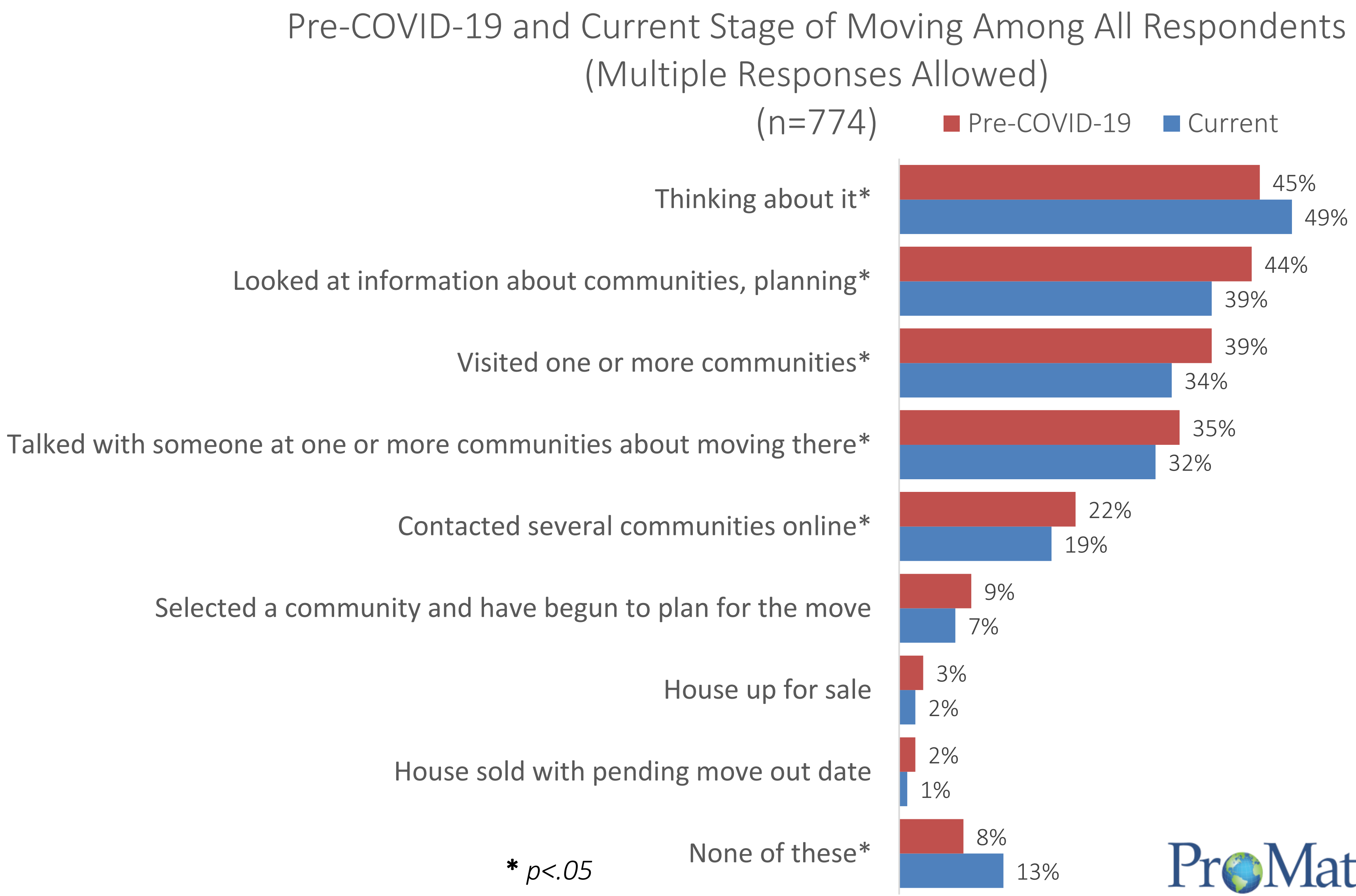
* *p<.05*

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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."



* p<.05

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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. Ten percent of the Lead List and 3% 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 (n=323, *p*<.001)						
	Likelihood of Moving to an IL Community					
Timeframe for Moving to an IL Community	Very likely	Likely	Unsure	Unlikely	Very unlikely	Total
In the next 3 months	5%	1%	1%			**7%**
4 to 6 months	5%	1%	1%			**7%**
7 to 12 months	6%	6%	3%			**15%**
1 to 2 years	14%	12%	8%			**34%**
3 years or more	5%	9%	10%			**24%**
No longer planning to move		1%	6%	5%	1%	**13%**
Total	**35%**	**30%**	**29%**	**5%**	**1%**	**100%**

Timeframe for Moving to an IL Community by Likelihood of Moving – Purchased List (n=210, *p*<.001)						
	Likelihood of Moving to an IL Community					
Timeframe for Moving to an IL Community	Very likely	Likely	Unsure	Unlikely	Very unlikely	Total
In the next 3 months	2%		1%			**3%**
4 to 6 months	1%	1%	1%			**3%**
7 to 12 months	1%	2%	1%		1%	**5%**
1 to 2 years	5%	12%	11%	1%		**29%**
3 years or more	10%	16%	24%			**50%**
No longer planning to move	1%	1%	6%	1%	1%	**10%**
Total	**20%**	**32%**	**44%**	**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-four 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. Twenty-eight 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 (n=86, *ns*)

	Likelihood of Moving to an AL Community					
Timeframe for Moving to an AL Community	Very likely	Likely	Unsure	Unlikely	Very unlikely	Total
In the next 3 months	17%	5%	2%	1%		**25%**
4 to 6 months	2%	4%	1%			**7%**
7 to 12 months	4%	2%	4%			**10%**
1 to 2 years	11%	6%	8%			**25%**
3 years or more	8%	11%	4%			**23%**
No longer planning to move	6%	2%	2%			**10%**
Total	**48%**	**30%**	**21%**	**1%**		**100%**

Timeframe for Moving to an AL Community by Likelihood of Moving – Purchased List (n=45, *ns*)

	Likelihood of Moving to an AL Community					
Timeframe for Moving to an AL Community	Very likely	Likely	Unsure	Unlikely	Very unlikely	Total
In the next 3 months	2%	4%	2%		3%	**11%**
4 to 6 months	2%		3%			**5%**
7 to 12 months	2%	2%	5%			**9%**
1 to 2 years	5%	13%	2%			**20%**
3 years or more	3%	13%	18%			**34%**
No longer planning to move	2%	2%	13%	2%	2%	**21%**
Total	**16%**	**34%**	**43%**	**2%**	**5%**	**100%**

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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. Thirty-nine 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, 36% were very likely or likely to move to a memory care community in 12 months, and 22% were very likely or likely to move within 6 months.

