

special issue

brief



SUMMER 2021

MESSAGES THAT MATTER

How Senior Living Advertising/Marketing
Impacts Move-In Decisions



SPONSOR





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Special thanks to Senior Star for their generous sponsorship of this research.

These MSAs were selected for survey participation because ASHA member communities that participated in the survey of residents and their family members were located in these MSAs:

- Atlanta-Sandy Springs-Alpharetta, GA
- 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
- Milwaukee-Waukesha, WI
- New York-Newark-Jersey City, NY-NJ-PA
- Philadelphia-Camden-Wilmington, PA-NJ-DE-MD
- Phoenix-Mesa-Chandler, AZ
- Pittsburgh, PA
- Portland-Vancouver-Hillsboro, OR-WA
- Rochester, NY
- San Francisco-Oakland-Berkeley, CA
- Seattle-Tacoma-Bellevue, WA
- St. Louis, MO-IL
- Washington-Arlington-Alexandria, DC-VA-MD-WV

MESSAGES THAT MATTER

How Senior Living Advertising/Marketing Impacts Move-In Decisions

INTRODUCTION

Messages That Matter, a multi-year research project with over 1,700 participants that probed how marketing and advertising shape the opinions and decisions of prospective senior living residents and adult child influencers, initially zeroed in on how these consumers react to imaging, terminology and various information sources, as well as their priorities for learning more about seniors housing.

Digging deeper, though, the surveys also delivered broader insights on the propensity to consider relocating and how achieving more effective communication can impact the public's attitudes regarding communal living, institutionalization and ageism.

The study was sponsored by the American Seniors Housing Association and conducted by ProMatura Group. To review the entire *Messages That Matter* research report, [PLEASE CLICK HERE](#).

The breakout of those surveyed subdivides the prospective resident and adult child influencer categories, separating each of these two groups into three additional segments. Results can be extrapolated to suggest that:

- A purchased list of individuals who were 75 years-of-age and had an estimated annual household income of \$35,000+ (prospects), or adult children (influencers) 45 to 64 years-of-age with an estimated annual household income of \$100,000+ who lived in one of 21 metropolitan statistical areas (MSAs) tends to portray consumers at large who, in general, have not focused on relocating to a senior living community and therefore represents the market's overall, arms-length opinions of seniors housing
- Participants in Internet referral sources such as A Place for Mom and newsletter/blog subscribers likely represent prospective senior living residents and adult child influencers who are in the preliminary stages of learning about seniors housing and determining where nearby communities are located

- Survey respondents, both prospective residents and adult child influencers, from lead lists of senior living communities reflect those who are well along the sales cycle

Some of the most pertinent take-aways from the Messages That Matter surveys combined all the groups participating in the research and compared the overall perspectives of all prospects with those of all influencers.

NEED FOR ADDITIONAL SERVICES

Responses from all prospects indicated they were significantly more likely (83 percent) to have excellent, very good or good health, while only 49 percent of all influencers included those they represent in this grouping. In fact, the majority of those ranked by an influencer had health issues — only 20 percent had very good or excellent health, while 52 percent had fair or poor health.

More than twice as many influencers (62 percent) than prospects (29 percent) said additional services would be required.

Fifteen percent of prospects said they would need three meals per day, and five percent said they would require assistance getting around the community. But, in comparison, influencers saw a far greater need for services, with 58 percent reporting three meals per day would be required; 43 percent said assistance with daily medication would be needed; 34 percent said help getting around the community would be needed; 33 percent said assistance with bathing/showering would be needed; and 30 percent said assistance with memory impairments/dementia would be needed.

PROPENSITY TO RELOCATE

The propensity to relocate to a senior living community within the next five years varied significantly among the six prospect and influencer groups.

Of the three prospect categories, 63 percent of those from the Internet referral list said they were likely or very likely to move; 69 percent from the lead list said they were likely or very likely to move; and 22 percent from the purchased list said they were likely or very likely to move.

Among the three influencer categories, 65 percent of those from the Internet referral list said those they represent were likely or very likely to move; 55 percent from the lead list were likely or very likely to move; and 27 percent from the purchased list said they were likely or very likely to move.

When asked why a move from a current residence is under consideration, 27 percent of lead list prospects said this was because of age, and 16 percent said they wanted to downsize. Among prospects on the purchased list, 30 percent said the move was being contemplated because they wanted to downsize.

Additional reasons cited for moving from 10 to 11 percent of both prospect and influencer respondents included limitations, age, need for help/care, and location.

