Impact of COVID-19 on the Seniors Housing Industry

A Study of Consumers: Round 3

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KEY TAKE-AWAYS:

- On behalf of the American Seniors Housing Association, ProMatura has collected data from three points in time over the course of the COVID-19 pandemic to gauge consumers' sentiment about the seniors housing industry and their propensity to move to a retirement community.

- Results presented in this report (Round 3) included prospective residents and adult children from 220 ASHA member communities (Lead List) as well as households 75+ years of age with incomes $35,000+ (Prospects) and households 45 to 64 with incomes $100,000 (Adult Children) living in one of the 20 MSAs of the participating ASHA member communities. This data was collected during June and July 2021.

- Eighty percent of households from the ASHA member community Lead List have been actively shopping for a retirement community in the past. Twenty-three percent of households from the 75+ Purchased List and 47% of age 45 to 64 Purchased List have been actively shopping within the past year. These proportions are consistent for Leads and for 75+ households on the Purchased List, however, the proportion of adult children actively shopping has significantly increased since December 2020. Any survey respondent who has not been actively shopping within the past year skipped the bulk of the survey and only answered questions relative to the appeal of communities, their current stage of moving, their opinions about COVID-19 regulations, and their personal demographics.

- The majority of prospects who responded to the survey were shopping for an independent living community while the majority of adult children responding for a parent or loved one were shopping for an assisted living or memory care community. Prospects from the Purchased List were also interested in active adult communities.

KEY TAKE-AWAYS:

- Awareness of 55+ communities, or active adult communities, was high among all three survey groups. A majority Leads (80%) and both Prospect and Adult Child Purchased Lists (66% and 67%, respectively) were aware of at least one community for people 55+ years of age in their area. Nearly all households from the Lead List and roughly three quarters of both Purchased Lists were aware of at least one retirement community in their area.

- As has been the pattern of results over the past year, a greater proportion of households from the Lead List than the Purchased List are currently looking at information about communities and planning a move; or have visited, talked with, or contacted communities online. Households from the Purchased List are currently in the “thinking” stage of the moving process.

- <u>DEMOGRAPHIC ATTRIBUTES</u>: The mean age of Lead List prospects was slightly younger than the mean age of Purchased List prospects (76.9 vs. 78.9 years of age). More than twice as many prospects from the Purchased List were married (65% vs. 31%) and half as many were widowed (17% vs. 34%) than prospects on the Lead List. A significantly greater proportion of Lead List prospects than Purchased List prospects reported having an impairment or health problem (49% vs. 31%). Prospects on the Lead List reported lower annual household incomes than those on the Purchased List. While this survey did not collect employment status, it could be the case that greater proportions of Purchased List prospects are still working and fewer have retired as compared to those on the Lead List. Fewer prospects from the Lead List currently own their own home as compared to households from the Purchased List (74% vs. 88%). Likewise, prospects on the Lead List reported lower home values than did those from the Purchased List. It is possible that a greater proportion of the Lead List prospects have already sold the family home and have since moved to a smaller and/or less expensive home.

KEY TAKE-AWAYS:

- PSYCHOGRAPIC ATTRIBUTES: Prospects on the Lead List were more likely to agree or strongly agree that they were people-people, and enjoyed being around others than prospects on the Purchased List (80% vs. 65%). Likewise, prospects on the Purchased List would rather be doing a task or hobby they enjoy than socializing with others than would Lead List prospects (31% vs. 17%). Prospects from the Lead List were more likely than those from the Purchased List to indicate they've felt sad, afraid, and anxious "quite a bit" where those on the Purchased List rather than the Lead List were more likely to indicate they have felt happy "quite a bit." Prospects from the Lead List were less likely than those on the Purchased List to feel that they have a lot in common with people around them, to feel close to people, to feel there are people who understand them, and who they can talk to or turn to.

- Despite the fact that the impact of COVID-19 can be felt all throughout the country and the rest of the world, the majority of prospects and adult children from both the Lead List and the Purchased List indicated that the COVID-19 pandemic had no impact on their likelihood to consider a retirement community.