Timeframe for Moving to a MC Community by Likelihood of Moving – Lead List (n=42, *p<.05*)						
	Likelihood of Moving to a MC Community					
Timeframe for Moving to a MC Community	Very likely	Likely	Unsure	Unlikely	Very unlikely	Total
In the next 3 months	24%	2%				**26%**
4 to 6 months	2%	2%				**4%**
7 to 12 months	2%	7%	3%			**12%**
1 to 2 years	7%	5%	5%			**17%**
3 years or more			10%			**10%**
No longer planning to move	14%	5%	10%		2%	**31%**
Total	**49%**	**21%**	**28%**		**2%**	**100%**

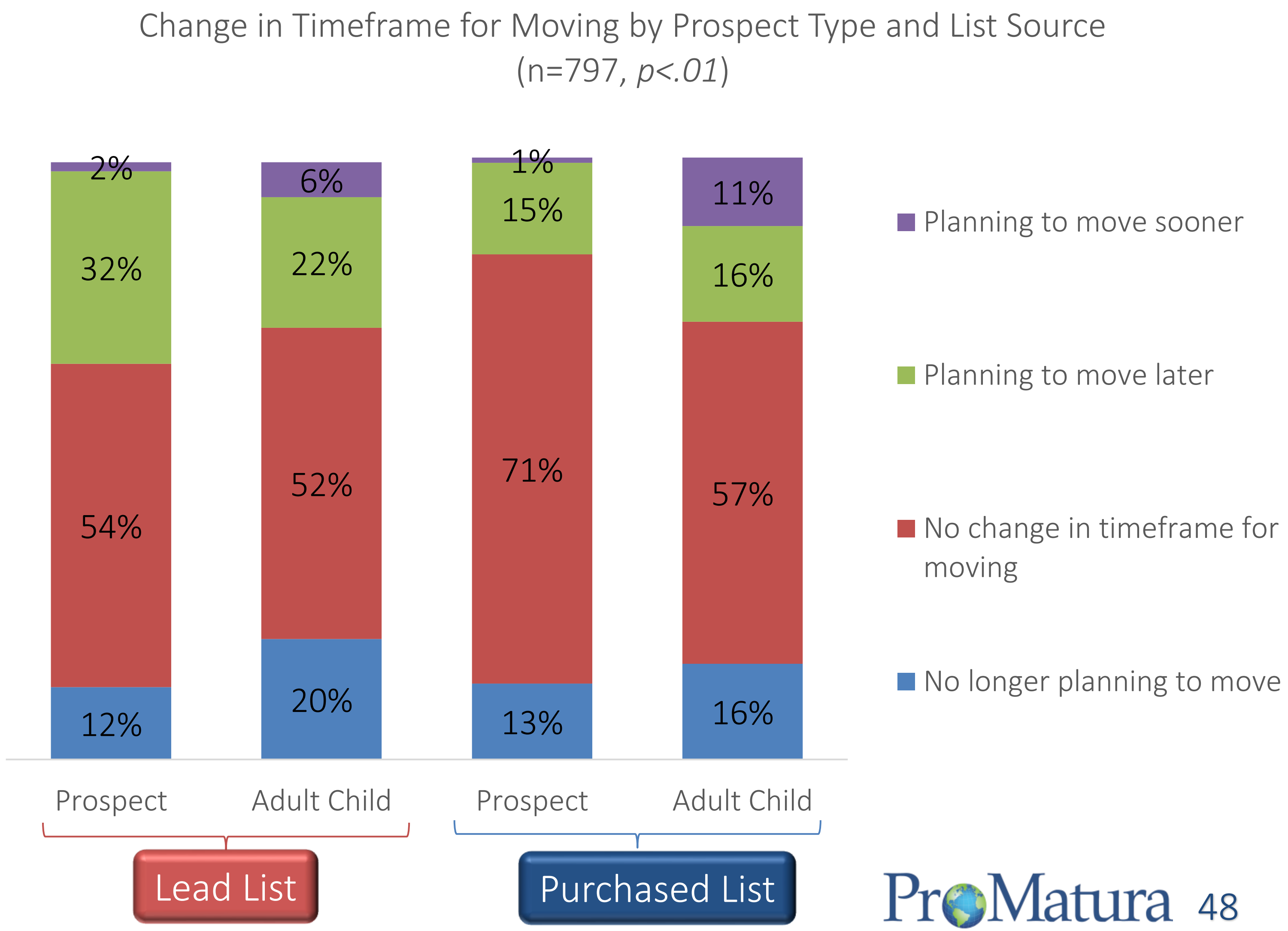
Timeframe for Moving to a MC Community by Likelihood of Moving – Purchased List (n=14, *ns*)						
	Likelihood of Moving to a MC Community					
Timeframe for Moving to a MC Community	Very likely	Likely	Unsure	Unlikely	Very unlikely	Total
In the next 3 months	14%	8%				**22%**
4 to 6 months						
7 to 12 months	7%	7%	7%			**21%**
1 to 2 years			15%	14%		**29%**
3 years or more			14%			**14%**
No longer planning to move		7%	7%			**14%**
Total	**21%**	**22%**	**43%**	**14%**		**100%**

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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.