RANKING COMMUNITY ATTRIBUTES

The top five community attributes ranked by lead list influencers matched those of lead list prospects with one exception. Prospects favored “friendly atmosphere/companionship”, while influencers preferred “clean.”

Among influencers on the purchased list compared to prospects on the purchased list, three of the top five attributes matched: services/care, location and social activities. From the purchased list, the top attributes from influencers included safe and secure, and affordable. Purchased list prospects preferred single level and easy living, along with maintenance/worry-free.

One-third of all prospects surveyed learned about senior living communities from the operators’ websites. An Internet search was used by 29 percent, and 26 percent indicated word-of-mouth accounted for community awareness. Meanwhile, 26 percent of all influencers reported using on an equal basis websites, Internet searches and Internet referral sources.

RESPONSE TO MARKETING MATERIALS

How recently were marketing materials viewed by those surveyed? Lead list influencers (38 percent) were significantly more likely to have viewed marketing materials in the past week than any other respondent groups. And both lead list influencers (67 percent) and prospects (66 percent) were more likely to have viewed marketing materials within the month. There was a range of 36 to 52 percent for those in the other respondent groups engaging in marketing materials within the month.

Both all prospects (81 percent) and all influencers (75 percent) considered price and financial information absolutely necessary in marketing materials. Additional information rated “absolutely necessary” included housing/residential information (floorplans, square footage, etc.); services provided – utilities, housekeeping, meals, etc.; health care services provided; and location of community (address, description of location, maps).

According to ProMatura, lack of transparency “about your pricing/financial information, residences, services provided, and the location of the community could cause someone to stop looking at your community. Eighteen percent of influencers and 29 percent of prospects would discontinue exploring your community because they were unable to find pricing information.”

More than half the prospects and influencers from the lead lists and Internet referral sources were unlikely to provide contact information if it was required to view floorplans and the size of residences. A similar proportion was observed for respondents on the purchased list.

And 50 percent or more of prospects and influencers from Internet referral sources or lead lists were unlikely or very unlikely to provide their contact information in order to view pricing. Slightly smaller proportions on the purchased lists (34 percent to 47 percent) were reluctant to provide contact information to obtain information about a community.

The two features of marketing materials that lead list and purchased list prospects and influencers liked the most were invitations for tours, meals and events, along with photographs.

APPENDIX

Click link below to go direct to page.

Select exhibits from the *Messages That Matter* research report.
To view the entire report please [CLICK HERE](#).

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TOTAL NET WORTH OF PROSPECTS AND INFLUENCERS

Exhibit 19. Prospects' Total (Net) Worth by Respondent Group (p<.001)

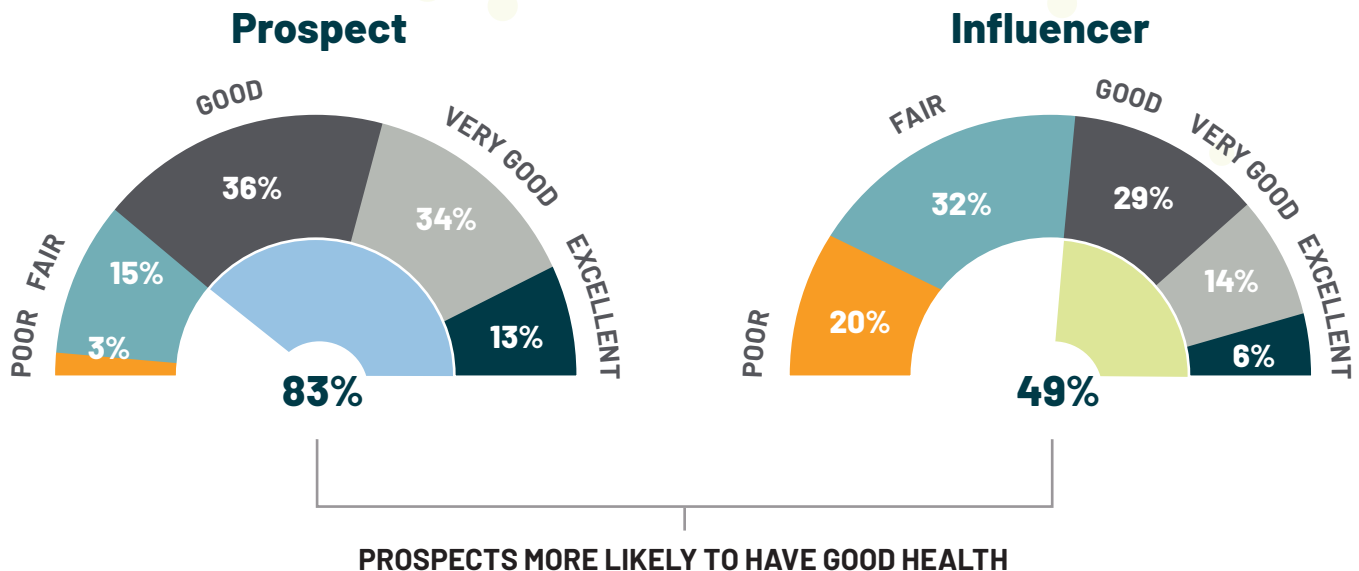
	PROSPECT	INFLUENCER
Less than \$50,000	18%	30%
\$50,000 to \$99,999	6%	11%
\$100,000 to \$299,999	17%	19%
\$300,000 to \$499,999	14%	14%
\$500,000 to \$749,999	12%	10%
\$750,000 to \$999,999	8%	6%
\$1,000,000 to \$1,999,999	16%	7%
\$2,000,000 or more	10%	4%