- Among the households who participated in the survey, only a small fraction of respondents had tested positive for COVID-19 since the beginning of the pandemic. Nearly all of the Lead List (93%) and the majority of the Purchased List (88%) were fully vaccinated against the COVID-19 virus. Survey respondents, for the most part, indicated that the COVID-19 pandemic had no impact on their physical or mental/emotional health.

- A majority of prospects across all levels of care indicated that all types of individuals that would be encountered at a retirement community should be required to get a COVID-19 vaccine. Fifty-eight percent or more indicated that residents, staff, visitors, and third-party vendors should all be required to be fully vaccinated before entering a retirement community.

KEY TAKE-AWAYS:

- One out of three prospects and 30% of adult children from the Lead List postponed visiting a retirement community due to the COVID-19 pandemic. Slightly more adult children from the Purchased List (41%) have postponed a visit to a retirement community because of concerns over the virus.

- While they seem to want everyone they might encounter at a retirement community to be vaccinated, prospects from the Lead List are currently very comfortable interacting with communities in a variety of ways—visiting friends and family, having a meal, attending an event or going on a tour of the community. Prospects from the Purchased List were slightly less comfortable engaging with communities since the COVID-19 pandemic, especially among prospects of assisted living or memory care communities. Overall, prospects from the Purchased List seem most comfortable visiting a family member or friend in their personal residence or attending an outdoor event at the community.

- When asked what communities can do to help prospects feel more comfortable visiting the communities, the number one response across all four care levels was that a fully vaccinated community would make prospective customers more comfortable visiting the communities.

- When asked to describe what has to happen, or what do they need to know, before they would feel confident about moving to a retirement community, while prospects to active adult still hope to see a fully vaccinated community as well as a community following COVID-19 protocols, prospects to a more serviced-enriched community (independent living, assisted living or memory care) are more concerned with costs and affordability rather than the COVID-19 virus—a significant change from the pattern of responses in earlier rounds of this consumer sentiment survey conducted in June/July 2020 and December 2020.

KEY TAKE-AWAYS:

- After the Round 1 report, we were cautiously optimistic about the road ahead for the seniors housing industry. The results of the Round 2 survey reassured that sense of cautious optimism for a positive future for the industry. The results from the current survey take it even one step further--prospects are ready, willing and have indicated they are “very comfortable” engaging with communities, and doing so face-to-face.

- Regional analyses, found in the Appendix of this report, display results for all survey questions by census region of the country and list source, when appropriate.

KEY TAKE-AWAYS:
Active Adult

- More than half of the households from the Lead and Purchased Lists had visited an active adult community at some point in time. Since the onset of COVID-19, only 38% of Leads and 36% of Purchased List households have visited an active adult community.
- Both prospective residents and adult children from the Purchased List were significantly more likely to find active adult communities appealing or very appealing than households from the Lead List. More than three-quarters of households from the Purchased List found active adult communities appealing, compared to nearly two-thirds of households from the Lead List who found active adult communities appealing.
- Top reasons for moving to active adult communities included the following:
    - No home maintenance/Home too hard to maintain
    - Activities/programs
    - People of the same age, and interests
    - Meet new people
    - Social interaction
- Those who found active adult communities unappealing provided their reasoning. Most frequently provided comments included the following:
    - Prefer my own home
    - Too expensive
    - Prefer all age communities
    - Doesn't fit my lifestyle
    - Like my independence
- More than 60% of prospects from the Lead and Purchased Lists said they were likely or very likely to move to an active adult community at some point in the future.

