MESSAGES THAT MATTER

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Thank You

ASHA and ProMatura wish to thank Senior Star for their generous sponsorship support of the Messages that Matter research project.

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EXECUTIVE SUMMARY

Two groups of respondents Influencers and Prospects participated in the research. They were obtained from three sources: lead lists of communities, Internet referral sites; and, a purchased list of households who were 75 years of age and had an estimated annual household income of $35,000+. And adult children 45 to 64 years of age with an estimated annual household income of $100,000 who lived in one of 21 MSAs.

Influencer provided information about the Prospect.

All information in the report labelled "Influencer" is about the Prospect

Total Influencers: 1,430 - Messages that Matter

Prospect provided information about herself or himself

Total Prospects: 1,543 - Messages that Matter

These MSAs were selected because ASHA member communities who had 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

EXECUTIVE SUMMARY

The American Seniors Housing Association initiated "Messages that Matter," a multi-faceted study of the perception and impact of the media, messages (topics), terminology, labels, , and imaging on attitudes, acceptance, and purchase decisions of people (**Prospects** and/or **Influencers** such as a spouse or adult children) who are exploring the lovely residential communities that include a host of customized convenience, entertainment, educational, supportive and personal services. The study was initiated in 2018 and data were collected through 2020.

The data were collected from respondents located in 21 MSAs that were selected because ASHA member communities located in these markets participated in the first study of residents and their family members.

There were several differences between the prospective resident (**Prospect**) shopping for him or herself and the prospective resident (**Influencer**) whose family member or friend was shopping with them or on their behalf.

More than twice as many **Influencers** (62%) than **Prospects** (29%) would require additional services from the community. Fifty-eight percent of **Influencers** would require three meals per day; 43% would need help with daily medication; 34% need help with getting around the community; 33% need assistance with bathing/showering, and 30% need assistance with memory impairments/dementia. Of the **Prospects** who would require additional services, 15% said they would require three meals per day, and 5% said they would need assistance getting around the community.

Among influencers from lead lists the two primary reasons a move was likely were age (22%) and the need for help or care (20%). Among purchased list influencers 21% said they needed help or care and 19% said age. Among lead list prospects, 27% said the move was because of age and 16% said they wanted to downsize. Among prospects on the purchased list, 30% said the move was being contemplated because they wanted to downsize.

The top five attributes desired in a community by lead list influencers: 1) Services/Care provided, 2) Affordable, 3) Social/activities, 4) Good meals and dining options, and 5) Clean, matched those of lead list prospects with one exception; **Prospects** listed "friendly atmosphere/companionship" and **Influencers** listed "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 five attributes desired by **Influencers** included safe and secure, and affordable. **Prospects** listed single level (no stairs) and easy living, maintenance/worry-free.

EXECUTIVE SUMMARY

One-third of the **Prospects** learned about communities with services from the community website; an internet search was used by 29%, and word-of-mouth was 26%. Twenty-six percent of **Influencers** reported using websites, or internet searches, or internet referral sources.

Prospects from internet referral sources (22%) reported that websites of the community were the most beneficial source, followed by internet referral sources or internet searches. Prospects on lead list and purchased lists cited word of mouth as most beneficial (28%). Influencers from internet referral sources stated the referral sources as most beneficial.

Lead list influencers (67%) were significantly more likely than prospects to have viewed marketing materials in the past week, and both lead list influencers (67%) and prospects (66%) were likely to have viewed materials within the month.

Lead list and internet referral leads (82% of both groups) are those most likely to move to the community and thus are more keenly interested in price, housing information, and services provided than the other respondent groups. Price/financial information was rated as “absolutely necessary in marketing materials by the highest proportion of Prospects (81%) and Influencers (75%). If the pricing information was unavailable

Learning about the type of kitchen and the appliances in it was absolutely necessary for 48% of **Prospects**. This was followed by 47% who want to know about the outdoor spaces and 45% who want to know the amount of closet/storage space. **Influencers** (41%) were mostly interested in the total square footage of the residence.

Prospects (87%) rated having state-of-the-art technologies as important or very important, compared to 72% of **Influencers**. This suggests using the Prospect’s preferences as your guide.

The largest proportion of influencers on lead lists (32%) and purchased lists (34%) liked that the marketing information was informative. Lead list prospects (18%) liked being invited to the community. Purchased list prospects liked that the marketing was informative. The second most liked marketing element among all respondents were photos (range from a low of 9% among purchased list influencers and 21% of purchased list prospects).

EXECUTIVE SUMMARY

Pricing information was rated absolutely necessary in marketing media by 81% of the Prospects and 75% of the Influencers. Despite this decrease, the majority (61% Prospects and 82% Influencers) rated price and financial information as difficult, very difficult, or unable to be found. Among all source groups (leads, Internet referral sources, and age and income-qualified households on purchased lists), 18% of Influencers and 29% of Prospects would discontinue interest in a community if they were unable to find pricing and financial information.

A higher proportion of Prospects (44%) and Influencers (53%) move on to another web-site or decide they are no longer interested in the community (35% Prospects and 20% Influencers) if they have to provide their contact information before being able to see information about the community.

Prospects (98%) on lead lists were significantly more likely to be aware of residential communities with services than those from internet referral sources (78%) or purchased lists (78%). Similarly, 95% of Influencers on lead lists were aware of residential communities with services compared to 84% from internet referral sources and 71% of those from purchased lists.

More than twice as many Influencers (62%) than Prospects (29%) would require additional services from the community. Of the Prospects who would require additional services, 15% said they would require three meals per day, and 5% said they would need assistance getting around the community.

Fifty-eight percent of Influencers would require three meals per day; 43% would need assistance with daily medication; 34% need help with getting around the community; 33% need assistance with bathing/showering, and 30% need assistance with memory impairments/dementia.

KEY TAKE AWAY COMPARISONS

PROSPECTS COMPARED TO INFLUENCERS AND COMPARISONS BETWEEN RESPONDENTS FROM LEAD LISTS, PURCHASED LISTS OF AGE AND INCOME-QUALIFIED HOUSEHOLDS, AND LISTS OBTAINED FROM ONLINE REFERRAL SOURCES.

KEY TAKE-AWAYS: PROSPECTS COMPARED TO INFLUENCERS

Characteristics of Prospects and Influencers					
Topic	**Prospects**	**Influencers**	**Topic**	**Prospects**	**Influencers**
Age			**Annual Household Income**		
70 to 79 Years	59%	22%	$50,000 or more	61%	40%
80+ Years	23%	61%	**Total Net Worth**		
Gender			$500,000 or more	46%	27%
Female	60%	67%	**Health Status**		
Male	40%	33%	Excellent, very good, or good	83%	49%
Marital Status			Limited by Health/Impairment	35%	70%
Married	49%	34%	Require Use of Assistive Device	29%	62%
Widowed	24%	47%	**Type of Assistive Device Required**		
Educational Attainment			Cane	66%	42%
High School Graduate	10%	35%	Walker	39%	62%
College Graduate	60%	31%	Wheelchair	13%	27%
Employment Status			**Type of Additional Services Required**		
Retired	78%	78%	Three meals per day	15%	58%
Part-time work or volunteer	17%	10%	Assistance bathing/showering	3%	33%
			Assistance getting around the community	5%	34%
Disabled or unable to work	3%	11%	Assistance with memory impairments	1%	30%
Home Value			**Home Ownership**		
$300,000 or more	53%	38%		75%	63%

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KEY TAKE-AWAYS: PROSPECTS COMPARED TO INFLUENCERS

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Characteristics of Prospects and Influencers					
Topic	**Prospects**	**Influencers**	**Topic**	**Prospects**	**Influencers**
Preferred Social Setting			**“My life is close to ideal”**		
Individually	12%	21%	Strongly agreed or agreed	60%	34%
Small gatherings or groups	54%	62%	**“The conditions of my life are excellent”**		
Large groups	4%	3%	Strongly agreed or agreed	59%	34%
“I would rather eat a meal with strangers than by myself”			**“I am satisfied with my life”**		
Strongly agree or agree	34%	47%	Strongly agreed or agreed	73%	41%
“I have a strong sense of camaraderie with others”			**“I have gotten the important things I want in life”**		
Strongly agree or agree	54%	53%	Strongly agreed or agreed	80%	62%
“I am a people person”			**“If I could live my life over, I would change almost nothing”**		
Strongly agree or agree	59%	57%	Strongly agreed or agreed	51%	46%
“I feel safe and secure”			**Total Life Satisfaction**		
Strongly agreed or agreed	85%	60%	Very satisfied or satisfied	78%	53%

KEY TAKE-AWAYS: RESPONDENTS COMPARED BY RESPONDENT SOURCE

Characteristics of Respondents by Respondent Source							
Topic	**Internet Referral**	**Lead List**	**Purchased List**	**Topic**	**Internet Referral**	**Lead List**	**Purchased List**
Age				**Total Net Worth**			
70 to 79 Years	43%	44%	87%	$500,000 or more	22%	71%	55%
Gender				**Health Status**			
Female	71%	59%	48%	Excellent or very good	39%	63%	46%
Male	29%	41%	52%	Limited by Health or Impairment	48%	27%	25%
Educational Attainment				**“I feel safe and secure”**			
College Graduate or higher	52%	75%	59%	Strongly agree or agree	79%	89%	89%
Home Ownership	58%	86%	85%	**Preferred Social Setting**			
Home Value				Individually	13%	9%	13%
$299,999 or less	59%	32%	52%	Small gatherings or groups	49%	53%	62%
$300,000 or more	41%	68%	48%	Large groups	4%	2%	3%
Annual Household Income				**Total Life Satisfaction**			
$50,000 or more	38%	77%	74%		67%	88%	82%

KEY TAKE-AWAYS: INFLUENCERS COMPARED BY RESPONDENT SOURCE

Characteristics of Influencers by Respondent Source							
Topic	Internet Referrals	Lead List	Purchased List	Topic	Internet Referral	Lead List	Purchased List
Age				**Annual Household Income**			
55 to 59	17%	19%	34%	$50,000 to $99,999	32%	40%	50%
60 to 64	21%	23%	34%	$100,000 to $149,999	19%	18%	19%
65 to 69	23%	13%	0%	$150,000 or more	15%	34%	16%
Gender				**Employment Status**			
Female	82%	84%	62%	Employed, working full-time	29%	29%	50%
Male	18%	16%	38%	Retired	47%	47%	22%
Marital Status				**Total Net Worth**			
Married	70%	78%	72%				
Educational Attainment				$100,000 to $749,999	51%	42%	53%
Bachelor's degree or higher	60%	72%	62%	$750,000 or more	24%	51%	30%

CHAPTER 1.
INTRODUCTION AND RESEARCH METHOD

TASK FORCE MEMBERS

Thank you to the Task Force Members who participated in face-to-face meetings, reviews of the survey, and provision of photos for use in the survey. Without the generosity of their time and wisdom, we would not have the same quality and depth of the research.

Task Force Members

- Kristen Ahrens, Capital Seniors Housing
- Jeffrey M. DeBevec, Belmont Senior Living (retired)
- Mandi Hogan, LTC Properties
- Lynne Katzmann, Juniper Communities
- Michael T. Milhaupt, Milhaupt Holdings
- Meg Ostrom, A/O Strategic Consulting
- Justin Robins, Senior Lifestyle
- Brett Robinson, Greystar
- Jonathan Ruchman, Brookdale

Research Team

- Kristen Paris, ProMatura Group, LLC
- David S. Schless, American Senior Housing Association
- Margaret A. Wylde, ProMatura Group, LLC

INTRODUCTION AND RESEARCH METHOD

Introduction

The American Seniors Housing Association initiated "Messages that Matter" a multi-faceted study of the perception and impact of the media, messages (topics), terminology, labels, jargon, and imaging on attitudes, acceptance, and purchase decisions of people (**Prospects** and/or **Influencers** such as a spouse or adult children) who are exploring the lovely residential communities that include a host of customized convenience, entertainment, educational, supportive and personal services. These communities are labeled relative to the amount of support provided to the individual: independent living, assisted living, and/or memory care services. We did not ask respondents the level of care they were seeking for themselves or a family member because many people do not know the differences between the levels of care.

Goals

The goal of this research effort was to achieve better and more effective communication with prospective and current customers, the general public, legislative bodies, and the professional referral market. The Messages that Matter task force members agreed that the language, jargon, and images presented in marketing materials for residential communities with services are often ageist, focus too heavily on care and communal living, and do not recognize individual differences, the lifestyle of each person, and the opportunities for quality of life.

The language and jargon are entrenched, but we, as an industry, need to eradicate the institutional cloud that hangs over us from skilled nursing, and our penchant to over-communicate about the care and services provided, and not the quality of life lived. These age-qualified, service-enriched residential communities promote living longer better.

Objectives of Research

1. Learn the impact of the many elements employed in marketing, advertising, and educational efforts of the industry by using examples and controlling their presentation to the research participants.
2. Identify similarities and differences in the respondent groups relative to their perceptions of the marketing, advertising, and educational components of our messaging.
3. Determine if there are better ways to describe and present the residential communities represented by the members of the American Senior Housing Association.

SURVEY RESPONDENTS

Survey Respondents

There were two groups of survey respondents: Prospects and Influencers. Prospects were individuals looking at the retirement housing options and were considering them for themselves. Influencers were looking for or with another person, such as a parent or sibling.

1,543 Prospects and 1,430 Influencers participated in the study. The majority of both groups (59% and 57%, respectively) participated in the marketing materials survey, and 629 Prospect respondents and 613 Influencer respondents obtained from purchased lists of age- and income-qualified households participated in the images study. The images study is in a separate report entitled, “Images that Matter.”

Exhibit 1. Number of Participants by Source

Survey	Source	Survey Respondent	
		Prospect	Influencer
Marketing Materials Survey	Purchased List 1	278	259
	A Place For Mom® Internet Newsletter/Blog Subscribers	314	348
	Lead List Participants from ASHA Member Participating Communities	322	210
	Sub-Total	914	817
Images Study	Purchased List 2 (separate report)	629	613
	Total	**1,543**	**1,430**

PARTICIPATING COMMUNITIES

Number of Levels of Care by Type of Community

Seventy-six communities participated in the study. Eight percent of the participating communities had one level of care. Five of these six communities were independent living, one was assisted living. Ninety-two percent of the remaining communities had two or more levels of care.

Exhibit 2. Number of Participating Communities by Levels of Care at Property

Property Type	Participating Communities		
	Count	Percent	
Freestanding IL	5	7%	8%
Freestanding AL	1	1%	
IL/AL	17	23%	92%
IL/AL/MC	26	34%	
CCRC	7	9%	
AL/MC	20	26%	
Total	**76**	**100%**	

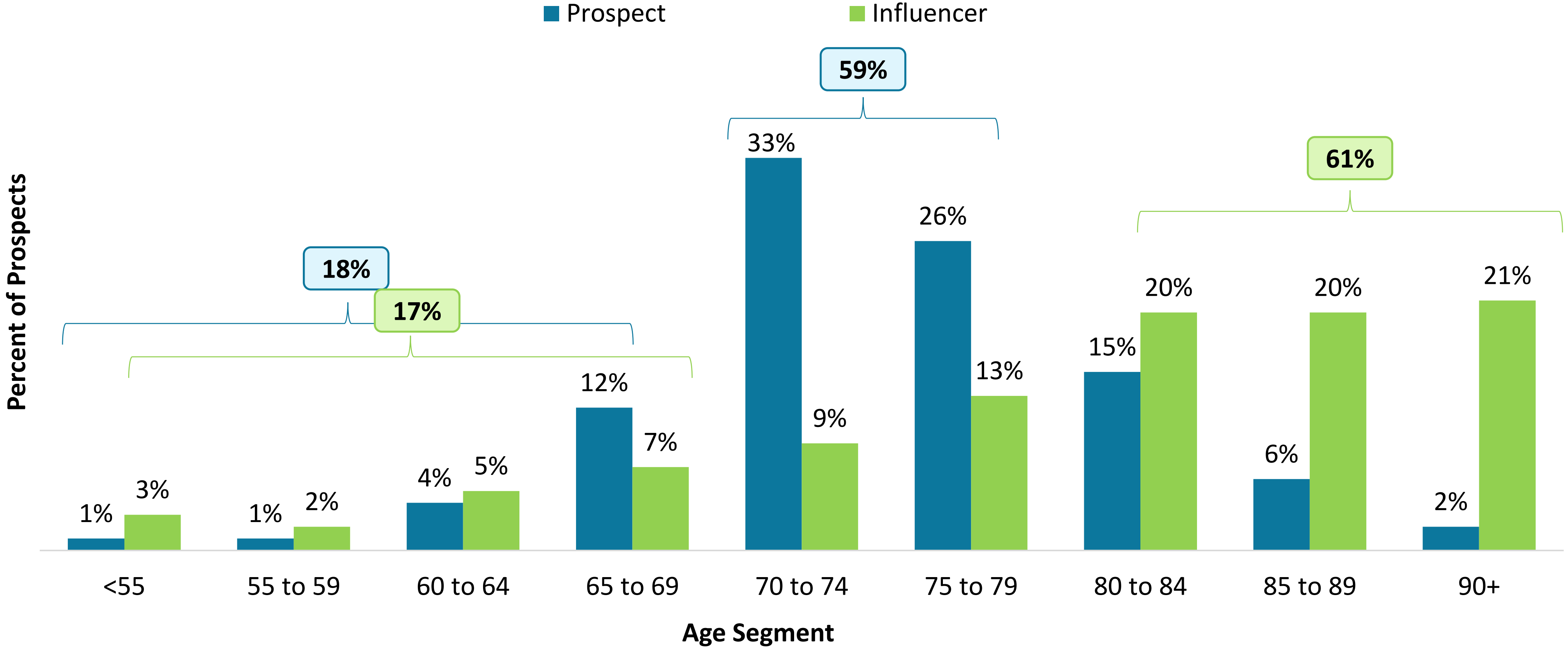
CHAPTER 2.
PROSPECTS OF AGE-QUALIFIED,
SERVICE-ENRICHED COMMUNITIES AND THEIR INFLUENCERS

AGE OF PROSPECTS AND INFLUENCERS

Influencers (61%) were significantly more likely to represent someone 80+ years of age, and **Prospects** (59%) were more likely to be between 70 and 79 years of age. Eighteen percent of **Prospects** and 17% of **Influencers** were less than 70 years of age.

Thirty-five percent of the 80+ were 80 to 84, 26% were 85 to 89, and 23% were 90+ years of age.

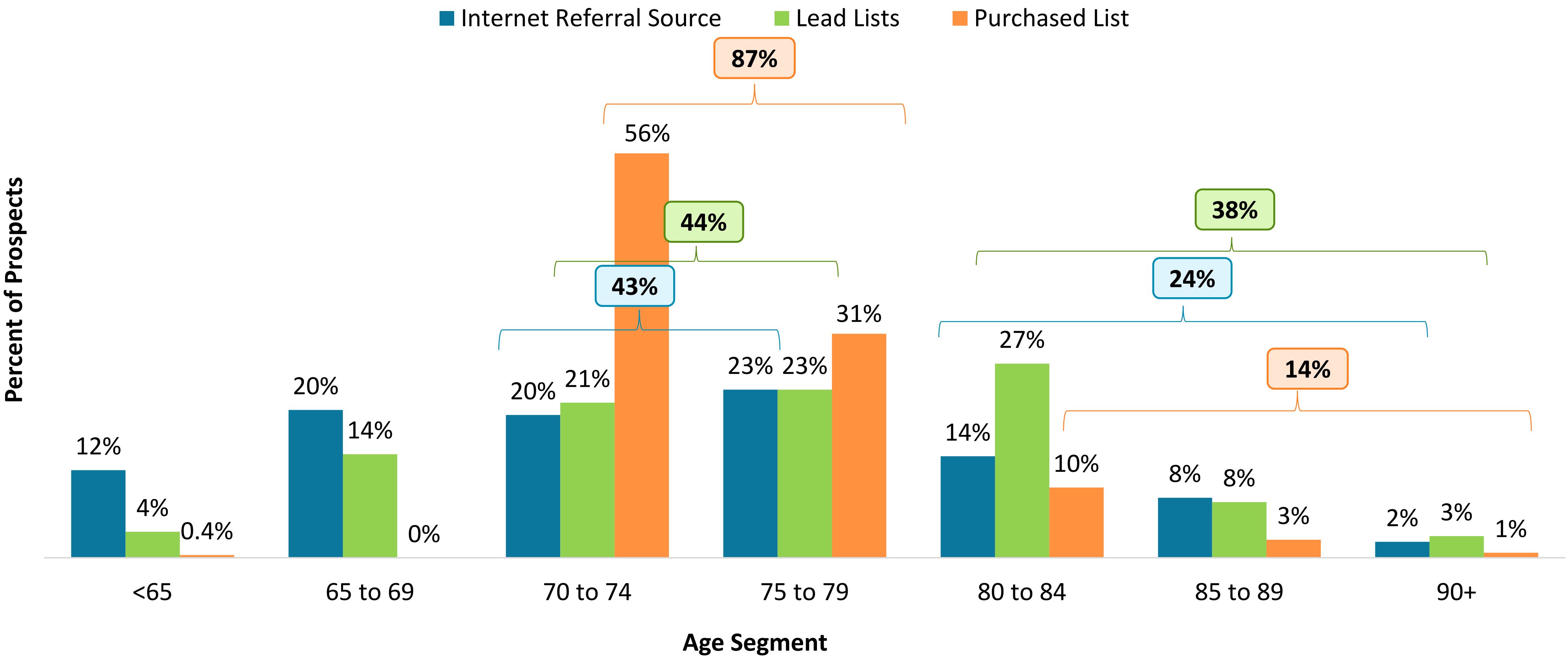
Exhibit 3. Percent of Prospects by Age Group and Respondent Type (p<.001)



AGE OF PROSPECTS AND INFLUENCERS

Respondents who were recruited via a purchased list of individuals tended to be younger. Eighty-seven percent of purchased list prospects who would consider moving to a retirement community were between 70 and 79 years of age, compared to just 44% of prospects on lead lists and 43% of internet referral source prospects who were in the 70 to 79-year age group. Thirty-eight percent of leads were 80+ years of age, compared to 24% of internet referral and 14% of purchased list respondents.

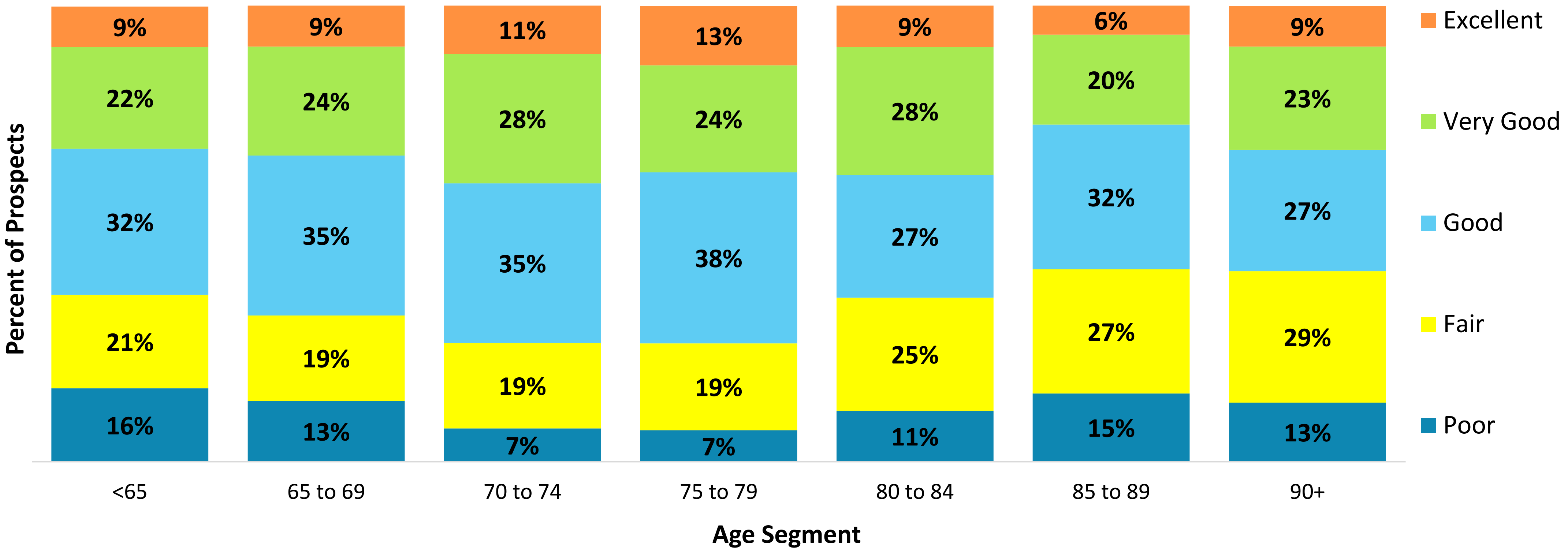
Exhibit 4. Percent of Prospects by Age Group and Respondent Source (p<.001)



HEALTH OF PROSPECTS AND INFLUENCERS BY AGE GROUP

On average, 66% of **Prospects** among all age groups said their health was good, very good, or excellent compared to others their same age. The differences in the health ratings between age groups were not statistically significant.

Exhibit 5. Percent of Prospect by Age Group and Health Status as Compared to Those the Same Age (*not sig.)*



GENDER OF PROSPECTS AND INFLUENCERS

Sixty percent of **Prospects** were female. In contrast, **Influencers** represented 67% of **Prospects** who were female. Females constituted 71% of internet referrals, 59% of the lead lists, and 48% of purchased list prospects. The purchased list was a randomly selected sample of individuals within the age and income range of prospects for service-enriched communities.

Exhibit 6. Gender of Prospects by Respondent Group (p<.01)

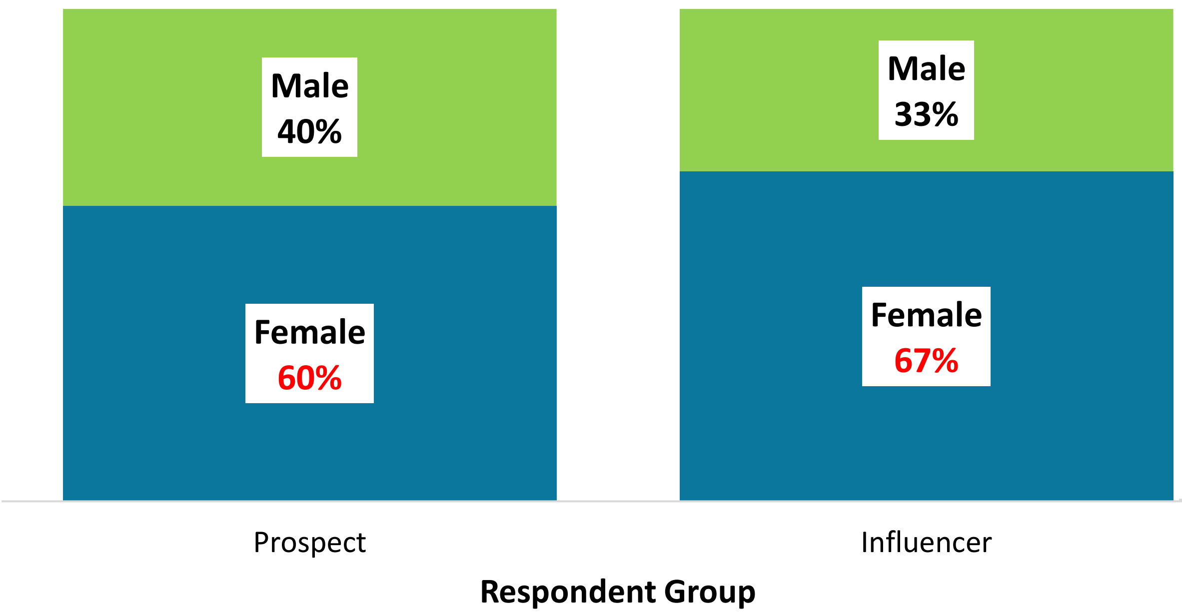
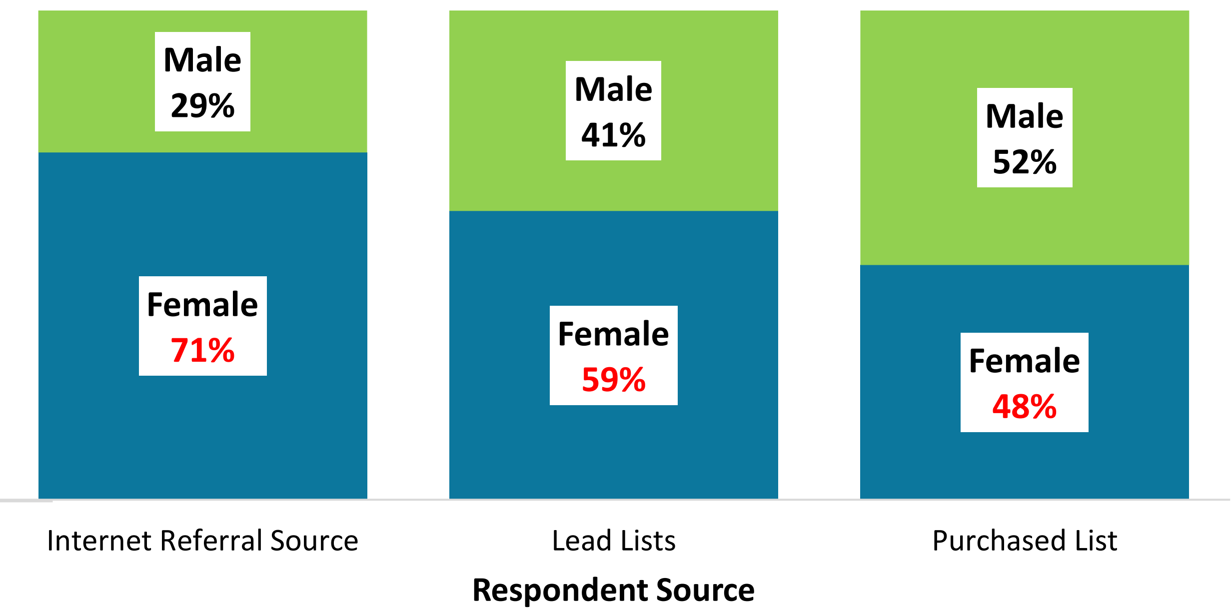
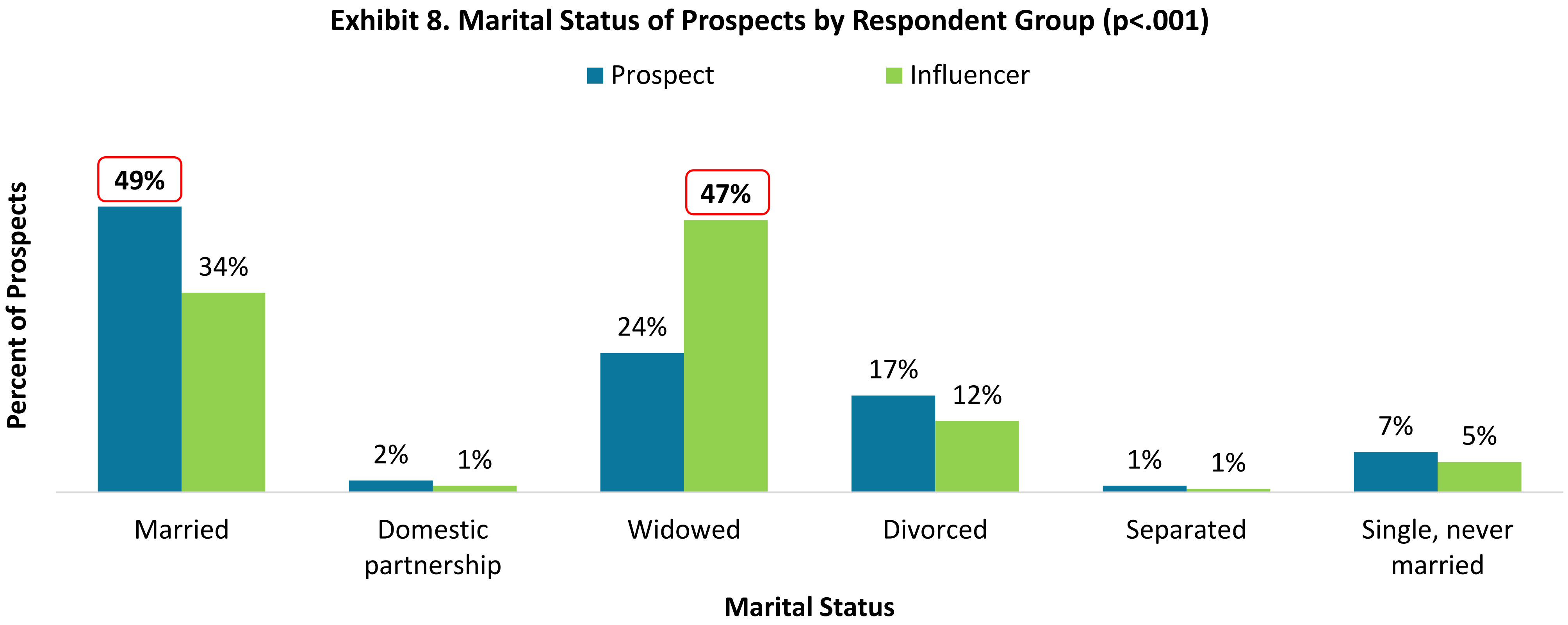


Exhibit 7. Gender of Prospects by Respondent Source (p<.001)



MARITAL STATUS OF PROSPECTS AND INFLUENCERS

Almost half of all **Prospects** were married. **Influencers** represented individuals who were more likely to be widowed (47%).

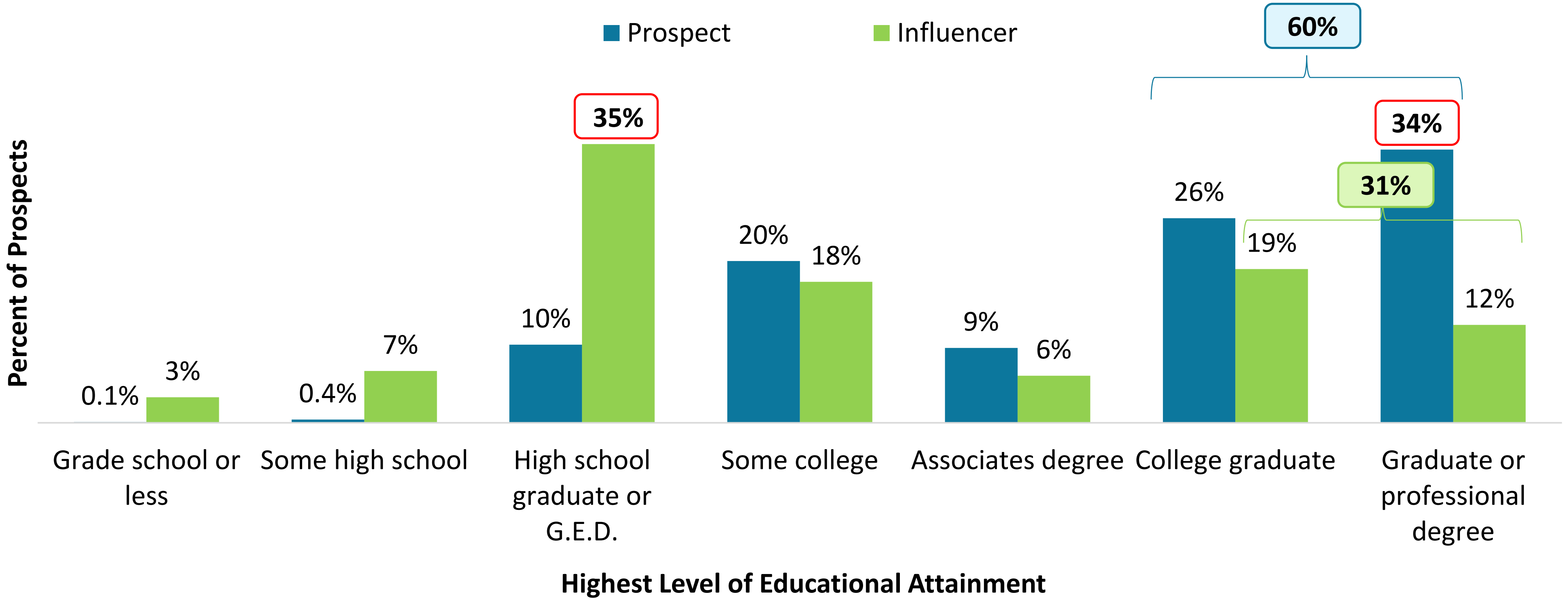


Totals of each category may exceed 100% because of rounding

EDUCATION LEVEL OF PROSPECTS AND INFLUENCERS

Prospects were significantly more likely than those represented by an **Influencer** to have an advanced education. The largest proportion of **Prospects** (34%) had a graduate or professional degree, and 60% had at least a four-year college degree. In contrast, the largest proportion (35%) of **Influencers** had a high school degree or G.E.D., and 31% had a four-year college degree.