NET WORTH EXCEEDING \$500,000

46% 27%

HEALTH STATUS OF PROSPECTS AND INFLUENCERS

Exhibit 21. Prospects Health Status, Compared to Others the Same Age, by Respondent Group (p<.001)

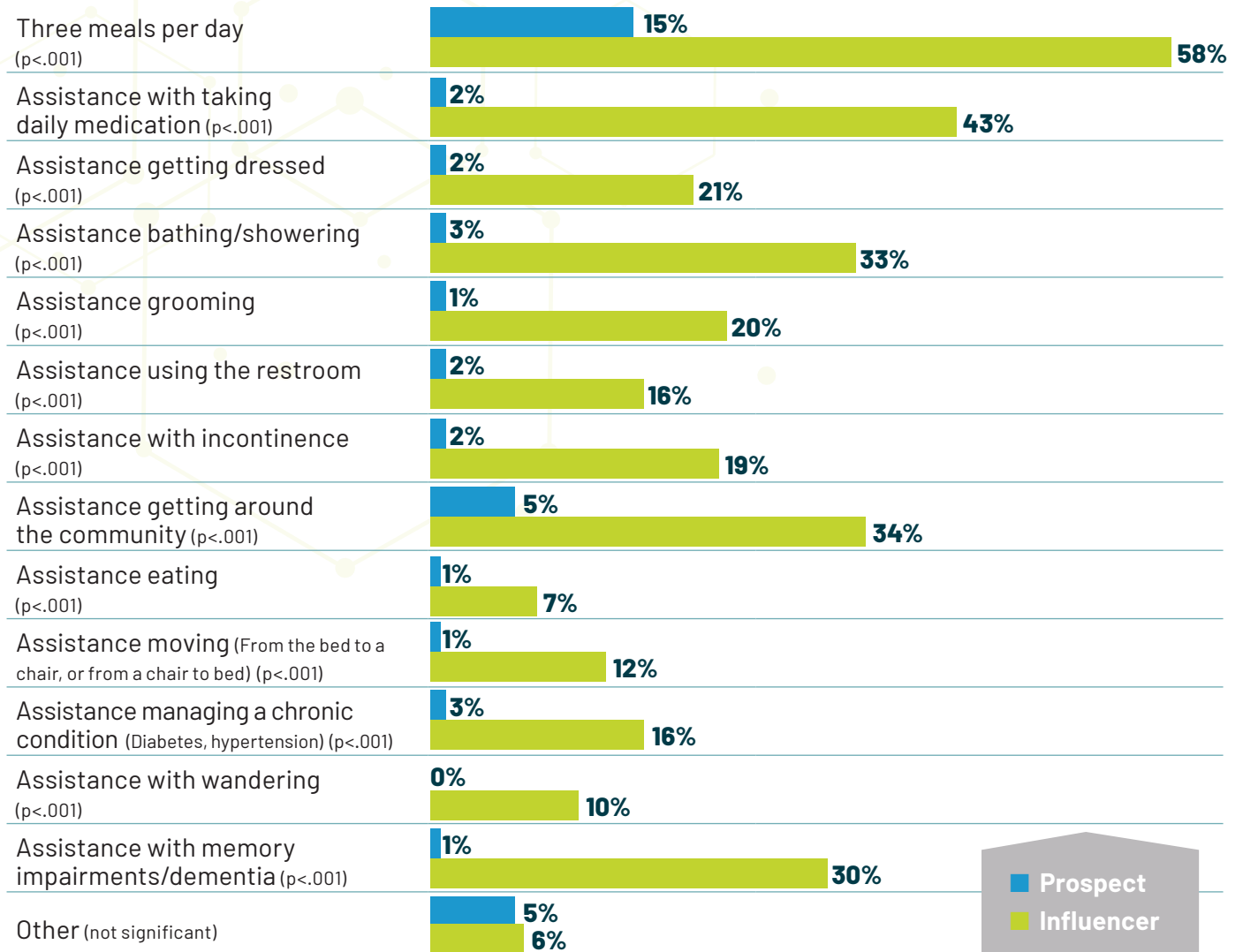


RESIDENTIAL COMMUNITY SERVICES

Exhibit 27. Percent of Prospects Who Would Require Additional Services if They Moved to a Residential Community with Services by Respondent Group (p<.001)



Exhibit 28. Percent of Prospects by the Services They Would Require if They Moved to a Residential Community [Multiple Responses Allowed]