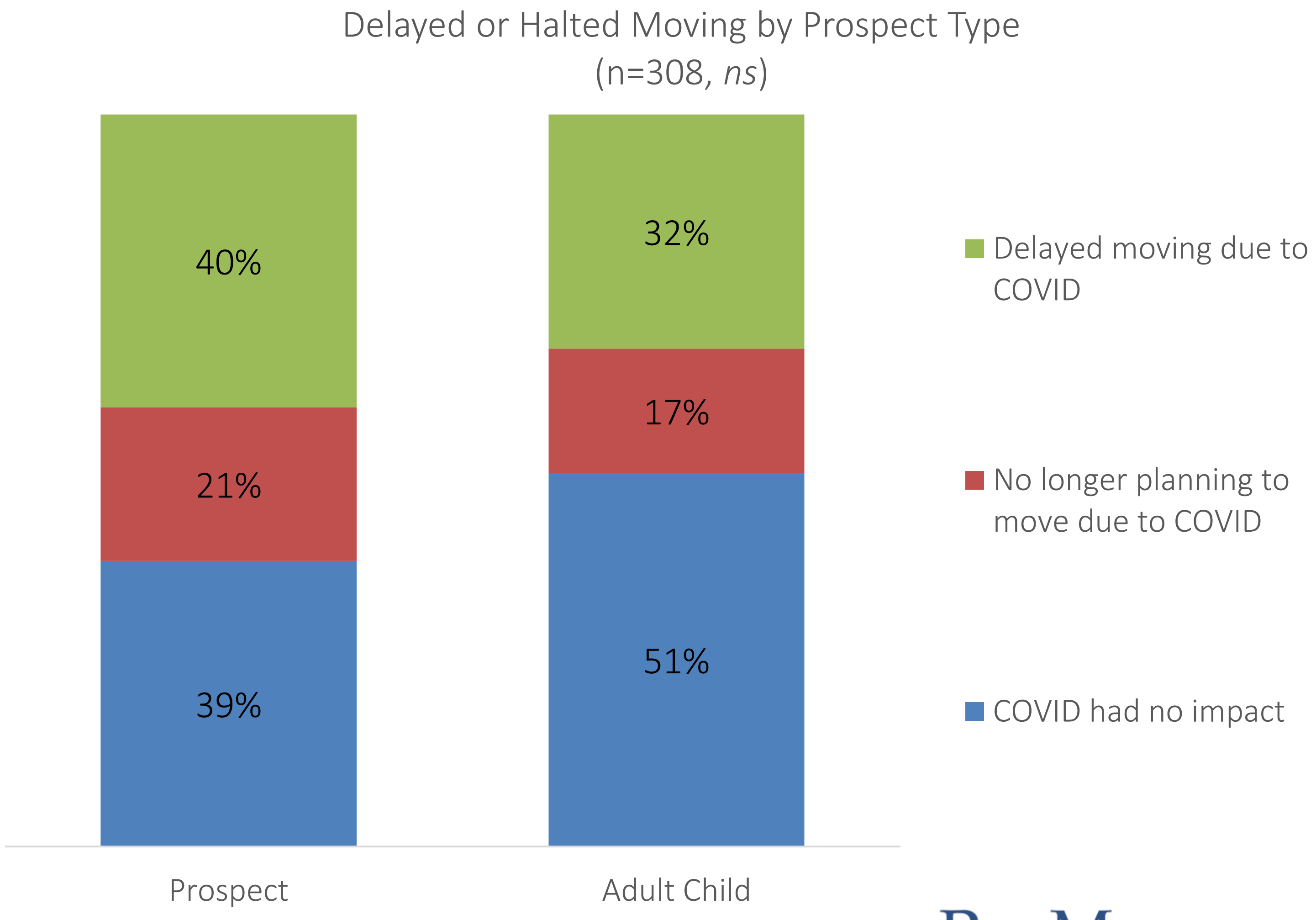


AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

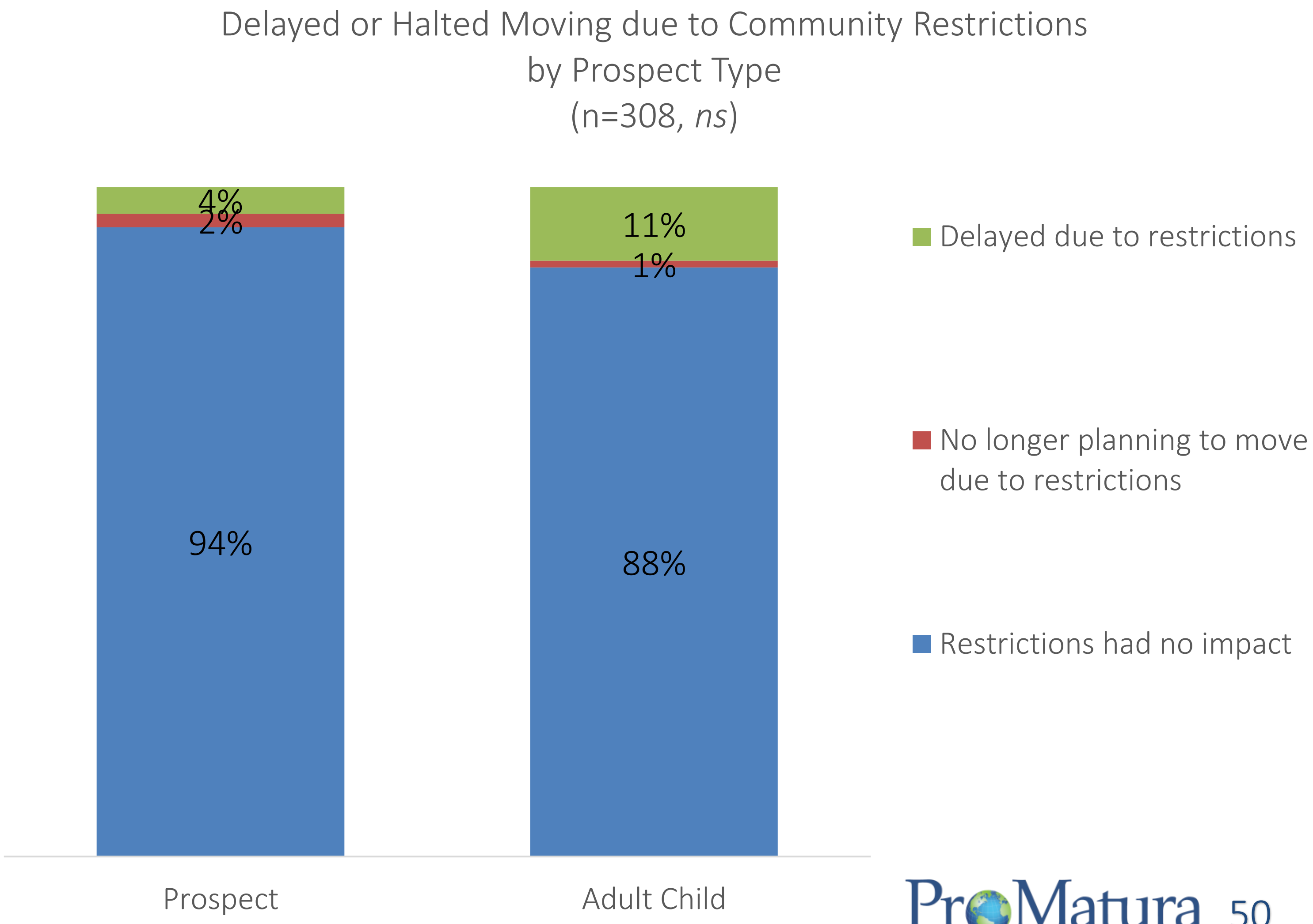
Delayed or Halted Moving due to COVID-19 Pandemic

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-one percent of prospects and 49% of adult children have delayed or are no longer moving because of COVID-19.



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 12% of adult children have delayed or are no longer moving because of community restrictions due to COVID-19.



AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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

Comment	Count
A cure for COVID-119/elimination of COVID-19	82
Affordability	78
Health condition of myself/loved one deteriorates	77
I would have to know what policies/procedures were in place to prevent future infection	44
Need to know costs	41
Unable to maintain home/ cook meals	33
Freedom to come and go at will/ no lockdowns	22
Sell our home	20
Need to know the history of COVID-19 in the community	19
Would have to find the perfect fit in a community	17
Financial stability and basic cash flow	16
An overall significant drop in COVID-19 cases in the area/city	16
Would have to feel safe in community	13
Need to know if continuing care is available	10
Death of spouse	10
Need to downsize	8
Family agreement/spouse has to agree	5
I would need to be unable to drive	3
I would have to move near my grandchildren	1

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

What Must Occur Before Moving to a Retirement Community – AL

What Must Occur Before Moving to a Retirement Community—Assisted Living	
Comment	**Count**
Health condition of myself/loved one deteriorates	26
A cure for COVID-119/elimination of COVID-19	19
I would have to know what policies/procedures were in place to prevent future infection	11
Services, including social amenities fit my needs	11
Unable to maintain home/ cook meals	10
Need to know costs	9
I would have to have enough money to afford it	8
Need to be able to visit family member daily/ no visitor restrictions	7
Routine COVID-19 testing for staff and residents	7
Family agreement/spouse has to agree	4
Better hygiene/cleaner environment	3
I would have to be able to bring my pets	1

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

What Must Occur Before Moving to a Retirement Community – MC

What Must Occur Before Moving to a Retirement Community—Memory Care	
Comment	**Count**
A cure for COVID-19/elimination of COVID-19	9
I would have to see what policies were in place to prevent future infection	7
Health condition of myself/loved one deteriorates	6
Engaging, high level of care	3
Find affordable community	3
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
Need to be near children	1

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

(n=480)	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%	28%	54%
The virus is contained locally but not statewide, with no new cases confirmed in 14 days	10%	15%	30%	45%
A primary care physician is on-site or via telemedicine at retirement communities	8%	13%	35%	45%
Safe, physically distant social engagement activities are available at retirement communities	6%	12%	39%	43%
Residents are able to eat with other residents in dining rooms and restaurants on-site at safe, social distances	8%	11%	42%	39%
The virus is contained statewide with no new cases confirmed in 14 days	13%	16%	36%	36%
A vaccine exists and has become readily available for consumers	13%	12%	38%	36%
The virus is contained nationwide with no new cases confirmed in 14 days	14%	20%	40%	26%

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.

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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

(n=269)	Do not need	Indifferent	Desirable	Essential
Identifiable cleaning and disinfecting programs are in place at retirement communities	6%	4%	23%	67%
COVID-19 testing with rapid results is accessible at all retirement communities	7%	8%	33%	52%
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%	13%	37%	43%
The virus is contained locally but not statewide, with no new cases confirmed in 14 days	14%	11%	33%	42%
A primary care physician is on-site or via telemedicine at retirement communities	9%	10%	39%	42%
Residents are able to eat with other residents in dining rooms and restaurants on-site at safe, social distances	6%	9%	46%	39%
The virus is contained statewide with no new cases confirmed in 14 days	14%	13%	38%	35%
The virus is contained nationwide with no new cases confirmed in 14 days	15%	14%	42%	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 (n=552)	Assisted Living: Essential (n=139)	Memory Care: Essential (n=58)
Identifiable cleaning and disinfecting programs are in place at retirement communities	69%	74%	74%
COVID-19 testing with rapid results is accessible at all retirement communities	54%	53%	57%
The virus is contained locally but not statewide, with no new cases confirmed in 14 days	44%	42%	43%
A vaccine exists and has become readily available for consumers	42%	33%	28%
A primary care physician is on-site or via telemedicine at retirement communities	42%	50%	57%
Safe, physically distant social engagement activities are available at retirement communities	42%	45%	41%
Residents are able to eat with other residents in dining rooms and restaurants on-site at safe, social distances	39%	37%	38%
The virus is contained statewide with no new cases confirmed in 14 days	37%	30%	38%
The virus is contained nationwide with no new cases confirmed in 14 days	29%	22%	22%

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
My children/family	115
Myself/my own research	60
Doctor	46
Federal/local government	37
Current residents	33
Spouse	26
Friends	25
CDC	14
News/Newspaper	12
Online ratings	10
AARP	4
Lawyer	4
A Place for Mom	3
Financial advisor	2
WHO	1

Trusted Source of Information: Assisted Living

Source	Count
Doctor	22
My children/family	19
Myself/my own research	18
Current residents	14
Federal/local government	12
Online ratings	7
Spouse	5
Friends	5
CDC	4
AARP	1
A Place for Mom	1
Lawyer	1
News/Newspaper	1
Financial advisor	1

Trusted Source of Information: Memory Care

Source	Count
Doctor	22
My children/family	19
Myself/my own research	18
Current residents	14
Federal/local government	12
Online ratings	7
Spouse	5
Friends	5
CDC	4
AARP	1
A Place for Mom	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	59
Have a plan in place for any potential future epidemic episodes	47
Follow CDC guidelines	28
Routine testing of staff and residents	25
No positive cases of COVID-19 in community	20
Practice social distancing	20
Good track record of dealing with COVID-19 to date	19
Have a safe visitation policy/no isolation	18
Require all who enter the community to wear a mask	17
Federal and state inspections of community	17
Adequate staff	17
Regular updates regarding COVID-19 from community /Transparency in communication	14
A successful vaccine has to be available for COVID-19	11
On-site/ close proximity to medical personnel	9
COVID-19 completely eliminated	8
24-hour security	6
Affordable pricing	6
Don't allow any visitors	4
Special filtering in the HVAC system	1

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
Frequent cleaning of all areas	8
Adequate staff	7
Have affordable rates	7
Routine testing of staff and residents	6
Good track record of dealing with the virus to date	6
Regular updates regarding COVID-19 at the community/honesty/communication	5
Federal and state inspections of community	5
Have a plan in place to deal with any future outbreaks	5
Allow visitors/no isolation	4
RN on site 24/7	4
Allow me to make visual checks for safety/visit the community	4
COVID-19 vaccine readily available	3
COVID-19 completely eliminated	3
Have no active cases of COVID-19 in the community	1