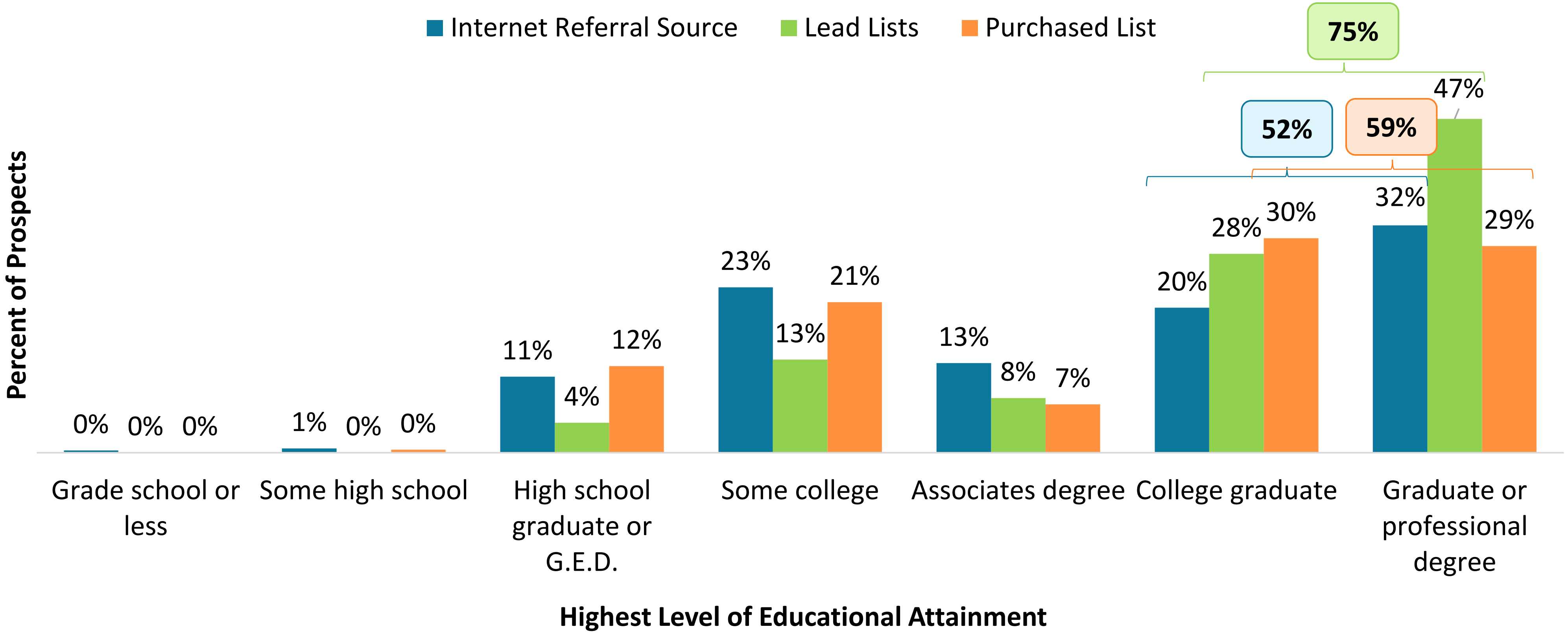
Exhibit 9. Prospects' Highest Level of Educational Attainment by Respondent Group (p<.001)



EDUCATION LEVEL OF PROSPECTS AND INFLUENCERS

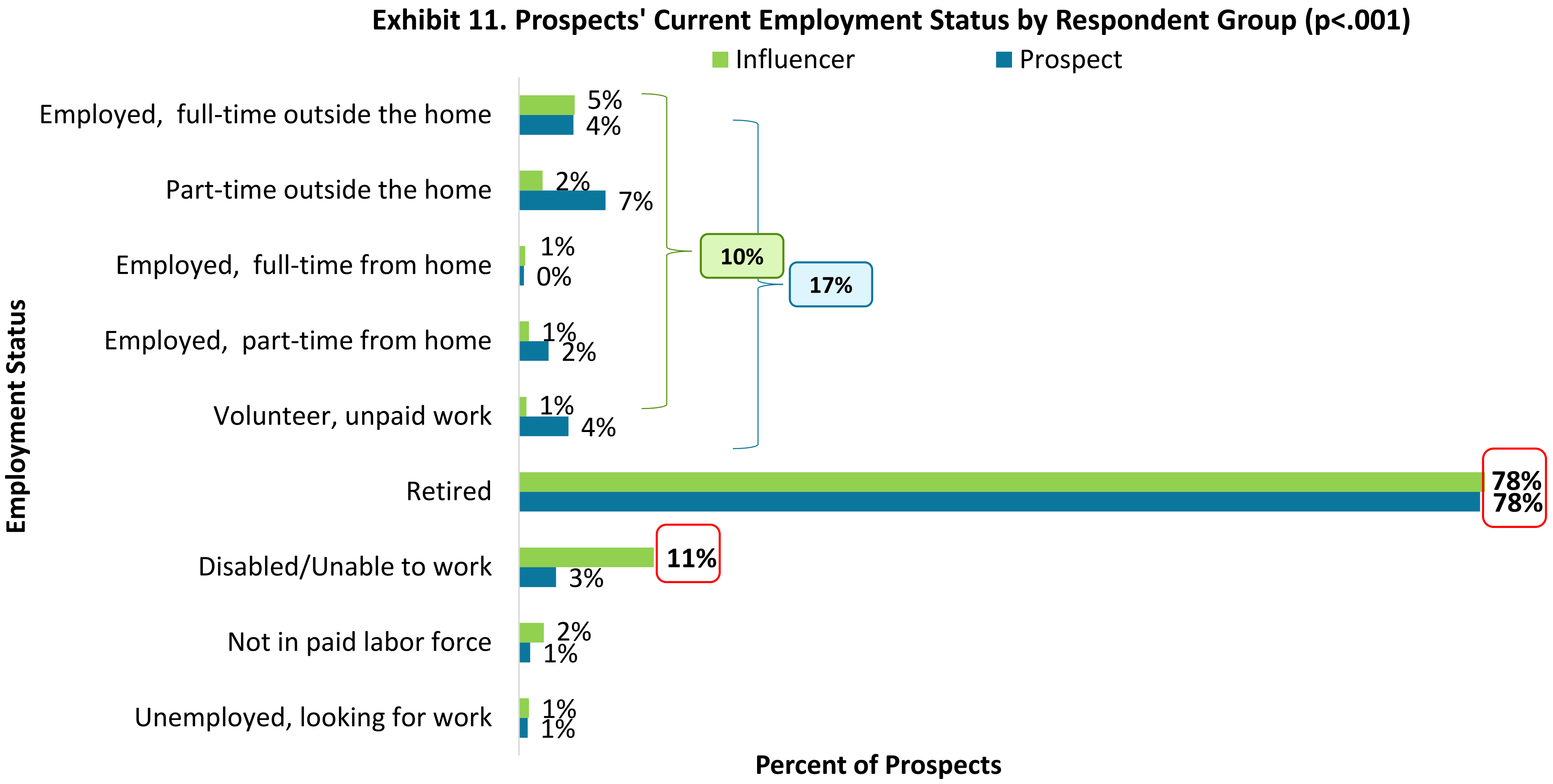
Slightly more than half (52%) of internet referral prospects had a four-year college degree or graduate degree, compared to 59% of purchased list prospects and 75% of lead list prospects. Residents of service-enriched age-qualified communities have achieved a higher academic level than is seen in the total population of this age group.

Exhibit 10. Prospects' Highest Level of Educational Attainment by Respondent Source (p<.001)



EMPLOYMENT STATUS OF PROSPECTS AND INFLUENCERS

Seventy-eight percent of both Prospects and Influencers were retired. Eleven percent of Influencers had a disability or were unable to work. Ten percent of the Influencers and 17% of the Prospects were engaged in employment or volunteer work.



PRIMARY OCCUPATION OF PROSPECTS AND INFLUENCERS

Prospects were more likely than Influencers to be in Business and Financial Services (11% vs. 5%, respectively), and Education and Library (19% vs. 11%).

Approximately equal proportions of Prospects and Influencers were in the health field (12% vs. 11%), and office and administrative fields (12% vs. 11%).

Influencers were more likely to be a homemaker (14%) than Prospects (2%).

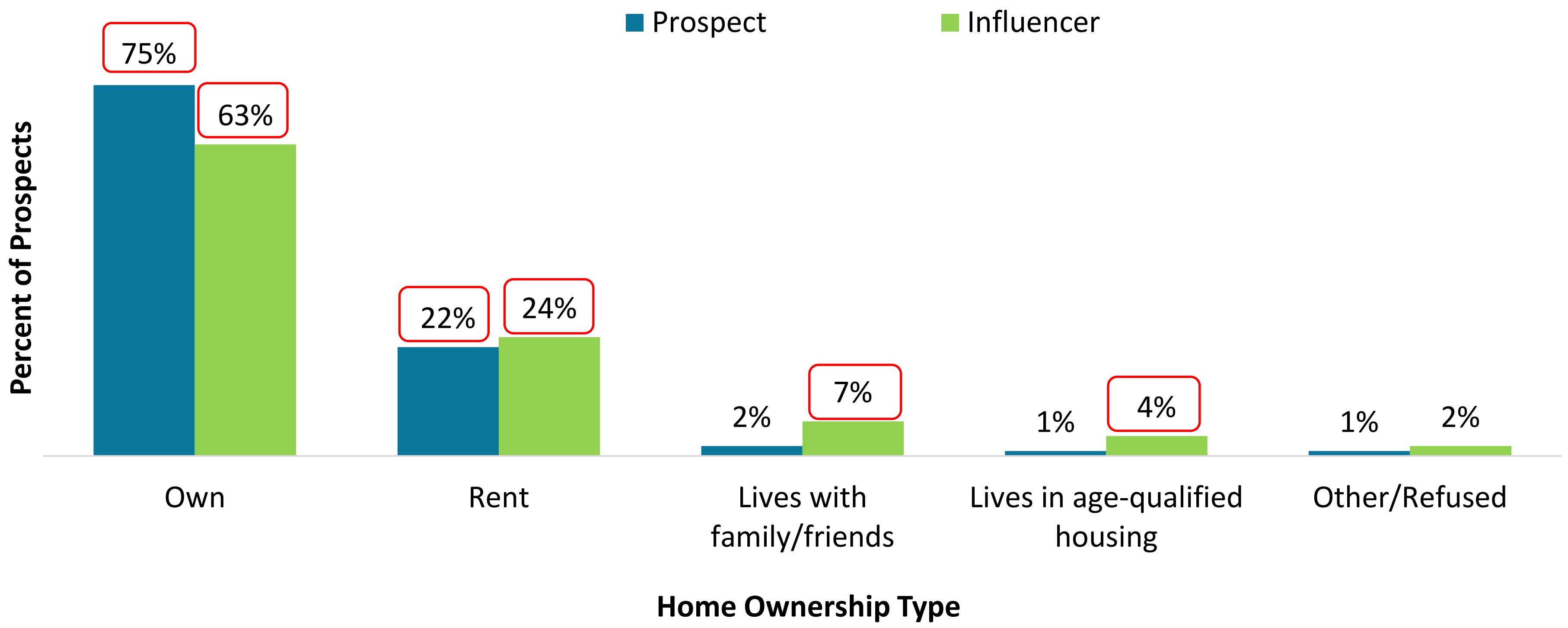
Exhibit 12. Prospects' Primary Occupation by Respondent Group (p<.001)

Primary Occupation (Alphabetical Order)	Prospects	
	Prospect	Influencer
Architecture & Engineering	3%	3%
Art, Design, Entertainment, Media & Sports	1%	2%
Buildings & Grounds Maintenance Occupations	0%	1%
Business & Financial	11%	5%
Community & Social Service	2%	2%
Computer & Mathematical	3%	1%
Construction	1%	2%
Education & Library	19%	11%
Farming & Forestry	0%	1%
Food Preparation & Serving	3%	4%
Government	8%	8%
Health	12%	11%
Homemaker	2%	14%
Installation, Maintenance, & Repair	1%	1%
Legal	2%	1%
Life, Physical, Social and Other Related Sciences	1%	1%
Management	7%	2%
Military	2%	1%
Office & Administrative	12%	11%
Personal Care & Service	0%	1%
Production Occupations	2%	3%
Protective Occupations	1%	1%
Sales	5%	8%
Transportation & Material Moving	2%	1%
I have never worked	0%	4%
Total	**100%**	**100%**

WHERE PROSPECTS AND INFLUENCERS LIVE

Prospects were significantly more likely to own their home than Influencers. Seventy-five percent of Prospects own their home and 22% rent. Sixty-three percent of Influencers own their home, 24% rent, 7% live with family and friends, and 4% live in age-qualified housing.

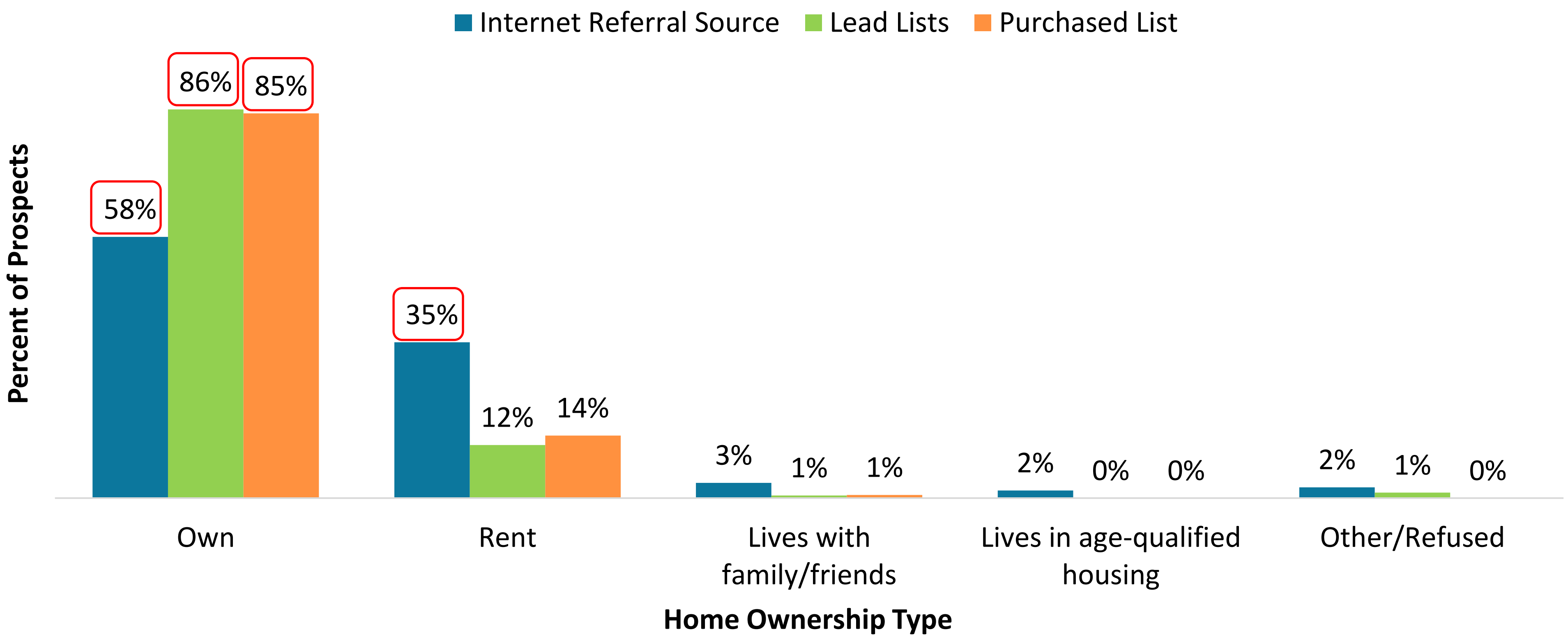
Exhibit 13. Prospects' Current Home Ownership by Respondent Group (p<.001)



HOME OWNERSHIP BY RESPONDENT SOURCE

At least 85% of both lead and purchased list prospects own their home. Fifty-eight percent of internet referral prospects own their homes, and 35% rent. Internet referral prospects are less likely to have equity in a home and thus would be less likely to be a candidate for an entrance fee community.

Exhibit 14. Current Home Ownership by Respondent Source ($p<.001$)



HOME VALUE OF PROSPECTS AND INFLUENCERS

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Prospects are significantly more likely to have equity in a home than Influencers.

Prospects (53%) were more likely than Influencers (38%) to report a home value of $300,000 or more.

Forty-nine percent of Prospects and 63% of Influencers estimated the current market value of their home was within the range from less than $100,000 to $299,999.

Forty-one percent of Prospects said their home value ranged from $300,000 to $699,999. Just 28% of Influencers said the prospect's home value was in this range.

Twelve percent of Prospects said their home value was $700,000 or more. Ten percent of Influencers said the prospect's home value was $700,000 or more.

Exhibit 15. Current Market Value of Prospects' Primary Residence by Respondent Group (p<.001)

		Prospect			Influencer
Less than $100,000			6%		13%
$100,000 to $149,999		**49%**	9%	**63%**	13%
$150,000 to $199,999			16%		13%
$200,000 to $299,999			18%		24%
$300,000 to $399,999	**53%**		18%	**38%**	10%
$400,000 to $499,999		**41%**	12%	**28%**	8%
$500,000 to $599,999			5%		6%
$600,000 to $699,999			6%		4%
$700,000 to $799,999			3%		4%
$800,000 to $899,999		**12%**	3%	**10%**	1%
$900,000 to $999,999			2%		1%
$1,000,000 or more			4%		4%

HOME VALUE BY RESPONDENT SOURCE

If purchasing a list of households for marketing purposes be sure to specify not only age-range, income levels, but also home values, particularly if it is an entrance-free community.

Households on the lead list had the highest home value with 68% reporting home values of $400,000 or more compared to 41% of internet referrals and 49% of purchased list respondents.

The majority (59%) of internet referrals and 52% on the purchase list estimated the current market value of their home was within the range from less than $100,000 to $299,999.

Thirty-one percent of internet referrals and 39% of the purchased list said their home values ranged from $300,000 to $699,999.

Thirteen percent of the lead list and 10% of both the internet referrals and purchased list said their home value is $700,000 or more.

Exhibit 16. Current Market Value of Prospects' Primary Residence by Respondent Source (p<.01)

	Internet Referral Source	Lead Lists	Purchased List
Less than $100,000	9%	2%	6%
$100,000 to $149,999	14%	2%	10%
$150,000 to $199,999	19%	11%	18%
$200,000 to $299,999	17%	17%	18%
$300,000 to $399,999	13%	29%	16%
$400,000 to $499,999	10%	15%	11%
$500,000 to $599,999	4%	5%	6%
$600,000 to $699,999	4%	6%	6%
$700,000 to $799,999	1%	2%	3%
$800,000 to $899,999	1%	3%	3%
$900,000 to $999,999	2%	3%	2%
$1,000,000 or more	6%	5%	2%

Bracketed subtotals	Internet Referral Source	Lead Lists	Purchased List
Less than $100,000 to $299,999	59%	32%	52%
$300,000 to $699,999	31%	55%	39%
$700,000 or more	10%	13%	10%
$400,000 or more	41%	68%	49%

ANNUAL HOUSEHOLD INCOME OF PROSPECTS AND INFLUENCERS

Sixty-one percent of Prospects had incomes exceeding $50,000 compared to 40% of Influencers. Influencers were significantly more likely to report annual household incomes less than $50,000 (61%) compared to Prospects (39%).

Exhibit 17. Prospects' Annual Household Income (2018) by Respondent Group (p<.001)

Annual Income	Prospect		Influencer	
Less than $25,000	10%	39%	27%	61%
$25,000 to $34,999	12%		18%	
$35,000 to $49,999	17%		16%	
$50,000 to $74,999	23%	61%	16%	40%
$75,000 to $99,999	14%		12%	
$100,000 to $124,999	10%		5%	
$125,000 to $149,999	6%		2%	
$150,000 or more	8%		5%	

ANNUAL HOUSEHOLD INCOME BY RESPONDENT SOURCE

Seventy-seven percent of lead list prospects and 74% of purchased list prospects reported an annual household income of $50,000 or more. In contrast, 61% of internet referrals reported incomes of less than $50,000.

Exhibit 18. Prospects' Annual Household Income (2018) by Respondent Source (p<.001)

Annual Income	Internet Referral Source	Lead Lists	Purchased List
Less than $25,000	23%	3%	1%
$25,000 to $34,999	18%	7%	9%
$35,000 to $49,999	20%	14%	16%
$50,000 to $74,999	20%	20%	27%
$75,000 to $99,999	9%	20%	14%
$100,000 to $124,999	3%	12%	15%
$125,000 to $149,999	2%	11%	8%
$150,000 or more	4%	14%	10%

61%

77%

74%

TOTAL NET WORTH OF PROSPECTS AND INFLUENCERS

Internet referrals are not as likely as lead list and purchased list households to have income of $50,000+. Prospects were significantly more likely to have a higher net worth than Influencers. Forty-six percent of Prospects had a net worth exceeding $500,000 compared to 27% of 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%

46% **27%**

TOTAL NET WORTH BY RESPONDENT SOURCE

Individuals surveyed from lead lists of communities (71%) were significantly more likely to have a net worth of $500,000 or more than households surveyed from a purchased list (55%) and; those from an internet referral source among whom (22%) had a net worth exceeding $500,000.

Exhibit 20. Prospects' Total (Net) Worth by Respondent Source (p<.001)

	Internet Referral Source	Lead Lists	Purchased List
Less than $50,000	33%	7%	9%
$50,000 to $99,999	11%	1%	4%
$100,000 to $299,999	23%	10%	14%
$300,000 to $499,999	11%	12%	18%
$500,000 to $749,999	5%	18%	15%
$750,000 to $999,999	4%	10%	9%
$1,000,000 to $1,999,999	7%	27%	19%
$2,000,000 or more	6%	16%	12%

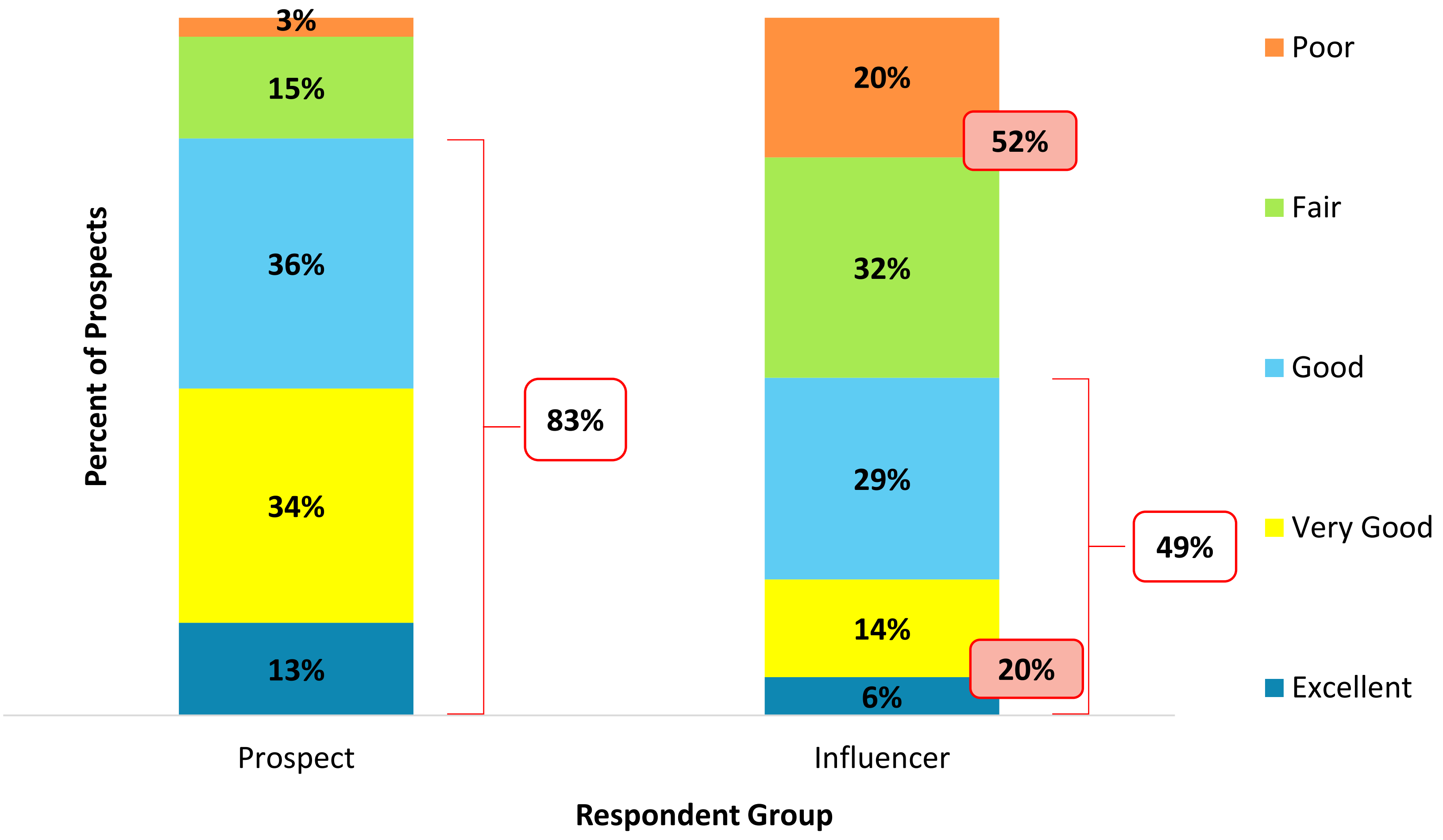
22% **71%** **55%**

HEALTH STATUS OF PROSPECTS AND INFLUENCERS

Prospects were significantly more likely (83%) to have excellent, very good, or good health than Influencers (49%).

The majority of individuals represented by an Influencer had health issues. Among those represented by Influencers, just 20% had very good or excellent health and 52% had fair or poor health.

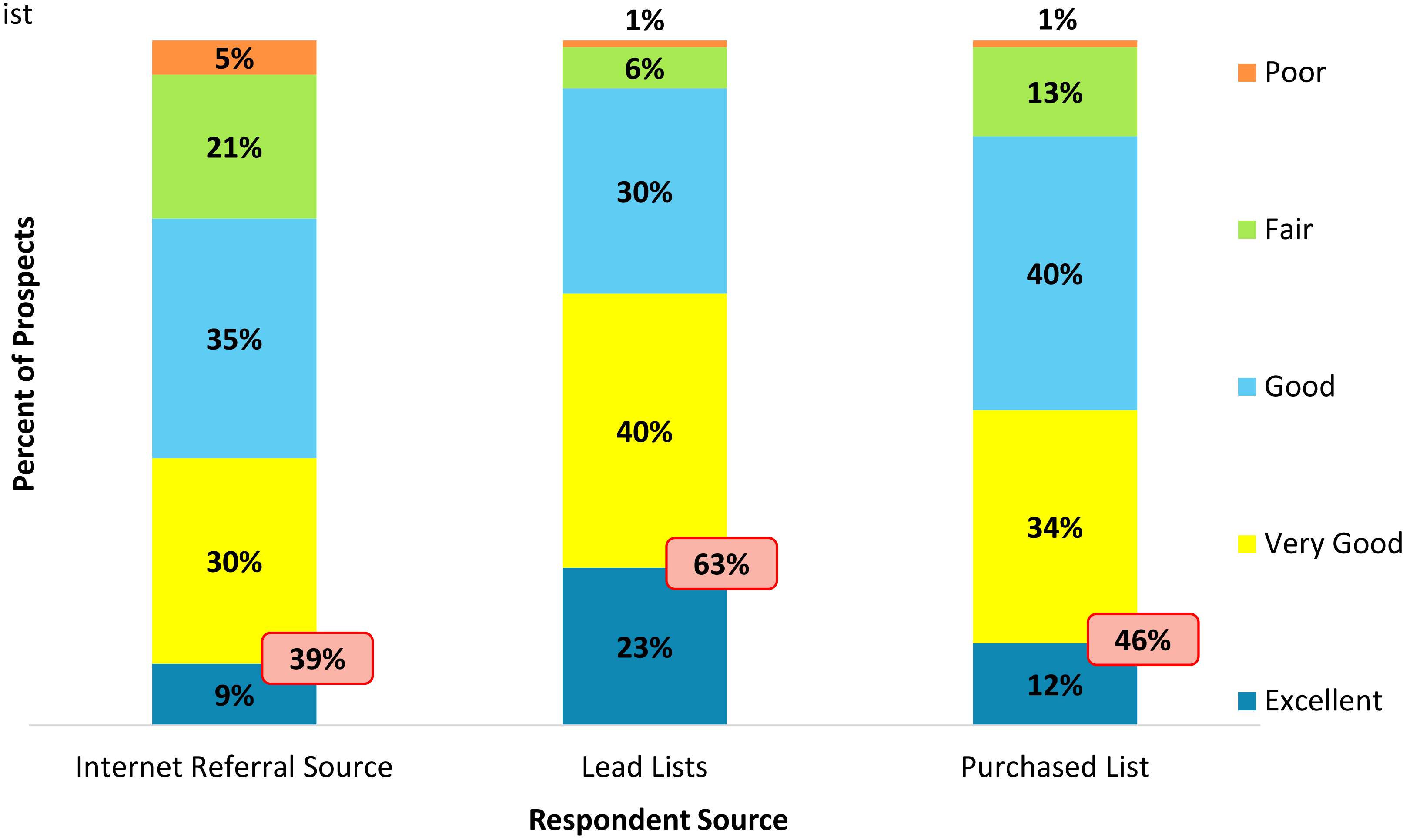
Exhibit 21. Prospects Health Status, Compared to Others the Same Age, by Respondent Group (p<.001)



HEALTH STATUS BY RESPONDENT SOURCE

Survey respondents who were from a lead list were significantly more likely to have health rated as excellent or very good (63%) than respondents who came from a purchased list (46%) or an internet referral source (39%).

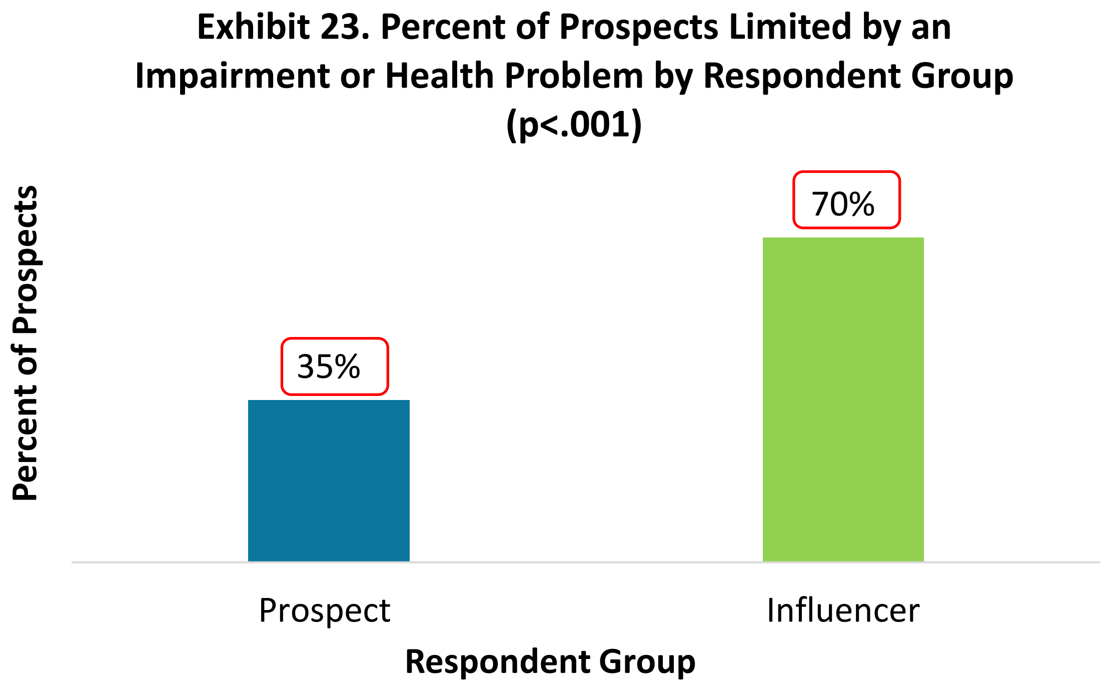
Exhibit 22. Prospects Health Status, Compared to Others the Same Age, by Respondent Source (p<.001)

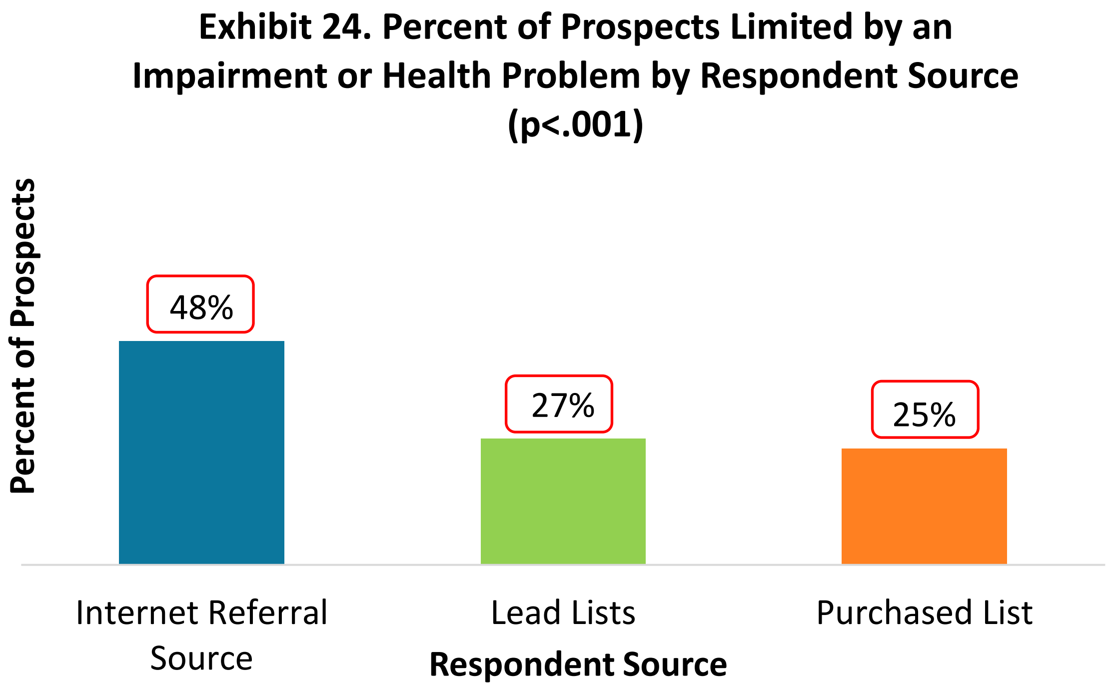


IMPAIRMENTS OR HEALTH PROBLEMS OF PROSPECTS AND INFLUENCERS

Prospects who completed the survey themselves were significantly **less** likely (35%) to be limited by an impairment or health problem than **Influencers** (70%).

Prospects who were from the internet referral source (48%) were significantly more likely than lead list (27%) or purchased list respondents (25%) to have an impairment or health problem.

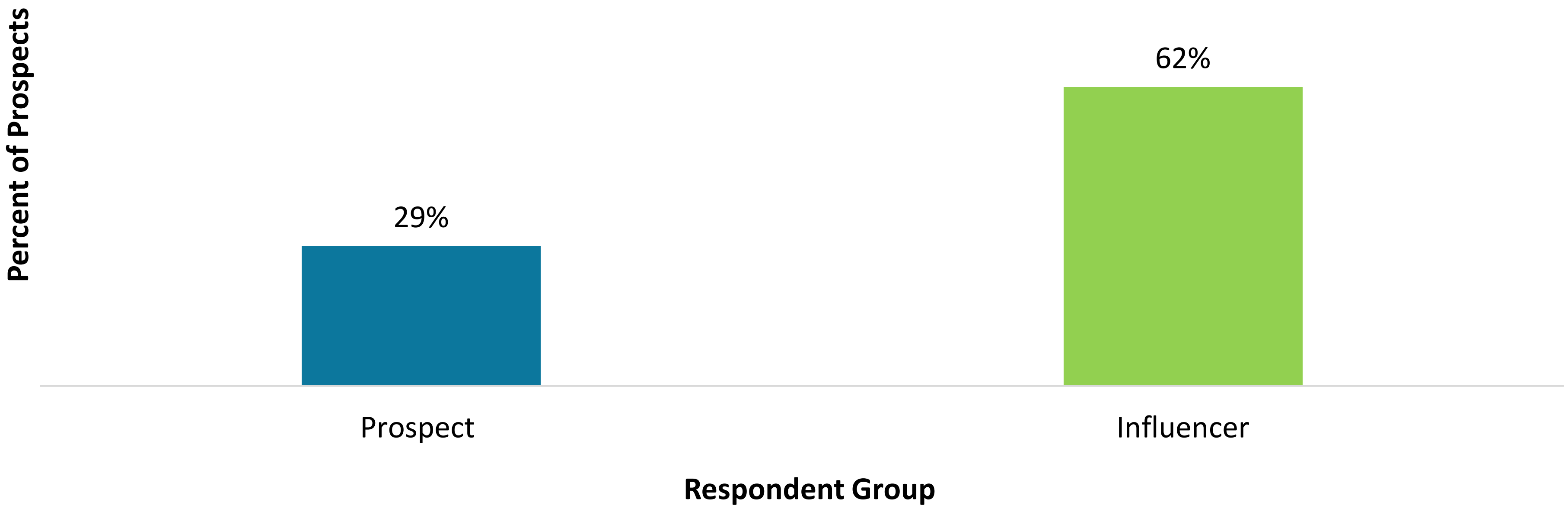




PROSPECTS’ AND INFLUENCERS’ USE OF ASSISTIVE DEVICES

Twenty-nine percent of **Prospects** reported the use of an assistive device to accomplish activities of daily living compared to 62% of **Influencers**.