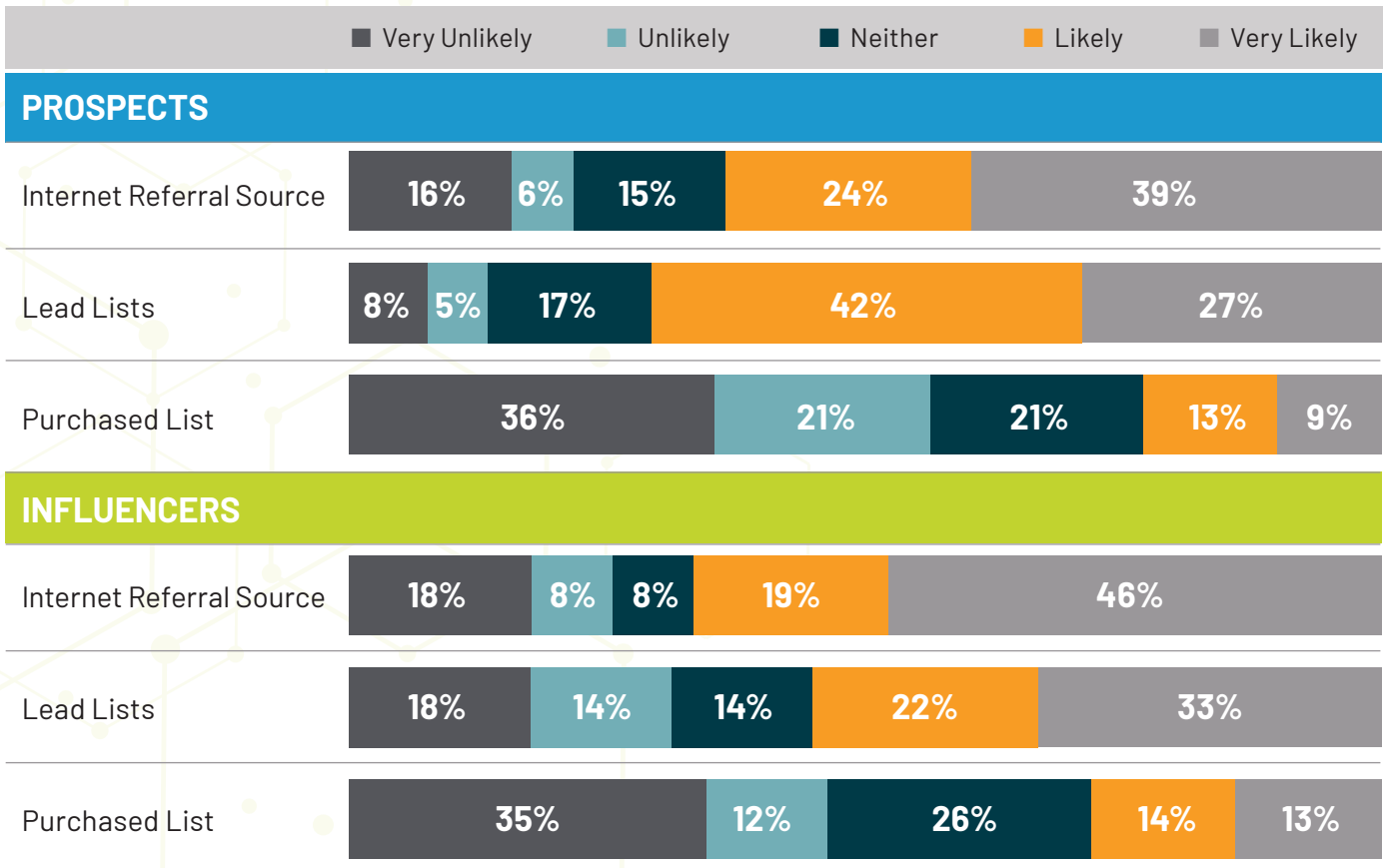
INFLUENCERS' RELATIONSHIP TO PROSPECT

Exhibit 52. Relationship Prospect to Influencer

PROSPECT'S RELATIONSHIP TO INFLUENCER	COUNT	PERCENT
Mother/Mother-in-law/Step-mother	267	37%
Father/Father-in-law/Step-father	100	14%
Spouse	99	14%
Parent(s)/In-law(s)	96	13%
Close Friend	46	6%
Sister/Sister-in-law	26	4%
Brother/Brother-in-law	16	2%
Aunt	13	2%
Daughter/Daughter-in-law	13	2%
Sibling	9	1%
Close relative/Family	8	1%
Child/Children	7	1%
Son/Son-in-law	5	1%
Cousin	4	1%
Grandparent	4	1%
Uncle	4	1%
Neighbor	3	0.4%
Elder Care Client	1	0.1%
Ex-husband	1	0.1%
God-mother	1	0.1%
Ward	1	0.1%
Total	724	100%

LIKELIHOOD OF MOVING WITHIN THE NEXT FIVE YEARS OF PROSPECTS AND INFLUENCERS BY RESPONDENT SOURCE

Exhibit 60. Likelihood of Moving from Current Residence Within the Next Five Years by Respondent Group and Respondent Source (p<.001)