KEY TAKE-AWAYS:
Independent Living

- Nearly three-quarters (74%) of households from the Lead List and 50% from the Purchased List have visited an independent living community. Since the onset of COVID-19, only 42% of Leads and 24% of Purchased List prospects have visited an independent living community.
- Sixty-nine percent of prospects from the Lead List found independent living communities appealing or very appealing, compared to 61% from the Purchased List.
- Top reasons for moving to independent living communities included the following:
    - Companionship/Camaraderie
    - No home maintenance
    - Declining health
    - Help available
    - Meals
- Those who found independent living communities unappealing provided their reasoning. Most frequently provided comments included the following:
    - Too expensive
    - Want to stay in my own home
    - Don't need it yet
    - Prefer all age communities
    - Can take care of myself
- Prospective residents from the Lead List were the most likely respondent group to consider moving to an independent living community in the future (72%); more than half (56%) of prospective residents from the Purchased List were likely or very likely to move to an independent living community.

KEY TAKE-AWAYS:
Assisted Living

- Households from the Lead List were significantly more likely to have visited an assisted living community than households from the Purchased List. Since the onset of COVID-19, 73% of adult children from the Lead List have visited an AL community, compared to only 17% of adult children from the Purchased List.
- Just less than half of all households on the Lead List found assisted living communities appealing or very appealing. Thirty-seven percent of prospective residents and 58% of adult children from the Purchased List found assisted living communities appealing or very appealing.
- Top reasons for moving to assisted living communities included the following:
  - Services available at community
  - Companionship/Camaraderie
  - Declining Health
  - Mobility Issues
  - Help with daily tasks
- Those who found assisted living communities unappealing provided their reasoning. Most frequently provided comments included the following:
  - Too healthy/Don't need the services
  - Too expensive
  - Depressing environment
  - Happy in my own home
  - Hope to never need one
- More than 70% of households from the Lead List said they or their family member were likely or very likely to move to an assisted living community. Fifty percent of prospects and 68% of adult children from the Purchased List were likely or very likely to move.

KEY TAKE-AWAYS:
Memory Care

- Nearly two-thirds of households from the Lead List have visited a memory care community, and 70% of prospective adult children have visited since the onset of COVID-19. Only a quarter of households from the Purchased List had ever visited a memory care community, including since the onset of COVID-19.
- More adult children from the Purchased List said memory care communities were appealing or very appealing than adult children from the Lead List (47% vs. 39%).
- Top reasons for moving to memory care communities included the following:
    - Memory decline/Alzheimer's disease
    - Unable to live independently at home
    - Declining health
    - Want structured care
    - Want 24/7 care
- Those who found memory care communities unappealing provided their reasoning. Most frequently provided comments included the following:
    - Do not need it right now
    - Too expensive
    - Communities seem sad/depressing
    - Prefer in-home care
    - Uneasy about quality of care
- All of the adult children from the Lead List and 66% of adult children from the Purchased List said their parent or family member was likely or very likely to move into a memory care community at some point in the future.

*Caution should be taken when reviewing these results because sample sizes were very small.

INTERNET SURVEY USING TWO LIST SOURCES

Lead List

Prospective customers of 220 ASHA member communities, representing seven companies, participated in the study.

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

n=297

Data was collected
June 14, 2021– July 30, 2021

Purchased List

Households 75+ years of age with incomes $35,000+ (Prospects) and households 45 to 64 with incomes $100,000 (Adult Children) living in one of the 20 MSAs of the participating ASHA member communities. Households who completed the Adult Child survey had to have a parent or relative 60+ years of age for whom they are at least partially responsible for, should help ever be needed.
The goal was 1,000 completed surveys for both versions of the survey from Dynata's internet panel in each MSA.

n=1,343 (Prospects)
n=952 (Adult Children)