Exhibit 25. Percent of Prospects Who Require the Use of an Assistive Device by Respondent Group (p<.001)

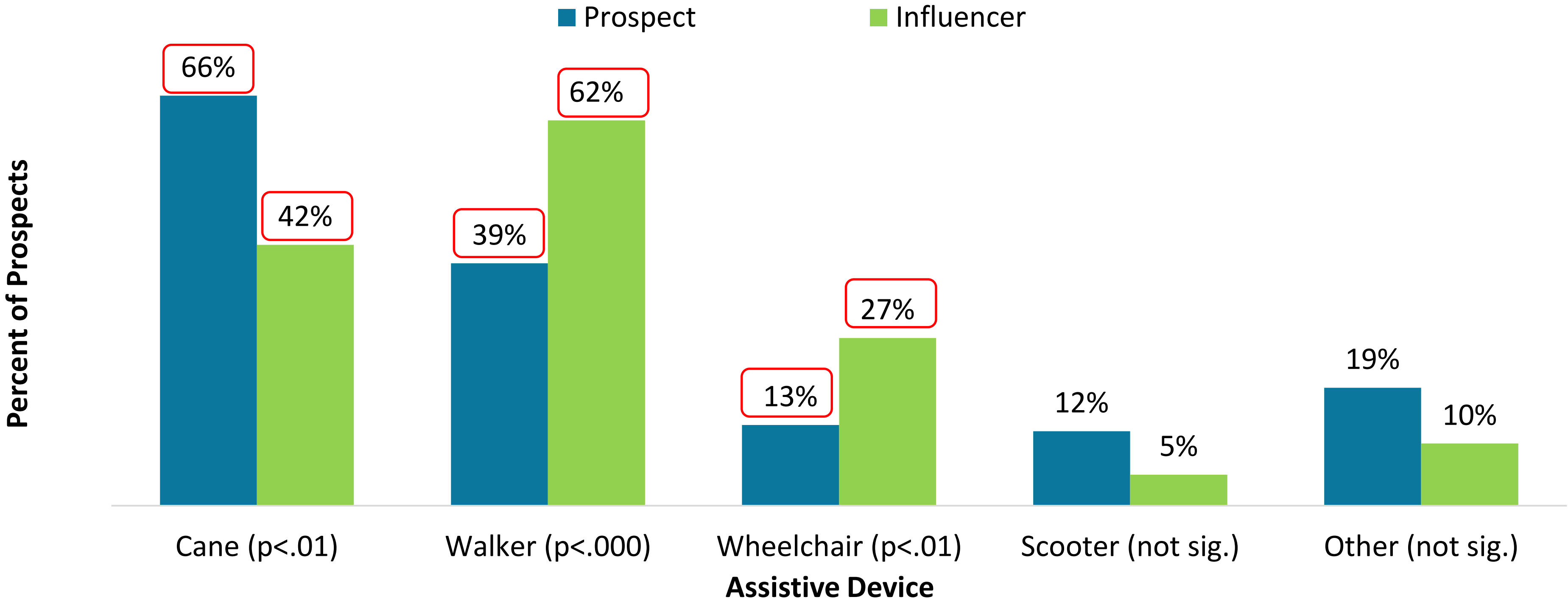


PROSPECTS' AND INFLUENCERS' USE OF ASSISTIVE DEVICES

Influencers (26%) were significantly more likely than Prospects (10%) to require the use of an assistive device.

Among Prospects who required the use of an assistive device, 66% used a cane, compared to 42% of Influencers; 39% of Prospects required the use of a walker compared to 62% of Influencers, and 13% of Prospects required the use of a wheelchair compared to 27% of Influencers.

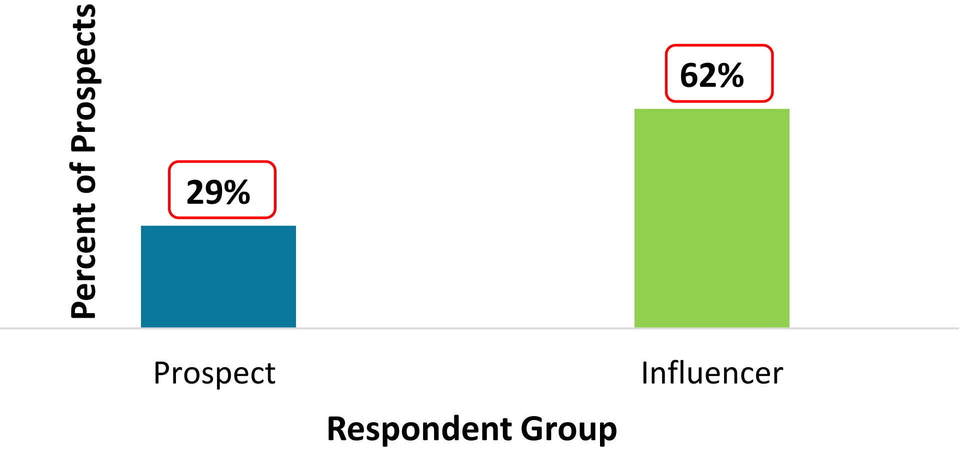
Exhibit 26. Percent of Prospects Who Require the Use of an Assistive Device by the Assistive Device(s) Used by Respondent Group [Multiple Responses Allowed]



RESIDENTIAL COMMUNITY SERVICES

More than twice as many **Influencers** (62%) than **Prospects** (29%) would require additional services from the community.

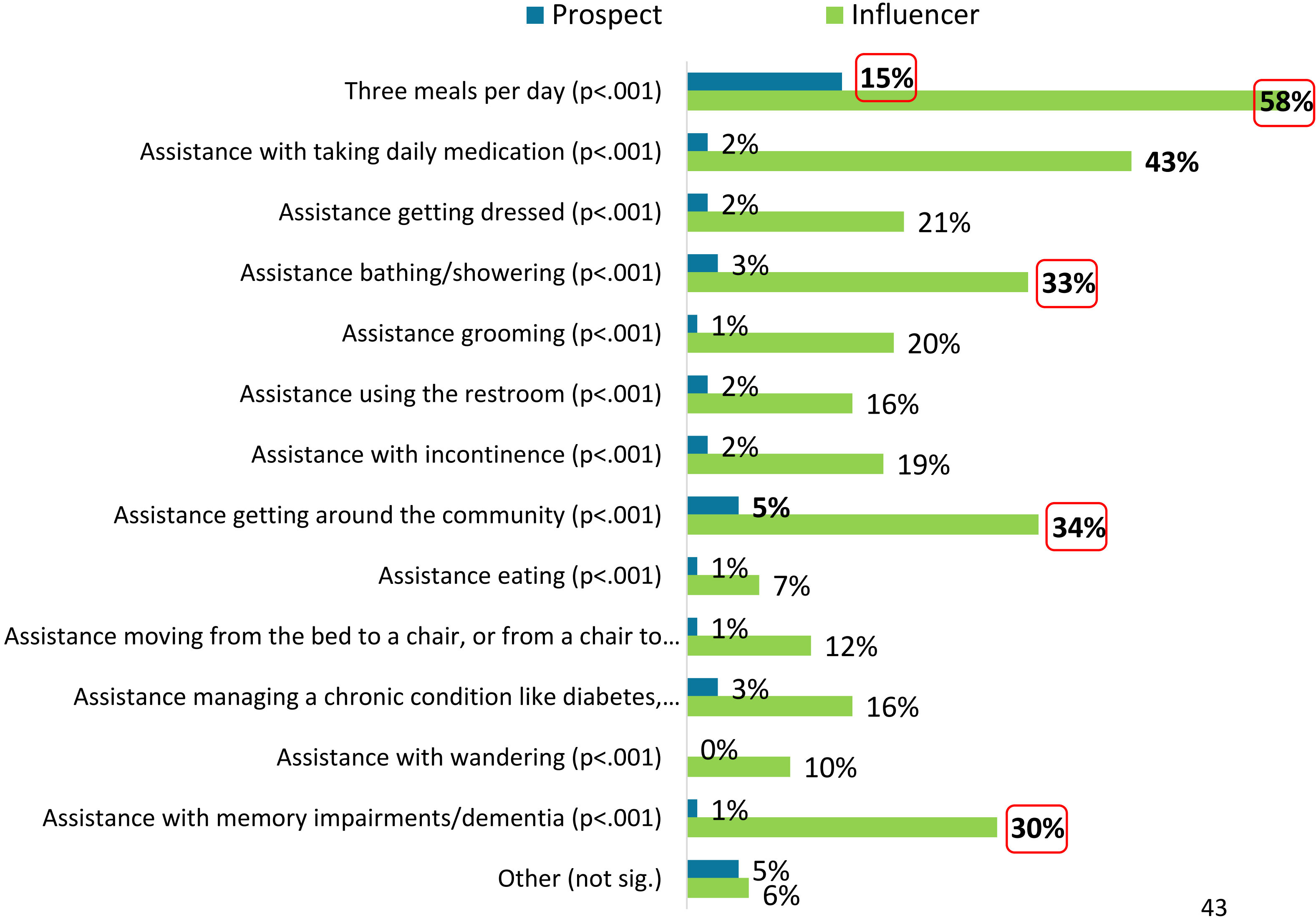
Exhibit 27. Percent of Prospects Who Would Require Additional Services if They Moved to a Residential Community with Services by Respondent Group (p<.001)



Of the **Prospects** who would require additional services, 15% said they would require three meals per day, and 5% said they would need assistance getting around the community.

Fifty-eight percent of **Influencers** would require three meals per day; 43% would need assistance with daily medication; 34% need help with getting around the community; 33% need assistance with bathing/showering, and 30% need assistance with memory impairments/dementia.

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

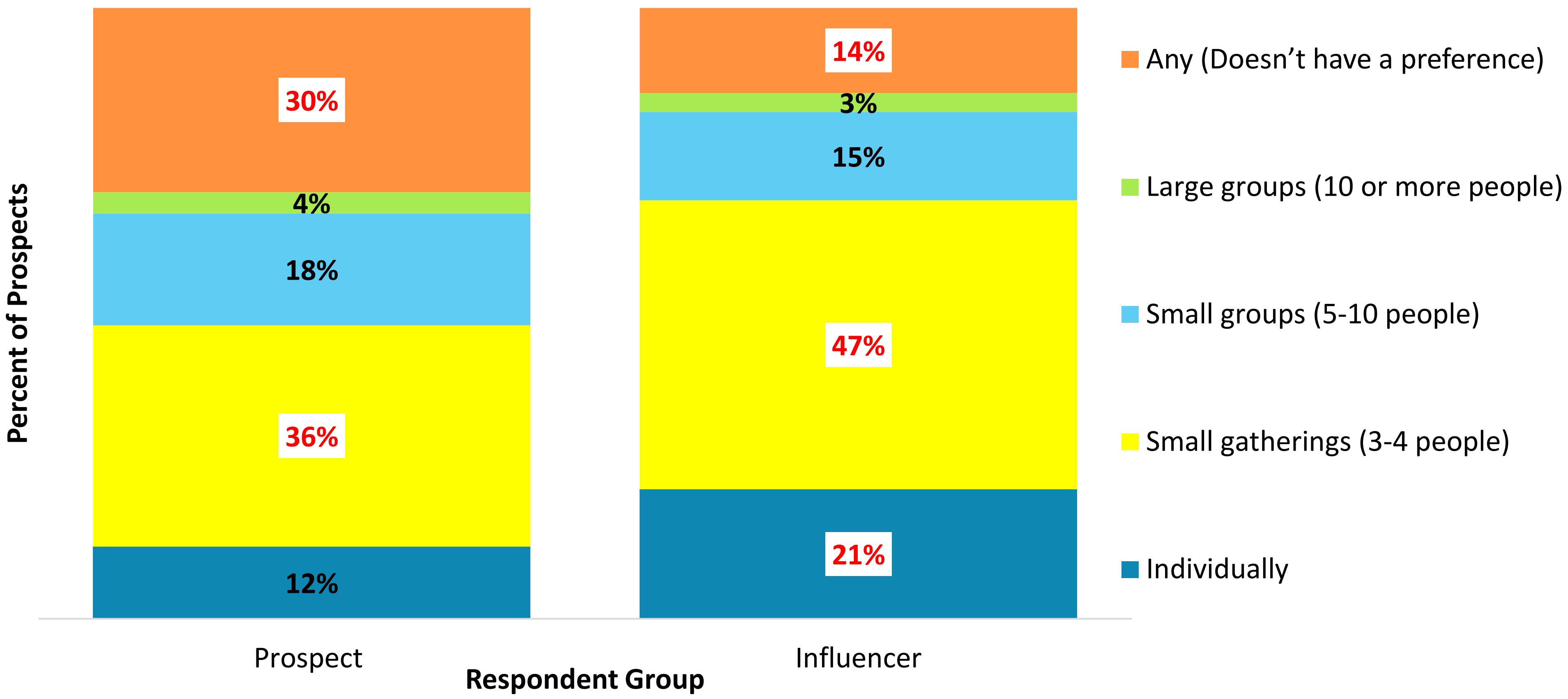


PROSPECTS' AND INFLUENCERS' PREFERRED SOCIAL SETTING

Nearly one-third (30%) of **Prospects** said they do not have a preferred social setting, while 36% preferred small gatherings of three to four people.

Influencers generally preferred smaller social settings with 47% preferring small gatherings of three to four people and 21% preferring to socialize individually. The differences in preferences in social settings among **Prospects** and **Influencers** is likely related to the differences in health and abilities.

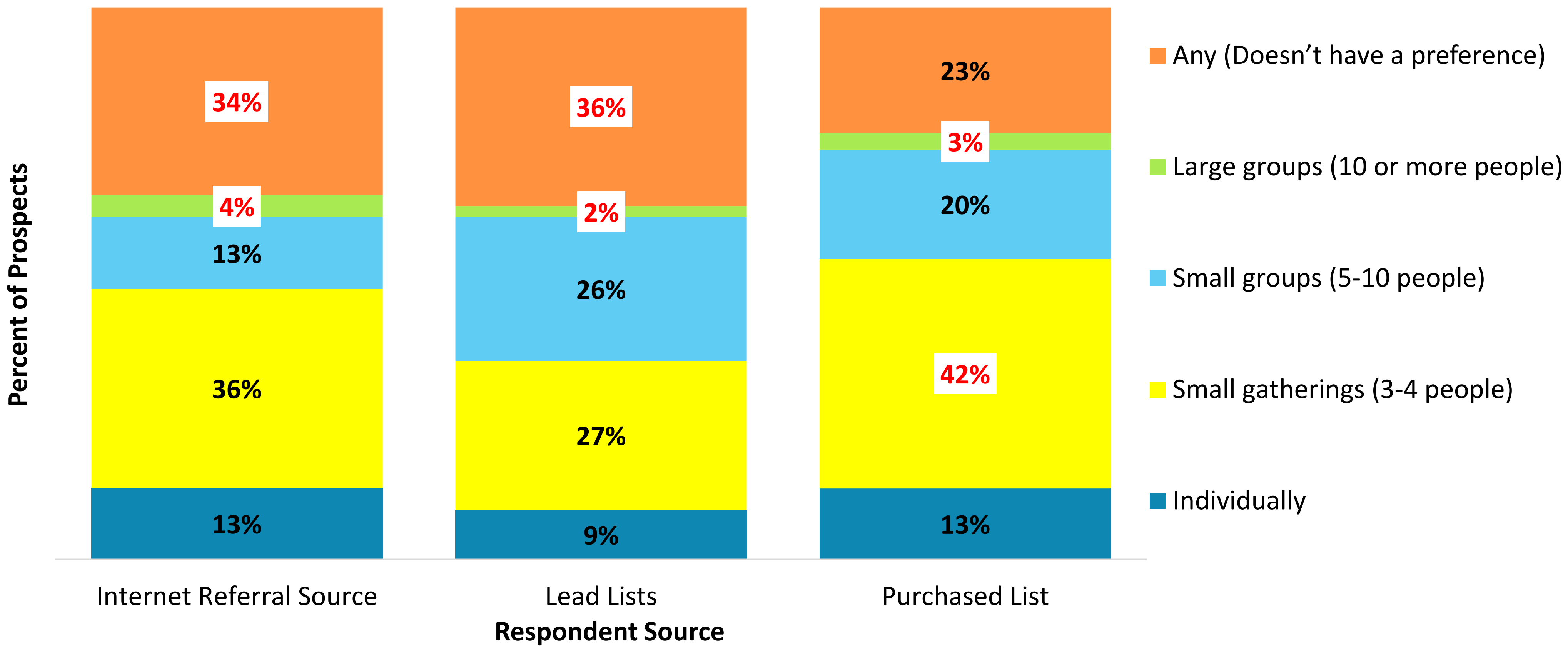
Exhibit 29. Prospects' Preferred Social Setting by Respondent Group (p<.001)



PROSPECTS' PREFERRED SOCIAL SETTING BY RESPONDENT SOURCE

Small gatherings of three to 10 people were preferred by approximately 50% or more of the respondents. Four percent or fewer of each group preferred large groups of 10 or more people. More than a third of internet referral prospects (34%) and lead list prospects (36%) said they don't have a preferred social setting. Forty-two percent of purchased list prospects prefer small gatherings of three to four people.

Exhibit 30. Prospects' Preferred Social Setting by Respondent Source (p<.001)



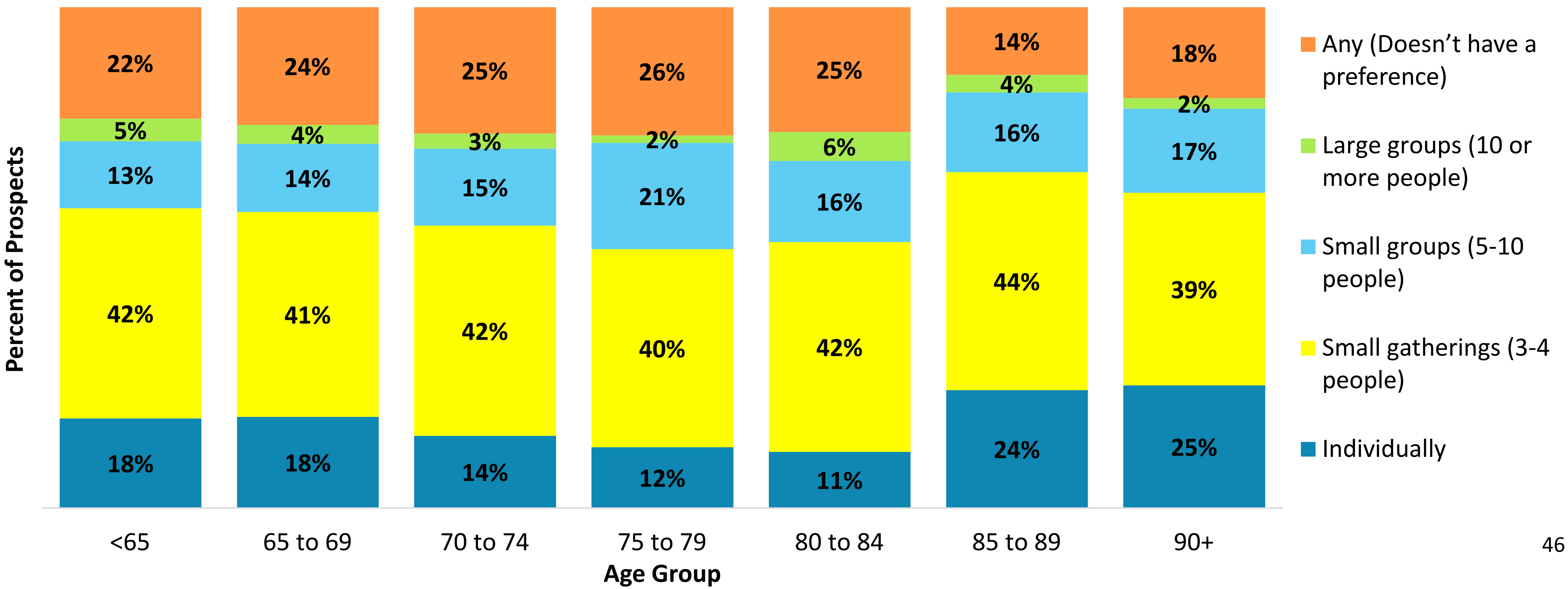
PROSPECTS' PREFERRED SOCIAL SETTING BY AGE GROUP

The largest proportion (from 39% to 44%) of all age groups prefer small social gatherings of three to four people. The next group size preferred is from five to 10 people. More than 60% of Prospects 85+ years of age prefer individual social settings or smaller social settings of three to four people.

More than 40% of Prospects 80 years of age or less prefer smaller social settings with three to four people.

More than 20% of Prospects 84 years of age or less do not have a social setting preference. Large groups of 10 or more people were the least preferred. Six percent or fewer of any age group preferred groups of 10 or more people.

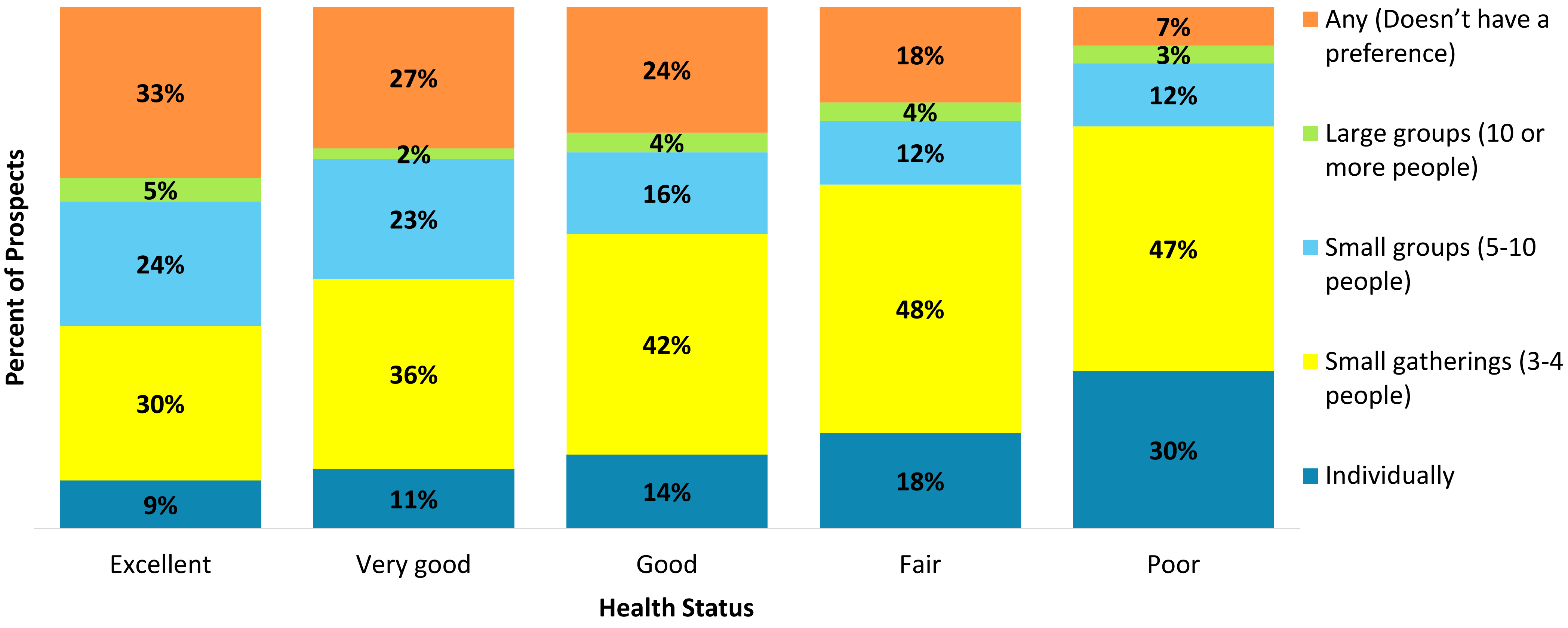
Exhibit 31. Prospects' Preferred Social Setting by Age Group (p<.01)



PROSPECTS' PREFERRED SOCIAL SETTING BY HEALTH STATUS

Prospects who rated their health as good or better were more likely to prefer larger social settings or did not have a preference. Large groups of 10 or more were the least preferred among all groups range from 2% to 5%. Prospects who rated their health as fair (18%) or poor (30%) were more likely to prefer small gatherings of three or four people or activities with one individual.

Exhibit 32. Prospects' Preferred Social Setting by Health Status (p<.001)

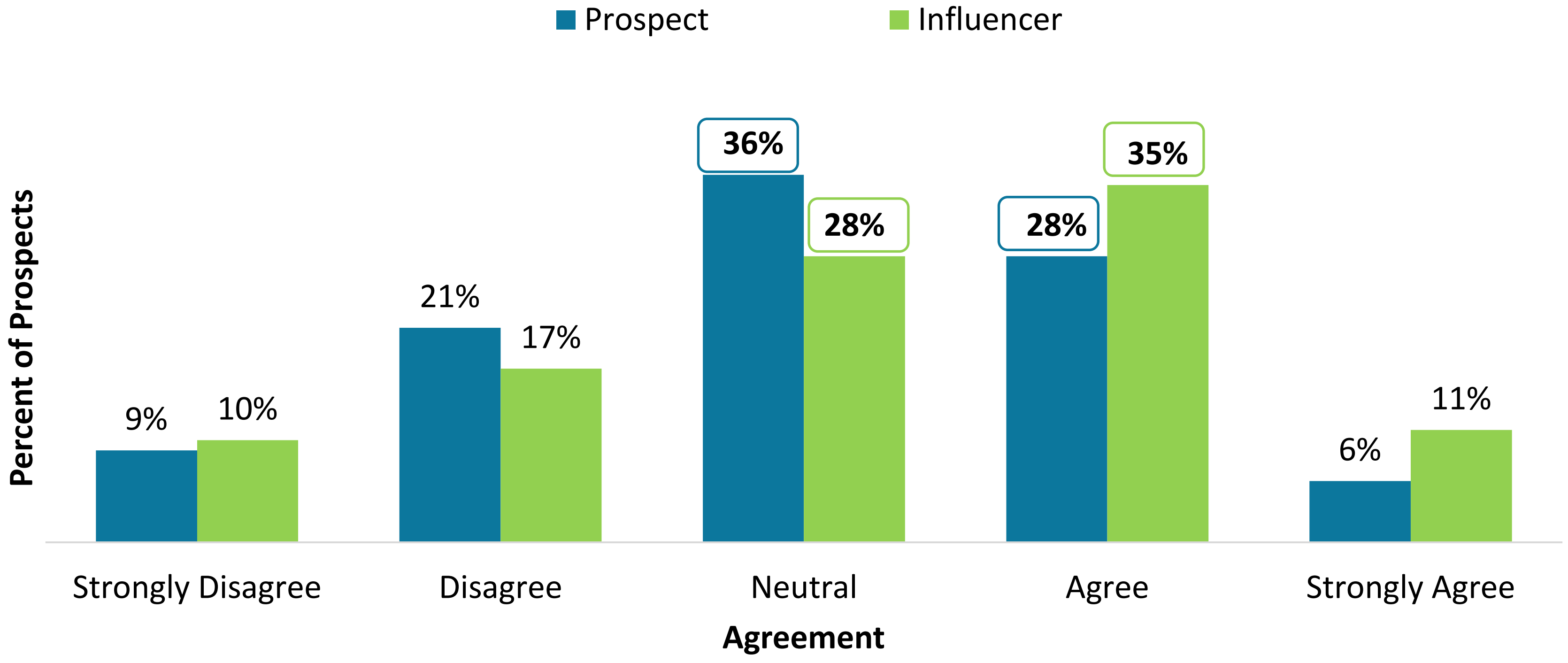


PROSPECTS' AND INFLUENCERS' DINING COMPANION PREFERENCES

When asked to rate their agreement with the statement "I would rather eat a meal with strangers than by myself," individuals who completed the survey themselves were more likely to be neutral (36%) or agreed (28%) with the statement. **Influencers** were more likely to agree (35%) or were neutral (28%) about the statement.

People who agree with the statement typically would agree that they enjoy being with people.

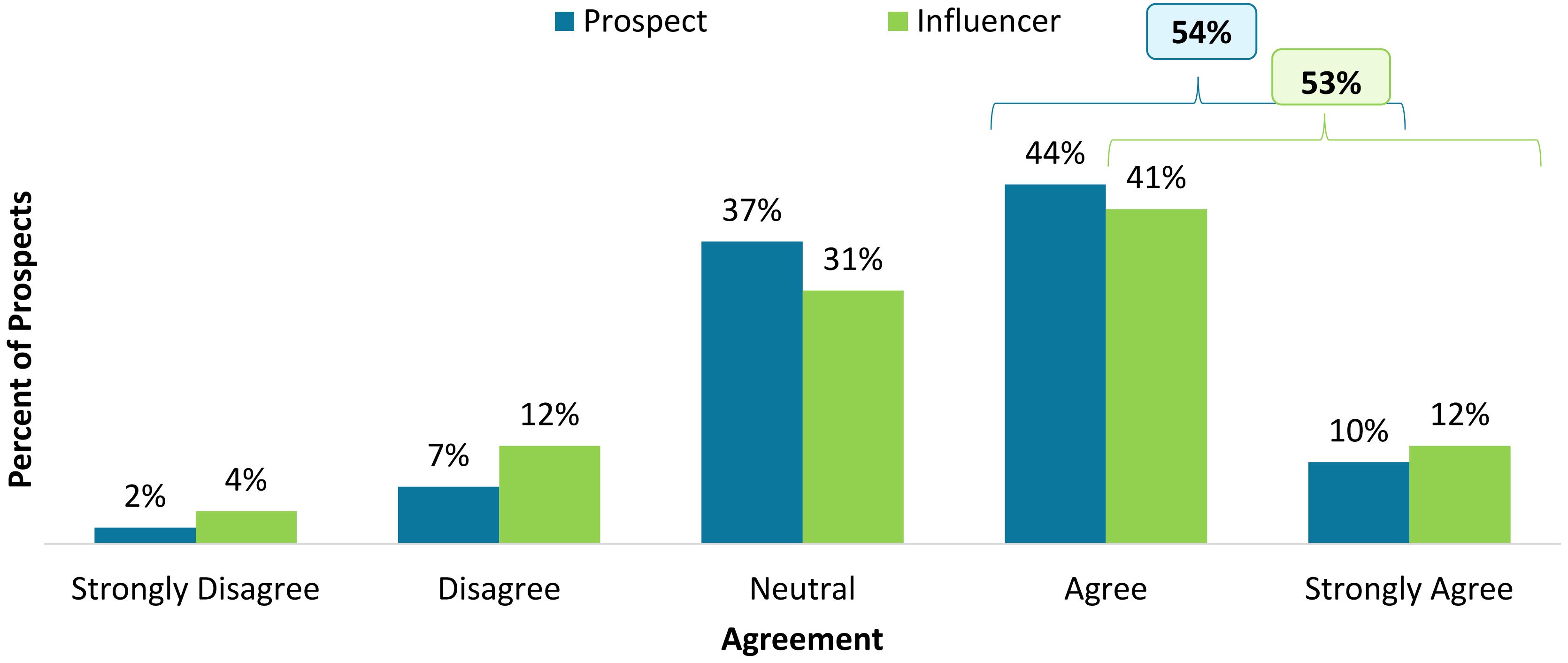
Exhibit 33. Percent of Prospects by their Agreement with the Statement "I would rather eat a meal with strangers than by myself " (p<.001)



PROSPECTS' AND INFLUENCERS' PREFERENCES FOR CAMARADERIE

Both groups of prospects appear to have similar feelings of camaraderie. More than half of Prospects (54%) and Influencers (53%) agreed or strongly agreed with the statement, "I have a strong sense of camaraderie with others."

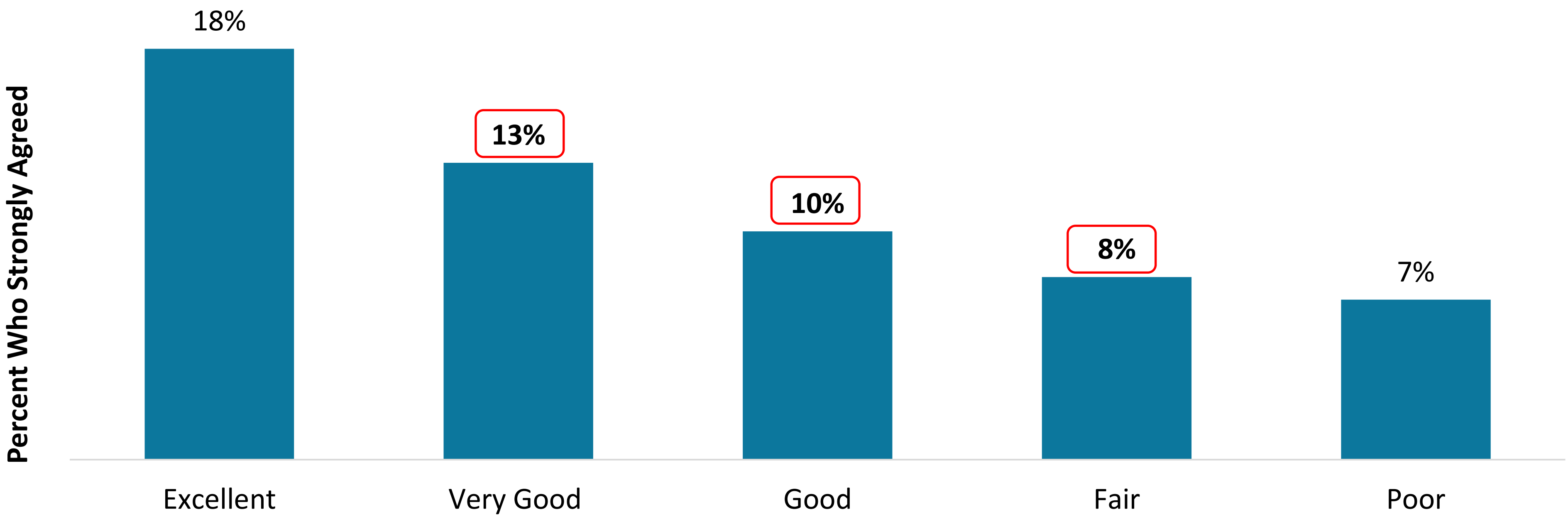
Exhibit 34. Percent of Prospects by their Agreement with the Statement "I have a strong sense of camaraderie with others " (p<.001)



RESPONDENTS' SENSE OF CAMARADERIE BY THEIR HEALTH STATUS

As you might expect, as health declines so does the sense of camaraderie with others. Eight percent or fewer with fair or poor health said they had a strong sense of camaraderie with others. Eighteen percent of **Prospects** who strongly agreed with the statement, "I have a strong sense of camaraderie with others," reported their health as excellent, 13% said their health was very good, and 10% said their health was good.