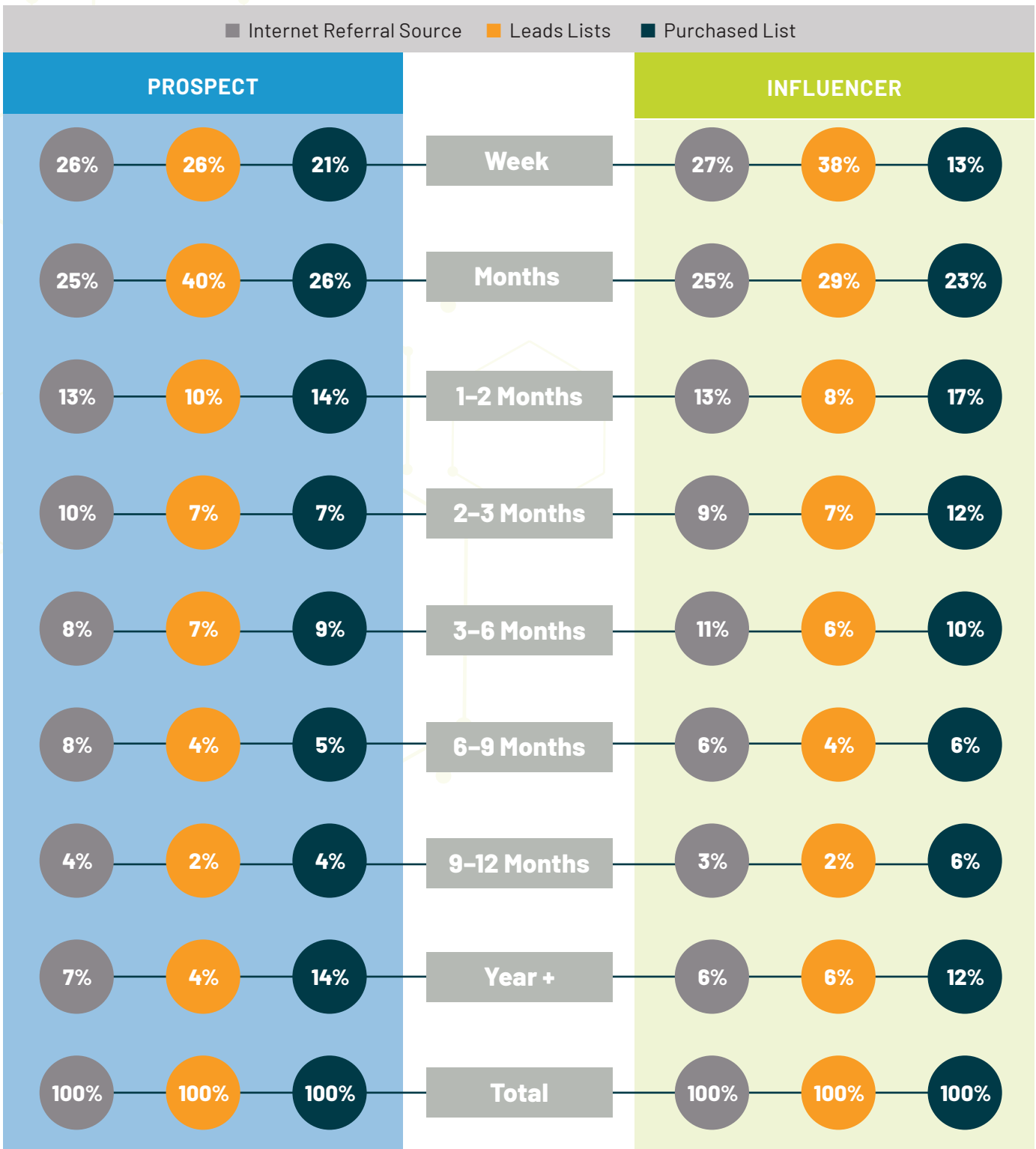
THE ATTRIBUTES PROSPECTS AND INFLUENCERS ARE LOOKING FOR IN A COMMUNITY

Prospect					
Lead List			Purchased List		
	Count	%		Count	%
Social/activities	76	13%	Services/care provided	49	12%
Good meals/food, flexible dining plans	71	13%	Location	39	10%
Support services/care - as needed	55	10%	Single level, Easy living	38	9%
Friendly atmosphere/companionship	43	8%	Less maintenance, worry free	37	9%
Affordable	41	7%	Social/activities	30	7%
Location	37	7%	Safe/secure	26	6%
Clean/well kept/attractive	35	6%	Affordable	25	6%
Amenities	34	6%	Good meals/food, flexible dining plans	24	6%
Wish List	26	5%	House/smaller house (9)	19	5%
Transportation	25	4%	Amenities	14	3%
Continuous care/life care	21	4%	Transportation	14	3%
Privacy/independence	18	3%	Wish List	14	3%
Safe/secure	18	3%	Convenience	12	3%
Comfortable	17	3%	Comfortable	11	3%
Vibrant/active community	9	2%	Friendly atmosphere/companionship	11	3%
Competent, friendly staff	8	1%	Close to family	10	2%
Pet friendly	8	1%	Continuing care	7	2%
Close to family	7	1%	Privacy/independence	6	1%
Convenient/convenience	4	1%	Clean/well kept/attractive	5	1%
Feeling of home	4	1%	55+ (3)/Adults only (2)	4	1%
Size of community	4	1%	Competent, friendly staff	4	1%