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

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

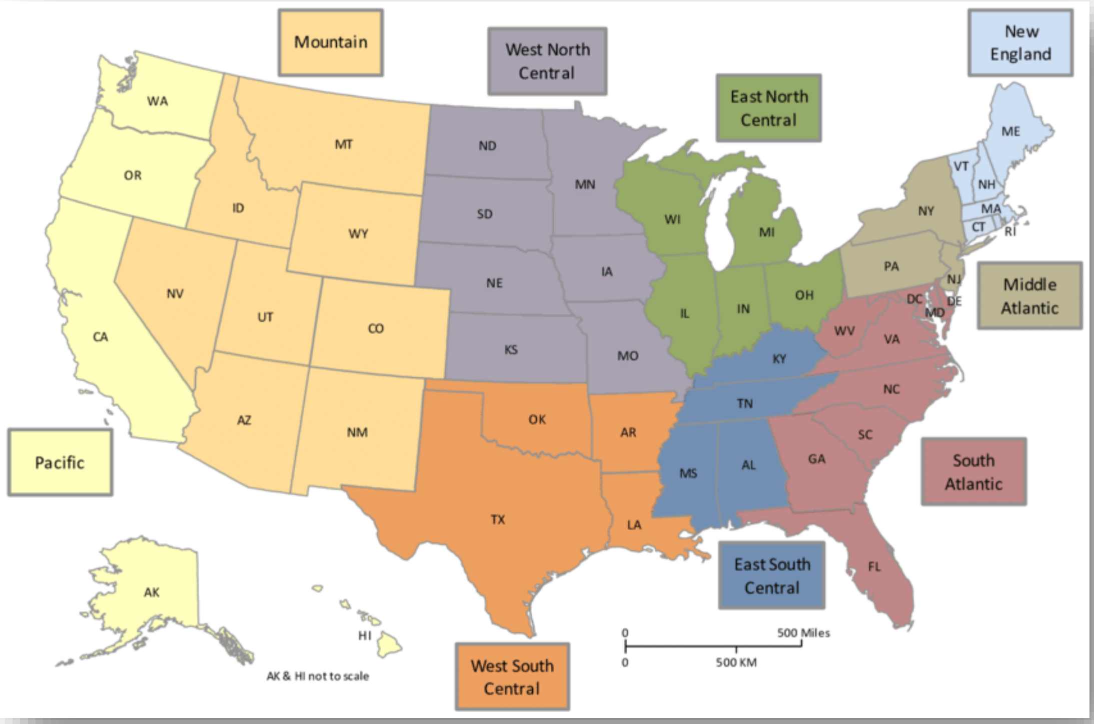
What Retirement Communities Must Do to be Considered Safe and Healthy – Memory Care	
Comment	**Count**
Follow CDC guidelines	5
Routine testing of staff and residents	4
Frequent cleaning of all areas	4
Regular updates regarding COVID-19 at the community/honesty/communication	3
Allow visitors/no isolation	2
RN on site 24/7	2
COVID-19 completely eliminated	1

Appendix
Analyses of Survey Data by Census Region

For the purposes of the regional analyses, only regions with a minimum of 20 completed surveys from both the Lead List and the Purchased List were included. The census regions of **East South Central** and **New England** will be omitted from all regional analyses.

Location of Participant's Primary Residence by List Source

	Lead List		Purchased List	
Census Region	Count	Percent	Count	Percent
East North Central	143	22%	182	12%
East South Central	13	2%	15	1%
Middle Atlantic	68	11%	198	13%
Mountain	60	9%	192	13%
New England	1	0%	1	0.1%
Pacific	40	6%	202	13%
South Atlantic	164	26%	406	27%
West North Central	22	3%	83	6%
West South Central	100	16%	200	13%
Refused to disclose location	26	4%	20	1%
Total	**637**	**100%**	**1,499**	**100%**



Appendix
Analyses of Survey Data by Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West North Central		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=143	n=182	n=68	n=198	n=60	n=192	n=40	n=202	n=164	n=406	n=22	n=83	n=100	n=200
Currently Shopping for a Community (Within the Past Year) *														
Yes	74%	17%	65%	16%	73%	20%	80%	20%	81%	17%	91%	28%	80%	25%
No	26%	83%	35%	84%	27%	80%	20%	80%	19%	83%	9%	72%	20%	75%
For Whom They Are Shopping														
Themselves	76%	97%	64%	88%	73%	85%	72%	75%	79%	81%	85%	78%	70%	78%
Parent, Other Relative or Friend	21%	0%	34%	12%	27%	16%	25%	23%	20%	17%	10%	22%	28%	20%
Other	3%	3%	2%	0%	0%	0%	3%	3%	2%	1%	5%	0%	3%	2%
Interest in Level of Care *														
Independent Living	77%	81%	52%	88%	66%	74%	66%	68%	76%	72%	70%	74%	64%	82%
Assisted Living	16%	13%	41%	13%	9%	15%	19%	25%	16%	26%	20%	17%	29%	12%
Memory Care	7%	6%	7%	0%	25%	10%	16%	8%	8%	1%	10%	9%	8%	6%

<u>Please Note</u>: Lead List = LL; Purchased List = PL   * *p<.05 for Lead List*

Appendix
Analyses of Survey Data by Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West North Central		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=143	n=182	n=68	n=198	n=60	n=192	n=40	n=202	n=164	n=406	n=22	n=83	n=100	n=200
Age Group of Prospective Residents * *														
<70	80%	6%	25%	0%	37%	1%	32%	0%	28%	0%	23%	2%	18%	0%
70 to 74	0%	6%	13%	2%	16%	4%	23%	2%	23%	2%	18%	5%	18%	5%
75 to 79	20%	61%	24%	65%	18%	64%	2%	70%	20%	60%	24%	62%	36%	58%
80 to 84	0%	22%	18%	26%	13%	22%	35%	24%	15%	26%	18%	21%	9%	24%
85+	0%	6%	20%	7%	16%	10%	8%	4%	15%	12%	18%	9%	18%	13%
Gender of Prospective Residents *														
Female	76%	48%	81%	42%	60%	47%	57%	52%	62%	43%	77%	48%	62%	43%
Male	24%	52%	19%	58%	40%	53%	43%	48%	38%	57%	23%	52%	38%	57%
Marital Status of Prospective Residents *														
Married/domestic partnership	34%	68%	47%	58%	58%	63%	50%	57%	51%	65%	59%	59%	52%	66%
Widowed	31%	18%	29%	20%	30%	22%	30%	21%	20%	21%	27%	22%	23%	21%
Divorced	21%	9%	18%	12%	8%	12%	10%	13%	18%	10%	9%	7%	16%	11%
Separated	1%	1%	0%	3%	0%	1%	0%	0%	2%	0%	0%	2%	1%	0%
Single, never married	13%	4%	6%	8%	3%	3%	10%	8%	9%	4%	5%	10%	8%	3%
Health Compared to Others The Same Age as Prospective Residents *														
Poor	4%	1%	4%	3%	2%	2%	10%	2%	4%	2%	0%	4%	3%	2%
Fair	20%	13%	16%	15%	10%	9%	13%	8%	18%	8%	27%	10%	14%	8%
Good	39%	32%	30%	37%	30%	30%	26%	33%	35%	38%	50%	42%	35%	33%
Very good	19%	34%	31%	34%	28%	42%	34%	35%	28%	37%	23%	29%	27%	36%
Excellent	18%	21%	19%	12%	30%	18%	19%	22%	15%	16%	0%	16%	21%	22%

Please Note: Lead List = LL; Purchased List = PL * *p<.05 for Lead List* * *p<.05 for Purchased List*