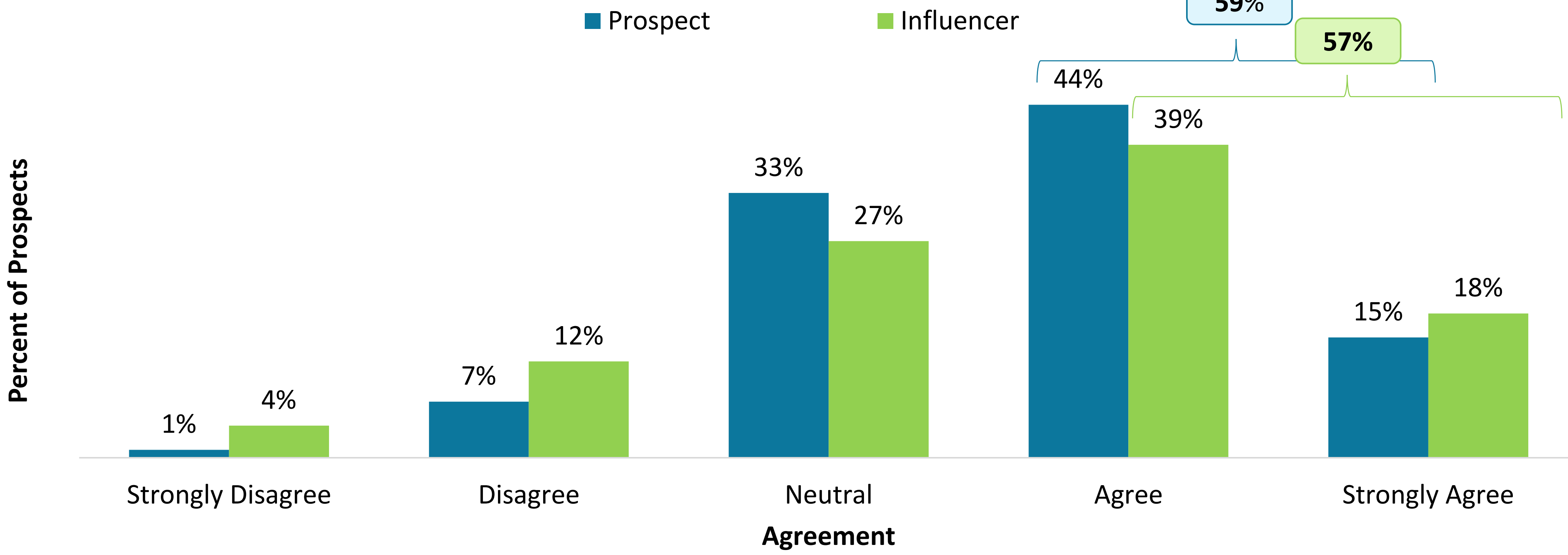
Exhibit 35. Percent of Prospects Who Strongly Agreed with the Statement "I have a strong sense of camaraderie with others" and Their Self-Reported Health (p<.001)



PROSPECTS' AND INFLUENCERS' SENSE OF BEING A PEOPLE PERSON SOMEONE WHO JUST ENJOYS BEING WITH PEOPLE

Fifty-nine percent of **Prospects** and 57% of **Influencers** agreed or strongly agreed with the statement, "I am a people person." The flip side of this is that around 41% were less apt to want to be around other people.

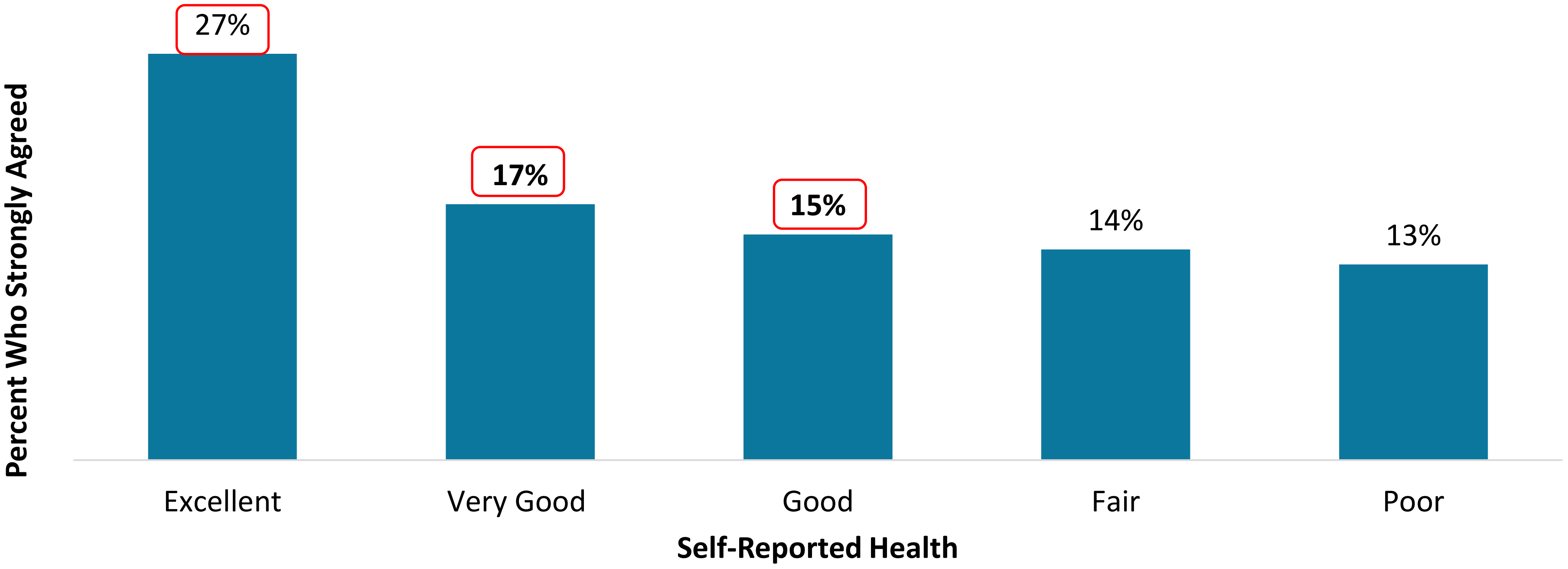
Exhibit 36. Percent of Prospects by their Agreement with the Statement "I am a people person" by Respondent Group (p<.001)



RESPONDENT'S HEALTH AND THEIR DESIRE TO BE WITH OTHER PEOPLE

When your health declines your ability and desire to be with other people declines. Twenty-seven percent of **Prospects** who strongly agreed with the statement, "I am a people person," reported their health as excellent, 17% said their health was very good, and 15% said their health was good. As health declined so did the proportion who strongly agreed they were a people person.

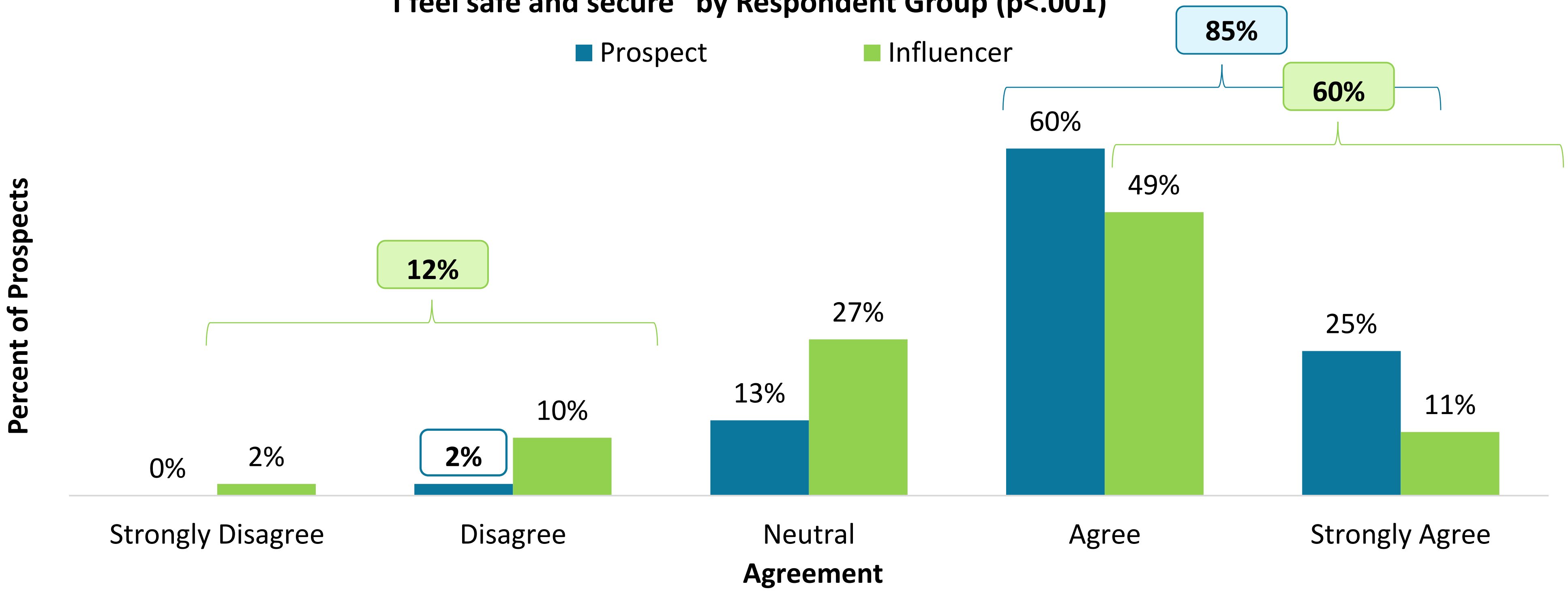
Exhibit 37. Percent of Respondents Who Strongly Agreed with the Statement "I am a people person" and Their Self-Reported Health (p<.001)



PROSPECTS' AND INFLUENCERS' SENSE OF BEING SAFE AND SECURE

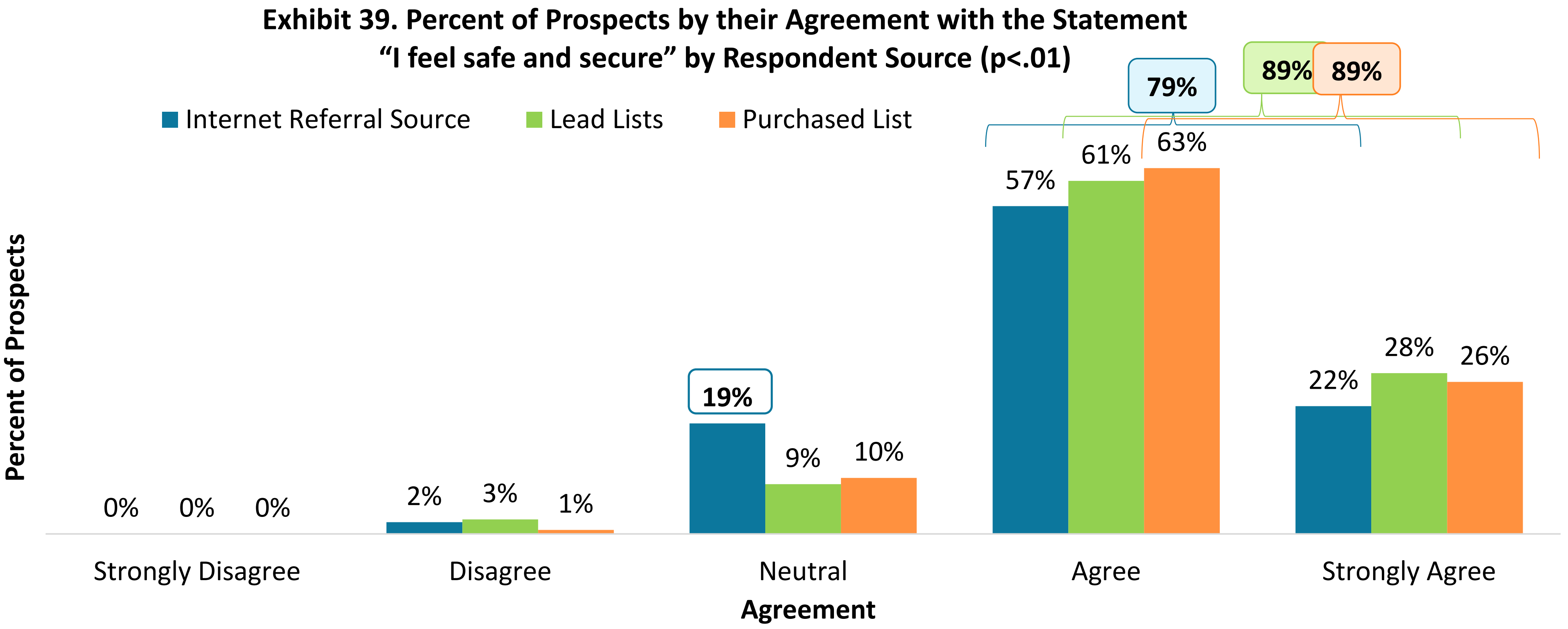
Prospects who completed the survey were more likely to strongly agree or agree with the statement that they feel "safe and secure." Eighty-five percent of **Prospects** and 60% of **Influencers** agreed or strongly agreed with the statement, "I feel safe and secure." Twelve percent of **Influencers** said they disagreed or strongly disagreed, compared to only 2% of **Prospects**. Recall that individuals represented by an Influencer were more likely to have compromised health and limitations in their abilities to complete activities of daily living independently.

Exhibit 38. Percent of Prospects by their Agreement with the Statement "I feel safe and secure" by Respondent Group (p<.001)



RESPONDENTS' SENSE OF FEELING SAFE AND SECURE BY RESPONDENT SOURCE

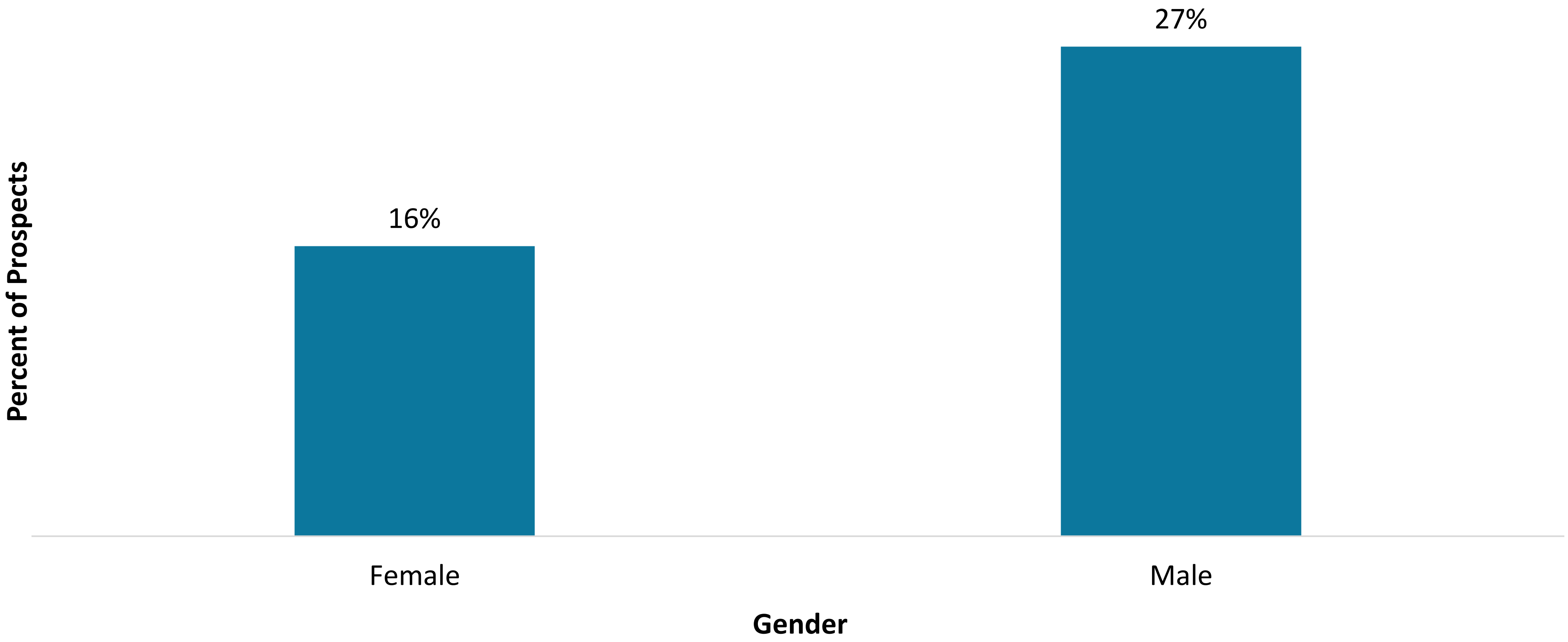
Eighty-nine percent of lead list and purchased list prospects and 79% of internet referral prospects agreed or strongly agreed with the statement, "I feel safe and secure." Nineteen percent of internet referral prospects were neutral to the statement.



RESPONDENTS' SENSE OF SAFETY AND SECURITY BY GENDER

Male respondents were more likely to feel safe and secure than female respondents. Twenty-seven percent of Prospects who strongly agreed with the statement, "I feel safe and secure," were male, compared to only 16% of the female prospects.

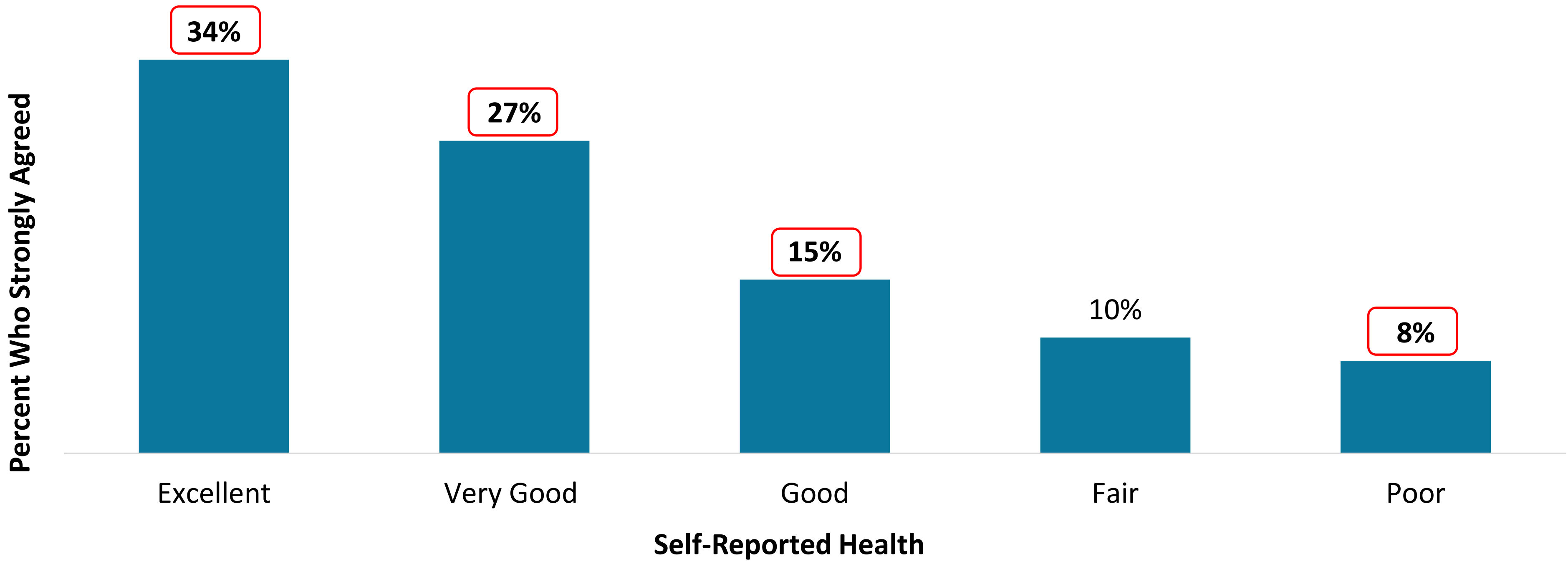
Exhibit 40. Percent of Prospects who Strongly Agreed with the Statement "I feel safe and secure" by their Gender (p<.005)



RESPONDENTS’ SENSE OF SAFETY AND SECURITY BY HEALTH STATUS

As health declines so does the sense of being safe and secure. Thirty-four percent of **Prospects** who strongly agreed with the statement, “I feel safe and secure,” self-reported their health as excellent, 27% said their health was very good, and 15% said their health was good. Eight percent who rated their health as poor said they feel safe and secure.

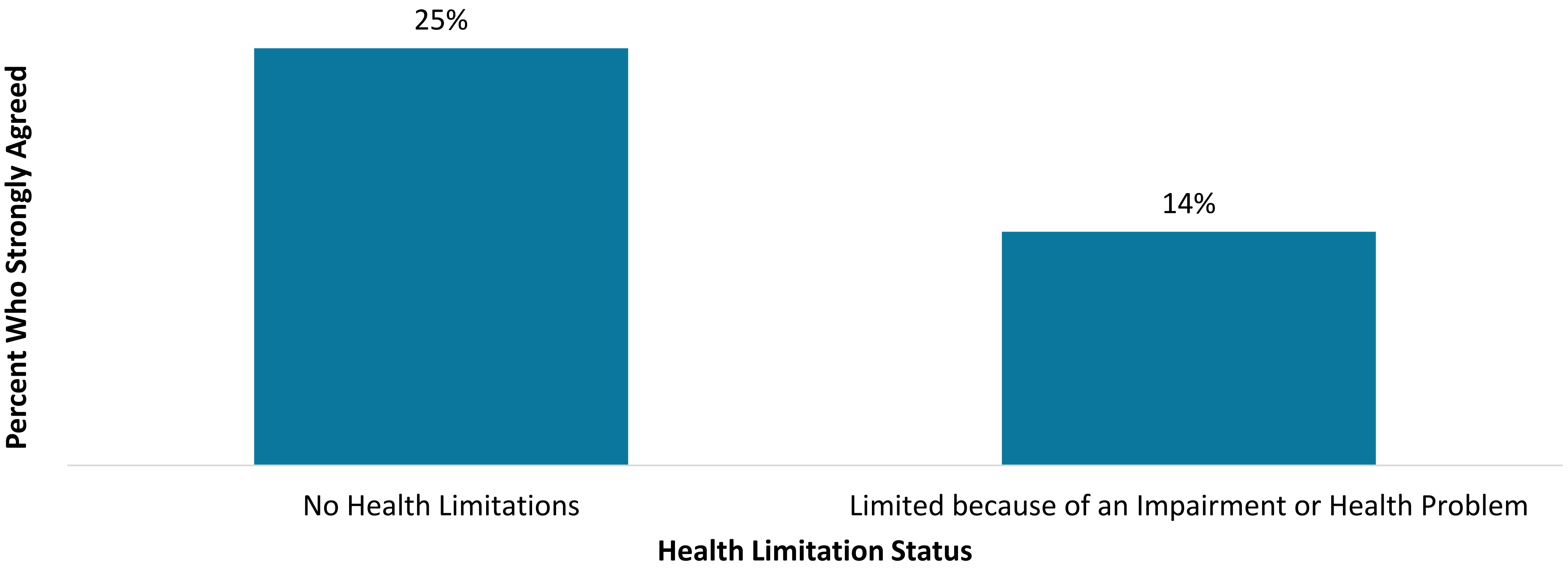
Exhibit 41. Percent of Prospects Who Strongly Agreed with the Statement “I feel safe and secure” and Their Self-Reported Health (p<.001)



RESPONDENTS' SENSE OF SAFETY AND SECURITY BY PRESENCE OR ABSENCE OF LIMITATION

The presence of a limitation or health issue decreases the sense of safety and security. Twenty-five percent of **Prospects** who strongly agreed with the statement, "I feel safe and secure," said they have no health limitations. Just 14% who were limited because of an impairment or health problem said they feel safe and secure.

Exhibit 42. Percent of Prospects Who Strongly Agreed with the Statement "I feel safe and secure" and Whether or Not They have Health Limitations (p<.001)

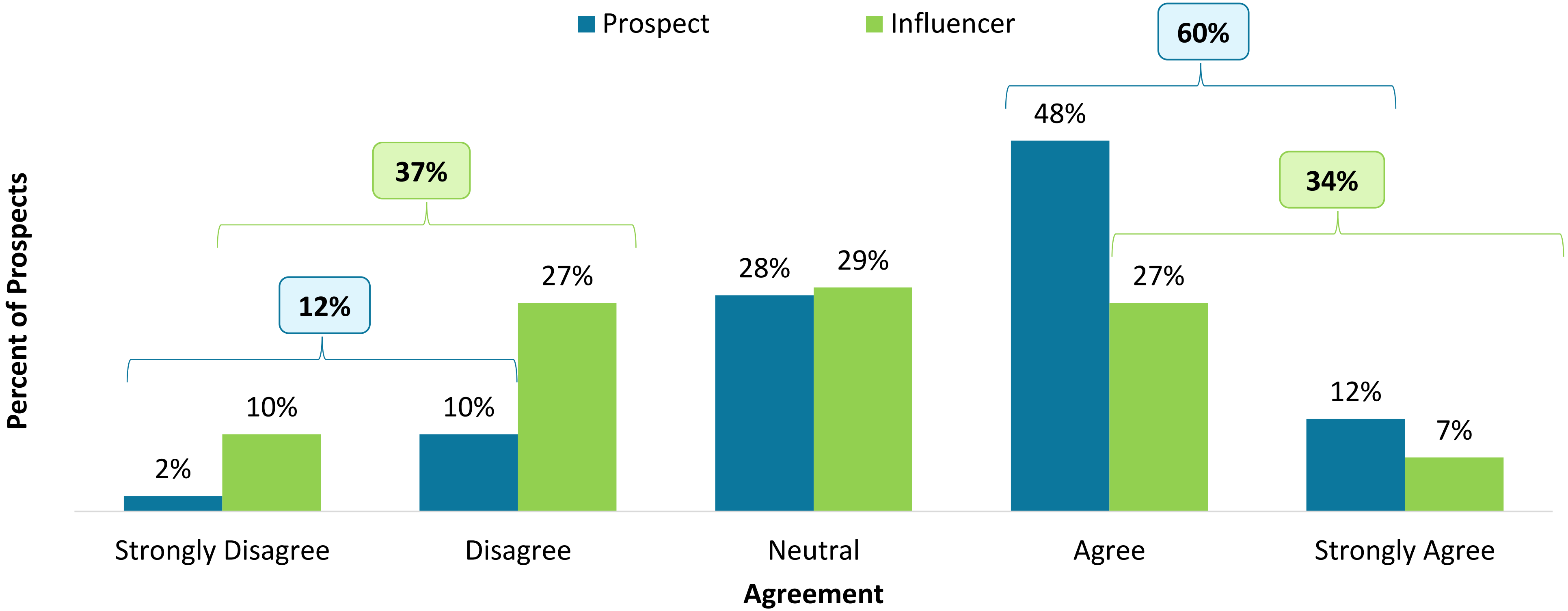


PROSPECTS' AND INFLUENCERS' AGREEMENT WITH THE STATEMENT MY LIFE IS CLOSE TO MY IDEAL

Prospects were significantly more likely than **Influencers** to rate that their life was close to their ideal. Sixty percent of **Prospects** and 34% of **Influencers** agreed or strongly agree with the statement, "In most ways, my life is close to my ideal." Thirty-seven percent of **Influencers** said they disagreed or strongly disagreed, compared to only 12% of **Prospects**.

The differences between **Prospects** and **Influencers** on this and the following fives pages are likely related to the economic, marital status, and health attributes of the two groups as evidenced in previous pages.

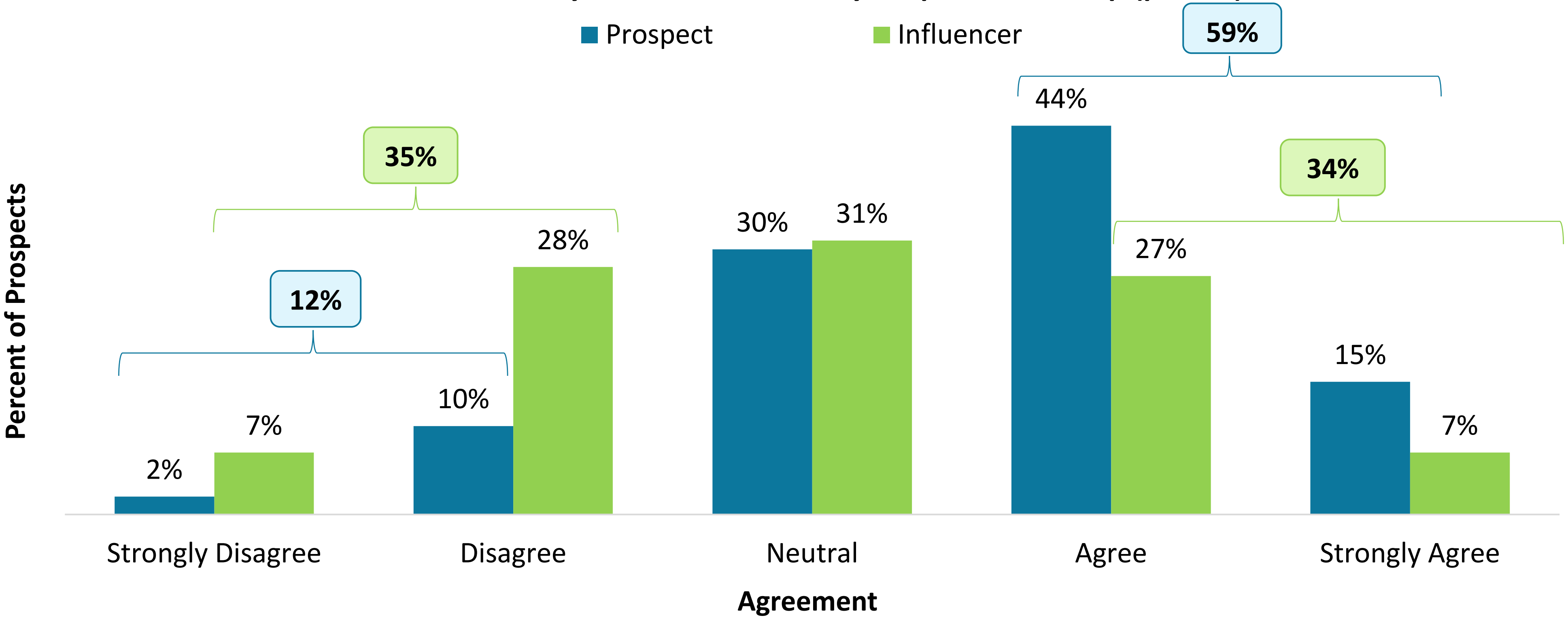
Exhibit 43. Percent of Prospects by their Agreement with the Statement "In most ways, my life is close to my ideal" by Respondent Group (p<.001)



PROSPECTS' AND INFLUENCERS' RATING OF "THE CONDITIONS OF MY LIFE ARE EXCELLENT"

Prospects were significantly more likely to rate that they agreed or strongly agreed the conditions of their life are excellent. Fifty-nine percent of **Prospects** and 34% of **Influencers** agreed or strongly agreed with the statement, "The conditions of my life are excellent." Thirty-five percent of **Influencers** said they disagreed or strongly disagreed, compared to 12% of **Prospects**.

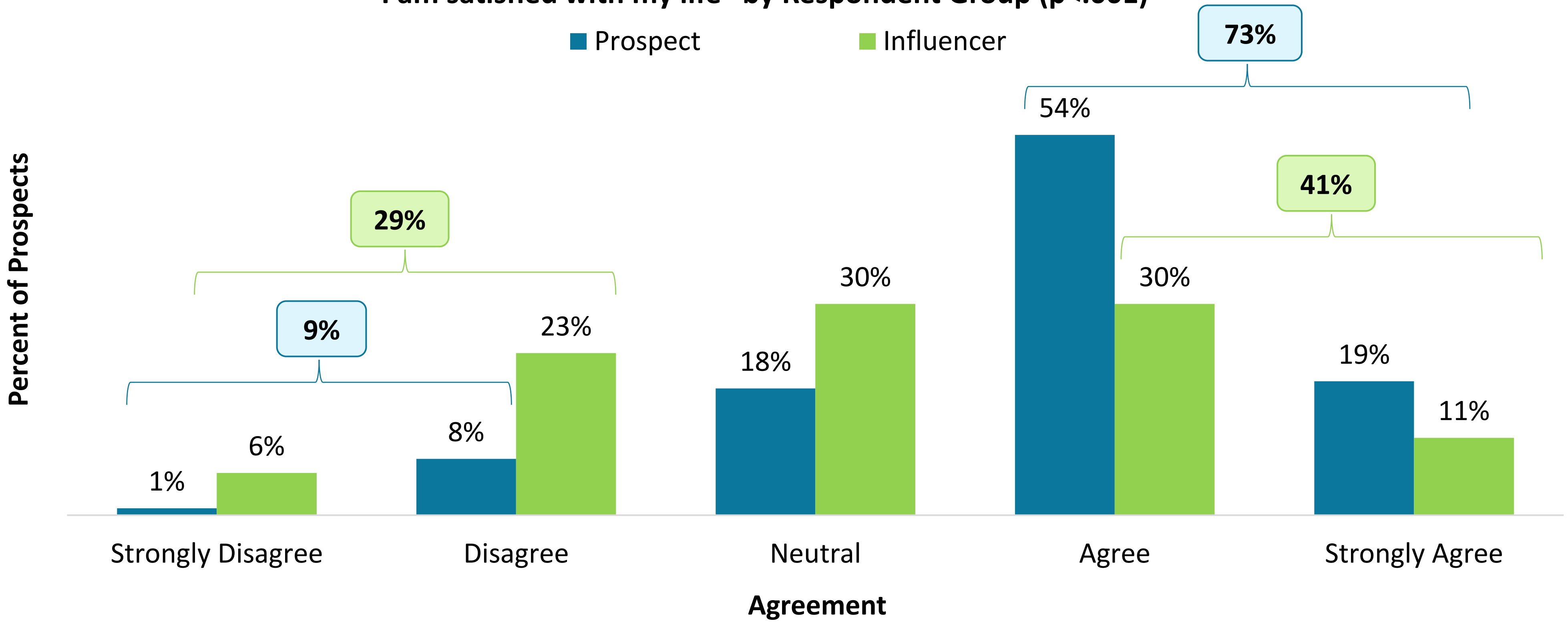
Exhibit 44. Percent of Prospects by their Agreement with the Statement "The conditions of my life are excellent" by Respondent Group (p<.001)



PROSPECTS' AND INFLUENCERS' AGREEMENT WITH "I AM SATISFIED WITH MY LIFE"

Prospects were significantly more likely to be satisfied with their lives than **Influencers**. Seventy-three percent of **Prospects** and 41% of **Influencers** agreed or strongly agree with the statement, "I am satisfied with my life." Twenty-nine percent of **Influencers** said they disagreed or strongly disagreed, compared to only 9% of **Prospects**.

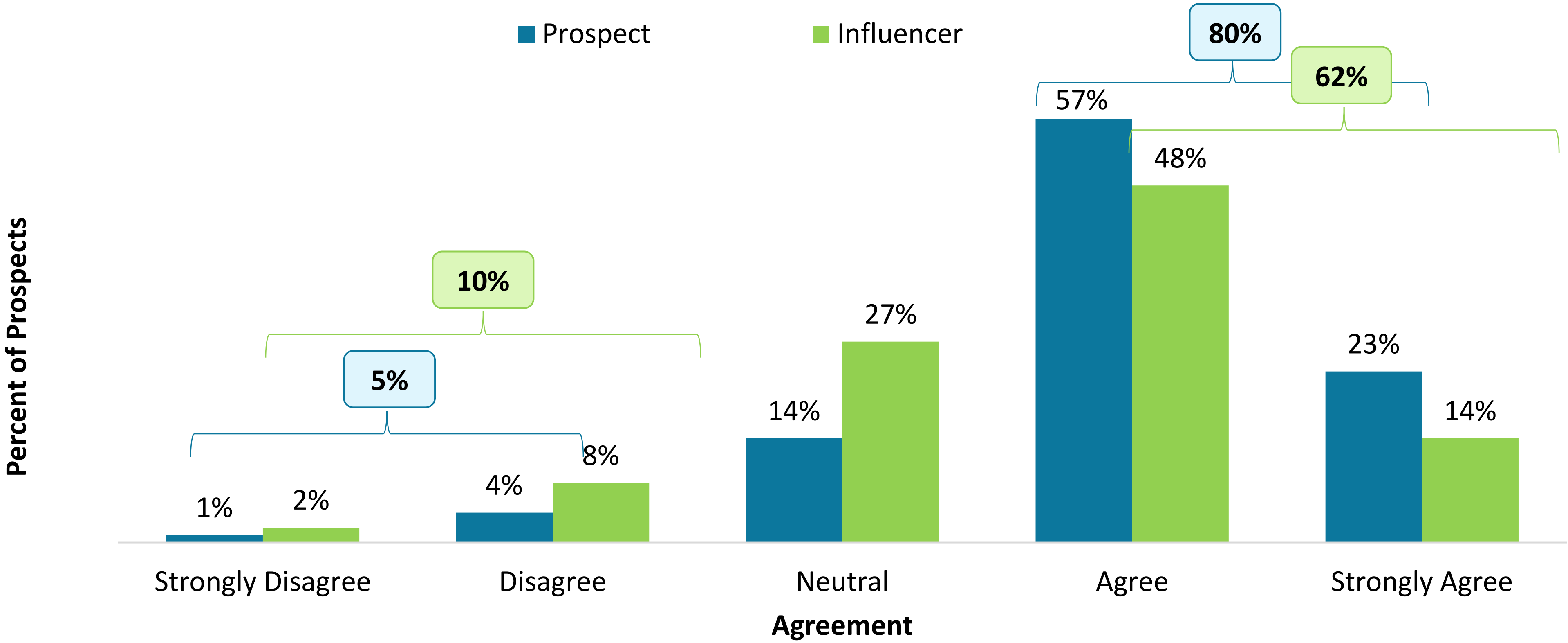
Exhibit 45. Percent of Prospects by their Agreement with the Statement "I am satisfied with my life" by Respondent Group (p<.001)



PROSPECTS' AND INFLUENCERS' RATING OF "THEY HAVE GOTTEN THE IMPORTANT THINGS IN LIFE"

Prospects, more than **Influencers** think they have gotten the important things in life. Eighty percent of **Prospects** and 62% of **Influencers** agreed or strongly agreed with the statement, "So far, I have gotten the important things I want in life." Ten percent of **Influencers** said they disagreed or strongly disagreed, compared to 5% of **Prospects**.