55+(1)/non profit(1)/Jewish (1)	3	1%	Pet friendly	2	0.5%
Total	564	100%	Vibrant/active community	2	0.5%
			Feel at home	1	0.3%
			Friendly atmosphere	1	0.3%
			Total	405	100%

Influencer					
Lead List			Purchased List		
	Count	%		Count	%
Services/care provided	26	19%	Services/care provided	73	21%
Affordable	17	13%	Safe/secure	38	11%
Social/activities	17	13%	Affordable	35	10%
Good meals/food/dining options	16	12%	Location	32	9%
Clean	11	8%	Social/activities	24	7%
Safe/secure	11	8%	Competent, compassionate staff	21	6%
Friendly atmosphere	9	7%	Single level/no steps	19	5%
Competent staff	7	5%	Clean/well kept	18	5%
Transportation	5	4%	Good meals/food	18	5%
Independence/private	4	3%	Accessible/limitations	11	3%
Amenities	3	2%	Comfortable	11	3%
Location	3	2%	Downsize	11	3%
Size of community	3	2%	Independence	10	3%
Close to family	2	1%	24 hour care	7	2%
Total	134	100%	Transportation	7	2%
			Close to family	6	2%
			Friendly atmosphere	6	2%
			Amenities	3	1%
			Size of community	2	1%
			55+	1	0.3%
			Total	353	100%

HOW RECENTLY MARKETING MATERIALS WERE VIEWED BY RESPONDENT SOURCE

Exhibit 67. How Recently Marketing Materials for Residential Communities with Services Were Viewed (p<.000)