Appendix
Analyses of Survey Data by Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West North Central		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=143	n=182	n=68	n=198	n=60	n=192	n=40	n=202	n=164	n=406	n=22	n=83	n=100	n=200
Prospective Residents Limited by an Impairment or Health Problem														
Yes	36%	22%	32%	21%	33%	23%	28%	28%	34%	20%	55%	23%	29%	24%
No	64%	78%	68%	79%	67%	77%	73%	72%	66%	80%	45%	77%	71%	76%
Total Household Income of Prospective Residents *														
Less than $10,000	3%	1%	2%	1%	0%	1%	0%	0%	4%	1%	0%	3%	3%	1%
$10,000 to $14,999	3%	1%	4%	2%	2%	1%	3%	3%	4%	2%	0%	5%	4%	2%
$15,000 to $24,999	10%	4%	12%	5%	13%	5%	6%	9%	5%	5%	0%	8%	7%	6%
$25,000 to $34,999	13%	8%	12%	4%	11%	10%	6%	8%	8%	7%	27%	6%	8%	6%
$35,000 to $49,999	20%	14%	8%	12%	9%	13%	16%	9%	11%	11%	20%	14%	17%	14%
$50,000 to $74,999	24%	26%	25%	21%	15%	21%	16%	21%	27%	17%	33%	23%	21%	27%
$75,000 to $99,999	14%	17%	6%	19%	33%	22%	25%	19%	17%	16%	13%	18%	15%	16%
$100,000 to $149,999	10%	17%	13%	23%	9%	16%	13%	16%	13%	18%	7%	15%	13%	14%
$150,000 to $199,999	3%	4%	6%	7%	7%	5%	3%	12%	5%	12%	0%	6%	4%	8%
$200,000 or more	2%	7%	13%	6%	2%	7%	13%	4%	6%	12%	0%	1%	8%	6%

Please Note: Lead List = LL; Purchased List = PL * *p<.05 for Purchased List*

Appendix
Analyses of Survey Data by Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West North Central		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=143	n=182	n=68	n=198	n=60	n=192	n=40	n=202	n=164	n=406	n=22	n=83	n=100	n=200
Home Ownership Method of Prospective Residents *														
Own	75%	95%	84%	79%	86%	92%	76%	79%	78%	90%	76%	86%	77%	86%
Rent	24%	4%	15%	20%	11%	7%	24%	17%	18%	9%	24%	11%	21%	12%
Occupy without paying	2%	1%	2%	1%	4%	1%	0%	4%	4%	1%	0%	2%	2%	2%
Current Market Value of Home of Prospective Residents * *														
Less than $150,000	18%	20%	21%	8%	16%	8%	8%	6%	7%	8%	31%	17%	11%	7%
$150,000 to $199,999	17%	8%	9%	9%	3%	4%	0%	1%	5%	7%	15%	20%	11%	14%
$200,000 to $249,999	18%	12%	6%	8%	3%	6%	13%	2%	17%	6%	23%	18%	18%	18%
$250,000 to $299,999	12%	16%	13%	12%	0%	9%	13%	5%	11%	10%	15%	9%	16%	19%
$300,000 to $349,999	11%	12%	19%	14%	10%	10%	9%	3%	11%	14%	8%	17%	3%	12%
$350,000 to $399,999	11%	8%	4%	12%	10%	13%	4%	5%	13%	10%	0%	8%	18%	6%
$400,000 to $499,999	10%	10%	9%	9%	20%	18%	13%	15%	13%	14%	0%	6%	5%	12%
$500,000 to $749,999	5%	10%	9%	17%	30%	24%	17%	32%	13%	18%	0%	3%	11%	6%
$750,000 to $999,999	0%	3%	6%	3%	8%	6%	13%	17%	6%	6%	0%	0%	0%	4%
$1,000,000 or more	0%	2%	4%	6%	3%	3%	8%	14%	5%	8%	8%	2%	5%	2%

<u>Please Note</u>: Lead List = LL; Purchased List = PL * *p<.05 for Lead List* * *p<.05 for Purchased List*

Appendix
Analyses of Survey Data by Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West North Central		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=143	n=182	n=68	n=198	n=60	n=192	n=40	n=202	n=164	n=406	n=22	n=83	n=100	n=200
Awareness of Retirement Communities (IL, AL, or MC) *														
Yes	96%	84%	96%	72%	98%	84%	95%	78%	92%	79%	95%	88%	98%	85%
No	4%	16%	4%	28%	2%	16%	5%	22%	8%	21%	5%	12%	2%	15%
Appeal of Independent Living Communities														
Very unappealing	1%	10%	3%	8%	5%	11%	0%	13%	1%	10%	5%	2%	1%	11%
Unappealing	10%	11%	3%	13%	7%	17%	5%	16%	6%	14%	0%	20%	3%	13%
Neither appealing nor unappealing	18%	40%	13%	40%	15%	31%	28%	42%	15%	38%	9%	34%	25%	41%
Appealing	41%	29%	49%	33%	40%	32%	33%	22%	41%	30%	36%	34%	34%	28%
Very appealing	30%	10%	32%	6%	33%	9%	35%	8%	37%	8%	50%	10%	37%	8%
Change in Opinion of IL Communities Since COVID-19 Pandemic*														
More negative		34%		34%		32%		28%		36%		23%		27%
No change		63%		62%		66%		70%		61%		75%		71%
More positive		3%		4%		2%		1%		3%		2%		2%

*Question only asked of the Purchased List.

Please Note: Lead List = LL; Purchased List = PL   * *p<.05 for Purchased List*

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Appendix
Analyses of Survey Data by Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West North Central		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=143	n=182	n=68	n=198	n=60	n=192	n=40	n=202	n=164	n=406	n=22	n=83	n=100	n=200
Appeal of Assisted Living Communities														
Very unappealing	5%	10%	1%	12%	5%	16%	0%	14%	4%	11%	5%	8%	2%	15%
Unappealing	13%	16%	9%	17%	5%	21%	18%	21%	3%	20%	0%	16%	5%	18%
Neither appealing nor unappealing	27%	43%	19%	46%	22%	30%	33%	44%	27%	42%	23%	48%	21%	40%
Appealing	32%	24%	41%	21%	40%	28%	25%	17%	38%	21%	36%	19%	48%	21%
Very appealing	23%	7%	29%	4%	28%	5%	25%	3%	27%	5%	36%	8%	24%	6%
Change in Opinion of AL Communities Since COVID-19 Pandemic*														
More negative		35%		36%		39%		32%		38%		24%		31%
No change		63%		63%		60%		67%		60%		73%		67%
More positive		2%		1%		1%		1%		2%		2%		3%
Appeal of Memory Care Communities *														
Very unappealing	5%	14%	7%	15%	8%	15%	3%	18%	6%	12%	5%	18%	5%	19%
Unappealing	14%	13%	7%	16%	5%	18%	23%	17%	6%	20%	0%	18%	5%	19%
Neither appealing nor unappealing	39%	46%	25%	48%	25%	39%	25%	45%	26%	43%	32%	39%	31%	39%
Appealing	27%	21%	35%	18%	35%	23%	20%	15%	37%	18%	41%	17%	39%	19%
Very appealing	15%	7%	25%	4%	27%	5%	30%	5%	25%	6%	23%	8%	20%	5%
Change in Opinion of MC Communities Since COVID-19 Pandemic*														
More negative		20%		21%		21%		20%		24%		19%		25%
No change		78%		78%		79%		78%		74%		78%		75%
More positive		2%		2%		0%		2%		2%		2%		1%

*Question only asked of the Purchased List.