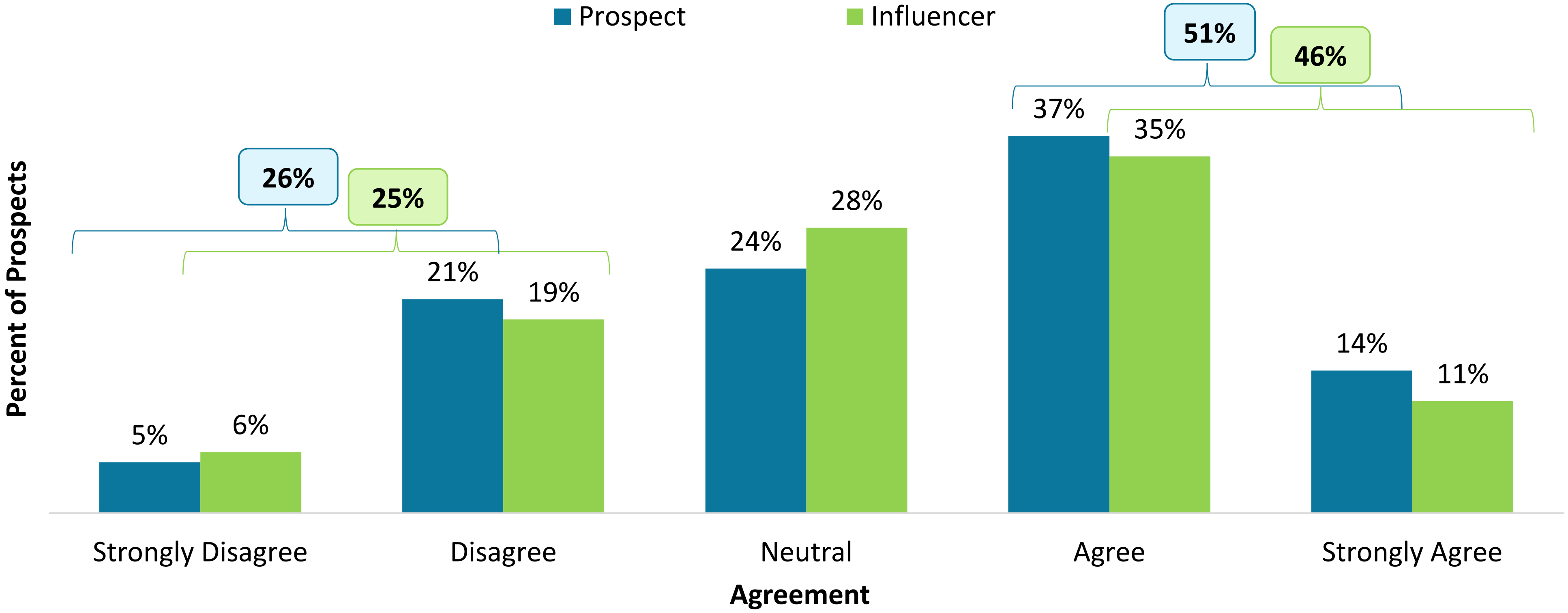
Exhibit 46. Percent of Prospects by their Agreement with the Statement "So far, I have gotten the important things I want in life" by Respondent Group (p<.001)



PROSPECTS' AND INFLUENCERS' RATING OF "IF I COULD LIVE MY LIFE OVER, I WOULD CHANGE ALMOST NOTHING"

The two groups of respondents were essentially the same on this question. The differences between the two groups were not statistically significant. Fifty-one percent of **Prospects** and 46% of **Influencers** agreed or strongly agreed with the statement, "If I could live my life over, I would change almost nothing." Twenty-six percent of **Prospects** said they disagreed or strongly disagreed, compared to 25% of **Influencers**.

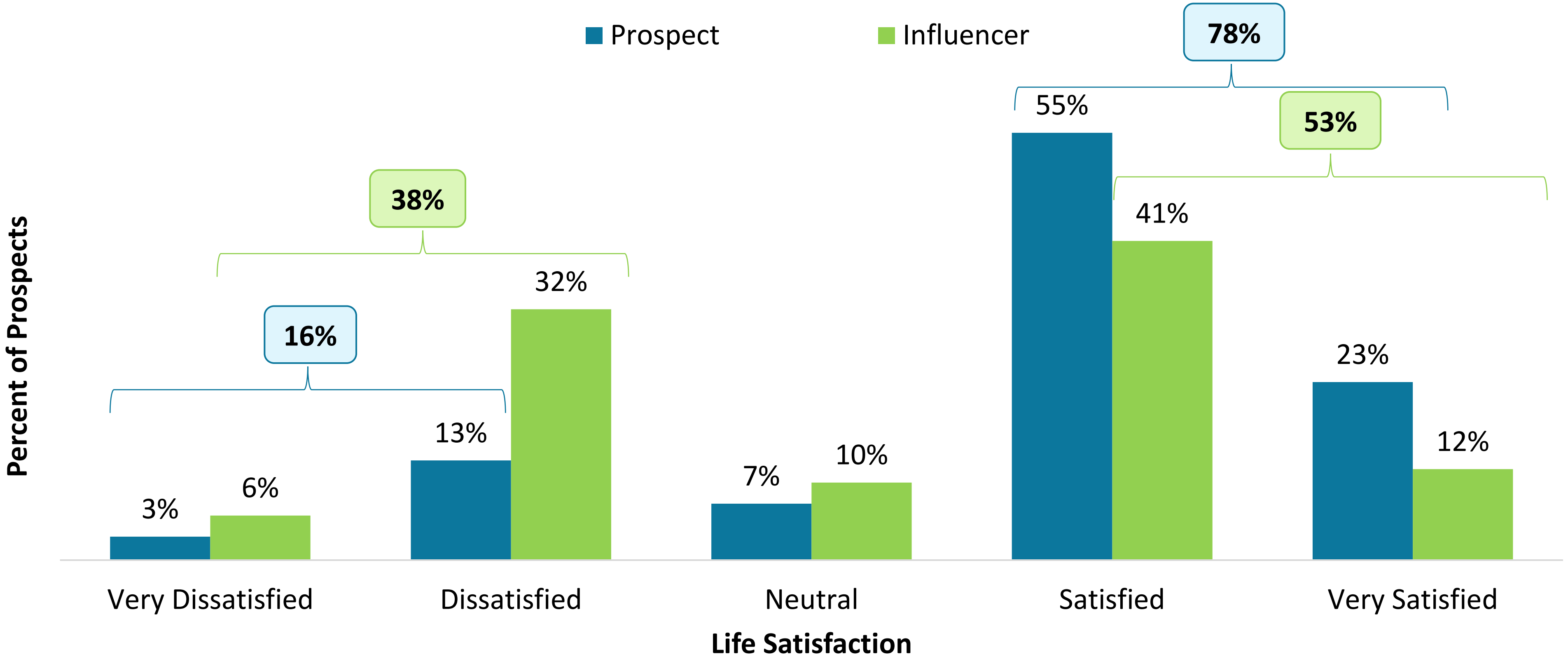
Exhibit 47. Percent of Prospects by their Agreement with the Statement "If I could live my life over, I would change almost nothing" by Respondent Group (*not sig.*)



PROSPECTS' AND INFLUENCERS' TOTAL LIFE SATISFACTION

The two groups of respondents had significant differences in their assessment of their sense of total life satisfaction. Seventy-eight percent of **Prospects** and 53% of **Influencers** said they were satisfied or very satisfied with their life. More than twice as many **Influencers** (38%) were dissatisfied or very dissatisfied, with their total life compared to 16% of **Prospects**.

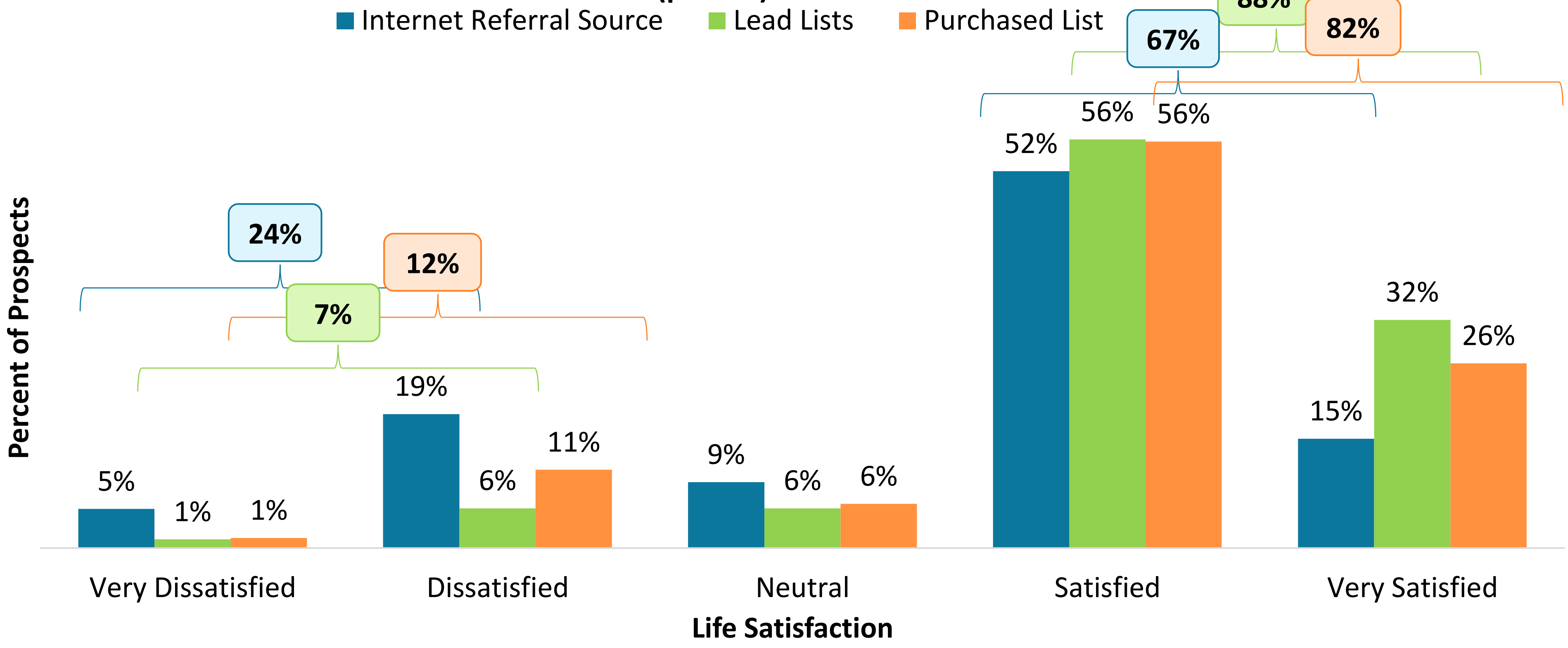
Exhibit 48. Percent of Prospects by Their Total Life Satisfaction by Respondent Group (p<.001)



RESPONDENTS' TOTAL LIFE SATISFACTION BY RESPONDENT SOURCE

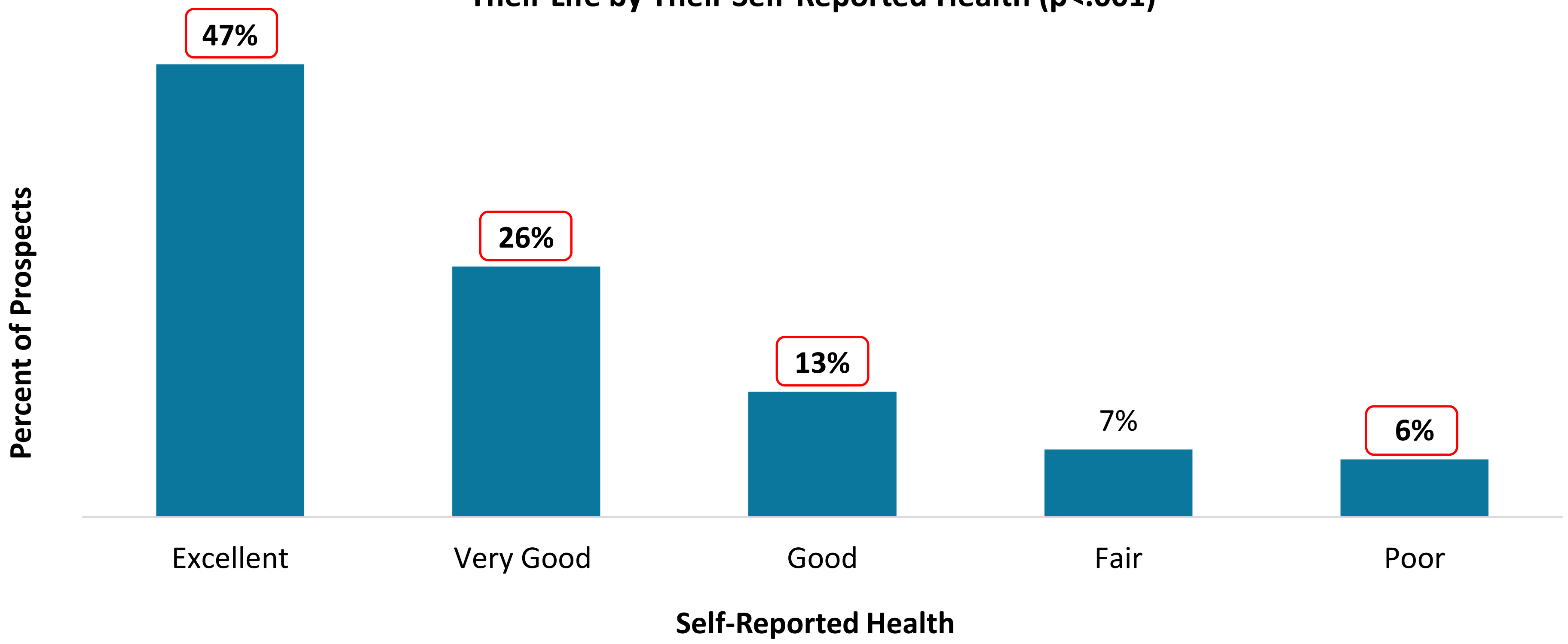
Lead list and purchased list respondents were more likely to be very satisfied with theirs lives than internet referral leads. Sixty-seven percent of internet referral prospects, 88% of lead list, and 82% of purchased list prospects said they were satisfied or very satisfied with their lives. Twenty-four percent of internet referral prospects were dissatisfied or very dissatisfied with their total life, compared to 7% of lead list and 12% of purchased list prospects. The differences in total life satisfaction are likely related to differences in marital status, economic and health status.

Exhibit 49. Percent of Prospects by Their Total Life Satisfaction by Respondent Source (p<.001)



Being satisfied with our lives is significantly related to our health. Of the **Prospects** who said they were very satisfied with their life, 47% self-reported their health as excellent. Twenty-six percent reported their health as very good and 13% said their health was good. But, just 6% who rated their health as poor, were very satisfied.

Exhibit 50. Percent of Prospects Who are Very Satisfied with Their Life by Their Self-Reported Health (p<.001)

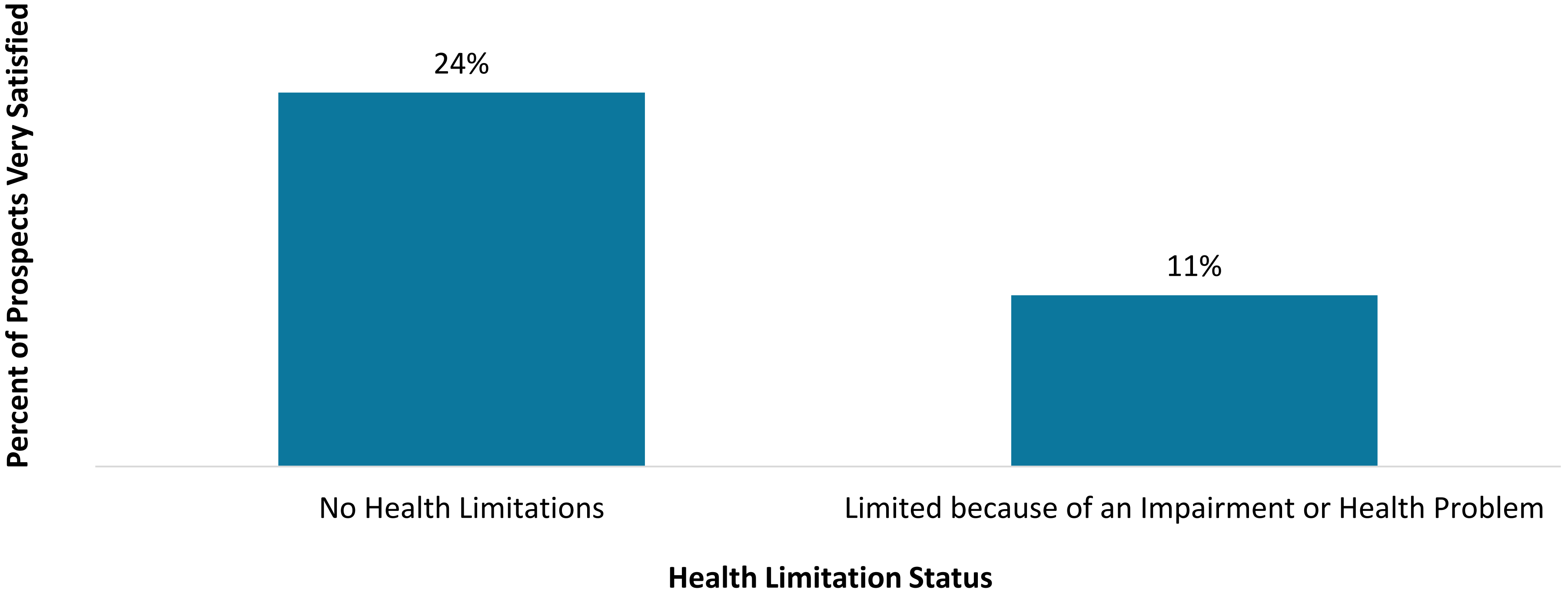


RESPONDENTS' LIFE SATISFACTION BY HEALTH STATUS

Individuals without health problems or physical/mental limitations were more than twice as likely as those who were limited because of a health issue or physical impairment to be very satisfied with their lives.

Of the **Prospects** who said they are very satisfied with their life, 24% said they had no health or physical limitations, and 11% said they were limited because of an impairment or health problem.

Exhibit 51. Percent of Prospects Who are Very Satisfied with Their Life by Whether or Not They have Health Limitations (p<.001)



INFLUENCER'S RELATIONSHIP TO PROSPECT

Men are usually older than the women who they marry. Thus, we often find widowed women living by themselves as primary candidates for a service-enriched community.

Thirty-seven percent of **Influencers** responded for their mother/mother-in-law/step-mother, 14% answered for their father/father-in-law/step-father, another 14% answered for their spouse, and 13% answered for an unspecified parent or in-law.

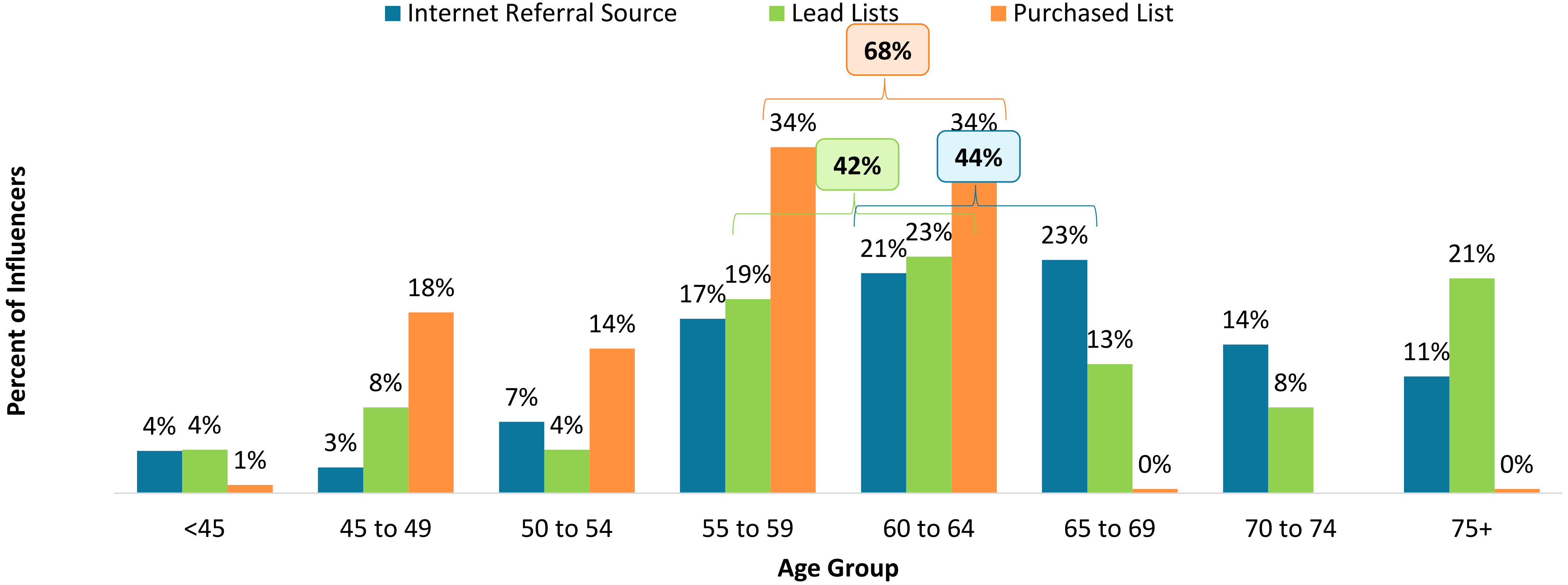
Exhibit 52. Relationship Prospect to Influencer

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%**

AGE OF INFLUENCERS BY RESPONDENT SOURCE

The age of **Influencers** ranged from less than 45 to 75+ years of age. The age of the **Influencers** was significantly different by source. Purchased list respondents were younger than internet and lead list respondents. Forty-four percent of influencers from internet referrals were 60 to 69; 42% of lead list influencers were 55 to 64, and 68% of purchased list influencers were 55 to 64 years of age.

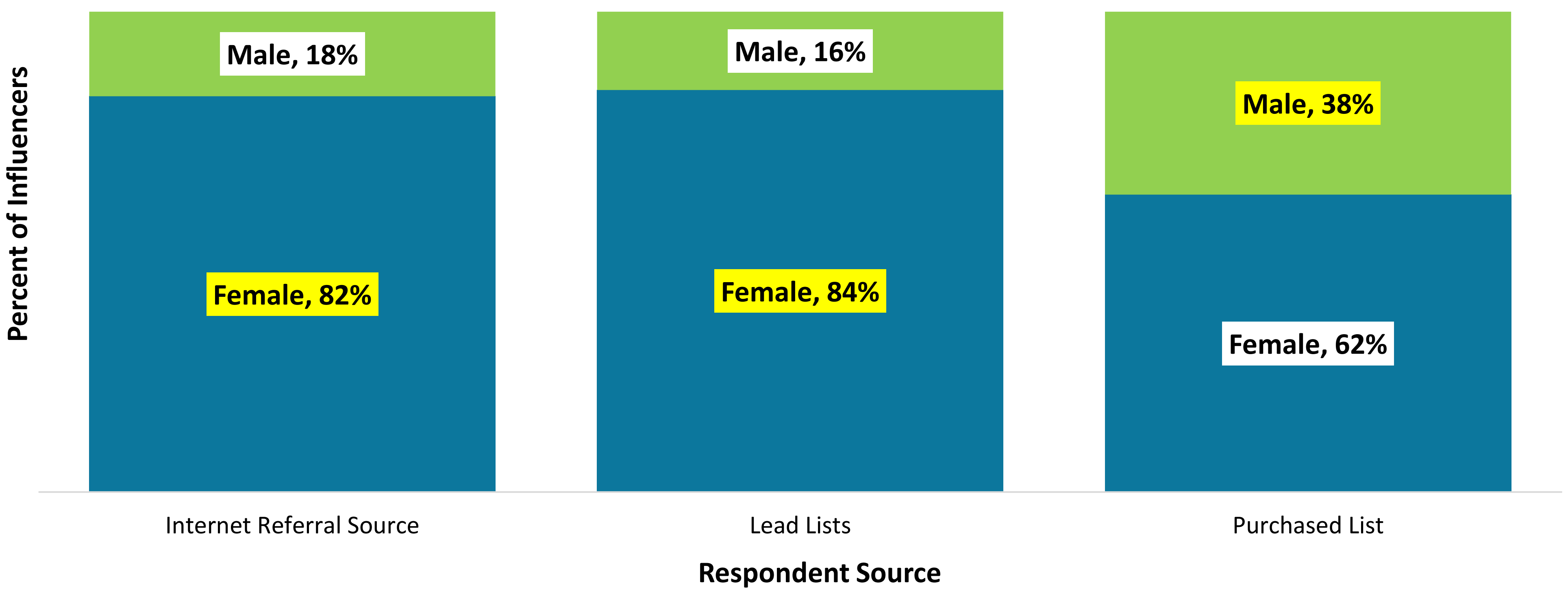
Exhibit 53. Percent of Influencers by Age Group and Respondent Source (p<.001)



GENDER OF INFLUENCERS BY RESPONDENT SOURCE

Eighty-two percent of internet referrals and 84% of lead list respondents were female. Thirty-eight percent of purchased-list respondents were male. Purchased list respondents were not obtained from a company in the retirement housing industry. It was a list of randomly selected age- and income-qualified households purchased from a company that sells contact information for people who have opted into the panel.

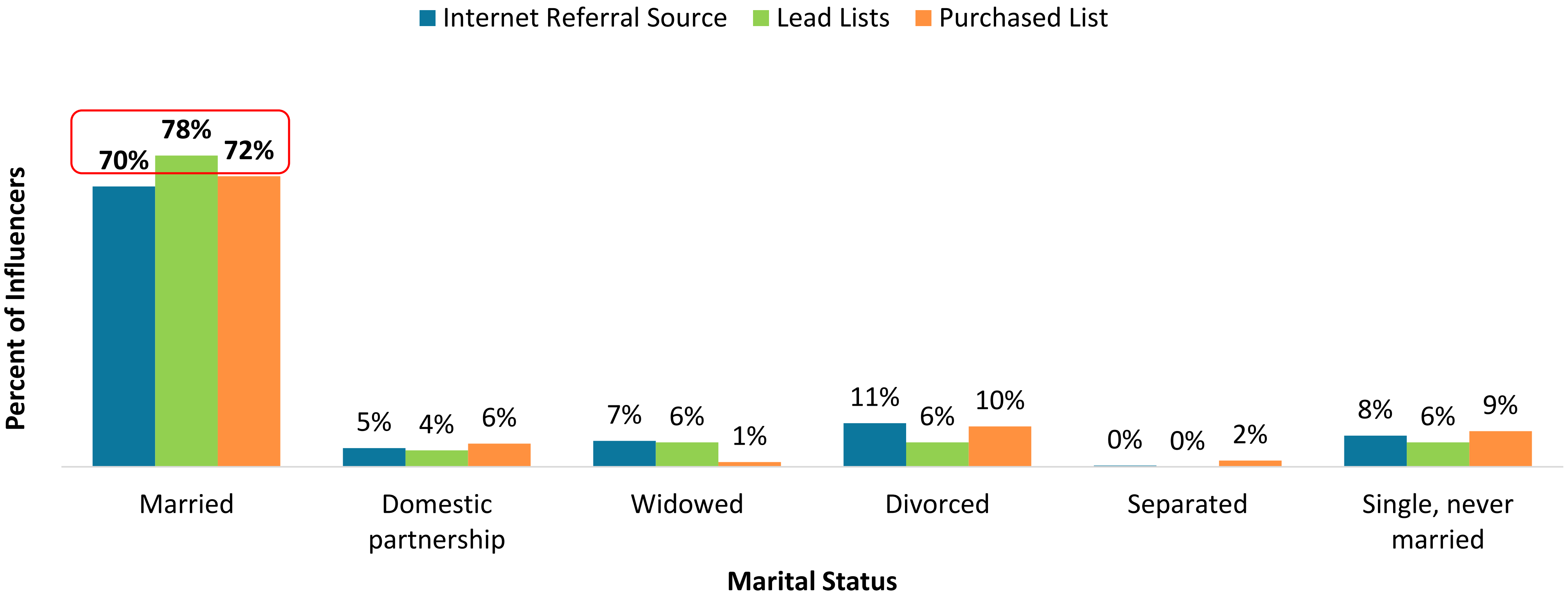
Exhibit 54. Percent of Influencers by Gender and Respondent Source (p<.001)



MARITAL STATUS OF INFLUENCERS BY RESPONDENT SOURCE

Seventy percent or more of all respondents, regardless of respondent source, were married. There was not a significant difference in marital status between the respondents relative to the list source.

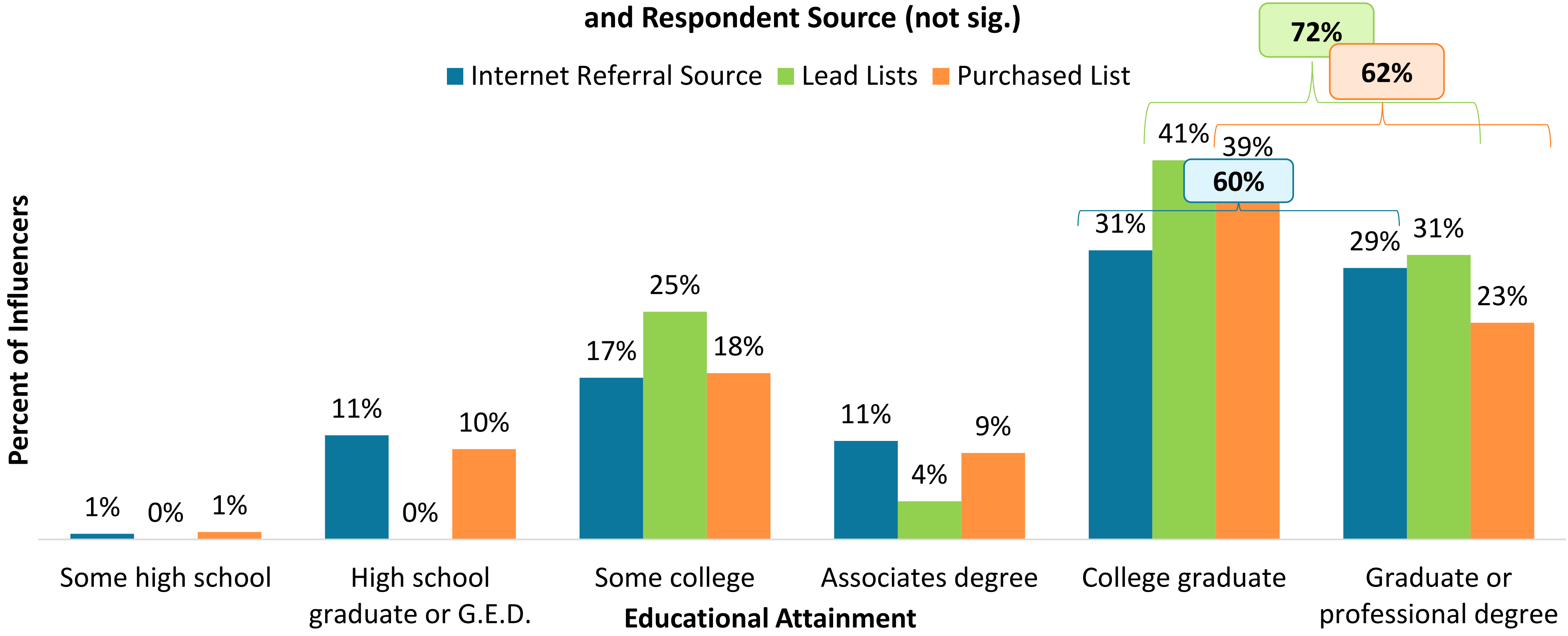
Exhibit 55. Percent of Influencers by Marital Status and Respondent Source



EDUCATION LEVEL OF INFLUENCERS BY RESPONDENT SOURCE

The lead list respondents are more representative of the households who move to retirement communities than the respondents on the internet referral source or the purchased list. Sixty percent of influencers from internet referrals, 72% from the lead list, and 62% from the purchased-list had a four-year college degree or higher. As we know from previous studies, residents of retirement communities are more likely than others in their age- and income-group to have a college education.

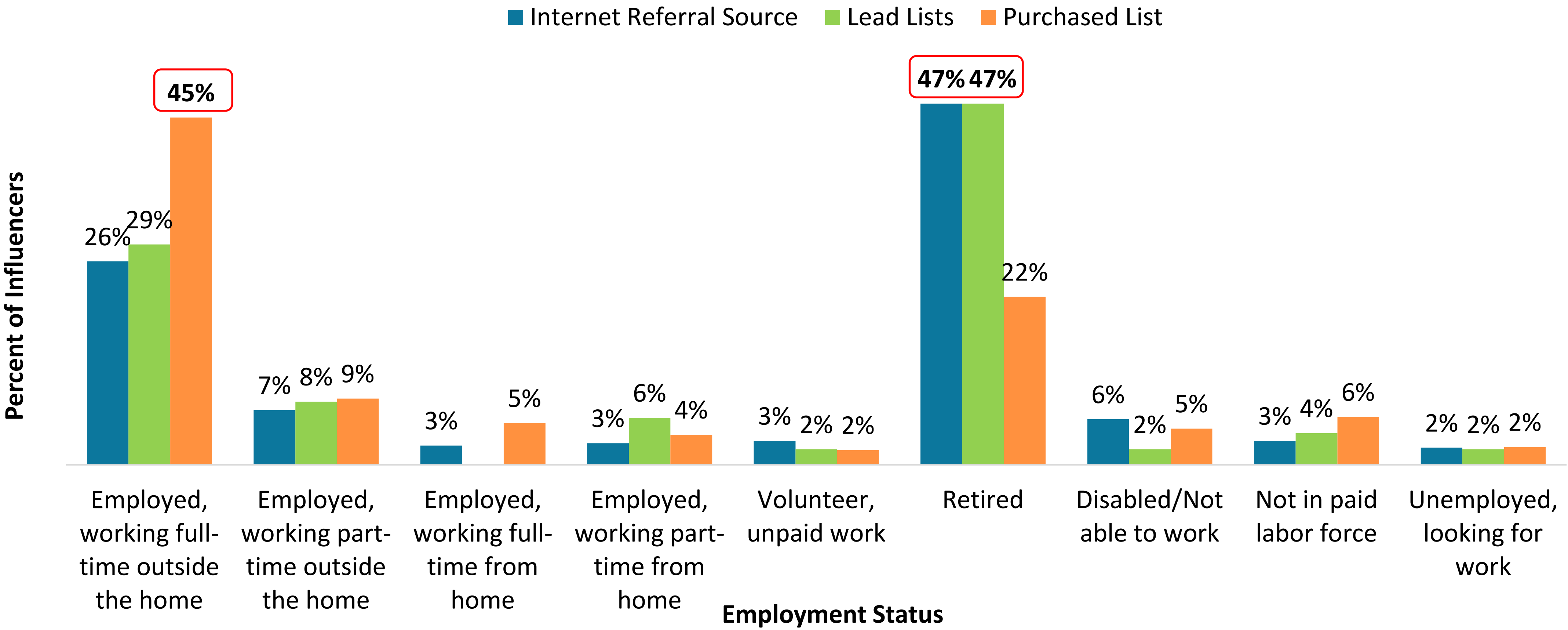
Exhibit 56. Percent of Influencers by Highest Level of Educational Attainment and Respondent Source (not sig.)



EMPLOYMENT STATUS OF INFLUENCERS BY RESPONDENT SOURCE

Forty-seven percent of influencers from internet referrals and the lead list were retired. Forty-five percent of influencers from the purchased list were employed, working full-time outside the home. The purchased list was a random sample of households selected by age and income levels.