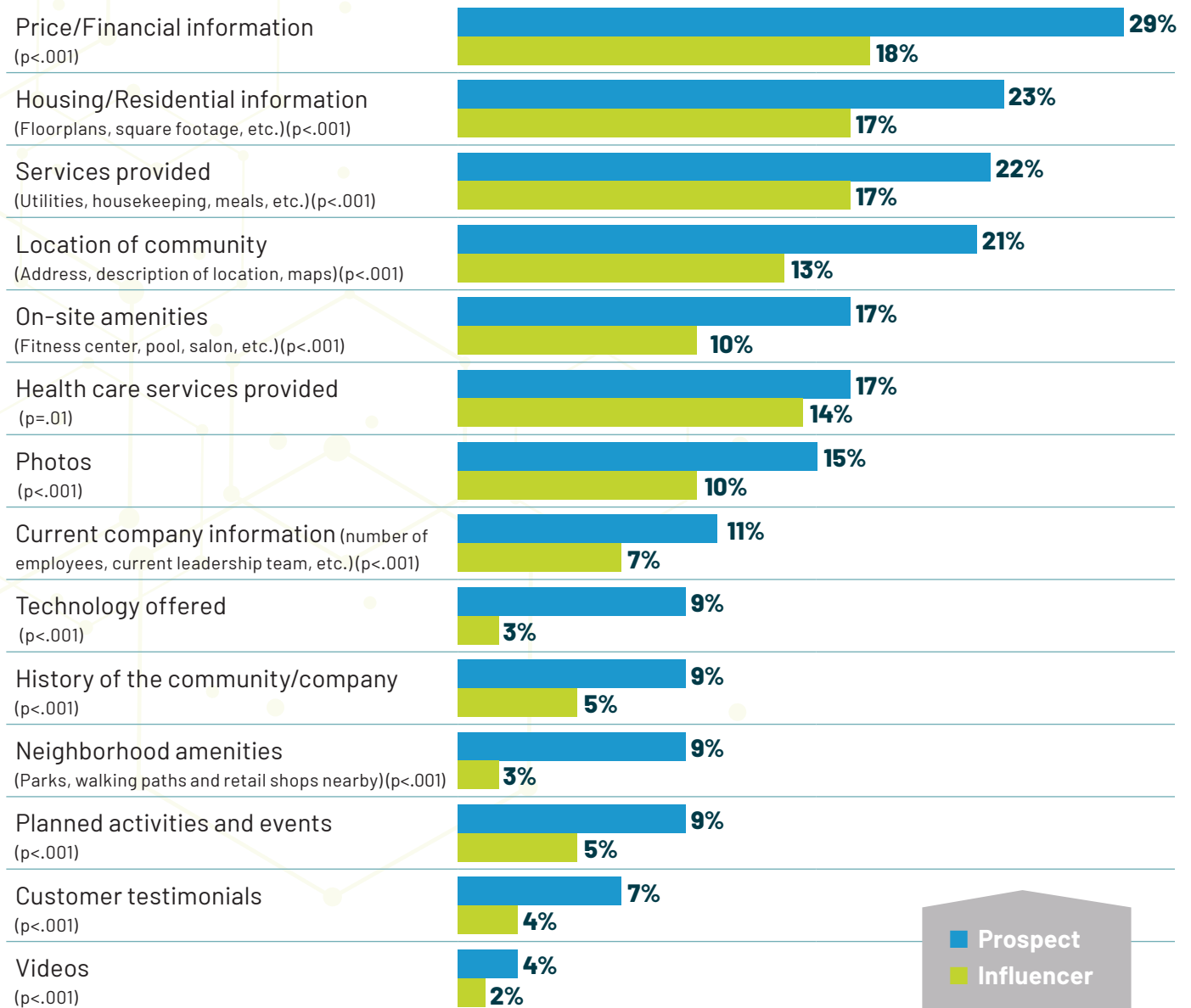
INFORMATION RATED “ABSOLUTELY NECESSARY” BY RESPONDENT SOURCE AMONG PROSPECTS AND INFLUENCERS

Exhibit 69. The Information about a Residential Community with Services Rated “Absolutely Necessary” by Respondent Source

Information (Listed in order of percent rating by Lead Lists / Prospect)	Internet Referral Source		Lead Lists		Purchased List	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Price/Financial information (p<.001)	82%	80%	82%	72%	79%	66%
Housing/Residential information (Floorplans, square footage, etc.)(p<.001)	58%	49%	69%	62%	50%	40%
Services provided (Utilities, housekeeping, meals, etc.)(p<.001)	57%	74%	67%	70%	58%	62%
Health care services provided (p<.001)	40%	70%	61%	61%	43%	51%
Location of community (Address, description of location, maps)(p<.005)	56%	60%	58%	61%	54%	58%
On-site amenities (Fitness center, pool, salon, etc.)(p<.001)	32%	30%	49%	38%	33%	32%
Photos (not significant)	46%	51%	43%	48%	52%	50%
Planned activities and events (p<.001)	27%	33%	34%	29%	21%	23%
History of the community/company (p=.01)	24%	26%	34%	14%	28%	26%
Current company information (Number of employees, current leadership team, etc.)(p<.001)	24%	33%	28%	16%	26%	30%
Technology offered (p<.001)	27%	15%	28%	10%	27%	27%
Neighborhood amenities (Parks, walking paths and retail shops nearby)(p<.001)	32%	22%	27%	20%	27%	26%
Videos (p<.001)	20%	15%	19%	15%	22%	26%
Customer testimonials (not significant)	21%	24%	19%	16%	26%	29%