Please Note: Lead List = LL; Purchased List = PL   * *p<.05 for Lead List*

Appendix
Analyses of Survey Data by Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West North Central		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=143	n=182	n=68	n=198	n=60	n=192	n=40	n=202	n=164	n=406	n=22	n=83	n=100	n=200
Retirement communities are safer than staying at home. *														
Strongly disagree	8%	13%	9%	10%	8%	19%	18%	13%	5%	13%	9%	13%	14%	16%
Disagree	21%	27%	15%	24%	18%	27%	23%	24%	23%	29%	5%	24%	22%	33%
Neither agree nor disagree	40%	38%	26%	43%	47%	36%	25%	48%	41%	40%	32%	40%	32%	36%
Agree	28%	16%	37%	20%	17%	15%	28%	13%	23%	15%	45%	19%	23%	12%
Strongly agree	3%	5%	13%	4%	10%	3%	8%	3%	7%	3%	9%	4%	9%	4%
Retirement communities allow one to feel less isolated than they would staying at home.														
Strongly disagree	3%	5%	3%	5%	2%	8%	0%	4%	2%	5%	5%	6%	3%	7%
Disagree	8%	10%	3%	10%	5%	19%	13%	14%	4%	12%	9%	11%	10%	14%
Neither agree nor disagree	27%	30%	25%	31%	18%	18%	20%	27%	29%	30%	14%	29%	19%	33%
Agree	44%	42%	47%	46%	50%	47%	53%	47%	43%	44%	50%	48%	48%	40%
Strongly agree	18%	12%	22%	8%	25%	7%	15%	8%	21%	8%	23%	6%	20%	8%

Please Note: Lead List = LL; Purchased List = PL * *p<.05 for Lead List*

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Appendix
Analyses of Survey Data by Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West North Central		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=143	n=182	n=68	n=198	n=60	n=192	n=40	n=202	n=164	n=406	n=22	n=83	n=100	n=200
The COVID-19 outbreak has made staying at home a more appealing option than moving to a retirement community. *														
Strongly disagree	3%	2%	0%	4%	2%	2%	3%	4%	1%	3%	0%	2%	2%	4%
Disagree	13%	7%	9%	6%	8%	3%	15%	7%	4%	5%	9%	4%	6%	7%
Neither agree nor disagree	22%	21%	37%	24%	23%	25%	20%	26%	34%	26%	55%	29%	33%	23%
Agree	25%	32%	29%	37%	45%	35%	30%	30%	35%	36%	18%	40%	24%	39%
Strongly agree	37%	37%	25%	29%	22%	35%	33%	32%	27%	30%	18%	25%	35%	28%
The COVID-19 outbreak has made retirement communities a more appealing option than staying at home.														
Strongly disagree	25%	35%	18%	27%	23%	35%	18%	31%	16%	29%	9%	29%	23%	29%
Disagree	34%	33%	34%	34%	38%	34%	40%	42%	37%	35%	23%	34%	34%	45%
Neither agree nor disagree	34%	27%	34%	32%	32%	26%	33%	24%	35%	29%	59%	31%	32%	23%
Agree	6%	3%	10%	4%	5%	3%	8%	1%	12%	5%	9%	4%	6%	3%
Strongly agree	2%	2%	4%	3%	2%	2%	3%	1%	1%	2%	0%	2%	5%	1%

Please Note: Lead List = LL; Purchased List = PL   * *p<.05 for Lead List*

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Appendix

Analyses of Survey Data by Census Region

	East North Central n=106	Middle Atlantic n=51	Mountain n=57	Pacific n=48	South Atlantic n=149	West North Central n=31	West South Central n=92
Likelihood of Moving to an INDEPENDENT LIVING Community – Pre-COVID							
Very unlikely	1%	2%	4%	2%	3%	0%	3%
Unlikely	3%	4%	9%	13%	5%	0%	4%
Unsure	26%	33%	25%	35%	23%	16%	26%
Likely	33%	29%	21%	27%	34%	61%	28%
Very likely	37%	31%	42%	23%	36%	23%	38%
Likelihood of Moving to an INDEPENDENT LIVING Community – Today							
Very unlikely	3%	4%	4%	0%	2%	0%	4%
Unlikely	3%	10%	16%	8%	5%	3%	2%
Unsure	32%	31%	30%	48%	34%	32%	37%
Likely	33%	29%	23%	27%	30%	45%	24%
Very likely	29%	25%	28%	17%	30%	19%	33%

Please Note: The survey questions presented in the table above were asked only of respondents who, within the past year, have considered an independent living community as a place they or a loved one might one day move.

Appendix

Analyses of Survey Data by Census Region

	East North Central n=19*	Middle Atlantic n=21	Mountain n=7	Pacific n=15	South Atlantic n=38	West North Central n=8	West South Central n=26
Likelihood of Moving to an ASSISTED LIVING Community – Pre-COVID							
Very unlikely	0%	5%	0%	0%	3%	0%	4%
Unlikely	21%	0%	0%	0%	8%	0%	0%
Unsure	21%	14%	29%	33%	26%	38%	19%
Likely	26%	33%	43%	33%	39%	38%	38%
Very likely	32%	48%	29%	33%	24%	25%	38%
Likelihood of Moving to an ASSISTED LIVING Community – Today *							
Very unlikely	0%	5%	0%	0%	3%	0%	4%
Unlikely	26%	5%	0%	0%	5%	0%	0%
Unsure	26%	19%	29%	40%	32%	50%	15%
Likely	11%	14%	43%	20%	42%	25%	42%
Very likely	37%	57%	29%	40%	18%	25%	38%

Please Note: The survey questions presented in the table above were asked only of respondents who, within the past year, have considered an assisted living community as a place they or a loved one might one day move.

* $p<.05$

*CAUTION: Small sample size. Caution should be taken when drawing conclusions or making assumptions from sample sizes smaller than n=20.

Appendix
Analyses of Survey Data by Census Region

	East North Central n=9	Middle Atlantic n=2	Mountain n=14	Pacific n=8	South Atlantic n=11	West North Central n=4	West South Central n=7
Likelihood of Moving to a <u>MEMORY CARE</u> Community – Pre-COVID							
Very unlikely	0%	0%	0%	0%	0%	0%	0%
Unlikely	11%	0%	14%	0%	0%	25%	14%
Unsure	56%	0%	14%	38%	9%	0%	43%
Likely	11%	0%	14%	13%	55%	25%	14%
Very likely	22%	100%	57%	50%	36%	50%	29%
Likelihood of Moving to a <u>MEMORY CARE</u> Community – Today *							
Very unlikely	0%	0%	0%	0%	9%	0%	0%
Unlikely	0%	0%	7%	0%	0%	25%	29%
Unsure	56%	0%	36%	13%	9%	0%	43%
Likely	22%	0%	7%	25%	55%	25%	0%
Very likely	22%	100%	50%	63%	27%	50%	29%

<u>Please Note</u>: The survey questions presented in the table above were asked only of respondents who, within the past year, have considered a memory care community as a place they or a loved one might one day move.