Exhibit 57. Percent of Influencers by Current Employment Status and Respondent Source (p<.001)



ANNUAL HOUSEHOLD INCOME OF INFLUENCERS BY RESPONDENT SOURCE

There was a statistically significant difference in the annual household income among the **Influencers**. Thirty-four percent of influencers from the lead list had an annual household income of $150,000 or more. Forty-five percent of influencers from the purchased list had an annual household income of $100,000 or more, and 44% of internet referrals had an income that was between $50,000 and $124,999. Lead list participants were the best representatives among the three sources of survey participants because they have at least contacted a community and provided their contact information so that they may obtain information. If you are planning to purchase a list of households for marketing purposes be sure to invest in selecting households with sufficient income or wealth.

Exhibit 58. Percent of Influencers by Total Annual Household Income and Respondent Source (p<.001)

	Internet Referral Source	Lead Lists	Purchased List
Less than $25,000	14%	0%	1%
$25,000 to $34,999	9%	0%	1%
$35,000 to $49,999	11%	8%	4%
$50,000 to $74,999	17%	24%	26%
$75,000 to $99,999	15% **44%**	16%	24%
$100,000 to $124,999	12%	13%	16%
$125,000 to $149,999	7%	5%	13% **45%**
$150,000 or more	15%	**34%**	16%

TOTAL NET WORTH OF INFLUENCERS BY RESPONDENT SOURCE

There is a statistically significant difference in net worth among the respondent groups. Fifty-one percent of influencers from the lead list had a net worth of $750,000 or more. Fifty-three percent of influencers from the purchased list and 51% of internet referrals had a net worth of $100,000 to $749,999.

Exhibit 59. Percent of Influencers by Total Net Worth and Respondent Source (p<.01)

	Internet Referral Source	Lead Lists	Purchased List
Less than $50,000	16%	6%	10%
$50,000 to $99,999	8%	0%	6%
$100,000 to $299,999	23%	12%	20%
$300,000 to $499,999	17%	18%	20%
$500,000 to $749,999	11%	12%	13%
$750,000 to $999,999	8%	24%	13%
$1,000,000 to $1,999,999	12%	9%	12%
$2,000,000 or more	4%	18%	5%

51%

51%

53%

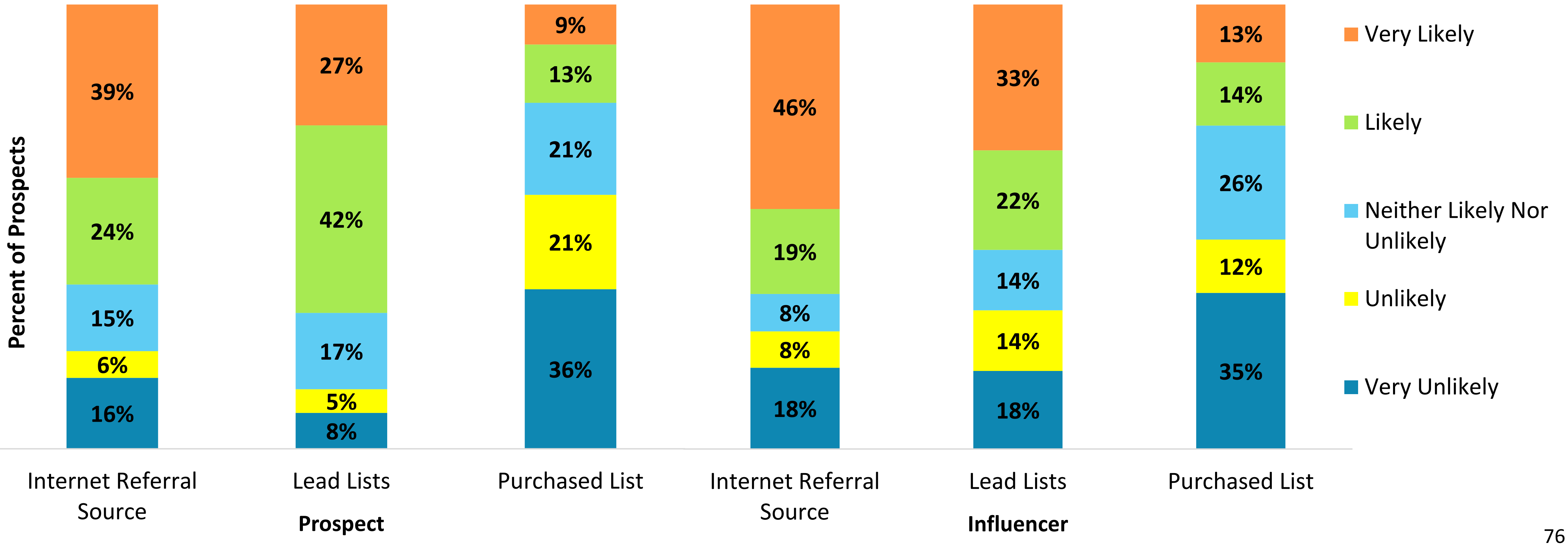
CHAPTER 3.
LIKELIHOOD OF MOVING AND ATTRIBUTES PROSPECTS AND INFLUENCERS ARE LOOKING FOR IN A COMMUNITY

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

The internet referral source results suggest that a high proportion of those respondents will move in the next five years. Take care when interpreting this, because many of these respondents do not reflect the attributes typically seen among residents of for-profit retirement communities. These results are suspect too because the proportions are higher than the lead lists. It seems that individuals who are on lead lists would be the most likely group to move within the next five years, than those who have filled out a quick form on the internet to obtain information.

Note the difference in likelihood of moving in the next five years between lead list prospects (69%) and lead list influencers (55%). Again this suggests the value of continuing to communicate and provide value from a continued relationship with lead list prospects.

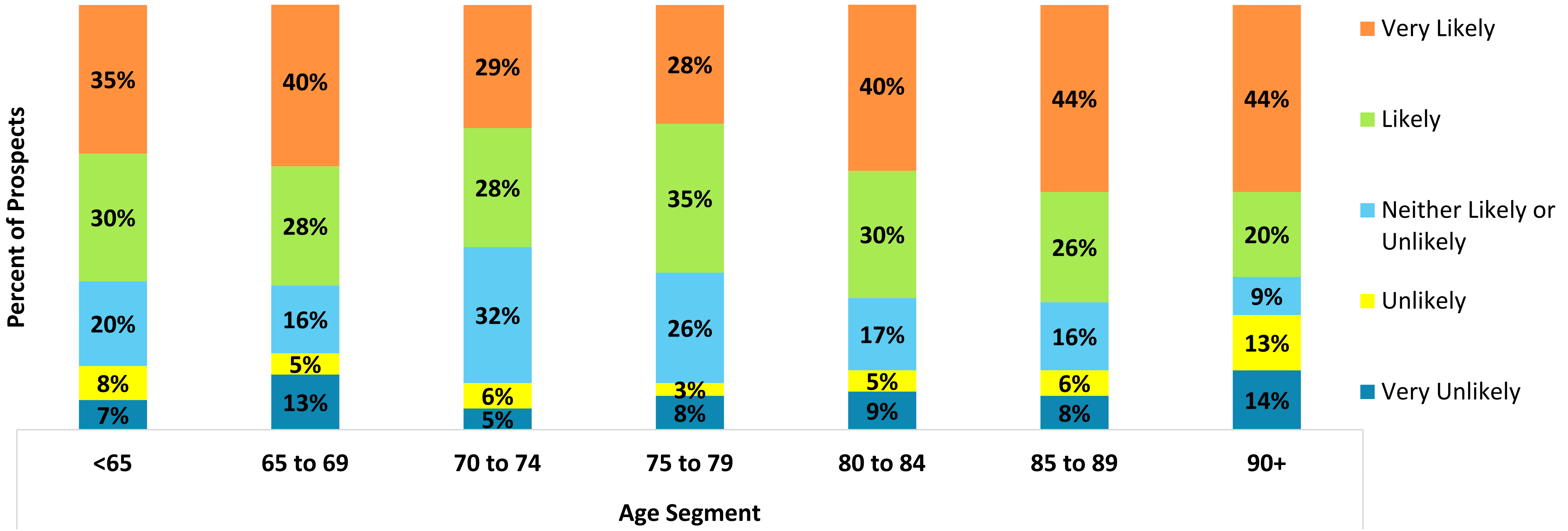
Exhibit 60. Likelihood of Moving from Current Residence Within the Next Five Years by Respondent Group and Respondent Source (p<.001)



LIKELIHOOD OF MOVING WITHIN THE NEXT FIVE YEARS BY AGE GROUP

Respondents 80+ years of age had the highest proportion (40% to 44%) very likely to move within the next five years. These results reflect three stages of mature adult life. Many adults 60 to 70 years of age are contemplating retirement and maybe considering a move (35% to 40%) to be closer to children or to a place they have enjoyed visiting during their work and family years. Those 70 to 79 may have already made a move and/or are satisfied with where they are, so they are not as likely to contemplate a move (28% to 29%). Those 80+ years of age may have experienced a change in marital status, health issues, and/or physical abilities, that may make staying where they are more challenging and/or undesirable.

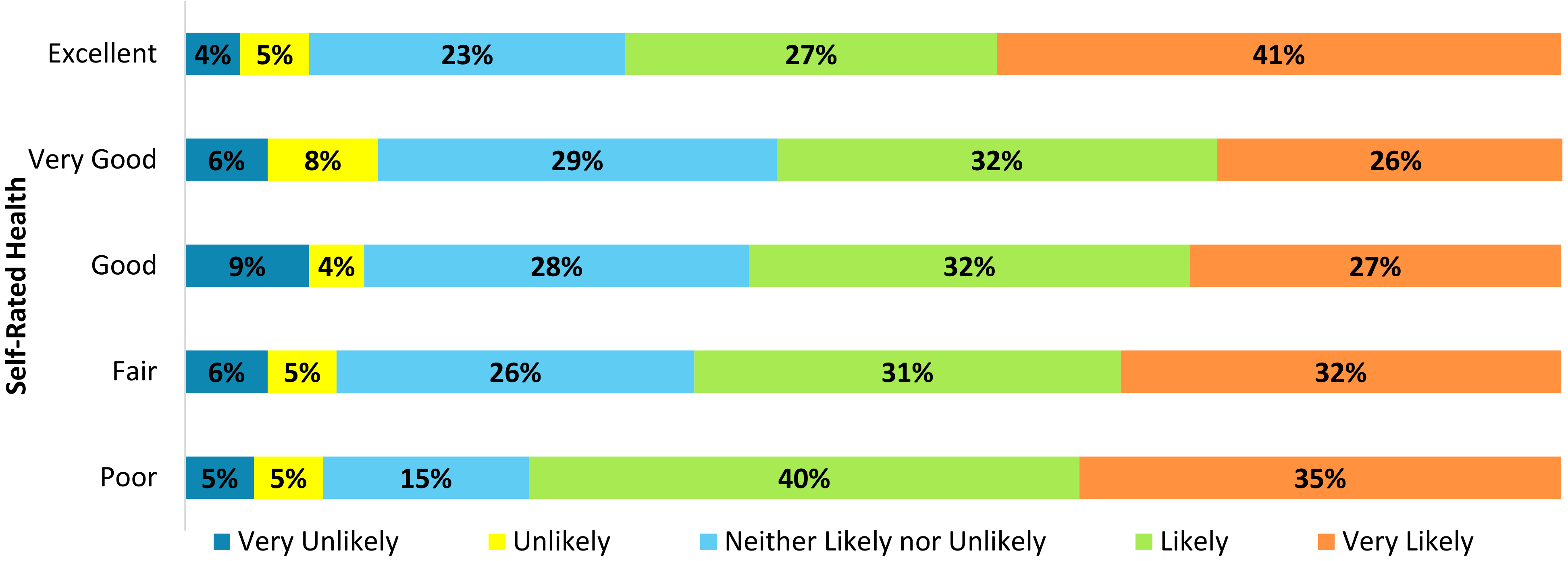
Exhibit 61. Likelihood of Moving from Current Residence Within the Next Five Years by Age Group (p<.001)



LIKELIHOOD OF MOVING WITHIN THE NEXT FIVE YEARS BY SELF-RATED HEALTH

There was not a statistically significant difference in the likelihood of moving relative to the respondents self-rating of health. This is likely because there are both "push" and "pull" conditions that influence someone to move or remain at home when facing health issues. Health is not the only factor that dictates the decision. One can be deathly ill, but with home care and hospice services, and a home that can accommodate someone with serious physical limitations and health issues, many want to and can remain at home. Thus, just having health issues does not always dictate a move. Although the likelihood of moving increased as the proportions with "good," "fair," and "poor" health increased.

Exhibit 62. The Likelihood of Moving from Current Residence Within the Next Five Years by Self-Rated Health (*not sig.*)



WHY A MOVE FROM THE CURRENT RESIDENCE IS BEING CONSIDERED BY INFLUENCERS AND PROSPECTS

Among influencers from lead lists the two primary reasons a move was likely were age (22%) and the need for help or care (20%). Among purchased list influencers 21% said they needed help or care and 19% said age. Among lead list prospects, 27% said the move was because of age and 16% said they wanted to downsize. Among prospects on the purchased list, 30% said the move was being contemplated because they wanted to downsize. The next most prevalent reasons were stated by equal proportions (10% to 11% of respondents included: limitations, age, need for help/care, and location.

Lead List – Influencer

	Count	%
Age	21	22%
Need help/care	19	20%
Health	9	10%
Don't want to be alone	8	9%
Limitations	7	7%
Memory	7	7%
Downsize	4	4%
Social	4	4%
Finances	3	3%
Safety	3	3%
Better food(1)/Quality(1)	2	2%
Close to family	2	2%
Death	2	2%
Location	2	2%
Quality of life	1	1%
Total	**94**	**100%**

Purchased List – Influencer

	Count	%
Need help/care	73	21%
Age	65	19%
Health	40	12%
Downsize	27	8%
Limitations	22	6%
Location	22	6%
Finance	21	6%
Memory	17	5%
No alone	12	4%
Quality of life	12	4%
Closer to family	8	2%
Job	7	2%
Health care	5	1%
Safety	5	1%
College	3	1%
Don't want to move	2	1%
Total	**341**	**100%**

Lead List – Prospect

	Count	%
Age	102	27%
Downsize	62	16%
Need help/care	43	11%
Limitations	34	9%
Health	27	7%
No alone	23	6%
Social	15	4%
Finances	14	4%
Close to family	12	3%
Quality of life	10	3%
Location	8	2%
Medical	7	2%
Retirement	7	2%
Don't want to burden children	5	1%
Food	4	1%
Safety	4	1%
Memory	2	1%
Total	**379**	**100%**

Purchased List – Prospect

	Count	%
Downsize	101	30%
Limitations	38	11%
Age	34	10%
Need help/care	34	10%
Location	33	10%
Health	24	7%
Retirement	23	7%
Finances	21	6%
Close to family	9	3%
Don't want to be alone	8	2%
Want a home	4	1%
Convenience	3	1%
Safety	3	1%
Don't want to burden children	1	0.3%
Medical	1	0.3%
Quality of life	1	0.3%
Social opportunities	1	0.3%
Total	**339**	**100%**

THE ATTRIBUTES PROSPECTS AND INFLUENCERS ARE LOOKING FOR IN A COMMUNITY

The top five attributes desired by lead list influencers matched those of lead list prospects with one exception, **Prospects** listed "friendly atmosphere/companionship" and Influences listed "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 five influencers included safe and secure, and affordable. **Prospects** listed single level and easy living, maintenance/worry-free.

Lead List – Influencer

	Count	%
Services/care provided	26	19%
Affordable	17	13%
Social/activities	17	13%
Good meals/food/dining options	16	12%
Clean	11	8%
Safe/secure	11	8%
Friendly atmosphere	9	7%
Competent staff	7	5%
Transportation	5	4%
Independence/private	4	3%
Amenities	3	2%
Location	3	2%
Size of community	3	2%
Close to family	2	1%
Total	134	100%

Purchased List – Influencer

	Count	%
Services/care provided	73	21%
Safe/secure	38	11%
Affordable	35	10%
Location	32	9%
Social/activities	24	7%
Competent, compassionate staff	21	6%
Single level/no steps	19	5%
Clean/well kept	18	5%
Good meals/food	18	5%
Accessible/limitations	11	3%
Comfortable	11	3%
Downsize	11	3%
Independence	10	3%
24 hour care	7	2%
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%

Lead List – Prospect

	Count	%
Social/activities	76	13%
Good meals/food, flexible dining plans	71	13%
Support services/care - as needed	55	10%
Friendly atmosphere/companionship	43	8%
Affordable	41	7%
Location	37	7%
Clean/well kept/attractive	35	6%
Amenities	34	6%
Wish List	26	5%
Transportation	25	4%
Continuous care/life care	21	4%
Privacy/independence	18	3%
Safe/secure	18	3%
Comfortable	17	3%
Vibrant/active community	9	2%
Competent, friendly staff	8	1%
Pet friendly	8	1%
Close to family	7	1%
Convenient/convenience	4	1%
Feeling of home	4	1%
Size of community	4	1%
55+(1)/non profit(1)/Jewish (1)	3	1%
Total	564	100%

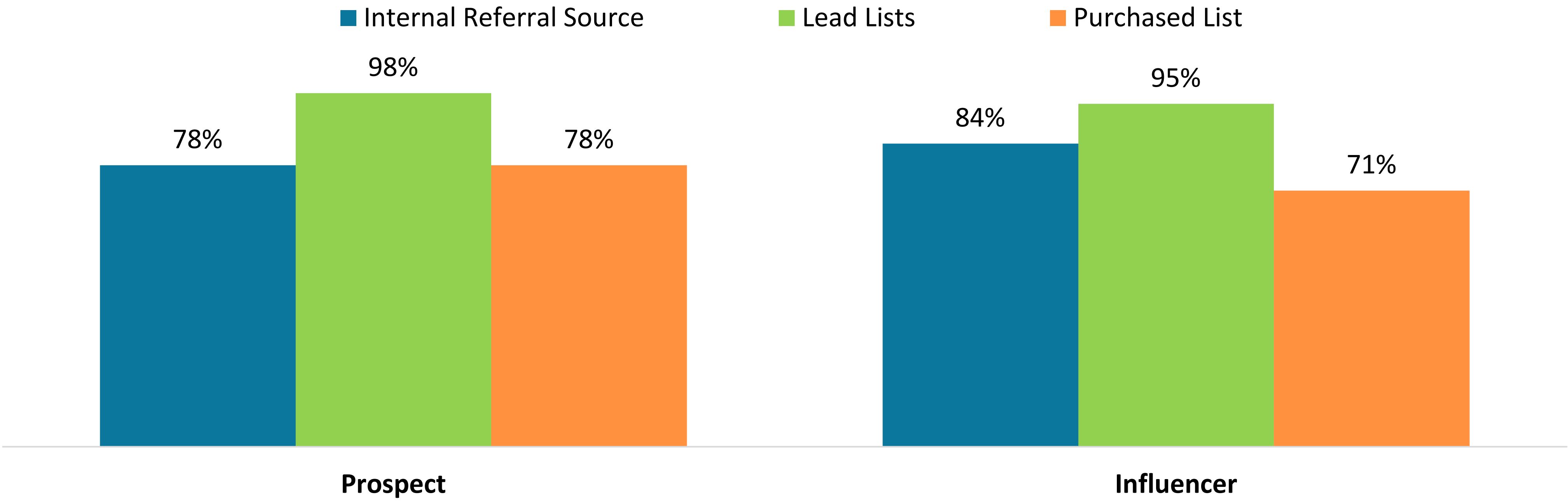
Purchased List – Prospect

	Count	%
Services/care provided	49	12%
Location	39	10%
Single level, Easy living, Less	38	9%
maintenance, worry free	37	9%
Social/activities	30	7%
Safe/secure	26	6%
Affordable	25	6%
Good meals/food/optional meal plan	24	6%
House/smaller house (9)	19	5%
Amenities	14	3%
Transportation	14	3%
Wish List	14	3%
Convenience	12	3%
Comfortable	11	3%
Friendly atmosphere/companionship	11	3%
Close to family	10	2%
Continuing care	7	2%
Privacy/independence	6	1%
Clean/well kept/attractive	5	1%
55+ (3)/Adults only (2)	4	1%
Competent, friendly staff	4	1%
Pet friendly	2	0.5%
Vibrant/active community	2	0.5%
Feel at home	1	0.3%
Friendly atmosphere	1	0.3%
Total	405	100%

AWARENESS OF RESIDENTIAL COMMUNITIES WITH SERVICES BY RESPONDENT SOURCE

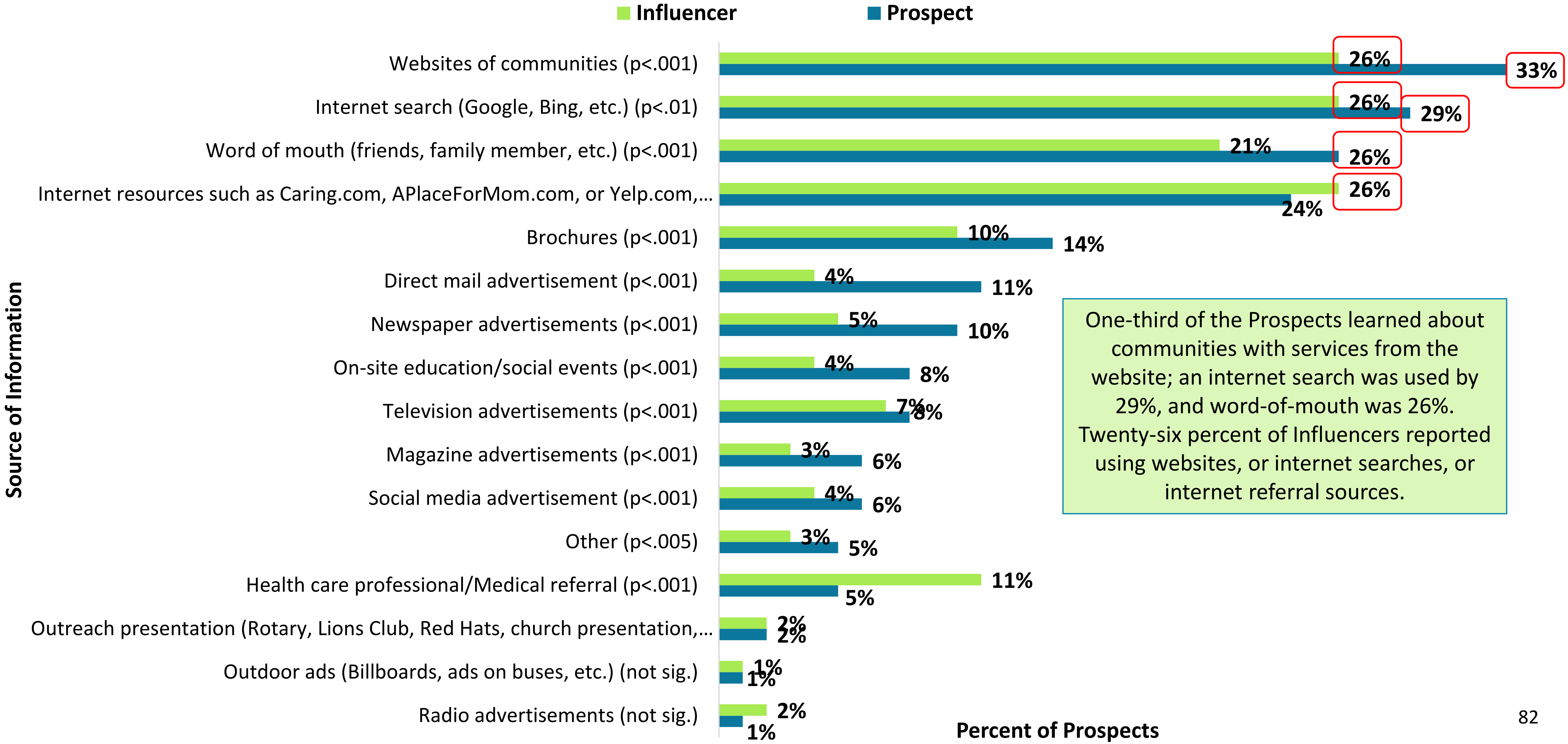
Prospects on lead lists (98% to 95%) were more likely to be aware of residential communities with services than prospects from an internet referral site (78%) or a purchased list (78%). A higher proportion of influencers from lead lists (95%) were aware of residential communities than influencers from internet sources (84%) or from purchased lists (71%).

Exhibit 63. The Awareness of Residential Communities with Services by Respondent Group and Respondent Source (p<.001)



HOW PROSPECTS AND INFLUENCERS LEARN ABOUT RESIDENTIAL COMMUNITIES WITH SERVICES

Exhibit 64. How Prospects and Influencers Learn about Potential Residential Communities with Service



One-third of the Prospects learned about communities with services from the website; an internet search was used by 29%, and word-of-mouth was 26%. Twenty-six percent of Influencers reported using websites, or internet searches, or internet referral sources.

MOST BENEFICIAL SOURCE OF INFORMATION BY RESPONDENT SOURCE

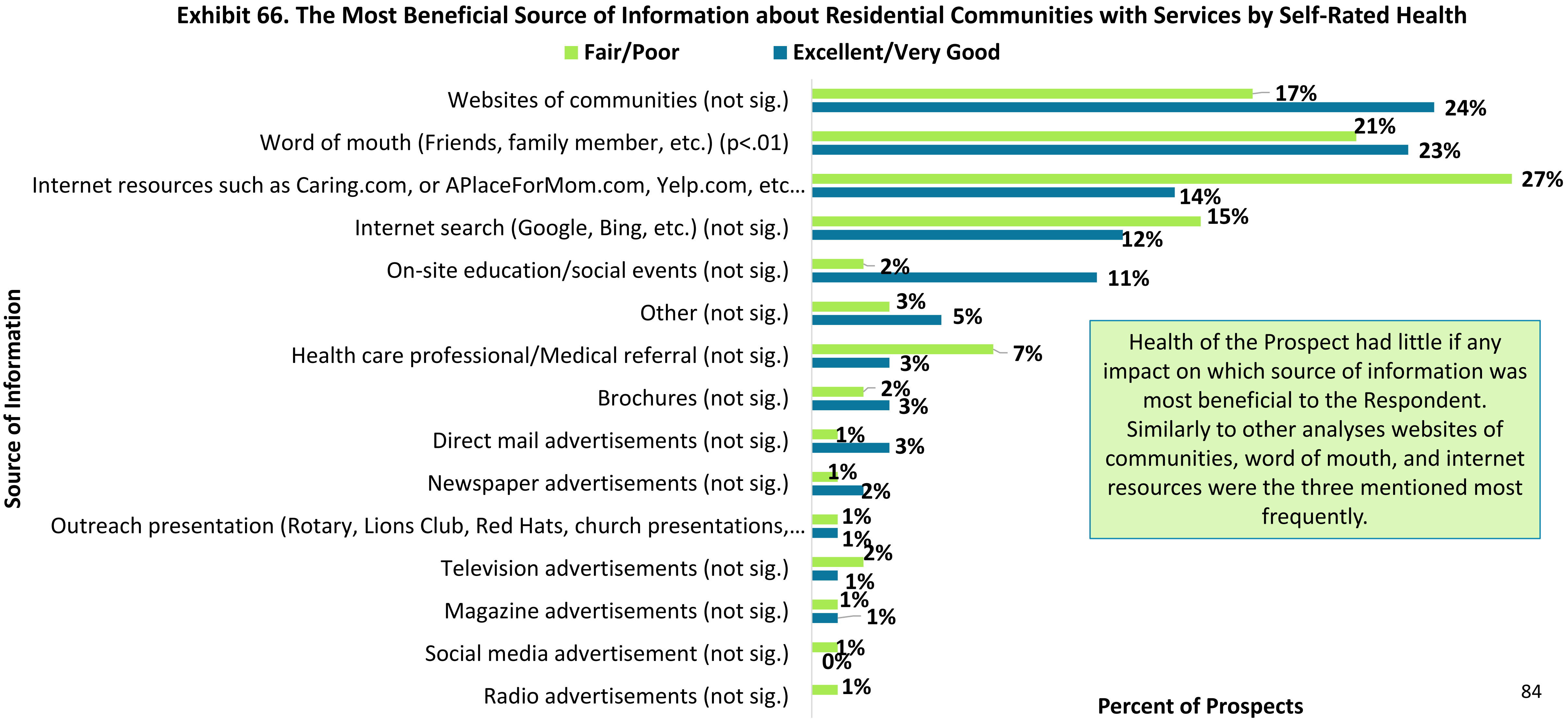
Among prospects from internet referral sources (22%) reported that websites of the community were the most beneficial source, followed by internet referral sources or internet searches. Prospects on lead lists and purchased lists cited word of mouth as most beneficial (28%). Influencers from internet referral sources identified the referral sources as most beneficial. Prospects on lead lists and purchased lists cited word of mouth as most beneficial.

Exhibit 65. The Most Beneficial Source of Information about Residential Communities with Services

Source of Information	Respondent Source					
	Internet Referral Source		Lead Lists		Purchased List	
	Prospects	Influencers	Prospects	Influencers	Prospects	Influencers
Word of mouth (Friends, family member, etc.) (p<.001)	18%	19%	28%	24%	28%	22%
Websites of communities (p<.001)	22%	15%	23%	28%	22%	20%
On-site education/social events (p<.001)v	3%	2%	20%	5%	7%	2%
Internet search (Google, Bing, etc.) (p<.001)	21%	12%	6%	12%	14%	21%
Brochures (p<.001)	3%	3%	6%	10%	5%	5%
Other (not sig.)	5%	4%	6%	4%	5%	1%
Internet resources such as Caring.com, or APlaceForMom.com, Yelp.com, etc. (not sig.)	21%	36%	5%	13%	2%	11%
Direct mail advertisements (p<.001)	1%	0.10%	3%		5%	2%
Newspaper advertisements (p<.005)	1%	0.10%	1%		4%	1%
Outreach presentation (Rotary, Lions Club, Red Hats, church presentations, etc.) (not sig.)	0.20%	1%	1%	1%	1%	1%
Health care professional/Medical referral (p<.001)	3%	7%	1%	3%	2%	7%
Magazine advertisements (not sig.)	0.20%	0.40%	0.40%		1%	1%
Social media advertisement (not sig.)	1%	0.10%			2%	1%
Television advertisements (not sig.)	1%	1%			2%	4%
Radio advertisements (not sig.)	1%	0.10%		1%	1%	1%
Outdoor ads (Billboards, ads on buses, etc.) (not sig.)		0.10%				0.40%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

MOST BENEFICIAL SOURCE OF INFORMATION BY SELF-RATED HEALTH OF RESPONDENT

Individuals with excellent or very good health rated web-sites (24%) and word of mouth from friend and family (23%) as the most beneficial sources of information. Individuals with fair or poor health rated internet sources: Caring.com or Aplaceformom.com (27%) and word of mouth (21%) as most beneficial.



Health of the Prospect had little if any impact on which source of information was most beneficial to the Respondent. Similarly to other analyses websites of communities, word of mouth, and internet resources were the three mentioned most frequently.

HOW RECENTLY MARKETING MATERIALS WERE VIEWED BY RESPONDENT SOURCE

Lead list influencers (38%) were significantly more likely to have viewed marketing materials in the past week than any of the other respondent groups. Both lead list influencers (67%) and prospects (66%) were more likely to have viewed marketing materials within the month than any of the respondent groups that ranged from 36% to 52%.

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

Time	Respondent Source											
	Internet Referral Source				Lead Lists				Purchased List			
	Prospects		Influencers		Prospects		Influencers		Prospects		Influencers	
Week	**26%**	51%	**27%**	52%	26%	66%	**38%**	67%	21%	47%	13%	36%
Month	25%		25%		**40%**		29%		**26%**		**23%**	
One to two months	13%		13%		10%		8%		14%		17%	
Two to three months	10%		9%		7%		7%		7%		12%	
Three to six months	8%		11%		7%		6%		9%		10%	
Six to nine months	8%		6%		4%		4%		5%		6%	
Nine to twelve months	4%		3%		2%		2%		4%		6%	
More than a year ago	7%		6%		4%		6%		14%		12%	
Total	**100%**		**100%**		**100%**		**100%**		**100%**		**100%**	

CHAPTER 4.
INFORMATION DESIRED ON WEBSITE AND/OR MARKETING MATERIALS

IMPORTANCE OF LEARNING ABOUT COMMUNITY ATTRIBUTES

Both **Prospects** (81%) and **Influencers** (75%) considered price and financial information absolutely necessary in marketing materials. Ten percent or fewer of **Prospects** and **Influencers** rated any of the items as unnecessary.

Exhibit 68. The Importance of Learning about Various Attributes of a Residential Community with Services from Marketing Materials by Type of Information and Respondent Group

Information (Sorted by "Absolutely Necessary" by Prospect)	Not at All Necessary		Unnecessary		Neutral		Necessary		Absolutely Necessary	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Price/Financial information (p<.001)	0%	1%	0%	1%	2%	5%	16%	18%	81%	75%
Services provided – utilities, housekeeping, meals, etc. (p<.001)	1%	1%	1%	1%	4%	6%	34%	23%	59%	70%
Housing/Residential information (Floorplans, square footage, etc.) (p<.001)	1%	1%	0%	1%	5%	12%	36%	38%	58%	47%
Location of community (address, description of location, maps) (not sig.)	0%	0%	1%	1%	7%	9%	36%	30%	56%	60%
Photos (not sig.)	1%	1%	1%	2%	11%	13%	40%	34%	47%	50%
Health care services provided (p<.001)	2%	1%	3%	1%	15%	9%	34%	26%	46%	63%
On-site amenities – fitness center, pool, salon, etc. (not sig.)	1%	2%	3%	5%	20%	22%	40%	40%	36%	32%
Neighborhood amenities such as parks, walking paths and retail shops nearby (p<.001)	1%	2%	3%	6%	21%	34%	46%	35%	29%	23%
Planned activities and events (p<.002)	2%	1%	5%	3%	29%	23%	38%	44%	27%	29%
History of the community/company (not sig.)	2%	2%	6%	6%	29%	29%	37%	39%	27%	25%
Technology offered (p<.001)	1%	3%	3%	7%	21%	38%	47%	34%	27%	18%
Current company information (number of employees, current leadership team, etc.) (not sig.)	3%	3%	7%	4%	27%	25%	39%	37%	25%	31%
Customer testimonials (not sig.)	3%	4%	10%	8%	31%	29%	34%	34%	22%	25%
Videos (not sig.)	2%	4%	7%	9%	38%	38%	32%	30%	21%	19%

ProMatura

INFORMATION RATED "ABSOLUTELY NECESSARY" BY RESPONDENT SOURCE AMONG PROSPECTS AND INFLUENCERS

asha living longer better

Prospects are those most likely to move to the community and thus were more keenly interested in price (79% to 82%), housing information (50 to 69%). Services provided were slightly more important to Influencers (62% to 74%) than Prospects (57% to 70%).

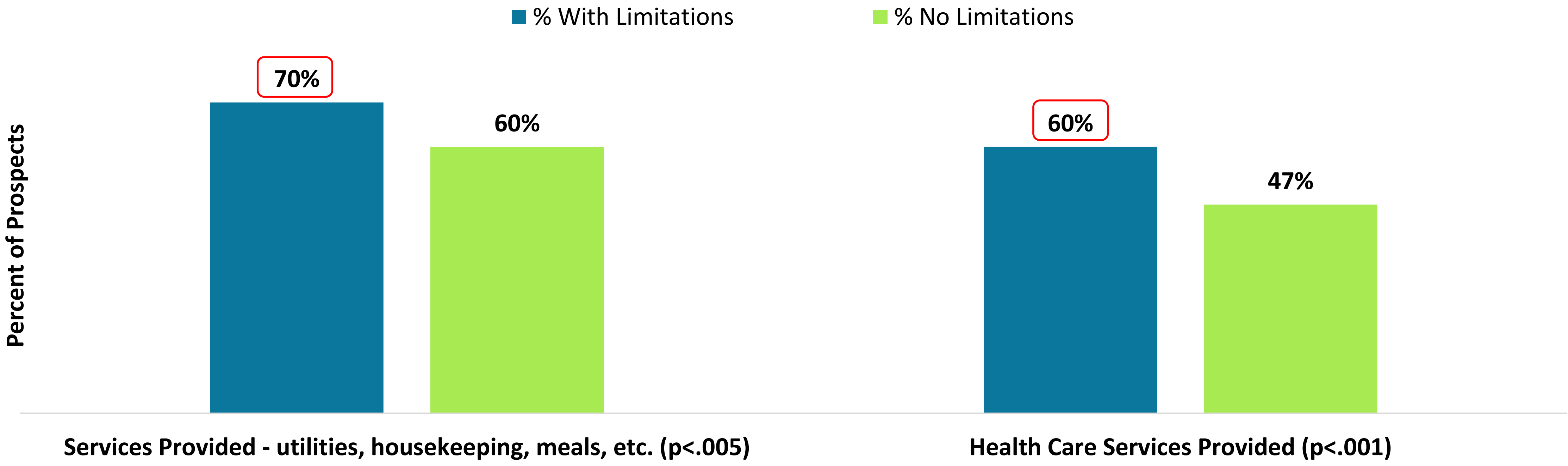
Exhibit 69. The Information about a Residential Community with Services Rated "Absolutely Necessary" by Respondent Source

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 sig.)	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 such as 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 sig.)	21%	24%	19%	16%	26%	29%

IMPORTANCE OF LEARNING ABOUT SERVICES PROVIDED

Respondents (70%) with limitations in their ability to perform activities of daily living independently without the aid of an assistive device or another person, were significantly more likely to rate receiving information about services provided (70%) and healthcare services (60%) than respondents who did not have any limitations (60% and 47%, respectively).