IMPACT OF MISSING INFORMATION ON CONTINUED INTEREST IN A COMMUNITY AMONG PROSPECTS AND INFLUENCERS

Exhibit 74. The Percent of Prospects and Influencers Who Would Discontinue Interest in a Residential Community with Services If Unable to Find Information by Type of Information



■ Prospect
■ Influencer

WHAT PROSPECTS AND INFLUENCERS LIKE MOST ABOUT MARKETING MATERIALS

Prospect					
Lead List			Purchased List		
	Count	%		Count	%
Invitation for Tour/Meals/Events	28	18%	Informative	39	23%
Photos	23	14%	Photos	35	21%
Informative	22	14%	Positive/Upbeat	16	10%
Brochures/Floor Plans	21	13%	Services	15	9%
Friendly/ Helpful Staff	14	9%	Activities	10	6%
Pricing	14	9%	Options for Seniors	8	5%
Amenities	9	6%	Awareness	7	4%
Activities	7	4%	Brochures/Floor Plans	7	4%
Resident Testimonials	6	4%	Amenities	6	4%
Services	6	4%	Feels Like Home	5	3%
Layout of Community	5	3%	Invitation for Tour	5	3%
Awareness	3	2%	Attractive/Nice	4	2%
Happy People	2	1%	Pricing	4	2%
Total	160	100%	Independence	3	2%
			Resident Testimonials	3	2%
			Total	167	100%

Influencer					
Lead List			Purchased List		
	Count	%		Count	%
Informative	25	32%	Informative	69	34%
Photos	11	14%	Photos	18	9%
Floor Plans	10	13%	Services	17	8%
Activities	9	12%	Happy People	14	7%
Services	6	8%	Attractive/New/ Inviting	12	6%
Pricing	5	6%	Positive	12	6%
Amenities	3	4%	Activities	11	5%
Happy People	3	4%	Competent/Caring Staff	7	3%
Social	3	4%	Amenities	6	3%
Food	1	1%	Socialization	6	3%
GPS Location	1	1%	Awareness	5	2%
Total	77	100%	Caring Employees	5	2%
			Food	4	2%
			Pricing	4	2%
			Safe Environment	4	2%
			Comfortable	3	1%
			Feels Like Home	2	1%
			Friendly/Inviting	2	1%
			Convenience	1	0.5%
			GPS Location	1	0.5%
			Timely Replies	1	0.5%
			Total	204	100%

“ABSOLUTELY NECESSARY” INFORMATION ABOUT THE RESIDENCE AMONG PROSPECTS AND INFLUENCERS BY RESPONDENT SOURCE

Exhibit 83. Information about the Residence/Apartment of a Residential Community with Services Rated “Absolutely Necessary” by Respondent Source

Attributes (Listed in order of percent rating “Absolutely Necessary” by Lead List /Prospect)	Internet Referral Source		Lead Lists		Purchased List	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Floorplan with total square footage defined (p<.000)	57%	39%	67%	58%	49%	40%
Room dimensions (p<.000)	45%	31%	50%	43%	33%	33%
Closet/Storage space (p<.000)	41%	22%	47%	36%	27%	25%
Type of kitchen in private residence (p<.000)	42%	23%	43%	36%	36%	34%
Appliances included in kitchen (p<.000)	44%	22%	42%	34%	37%	30%
Windows/Window treatments (p<.001)	18%	10%	20%	13%	14%	15%
Flooring (p<.000)	22%	12%	19%	15%	17%	18%
Views available (p<.000)	24%	15%	30%	18%	20%	20%
Outdoor spaces (Balcony/patio)(p<.000)	35%	16%	35%	22%	25%	28%
Laundry room vs. W/D in room (p<.000)	42%	24%	42%	37%	36%	33%
Apartment furnishings included (p<.000)	18%	18%	19%	21%	23%	28%
Apartment customizability (p<.005)	20%	15%	21%	19%	23%	28%





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