* *p<.05*

*<u>CAUTION</u>: Small sample size. Caution should be taken when drawing conclusions or making assumptions from sample sizes smaller than n=20.

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Appendix
Analyses of Survey Data by Census Region

	East North Central n=134	Middle Atlantic n=74	Mountain n=78	Pacific n=71	South Atlantic n=198	West North Central n=43	West South Central n=125
Current Stage of Moving to a Community – Pre-COVID (Multiple Responses Allowed)							
Thinking about it *	45%	47%	48%	56%	49%	52%	50%
Looked at information about communities, planning *	47%	41%	36%	41%	48%	50%	41%
Contacted several communities online *	24%	19%	26%	15%	21%	24%	23%
Talked with someone at one or more communities about moving there *	38%	24%	37%	28%	39%	38%	35%
Visited one or more communities *	38%	33%	41%	34%	40%	36%	40%
Selected a community and have begun to plan for the move	7%	16%	11%	6%	8%	12%	6%
House up for sale	2%	3%	0%	0%	3%	2%	3%
House sold with pending move out date	1%	1%	3%	1%	1%	0%	1%
None of these *	6%	9%	10%	12%	11%	2%	10%
Current Stage of Moving to a Community – Today (Multiple Responses Allowed)							
Thinking about it *	47%	49%	48%	51%	46%	43%	41%
Looked at information about communities, planning *	45%	30%	32%	28%	44%	40%	37%
Contacted several communities online *	20%	13%	16%	18%	22%	21%	17%
Talked with someone at one or more communities about moving there *	34%	23%	22%	28%	41%	33%	29%
Visited one or more communities *	33%	20%	38%	35%	42%	40%	37%
Selected a community and have begun to plan for the move *	5%	16%	10%	4%	4%	5%	6%
House up for sale	3%	3%	1%	1%	2%	2%	6%
House sold with pending move out date	1%	6%	0%	3%	2%	0%	1%
None of these *	8%	16%	10%	16%	12%	7%	15%

Please Note: The survey questions presented in the table above 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. * $p<.05$

Appendix
Analyses of Survey Data by Census Region

	East North Central	Middle Atlantic	Mountain	Pacific	South Atlantic	West North Central	West South Central
Timeframe for Moving to an INDEPENDENT LIVING Community	**n=106**	**n=51**	**n=57**	**n=48**	**n=149**	**n=31**	**n=92**
In the next 3 months	5%	10%	4%	7%	4%	6%	7%
4 to 6 months	6%	2%	4%	2%	8%	6%	2%
7 to 12 months	8%	8%	12%	9%	13%	13%	12%
1 to 2 years	40%	27%	31%	18%	35%	23%	34%
3 years or more	28%	35%	37%	51%	30%	42%	37%
No longer planning to move	13%	17%	13%	13%	11%	10%	8%
Timeframe for Moving to an ASSISTED LIVING Community	**n=19**	**n=21**	**n=7**	**n=15**	**n=38**	**n=8**	**n=26**
In the next 3 months	13%	25%	14%	13%	24%	25%	20%
4 to 6 months	0%	5%	14%	0%	8%	0%	12%
7 to 12 months	7%	15%	0%	27%	3%	0%	8%
1 to 2 years	33%	20%	14%	27%	16%	38%	28%
3 years or more	33%	0%	43%	20%	41%	25%	20%
No longer planning to move	13%	35%	14%	13%	8%	13%	12%
Timeframe for Moving to a MEMORY CARE Community	**n=9**	**n=2**	**n=14**	**n=8**	**n=11**	**n=4**	**n=7**
In the next 3 months	33%	50%	29%	50%	9%	0%	17%
4 to 6 months	0%	0%	0%	13%	9%	0%	0%
7 to 12 months	11%	0%	14%	0%	27%	67%	0%
1 to 2 years	22%	0%	21%	13%	18%	0%	50%
3 years or more	22%	0%	14%	13%	0%	0%	0%
No longer planning to move	11%	50%	21%	13%	36%	33%	33%

Please Note: The survey questions presented in the table above 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.

*CAUTION: Small sample size. Caution should be taken when drawing conclusions or making assumptions from sample sizes smaller than n=20.

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Appendix
Analyses of Survey Data by Census Region

	East North Central n=134	Middle Atlantic n=74	Mountain n=78	Pacific n=71	South Atlantic n=198	West North Central n=43	West South Central n=125
Change in Timeframe for Moving Since COVID-19 Pandemic							
No longer planning to move	13%	23%	15%	13%	12%	12%	10%
Planning to move later	27%	14%	22%	25%	29%	14%	23%
No change in timeframe for moving	59%	60%	60%	60%	55%	69%	64%
Planning to move sooner	2%	3%	3%	1%	4%	5%	2%
Delayed or Halted Moving due to COVID-19 Pandemic							
No longer planning to move due to COVID-19	29%	43%	23%	44%	46%	47%	9%
Delayed the move due to COVID-19	27%	18%	23%	19%	15%	17%	18%
COVID had no impact	43%	39%	54%	37%	38%	36%	73%
Delayed or Halted Moving due to Community Restrictions from COVID-19							
No longer planning to move due to restrictions	8%	8%	4%	15%	4%	4%	0%
Delayed due to restrictions	2%	2%	4%	4%	0%	1%	0%
Restrictions had no impact	90%	90%	92%	81%	96%	95%	100%

Please Note: The survey questions presented in the table above 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.

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura

Appendix
Analyses of Survey Data by Census Region

	East North Central n=134	Middle Atlantic n=74	Mountain n=78	Pacific n=71	South Atlantic n=198	West North Central n=43	West South Central n=125
What Must Occur Before Moving to a Retirement Community (Percent of respondents who rated attributes as "ESSENTIAL")							
Identifiable cleaning and disinfecting programs are in place at retirement communities	71%	81%	73%	68%	73%	71%	65%
COVID-19 testing with rapid results is accessible at all retirement communities	57%	59%	49%	59%	58%	38%	50%
A primary care physician is on-site or via telemedicine at retirement communities	46%	59%	47%	32%	46%	36%	42%
The virus is contained locally but not statewide, with no new cases confirmed in 14 days	48%	44%	44%	40%	48%	38%	38%
Safe, physically distant social engagement activities are available at retirement communities	43%	50%	45%	29%	44%	43%	43%
A vaccine exists and has become readily available for consumers	45%	37%	37%	38%	38%	38%	43%
Residents are able to eat with other residents in dining rooms and restaurants on-site at safe, social distances	43%	40%	36%	28%	42%	45%	41%
The virus is contained statewide with no new cases confirmed in 14 days	38%	33%	44%	31%	37%	31%	33%
The virus is contained nationwide with no new cases confirmed in 14 days	30%	24%	29%	29%	25%	31%	24%

Please Note: The survey questions presented in the table above 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.

AMERICAN SENIORS HOUSING ASSOCIATION
Living Longer Better

ProMatura