Exhibit 70. The Importance of Learning About Services Provided by Whether the Prospect has Limitations



THE EASE OF FINDING INFORMATION ABOUT THE COMMUNITY BY PROSPECTS AND INFLUENCERS

The information (Pricing/Financial Information) considered the most important to Prospects and Influencers was rated: difficult, very difficult, or unable to find by 78% of both Prospects and Influencers.

Exhibit 71. Rating the Ease of Finding Information by Type of Information and Respondent Group

Information (Listed in order of percent rating "Very Easy" by Prospect)	Not Able to Find		Very Difficult		Difficult		Easy		Very Easy	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Location of community (address, description of location, maps) (p<.01)	0%	1%	1%	2%	15%	11%	58%	51%	**25%**	**36%**
Photos (not sig.)	1%	1%	1%	2%	12%	10%	62%	53%	**24%**	**33%**
On-site amenities – fitness center, pool, salon, etc. (not sig.)	0%	1%	1%	1%	13%	14%	68%	67%	18%	16%
Services provided – utilities, housekeeping, meals, etc. (not sig.)	1%	2%	2%	2%	22%	21%	60%	60%	15%	15%
Housing/Residential information (floorplans, square footage, etc.) (not sig.)	2%	4%	6%	8%	28%	29%	50%	47%	14%	12%
Customer testimonials (not sig.)	4%	5%	5%	5%	28%	23%	50%	52%	14%	15%
Health care services provided (not sig.)	2%	3%	4%	4%	33%	37%	50%	46%	11%	10%
Videos (not sig.)	5%	9%	7%	8%	30%	26%	47%	45%	11%	13%
Planned activities and events (not sig.)	2%	4%	4%	5%	29%	31%	56%	50%	9%	10%
Neighborhood amenities such as parks, walking paths and retail shops nearby (not sig.)	2%	4%	7%	8%	37%	33%	47%	47%	7%	9%
Price/Financial information (p<.01)	**18%**	**27%**	**25%**	**24%**	**35%**	**27%**	18%	17%	5%	6%
History of the community/company (not sig.)	7%	8%	12%	11%	44%	35%	32%	39%	5%	7%
Technology offered (not sig.)	5%	8%	10%	12%	45%	40%	38%	33%	4%	6%
Current company information (number of employees, current leadership team, etc.) (not sig.)	14%	15%	16%	16%	47%	41%	19%	24%	3%	4%

THE EASE OF FINDING IMPORTANT INFORMATION AMONG PROSPECTS AND INFLUENCERS BY RESPONDENT SOURCE

The information that was the easiest to find for respondents from internet referral sites, lead lists and purchased lists included the location and onsite amenities. The information considered among the most important topics was at the bottom of the scale among **Prospects** and **Influencers** from the respondent sources.

Exhibit 72. The Information Rated "Easy" or "Very Easy" to Find on the Website of a Residential Community with Services by Type of Information and 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
On-site amenities – fitness center, pool, salon, etc.	82%	81%	88%	91%	91%	86%
Photos	84%	86%	88%	93%	93%	86%
Location of community (address, description of location, maps)	81%	87%	85%	84%	91%	85%
Services provided – utilities, housekeeping, meals, etc.	71%	72%	83%	79%	76%	84%
Housing/Residential information (floorplans, square footage, etc.)	60%	54%	70%	59%	71%	72%
Customer testimonials	58%	67%	69%	75%	72%	65%
Planned activities and events	61%	56%	67%	63%	70%	70%
Videos	52%	55%	66%	68%	66%	63%
Health care services provided	61%	53%	60%	50%	63%	68%
Neighborhood amenities such as parks, walking paths and retail shops nearby	53%	53%	46%	53%	67%	64%
Technology offered	38%	36%	41%	40%	51%	52%
History of the community/company	32%	42%	39%	43%	50%	56%
Price/Financial information	21%	17%	21%	18%	30%	39%
Current company information (number of employees, current leadership team, etc.)	22%	24%	19%	20%	29%	44%

THE DIFFICULTY OF FINDING IMPORTANT INFORMATION ABOUT THE COMMUNITY AMONG PROSPECTS AND INFLUENCERS

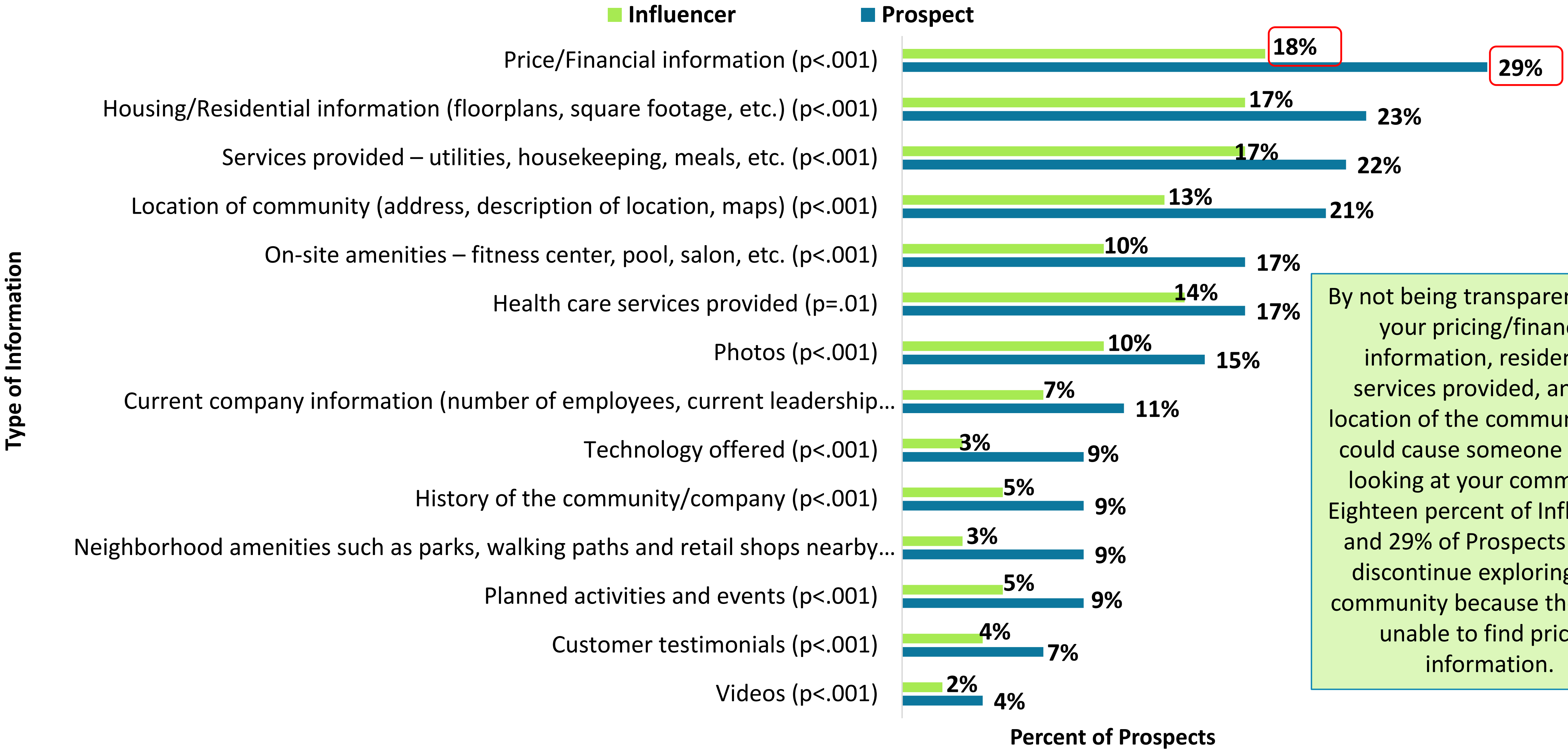
From 48% to 81% of **Prospects** and from 44% to 80% of **Influencers** rated current company information, price/financial information, history of the community/company, and technology offered, as difficult, very difficult, or not able to find.

Exhibit 73. The Information Rated "Difficult," "Very Difficult" or "Not Able to Find" on the Website of a Residential Community with Services by Type of Information and Respondent Source

Information About the Community (Listed in order of percent rating by Lead Lists / Prospect)	Internet Referral Source		Lead Lists		Purchased List	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Current company information (number of employees, current leadership team, etc.)	79%	77%	**81%**	**80%**	71%	56%
Price/Financial information	78%	82%	79%	82%	70%	61%
History of the community/company	68%	58%	61%	57%	49%	**44%**
Technology offered	62%	64%	60%	60%	**48%**	48%
Neighborhood amenities such as parks, walking paths and retail shops nearby	46%	47%	54%	47%	33%	37%
Health care services provided	38%	47%	40%	51%	38%	32%
Videos	48%	45%	34%	33%	33%	38%
Planned activities and events	40%	44%	33%	38%	29%	30%
Customer testimonials	42%	33%	31%	26%	28%	36%
Housing/Residential information (floorplans, square footage, etc.)	40%	46%	30%	41%	29%	28%
Services provided – utilities, housekeeping, meals, etc.	29%	29%	17%	22%	24%	16%
Location of community (address, description of location, maps)	20%	14%	15%	17%	9%	15%
On-site amenities – fitness center, pool, salon, etc.	17%	19%	13%	9%	9%	14%
Photos	16%	15%	12%	7%	6%	13%

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



By not being transparent about your pricing/financial information, residences, services provided, and the location of the community, you could cause someone to stop looking at your community. Eighteen percent of Influencers and 29% of Prospects would discontinue exploring your community because they were unable to find pricing information.

PERCENT OF PROSPECTS AND INFLUENCERS WHO WOULD DISCONTINUE INTEREST IN A COMMUNITY IF THEY CANNOT FIND DESIRED INFROMATION

It is apparent that the internet referral and lead list prospects who completed the survey were interested in the community they were exploring, however 41% of lead list prospects and 35% of the internet referral site prospects would discontinue their interest in the community if not provided financial information. Additionally, if the information is unavailable on the location, housing, floor plans, services provided, health care, other services provided, and on-site amenities 30% or more of prospects on lead lists would discontinue their interest.

Exhibit 75. 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, Respondent Source, and Respondent Group

Attributes (Listed in order of percent rating by Lead Lists / Prospect)	Respondent Source					
	Internet Referral Source		Lead Lists		Purchased List	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Price/Financial information (p<.001)	**35%**	24%	**41%**	22%	21%	11%
Housing/Residential information (floorplans, square footage, etc.) (p<.001)	27%	22%	38%	20%	15%	11%
Services provided – utilities, housekeeping, meals, etc. (p<.001)	24%	23%	35%	23%	15%	11%
Health care services provided (p<.001)	18%	20%	33%	18%	11%	9%
Location of community (address, description of location, maps) (p<.001)	25%	17%	33%	19%	13%	9%
On-site amenities – fitness center, pool, salon, etc. (p<.001)	19%	12%	30%	13%	11%	7%
Photos (p<.001)	19%	13%	21%	16%	9%	7%
Current company information (number of employees, current leadership team, etc.) (p<.001)	12%	9%	19%	6%	7%	5%
Planned activities and events (p<.001)	11%	7%	17%	8%	5%	3%
History of the community/company (p<.001)	10%	7%	16%	4%	6%	4%
Neighborhood amenities such as parks, walking paths and retail shops nearby (p<.001)	12%	4%	14%	5%	5%	3%
Technology offered (p<.001)	12%	3%	13%	2%	5%	2%
Customer testimonials (p<.001)	9%	6%	7%	4%	5%	3%
Videos (p<.001)	6%	2%	6%	2%	3%	2%

LIKELIHOOD OF PROVIDING PERSONAL CONTACT INFORMATION TO OBTAIN INFORMATION BY RESPONDENT SOURCE

More than half of the prospects (52%) and influencers (62%) on the internet referral site 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 lead lists and the purchased list. Most of us want to look around and learn about a potential residence before we have to provide our contact information and invite a call from a salesperson.

Exhibit 76. The Likelihood of Providing Contact information if Required Prior to Viewing Floorplans and Square Footage of Residences by Respondent Source and Respondent Group (p<.001)

Attributes	Respondent Source					
	Internet Referral Source		Lead Lists		Purchased List	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Very unlikely	32%	35%	26%	28%	25%	17%
Unlikely	20%	27%	25%	37%	24%	17%
	52%	**62%**	**51%**	**65%**	**49%**	**34%**
Unsure	21%	18%	28%	24%	27%	31%
Likely	17%	14%	18%	9%	19%	26%
Very likely	11%	6%	3%	2%	6%	9%

LIKELIHOOD OF PROVIDING PERSONAL CONTACT INFORMATION TO OBTAIN PRICING INFORMATION ABOUT A COMMUNITY

Fifty 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% to 47%) were reluctant to provide their contact information to obtain information about a community. Keep in mind those on the purchased lists would consider moving to a community, but were not looking for information or planning an imminent move.

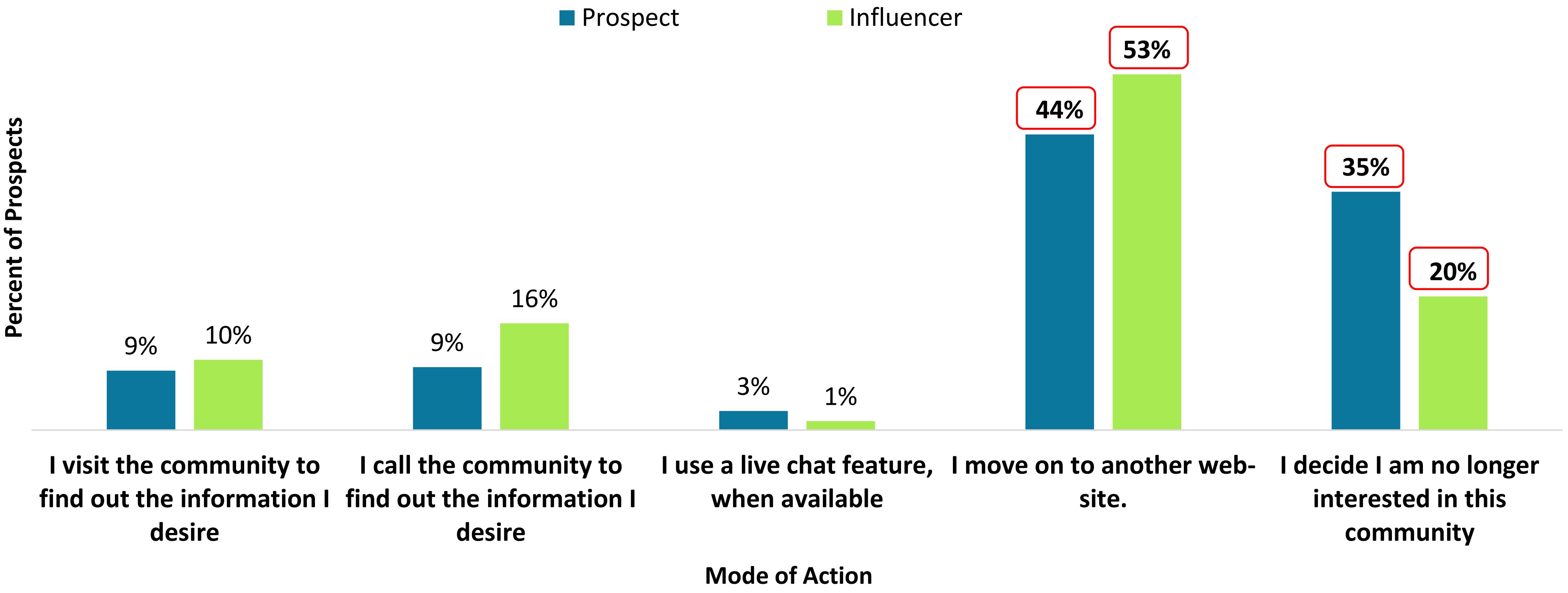
Exhibit 77. The Likelihood of Providing Contact Information If Required Prior to Viewing Pricing Information by Respondent Source and Respondent Group (p<.001)

Attributes	Respondent Source					
	Internet Referral Source		Lead Lists		Purchased List	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Very unlikely	30%	27%	27%	22%	27%	17%
Unlikely	20%	27%	27%	32%	20%	17%
(Very unlikely + Unlikely)	50%	54%	54%	54%	47%	34%
Unsure	22%	20%	21%	32%	25%	31%
Likely	17%	19%	21%	11%	20%	26%
Very likely	11%	7%	4%	3%	7%	9%

PROSPECTS AND INFLUENCERS PROVIDING CONTACT INFORMATION ON A WEBSITE TO OBTAIN INFORMATION ABOUT A COMMUNITY

The largest group of respondents, 44% of **Prospects** and 53% **Influencers** move to another website when they cannot obtain the information they want without entering their contact information on a website. A slightly smaller proportion (35%) of **Prospects** and 20% of **Influencers** decide they are no longer interested in the community.

Exhibit 78. What Prospects Do When a Request for Contact Information Prohibits Them from Viewing Information by Respondent Group (p<.001)



PROSPECTS AND INFLUENCERS ACTIONS IF REQUIRED TO PROVIDE CONTACT INFORMATION TO OBTAIN INFORMATION FROM A WEBSITE

When a Prospect or Influencer was unable to obtain the information they wanted from the website without entering their contact information most (42% to 48%) move on to another community, as do Influencers (50% to 60%). A smaller proportion (17% to 39%) decide they are no longer interested in the community. Influencers were less tolerant than Prospects.

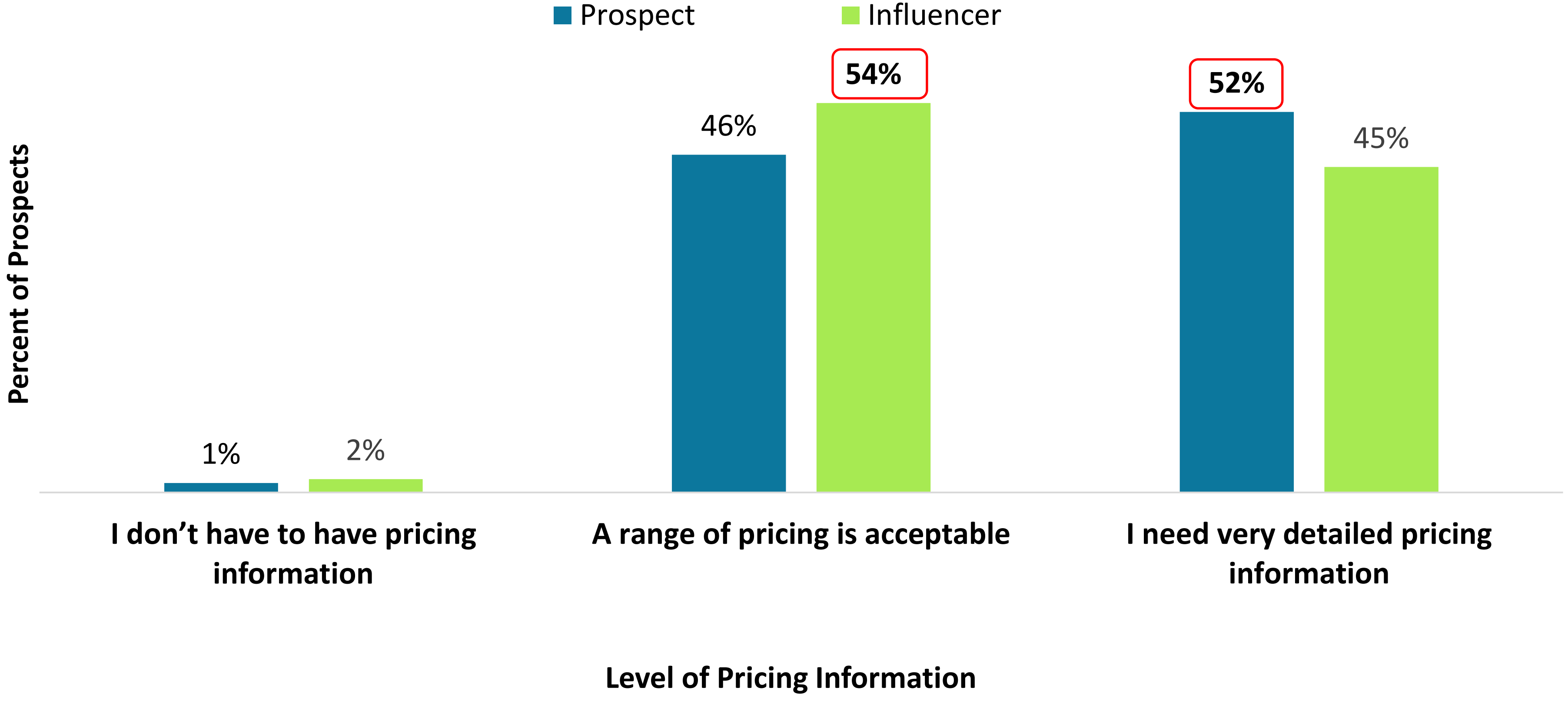
Exhibit 79. What Prospects Do When a Request for Contact Information Prohibits Them from Viewing Information by Respondent Source and Respondent Group (p<.01)

Attributes (Listed in order of percent rating by Lead Lists / Prospect)	Respondent Source					
	Internet Referral Source		Lead Lists		Purchased List	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
I move on to another web-site.	43%	52%	48%	60%	42%	50%
I decide I am no longer interested in this community	35%	21%	30%	17%	39%	19%
I call the community to find out the information I desire	9%	16%	12%	14%	8%	16%
I visit the community to find out the information I desire	9%	11%	8%	7%	10%	12%
I use a live chat feature, when available	4%	0%	2%	2%	2%	4%

DETAIL OF PRICING INFORMATION REQUIRED BY PROSPECTS AND INFLUENCERS TO CONTINUE INTEREST IN A COMMUNITY

A little more than half of the **Prospects** (52%) said they need detailed pricing to continue to pursue a community and 54% of **Influencers** said a range of pricing is acceptable. The marketing materials and/or the sales counselors need to provide the information desired by the **Prospect** or **Influencer** to ensure they will maintain interest if the community offers the services they want at a price they can afford.

Exhibit 80. Percent of Prospects by the Level of Pricing Information They Require in Order to Continue to Pursue a Residential Community with Services by Respondent Group (*not sig.*)



LEVEL OF PRICING INFORMATION REQUIRED BY PROSPECTS AND INFLUENCERS BY RESPONDENT SOURCE

Just three percent or fewer **Prospects** or **Influencers** from all three list sources said they don't have to have pricing information to continue pursuing a community. Between 43% and 64% of **Prospects** and **Influencers** said a range of pricing was acceptable. **Prospects** were more likely than **Influencers** to say they need detailed pricing information.

Exhibit 81. Percent of Prospects by the Level of Pricing Information They Require in Order to Continue to Pursue a Residential Community with Services by Respondent Source and Respondent Group (p<.001)

Attributes (Listed in order of percent rating by Lead Lists / Prospect)	Respondent Source					
	Internet Referral Source		Lead Lists		Purchased List	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
A range of pricing is acceptable	**43%**	**57%**	**50%**	**64%**	**49%**	**45%**
I need very detailed pricing information	56%	43%	47%	36%	51%	50%
I don't have to have pricing information	1%	1%	3%	0%	0.40%	4%

CHAPTER 5.
INFORMATION DESIRED FROM MARKETING MATERIALS

IMPORTANCE OF LEARNING ABOUT RESIDENCE ATTRIBUTES AMONG PROPSECTS AND INFLUENCERS

Learning about the type of kitchen and the appliances in it was absolutely necessary for 48% of **Prospects**. This was followed by 47% who want to know about the outdoor spaces and 45% who want to know the amount of closet/storage space. **Influencers** (41%) were mostly interested in the total square footage of the residence.

Exhibit 82. Importance of Learning About Various Attributes of the Residence/Apartment of a Residential Community with Services from Marketing Materials of Information by Respondent Group

Attributes (Listed in order of percent rating "Absolutely Necessary" by Prospect)	Not at All Necessary		Unnecessary		Neutral		Necessary		Absolutely Necessary	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Type of kitchen in private residence (p<.001)	0%	1%	12%	47%	40%	1%	3%	19%	**48%**	28%
Appliances included in kitchen (p<.001)	0%	1%	11%	46%	41%	1%	3%	22%	**48%**	26%
Outdoor spaces (balcony/patio) (p<.001)	1%	3%	20%	45%	31%	2%	3%	27%	**47%**	21%
Closet/Storage space (p<.001)	0%	1%	13%	48%	38%	0%	3%	27%	**45%**	25%
Room dimensions (p<.001)	1%	2%	11%	44%	42%	0%	3%	20%	44%	33%
Floorplan with total square footage defined (p<.001)	1%	1%	7%	35%	57%	1%	1%	14%	43%	**41%**
Laundry room vs. W/D in room (p<.001)	1%	2%	15%	42%	40%	2%	4%	21%	43%	29%
Apartment customizability (not sig.)	3%	6%	30%	39%	21%	3%	5%	32%	41%	20%
Flooring (p<.001)	1%	4%	34%	41%	20%	2%	8%	38%	38%	14%
Views available (p<.001)	1%	4%	32%	39%	24%	2%	7%	37%	38%	17%
Apartment furnishings included (p<.001)	8%	13%	31%	28%	20%	4%	7%	30%	38%	22%
Windows/Window treatments (p<.001)	2%	7%	39%	34%	17%	4%	12%	42%	30%	12%

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

Floorplan total square footage was the attribute about the residence that had the highest rating across all respondent groups: 67% of prospects on the lead list and 57% on the internet referral sites and 49% of prospects on the purchased list.

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 % Who Rated "Absolutely Necessary"		Lead Lists % Who Rated "Absolutely Necessary"		Purchased List % Who Rated "Absolutely Necessary"	
	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%

IMPORTANCE OF LEARNING ABOUT LOCATION ATTRIBUTES AMONG PROSPECTS AND INFLUENCERS

The highest proportion of both **Prospects** and **Influencers** rated the address (53% and 57% respectively) was absolutely necessary as well as the telephone number (44% to 50%). A smaller proportion of both respondent groups (31% and 29%) also cited distance to the nearest hospital as absolutely necessary.

Exhibit 84. Importance of Learning about Various Attributes Related to the Location of a Residential Community with Services from Marketing Materials by Type of Information and Respondent Group

	Prospect					Influencer				
Attributes (Listed in order of percent rating "Absolutely Necessary" by Prospect)	**Not at All Necessary**	**Unnecessary**	**Neutral**	**Necessary**	**Absolutely Necessary**	**Not at All Necessary**	**Unnecessary**	**Neutral**	**Necessary**	**Absolutely Necessary**
Address of the community (not sig.)	**1%**	**1%**	**7%**	**38%**	**53%**	**1%**	**1%**	**5%**	**36%**	**57%**
Telephone number of community (not sig.)	1%	2%	12%	41%	**44%**	1%	1%	9%	40%	**50%**
Map of the location (not sig.)	1%	2%	17%	45%	34%	1%	3%	20%	42%	33%
Distance to closest hospital (not sig.)	1%	5%	24%	39%	**31%**	2%	4%	24%	42%	**29%**
Photo of outside of the community, main building, etc. (p<.001)	1%	3%	18%	50%	27%	1%	1%	13%	54%	31%
Distance to closest retail, pharmacy, post office, etc. (p<.000)	1%	4%	25%	46%	26%	3%	6%	34%	39%	18%
Driving directions to the community (not sig.)	3%	10%	31%	37%	19%	3%	13%	36%	30%	18%
Interactive map (i.e., Google map) of the location with ability to zoom in, out, etc. (not sig.)	3%	8%	41%	31%	18%	3%	11%	40%	29%	18%
Description of business/retail surrounding the community (p<.000)	1%	4%	34%	44%	17%	3%	8%	41%	34%	14%
Description of nearby, local attractions (p<.000)	1%	6%	37%	41%	15%	4%	9%	44%	30%	13%

"ABSOLUTELY NECESSARY" INFORMATION ABOUT LOCATION AMONG PROSPECTS AND INFLUENCERS BY RESPONDENT SOURCE

The address of the community was considered absolutely necessary by 49% to 62% of the three respondent groups, followed by the telephone number (42% to 55%), and photo of the building (26% to 36%).

Exhibit 85. Information about the Location of a Residential Community with Services Rated "Absolutely Necessary" by Respondent Source

Attributes (Listed in order of percent rating "Absolutely Necessary" by Prospect)	Internet Referral Source % Who Rated "Absolutely Necessary"		Lead Lists % Who Rated "Absolutely Necessary"		Purchased List % Who Rated "Absolutely Necessary"	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Address of the community (not sig.)	**53%**	**62%**	**56%**	**49%**	**51%**	**50%**
Telephone number of community (p<.01)	**46%**	**55%**	**43%**	**46%**	**42%**	**43%**
Map of the location (not sig.)	35%	36%	39%	31%	31%	29%
Photo of outside of the community, main building, etc. (not sig.)	**29%**	**31%**	**26%**	**36%**	**26%**	**31%**
Distance to closest hospital (p<.000)	35%	27%	23%	15%	31%	34%
Distance to closest retail, pharmacy, post office, etc. (p<.000)	27%	14%	22%	14%	26%	24%
Driving directions to the community (not sig.)	21%	20%	18%	10%	16%	18%
Interactive map (i.e., Google map) of the location with ability to zoom in, out, etc. (not sig.)	21%	17%	17%	15%	14%	19%
Description of business/retail surrounding the community (p<.000)	17%	11%	15%	8%	18%	18%
Description of nearby, local attractions (p<.000)	15%	9%	13%	10%	17%	20%

NECESSITY OF LEARNING INFORMATION ABOUT OWNERS/OPERATORS AMONG PROSPECTS AND INFLUENCERS

With the exception of learning the names of the corporate leadership team, 52% to 86% of **Influencers** and 50% to 82% of **Prospects** thought learning the other attributes such as satisfaction scores, number of residents and employees was necessary to absolutely necessary.

Exhibit 86. Necessity of Learning about Various Attributes Related to the Owners and Operators of a Residential Community with Services from Marketing Materials by Type of Information and Respondent Group

Information	Prospect						Influencer					
(Listed in order of percent rating "Absolutely Necessary" by Prospect)	Not at All Necessary	Unnecessary	Neutral	Necessary	Absolutely Necessary	Necessary + Absolutely Necessary	Not at All Necessary	Unnecessary	Neutral	Necessary	Absolutely Necessary	Necessary + Absolutely Necessary
Recent satisfaction scores (not sig.)	1%	2%	16%	43%	38%	81%	1%	1%	14%	42%	42%	84%
Number of residents (p<.01)	1%	2%	14%	54%	29%	73%	0%	1%	13%	50%	36%	86%
Number of employees (p<.000)	1%	4%	21%	49%	25%	74%	1%	2%	15%	48%	34%	81%
Lifestyle/Culture of the community (not sig.)	1%	2%	14%	51%	31%	82%	0%	2%	19%	48%	30%	78%
Accreditation/Awards (not sig.)	2%	4%	26%	43%	26%	69%	0%	3%	24%	44%	28%	72%
Mission statement (not sig.)	3%	6%	31%	42%	17%	59%	2%	5%	34%	39%	20%	59%
Community leadership team (not sig.)	4%	8%	35%	39%	15%	54%	2%	6%	36%	40%	16%	56%
Corporate leadership team, such as the company's President, CEO or Reginal director (not sig.)	4%	11%	41%	30%	13%	43%	3%	10%	46%	27%	13%	50%
Size of company (number of communities) (not sig.)	**4%**	**8%**	**38%**	**38%**	**12%**	50%	**3%**	**9%**	**36%**	**40%**	**12%**	52%

"ABSOLUTELY NECESSARY" INFORMATION ABOUT OWNERS/OPERATORS BY RESPONDENT SOURCE

Recent satisfaction survey scores were the information was rated "Absolutely Necessary" by the largest proportion of all respondent groups. The ratings across the respondent groups ranged from 34% up to 47% of respondents in a group. Four groups rated learning the number of residents as "Absolutely Necessary" (32% to 37%) and four groups rated the lifestyle/cultures as "Absolutely Necessary" (30% to 33%).

Two influencer groups rated the number of employees as "Absolutely Necessary" (34% to 35%). And two groups rated accreditation/awards as "absolutely necessary:" 32% of lead list prospects, influencers on the purchased list.

Exhibit 87. Information about the Owners and Operators of a Residential Community with Services Rated "Absolutely Necessary" by Respondent Source

(Listed in order of percent rating "Absolutely Necessary" by Lead List by Prospect)	Internet Referral Source % Who Rated "Absolutely Necessary"		Lead Lists % Who Rated "Absolutely Necessary"		Purchased List % Who Rated "Absolutely Necessary"	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Recent satisfaction scores (not sig.)	34%	39%	39%	36%	41%	47%
Lifestyle/Culture of the community (p<.005)	29%	30%	33%	27%	33%	32%
Number of residents (p<.000)	27%	35%	32%	35%	29%	37%
Accreditation/Awards (p<.005)	23%	26%	32%	27%	25%	32%
Number of employees (p<.000)	23%	35%	28%	27%	25%	34%
Mission statement (p<.005)	15%	20%	24%	15%	16%	21%
Community leadership team (not sig.)	13%	15%	20%	9%	15%	19%
Corporate leadership team, such as the company's President, CEO or Reginal director (p<.01)	12%	13%	17%	9%	12%	15%
Size of company (number of communities) (p<.01)	11%	11%	16%	4%	10%	15%

OTHER INFORMATION ABOUT OWNERS/OPERATORS

It is evident lead list respondents have more knowledge about communities than individuals on a purchased list. Low employee turnover rates is usually a good indicator that a community is being managed and is functioning well.

Lead List

	Count	%
Employee and Corporate Tenure/Turnover Rates	15	21%
Financial Information/Status	15	21%
For Profit/Non-Profit	8	11%
Affiliations	5	7%
Experience/Background	4	6%
Reviews/Ratings/Feedback	4	6%
Education of Leadership	3	4%
Availability of Nursing Staff/Health Care	2	3%
Employee to Resident Ratio	2	3%
Future Plans	2	3%
Lawsuits/Health Code Violations	2	3%
Occupancy Rate	2	3%
Stability	2	3%
Accomplishments	1	1%
Community Involvement	1	1%
Corporate Contact Information	1	1%
Employment History	1	1%
Time in Business	1	1%
Total	**71**	**100%**

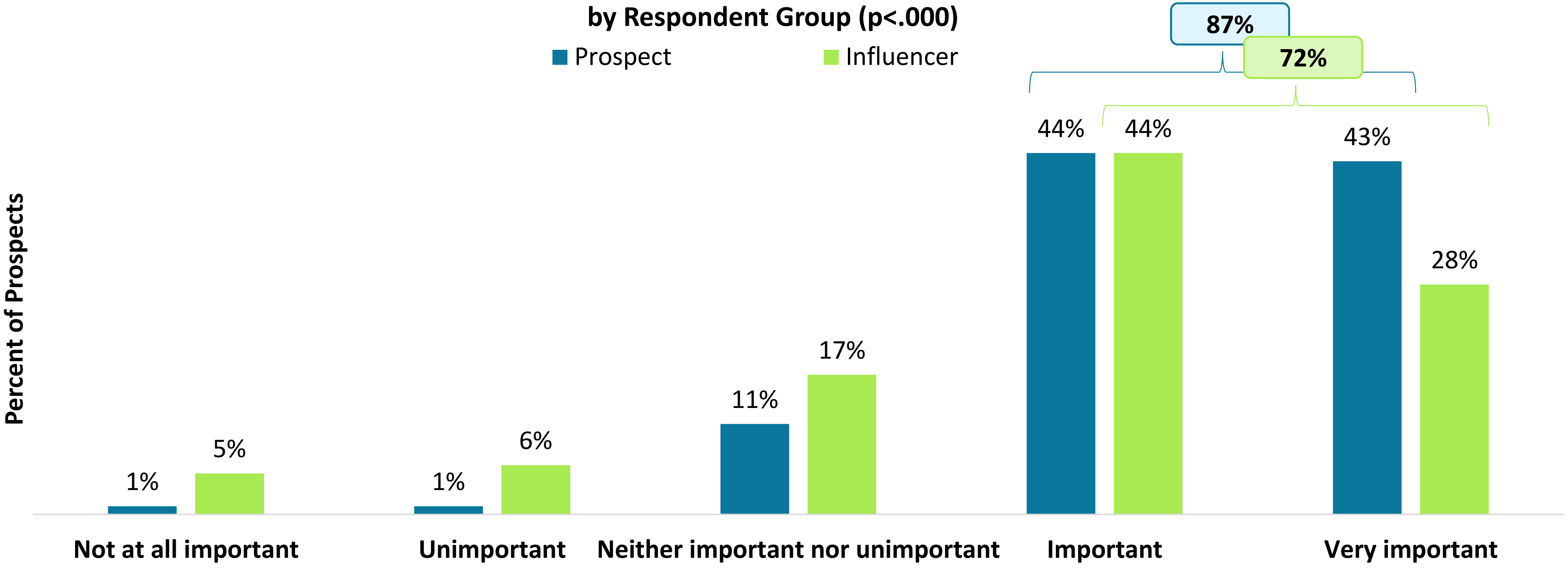
Purchased List

	Count	%
Financial Information	14	21%
Business History	11	17%
Ratings/Reviews/Testimonials	8	12%
Affiliations	6	9%
Availability of Nursing Staff/Employees	6	9%
Employee Experience/Background	6	9%
For Profit/Non-Profit	3	5%
Lawsuits/Health Code Violations	3	5%
Licenses/Credentials	3	5%
Background Check	2	3%
Employee and Corporate Tenure/Rate Turnover	2	3%
Resident Involvement	1	2%
Security	1	2%
Total	**66**	**100%**

IMPORTANCE OF STATE-OF-THE-ART TECHNOLOGIES AMONG PROSPECTS AND INFLUENCERS

Prospects (87%) rated having state-of-the-art technologies as important or very important, compared to 72% of **Influencers**. Our suggestion is to use the Prospect's preferences as your guide.

Exhibit 88. Importance of State-of-the-Art Technologies in a Residential Community with Services by Respondent Group (p<.000)



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IMPORTANCE OF STATE-OF-THE-ART TECHNOLOGIES BY RESPONDENT SOURCE

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Lead list prospects (93%) were significantly more likely than lead list influencers (81%) to rate having state-of-the-art technologies as important or very important. This pattern was also true for purchased list respondents (89% vs. 73%, respectively) and internet referral respondents (84% vs. 71%). Prospects on lead lists should be used as the primary indicator of what prospective customers want.

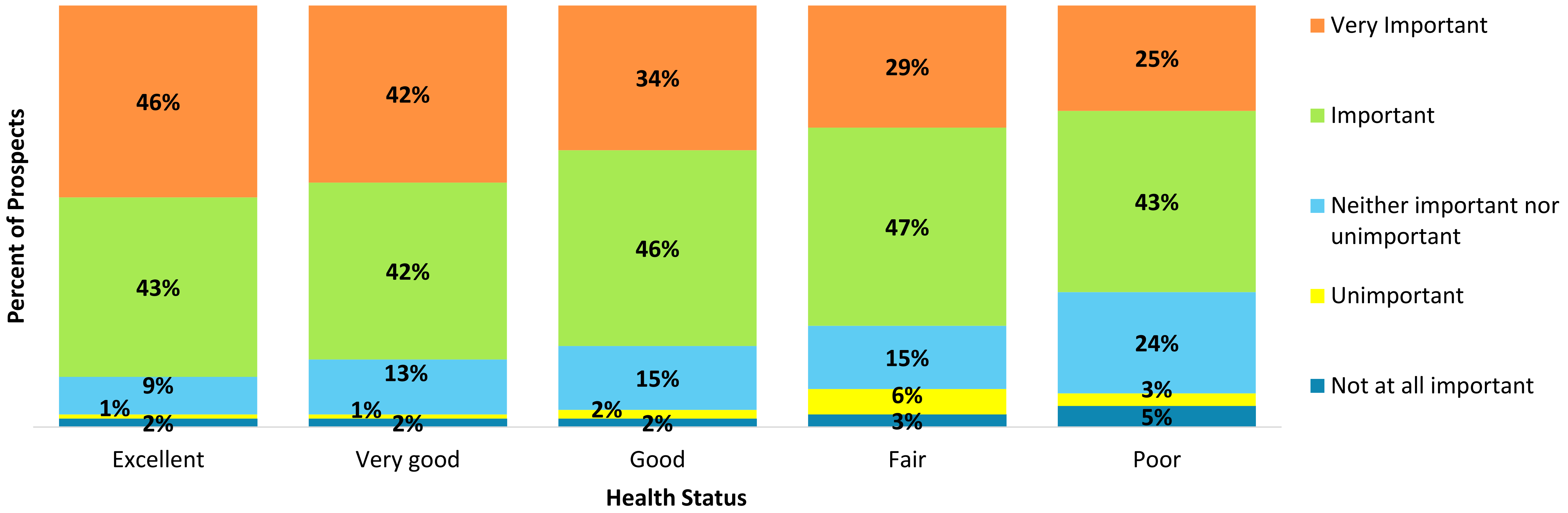
Exhibit 89. Importance of State-of-the-Art Technologies in a Residential Community with Services by Respondent Source (p<.000)

	Internet Referral Source % Who Rated "Absolutely Necessary"		Lead Lists % Who Rated "Absolutely Necessary"		Purchased List % Who Rated "Absolutely Necessary"	
	Prospect	Influencer	Prospect	Influencer	Prospect	Influencer
Not at all important	1%	6%	1%	6%	0%	4%
Unimportant	1%	5%	1%	2%	0%	7%
Neither important nor unimportant	14%	18%	6%	11%	11%	17%
Important	45%	44%	40%	48%	46%	45%
Very important	39%	27%	53%	33%	43%	28%
Important + Very important	84%	71%	93%	81%	89%	73%

IMPORTANCE OF STATE-OF-THE-ART TECHNOLOGIES BY HEALTH STATUS

As health declined, the proportion who rated technology "very important" declined. Among those who rated their health as excellent, 46% rated technology "very important." In contrast, among those who had poor health, 25% rated technology "very important."

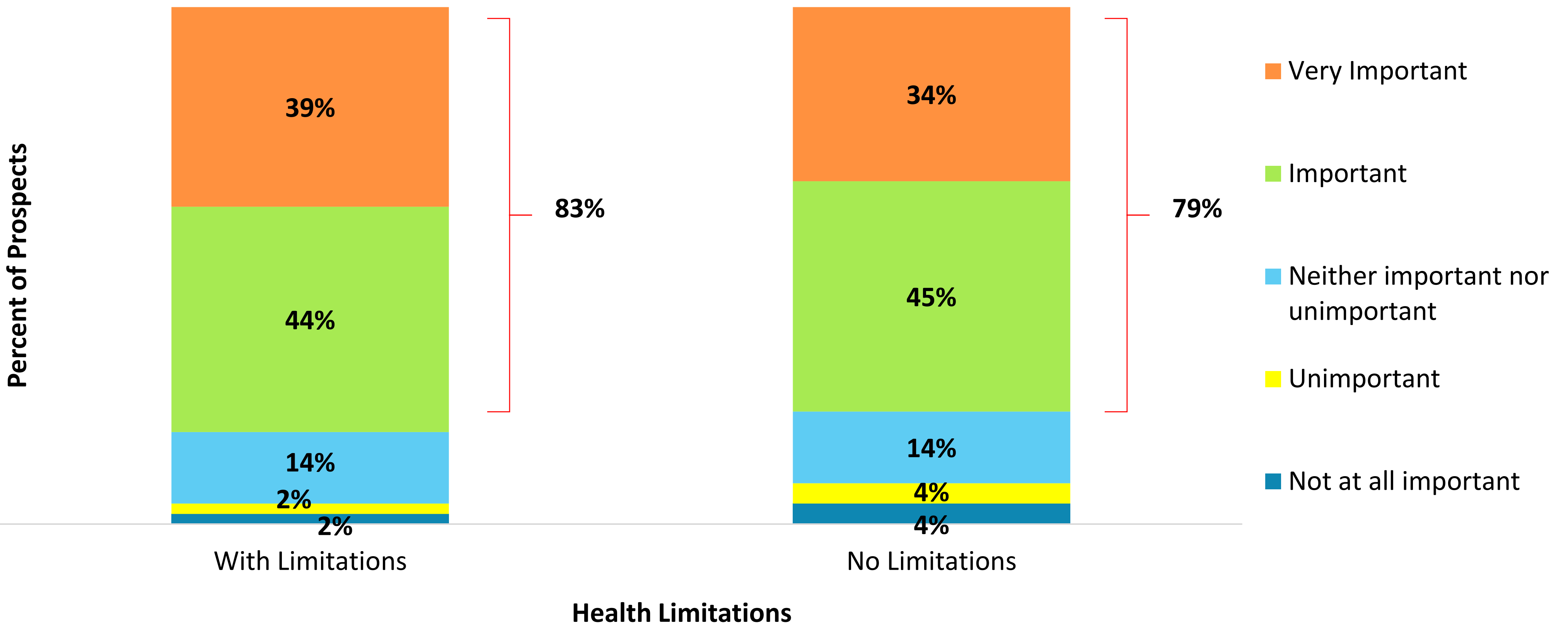
Exhibit 90. Importance of State-of-the-Art Technologies in a Residential Community with Services Among Prospect by Self-Rated Health Compared to Others the Same Age (p<.001)



IMPORTANCE OF STATE-OF-THE-ART TECHNOLOGIES BY LIMITATIONS OF DAILY LIVING

Respondents (83%) with limitations in their activities of daily living rated technology as important or very important. Among those with no limitations, 79% rated technology as important or very important. It appears that technology may have enabled individuals with limitations.

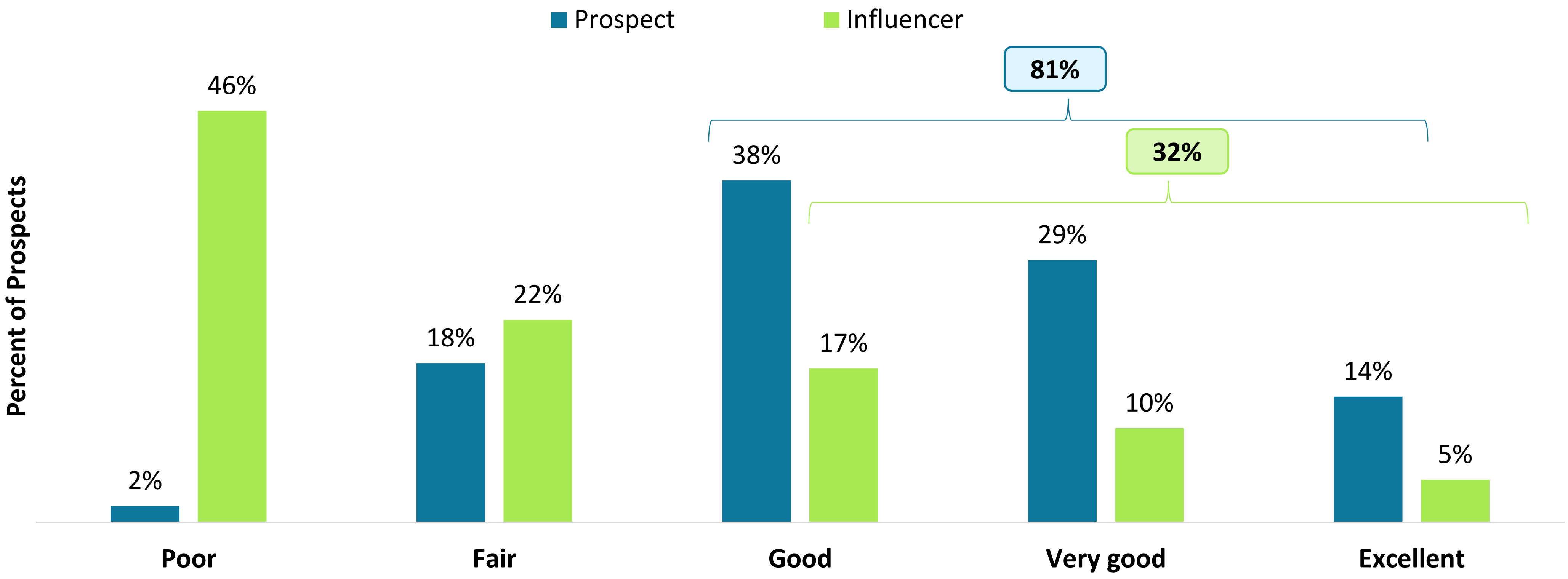
Exhibit 91. Importance of State-of-the-Art Technologies in a Residential Community with Services Among Respondents by Whether the Prospect has Health Limitations (p<.005)



SELF-RATING OF TECHNOLOGY SKILLS AMONG PROSPECTS AND INFLUENCERS

Eighty-one percent of **Prospects** rated their technology skills as good, very good, or excellent. In contrast, just 32% of **Influencers** rated **Prospects**' skills as good, very good, or excellent. Remember that **Influencers** often represent people who are 80+ years of age, and among whom the largest proportion have a high school education or G.E.D.

Exhibit 92. Self-Rating of Technology Skills (Ability to Operate Computers, Tablets, Smart Phones, Etc.) by Respondent Group (p<.000)



SELF-RATING OF TECHNOLOGY SKILLS AMONG PROSPECTS AND INFLUENCERS BY RESPONDENT SOURCE

A larger proportion of prospects across the three source lists rated their technology skills as very good or excellent than **Influencers**: Internet 41% vs. 7%; Lead list 39% vs. 9%, and Purchased list 47% vs. 27%. This skill rating was based on their **Prospects'** and/or **Influencers**' rating of their ability to use computers, tablets, smart phones, etc.

Exhibit 93. Self-Rating of Technology Skills (Ability to Operate Computers, Tablets, Smart Phones, Etc.) by Respondent Source p<.000)

	Internet Referral Source % Who Rated "Absolutely Necessary"				Lead Lists % Who Rated "Absolutely Necessary"				Purchased List % Who Rated "Absolutely Necessary"			
	Prospect		Influencer		Prospect		Influencer		Prospect		Influencer	
Poor	2%		61%		3%		44%		1%		24%	
Fair	19%		20%		19%		33%		16%		23%	
Good	38%		11%		40%		13%		36%		26%	
Very good	28%	41%	5%	7%	27%	39%	9%	9%	31%	47%	18%	27%
Excellent	13%		2%		12%		0%		16%		9%	

TECHNOLOGIES USED BY PROSPECTS AND INFLUENCERS

The largest proportion of **Prospects** (25%) used a smartphone, followed by a desktop computer (24%), laptop (23%), and I-pad (20%). **Influencers** represented prospects among whom just 1% to a maximum of 9% used one of these devices. The smartphone was used by 9% of **Influencers**.

Exhibit 94. Percent of Prospect by the Technology Devices Used and Respondent Group

	Prospect	Influencer
Smartphone (p<.000)	25%	9%
Desktop computer (p<.000)	24%	7%
Laptop (p<.000)	23%	6%
I-Pad, Tablet (p<.000)	20%	6%
Activity tracker (Fitbit, Garmin, etc.) (p<.000)	5%	1%
Personal Emergency Response System (not sig)	3%	4%
Other (not sig)	2%	1%

Exhibit 95. Other Technologies Used by Prospects and Influencers	
Cellphone	5
Computer	2
E-reader	2
Apple watch	1
Echo	1
Kindle	1
Gaming Consoles	1
TV	1

TECHNOLOGIES USED BY RESPONDENT SOURCE

Lead list prospects had the highest proportions using I-Pads, tablets, laptops, desktop computers, smartphones, and activity trackers. The proportions ranged from a high of 42% for smartphones to 5% for a personal emergency response system. Slightly smaller proportions of internet referral prospects used the same devices: 26% for both laptop and desktop computers to 5% using emergency response devices.

Purchased list respondents had the smallest proportions using a device. The proportions ranged from 20% using a smartphone to 1% using a personal emergency response device. Individuals represented by **Influencers** were less likely to use Technology. The highest proportion of **Influencers** (12%) used a smartphone.

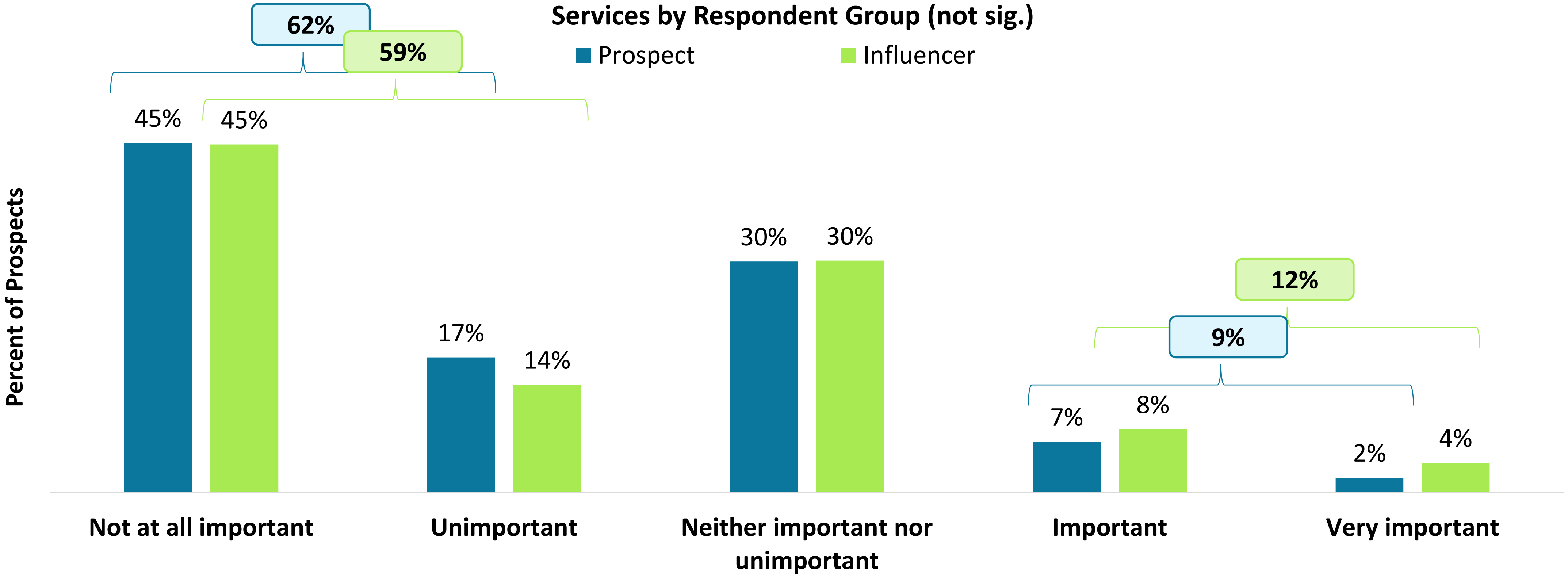
Exhibit 96. Percent of Prospect by the Technology Devices Used and Respondent Source

	Internet Referral Source		Lead Lists		Purchased List	
(Listed in order of percent rating by Lead Lists / Prospect)	**Prospect**	**Influencer**	**Prospect**	**Influencer**	**Prospect**	**Influencer**
Smartphone (p<.000)	24%	6%	**42%**	10%	**20%**	**12%**
Desktop computer (p<.000)	**26%**	7%	39%	10%	19%	7%
I-Pad, Tablet (p<.000)	19%	4%	34%	9%	16%	7%
Laptop (p<.000)	**26%**	4%	32%	5%	17%	7%
Activity tracker (Fitbit, Garmin, etc.) (p<.000)	5%	1%	11%	1%	3%	2%
Personal Emergency Response System (p<.000)	**5%**	7%	**5%**	3%	**1%**	2%

IMPORTANCE OF ACTIVE FACEBOOK PAGE AMONG PROSPECTS AND INFLUENCERS

An active Facebook page associated with a community was important or very important to 9% of **Prospects** and 12% of **Influencers**.
A Facebook page was unimportant to 59% of **Influencers** and 62% of **Prospects**.

Exhibit 97. Importance of an Active Facebook Page Associated with a Residential Community with Services by Respondent Group (not sig.)



IMPORTANCE OF ACTIVE FACEBOOK PAGE BY RESPONDENT SOURCE

With the exception of influencers on the purchased list (47%), the **Prospect** and **Influencer** respondents had a majority of respondents who rated the Facebook page as unimportant or not at all important (ratings ranged 45% to 68%).

Exhibit 98. Importance of an Active Facebook Page Associated with a Residential Community with Services by Respondent Source (p<.000)

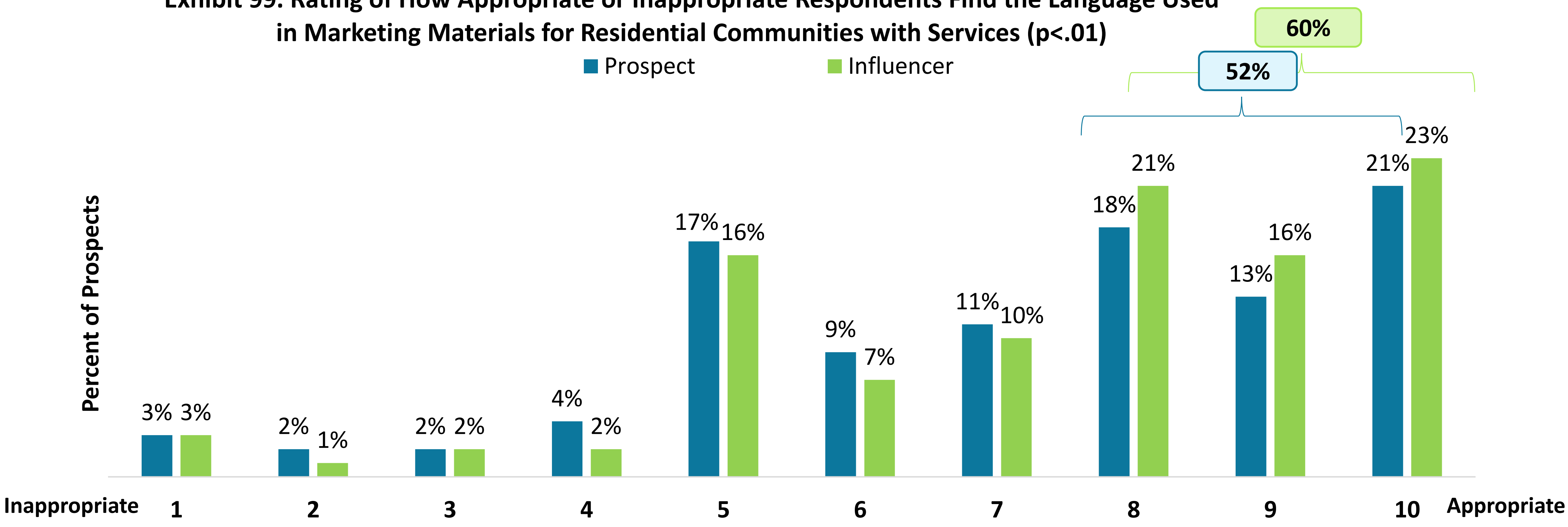
	Internet Referral Source % Who Rated "Absolutely Necessary"			Lead Lists % Who Rated "Absolutely Necessary"			Purchased List % Who Rated "Absolutely Necessary"		
	Prospect		Influencer		Prospect		Influencer		Prospect		Influencer	
Not at all important	42%	57%	54%	68%	**47%**	68%	43%	58%	**47%**	65%	32%	45%
Unimportant	15%		14%		21%		15%		18%		13%	
Neither important nor unimportant	33%		25%		26%		37%		28%		35%	
Important	8%		5%		5%		4%		5%		14%	
Very important	2%		2%		2%		2%		2%		7%	

CHAPTER 6.
REVIEW OF MARKETING MATERIALS

HOW APPROPRIATE IS LANGUAGE IN MARKETING MATERIALS AMONG PROSPECTS AND INFLUENCERS

Respondents rated the appropriateness of the language in the marketing materials on a scale of "1" for inappropriate and "10" for appropriate. A majority of both **Prospects** (52%) and **Influencers** (60%) rated the language as within the range of "8" and "10" on the scale.

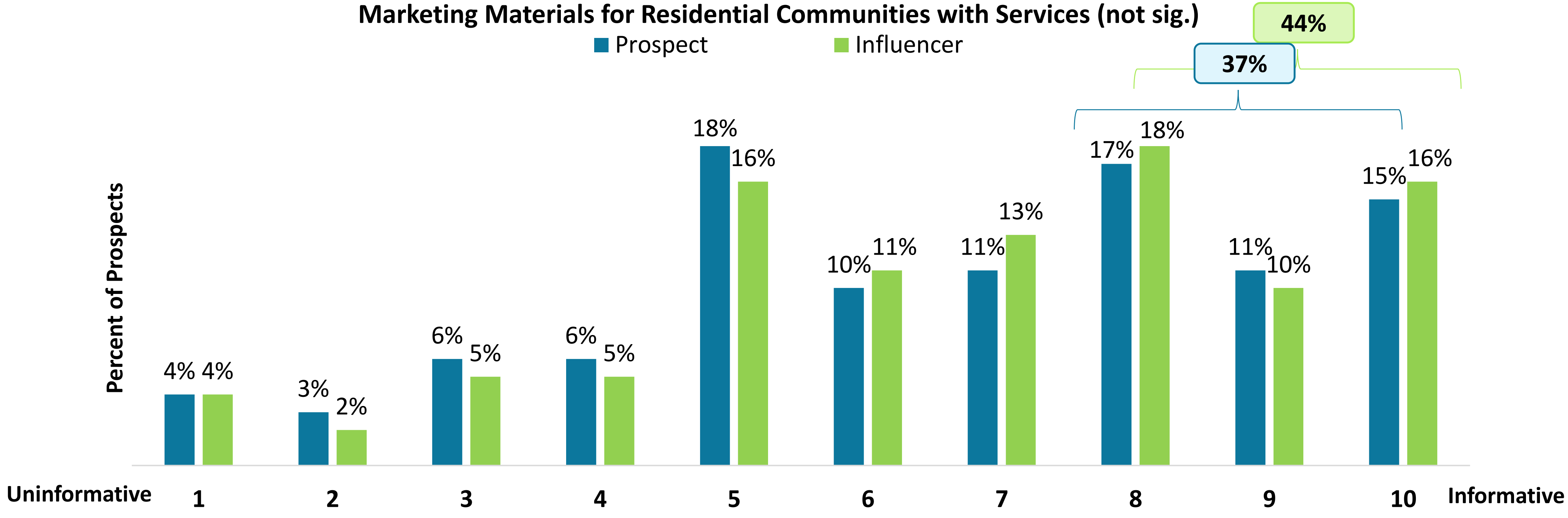
Exhibit 99. Rating of How Appropriate or Inappropriate Respondents Find the Language Used in Marketing Materials for Residential Communities with Services (p<.01)



HOW INFORMATIVE IS LANGUAGE IN MARKETING MATERIALS AMONG PROSPECTS AND INFLUENCERS

A slightly higher proportion (44%) of the **Influencers** rated the marketing materials an “8”, “9”, or “10” on the informative scale of “1” uninformative to “10” informative. In contrast, 37% of the **Prospects** rated the marketing materials between “8” and “10” on the informative scale.

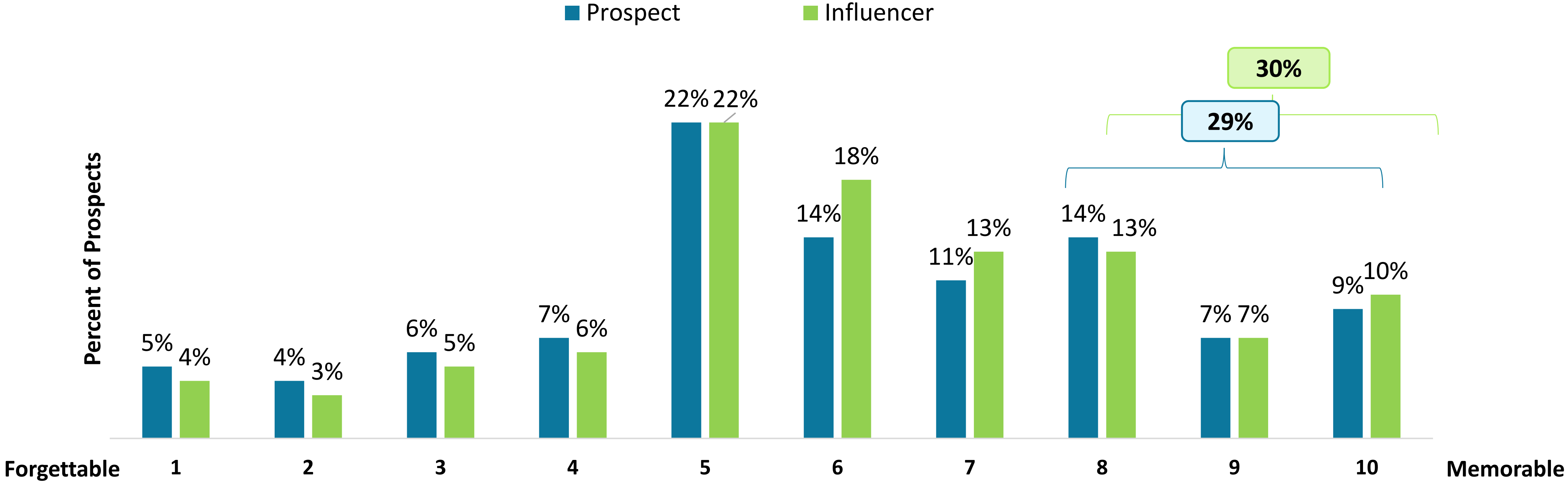
Exhibit 100. Rating of How Informative or Uninformative Prospect Find the Language Used in Marketing Materials for Residential Communities with Services (not sig.)



HOW MEMORABLE IS LANGUAGE IN MARKETING MATERIALS AMONG PROSPECTS AND INFLUENCERS

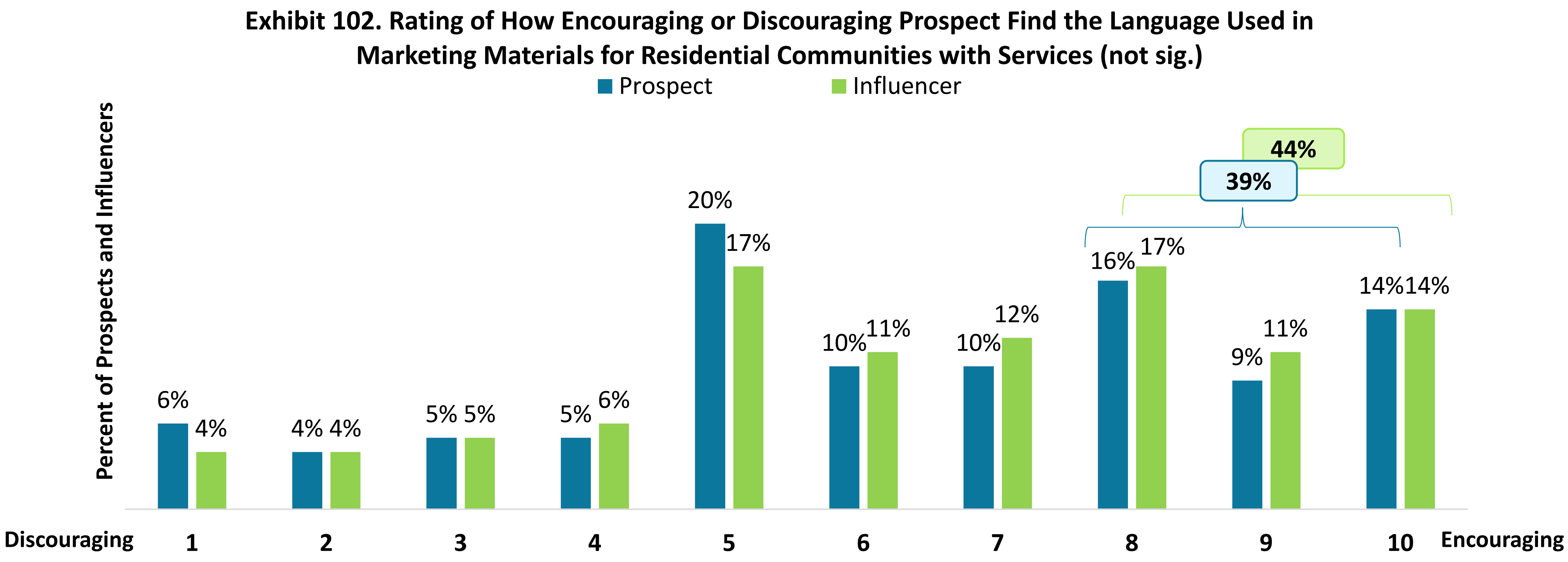
Fewer than one-third of the respondents thought the marking materials of the community were memorable. A small proportion of both **Influencers** (30%) and **Prospects** (29%) rated the language in the marketing materials as "8", "9", or "10."

Exhibit 101. Rating of How Memorable or Forgettable Prospect Self-Reported Find the Language Used in Marketing Materials for Residential Communities with Services (not sig.)



HOW ENCOURAGING IS LANGUAGE IN MARKETING MATERIALS AMONG PROSPECTS AND INFLUENCERS

Forty-two percent of Influencers and 39% of Prospects rated the marketing materials as encouraging (scores of 8, 9, or 10). A small percentage of both groups (4% to 6%) rated the marketing materials discouraging.



WHAT PROSPECTS AND INFLUENCERS LIKE MOST ABOUT MARKETING MATERIALS

The largest proportion of influencers on lead lists (32%) and purchased list (34%) liked that the marketing information was informative. Lead list prospects liked being invited to the community. Purchased list prospects liked that the marketing was informative. The second most liked marketing element among all respondents were photos.

Lead List – Influencer

	Count	%
Informative	25	32%
Photos	11	14%
Floor Plans	10	13%
Activities	9	12%
Services	6	8%
Pricing	5	6%
Amenities	3	4%
Happy People	3	4%
Social	3	4%
Food	1	1%
GPS Location	1	1%
Total	**77**	**100%**

Purchased List – Influencer

	Count	%
Informative	69	34%
Photos	18	9%
Services	17	8%
Happy People	14	7%
Attractive/New/ Inviting	12	6%
Positive	12	6%
Activities	11	5%
Competent/Caring Staff	7	3%
Amenities	6	3%
Socialization	6	3%
Awareness	5	2%
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%**

Lead List – Prospect

	Count	%
Invitation for Tour/Meals/Events	28	18%
Photos	23	14%
Informative	22	14%
Brochures/Floor Plans	21	13%
Friendly/ Helpful Staff	14	9%
Pricing	14	9%
Amenities	9	6%
Activities	7	4%
Resident Testimonials	6	4%
Services	6	4%
Layout of Community	5	3%
Awareness	3	2%
Happy People	2	1%
Total	**160**	**100%**

Purchased List – Prospect

	Count	%
Informative	39	23%
Photos	35	21%
Positive/Upbeat	16	10%
Services	15	9%
Activities	10	6%
Options for Seniors	8	5%
Awareness	7	4%
Brochures/Floor Plans	7	4%
Amenities	6	4%
Feels Like Home	5	3%
Invites for Touring	5	3%
Attractive/Nice	4	2%
Pricing	4	2%
Independence	3	2%
Resident Testimonials	3	2%
Total	**167**	**100%**

BIGGEST PET PEEVES ABOUT MARKETING MATERIALS AMONG PROSPECTS AND INFLUENCERS BY RESPONDENT SOURCE

The most frequently mentioned “Pet Peeves” about marketing included: lack of transparency about costs (28% to 38%); exaggeration of benefits (24% to 27%), and being too generic or impersonal (18% to 23%).

Lead List – Influencer

	Count	%
Price (transparency)	28	38%
Exaggeration of benefits	18	24%
Generic, impersonal	17	23%
Pushy	8	11%
Condescending	2	3%
Undefined target customer	1	1%
Total	**74**	**100%**

Purchased List – Influencer

	Count	%
Price (transparency)	41	28%
Exaggeration of benefits	39	27%
Generic, impersonal	25	17%
Ageist	21	14%
Pushy	7	5%
Bad Service	4	3%
Condescending	4	3%
Made to feel guilty	2	1%
Personality lacking	2	1%
Undefined target customer	2	1%
Total	**147**	**100%**

Lead List – Prospect

	Count	%
Price (transparency)	53	33%
Exaggeration of benefits	39	25%
Generic, impersonal	34	21%
Pushy	18	11%
Ageist	5	3%
Condescending	3	2%
Content	2	1%
Undefined target customer	2	1%
Bad service	1	1%
Communication	1	1%
Overwhelming	1	1%
Total	**159**	**100%**

Purchased List – Prospect

	Count	%
Price (transparency)	57	30%
Exaggeration of benefits	45	24%
Generic, impersonal	34	18%
Ageist	24	13%
Pushy	14	7%
Condescending	6	3%
Undefined target customer	5	3%
Limited resources	2	1%
Appearance	1	1%
Total	**188**	**100%**

ASHA and ProMatura wish to thank Senior Star for their generous sponsorship support of the Messages that Matter research project.