Data was collected June 28, 2021–July 13, 2021

METROPOLITAN STATISTICAL AREAS TESTED

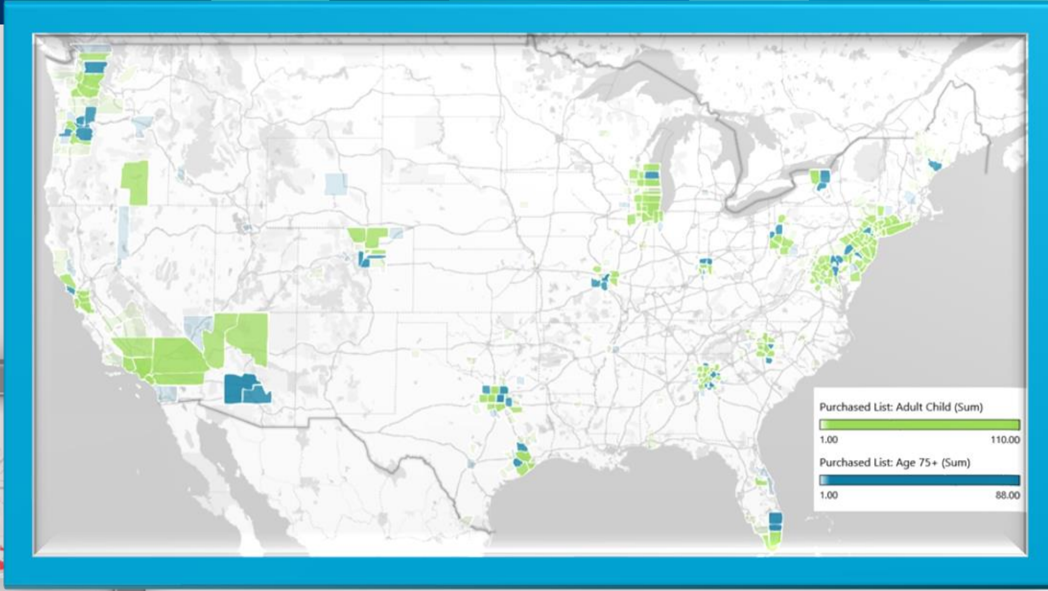
The following MSAs were selected for inclusion among the households from the **Purchased Lists**. We selected these MSAs based on the locations of the participating 220 ASHA member communities. MSAs with **three** or more participating communities were included.

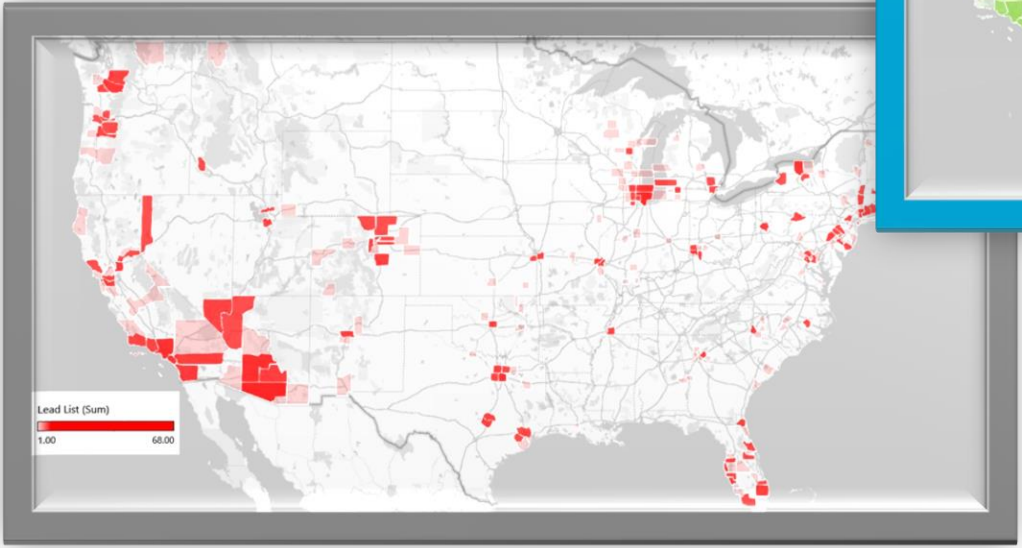
MSAs Included:

- Austin-Round Rock-San Marcos, TX **
- Baltimore-Columbia-Towson, MD
- Charlotte-Concord-Gastonia, NC-SC
- Chicago-Naperville-Elgin, IL-IN-WI
- Cincinnati, OH-KY-IN
- Dallas-Fort Worth-Arlington, TX
- Denver-Aurora-Lakewood, CO
- Houston-The Woodlands-Sugar Land, TX
- Los Angeles-Long Beach-Anaheim, CA
- Miami-Fort Lauderdale-Pompano Beach, FL
- New York-Newark-Jersey City, NY-NJ-PA
- Philadelphia-Camden-Wilmington, PA-NJ-DE-MD
- Phoenix-Mesa-Chandler, AZ
- Portland-Vancouver-Hillsboro, OR-WA
- Raleigh-Cary, NC **
- Rochester, NY
- San Francisco-Oakland-Berkeley, CA
- Seattle-Tacoma-Bellevue, WA
- St. Louis, MO-IL
- Tampa-St. Petersburg-Clearwater, FL **

**New MSAs added in Round 3 of the survey.

LOCATION OF SURVEY PARTICIPANTS





Participating Communities

Two hundred twenty communities representing seven ASHA member companies participated in Round 3 of the ASHA Consumer Sentiment Study. The communities were located in 33 states across the country.

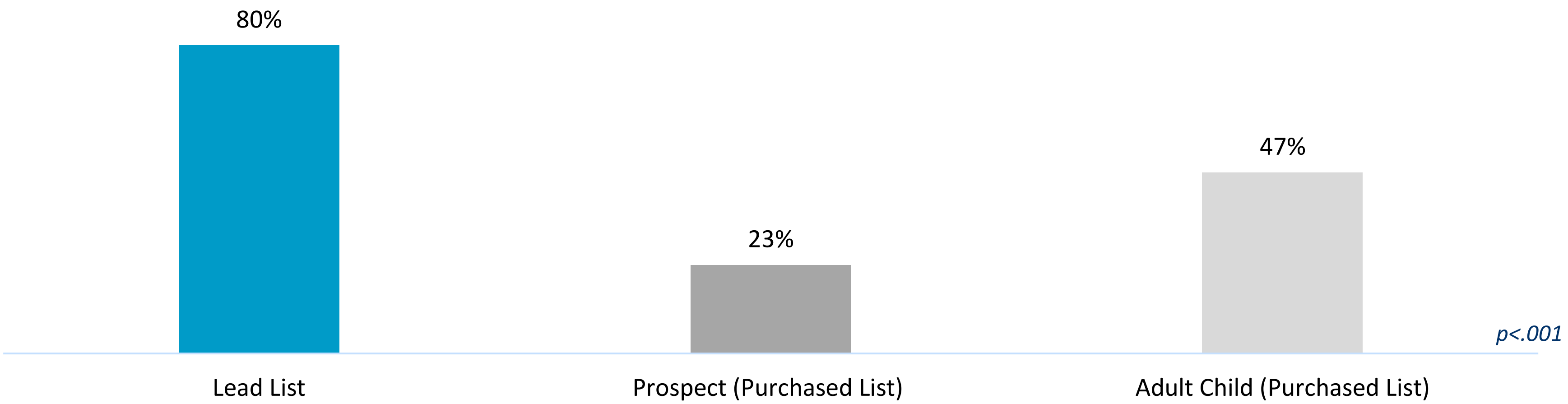
Participating communities in Round 3 varied by the levels of care they offered. The largest proportion in Round 3 (39%) were AL/MC communities. A combined 24% of communities provided independent living with assisted living services and memory care services (15%) or independent living and assisted living services, but no memory care (9%). The remaining communities were divided between Freestanding IL, Freestanding AL, Freestanding MC, and CCRCs.

Property Types of Participating ASHA Member Communities

Type of Property	Count	Percent
Freestanding IL	27	12%
IL/AL	20	9%
IL/AL/MC	32	15%
Freestanding AL	24	11%
AL/MC	86	39%
Freestanding MC	19	9%
CCRC	12	5%
Total	**220**	**100%**

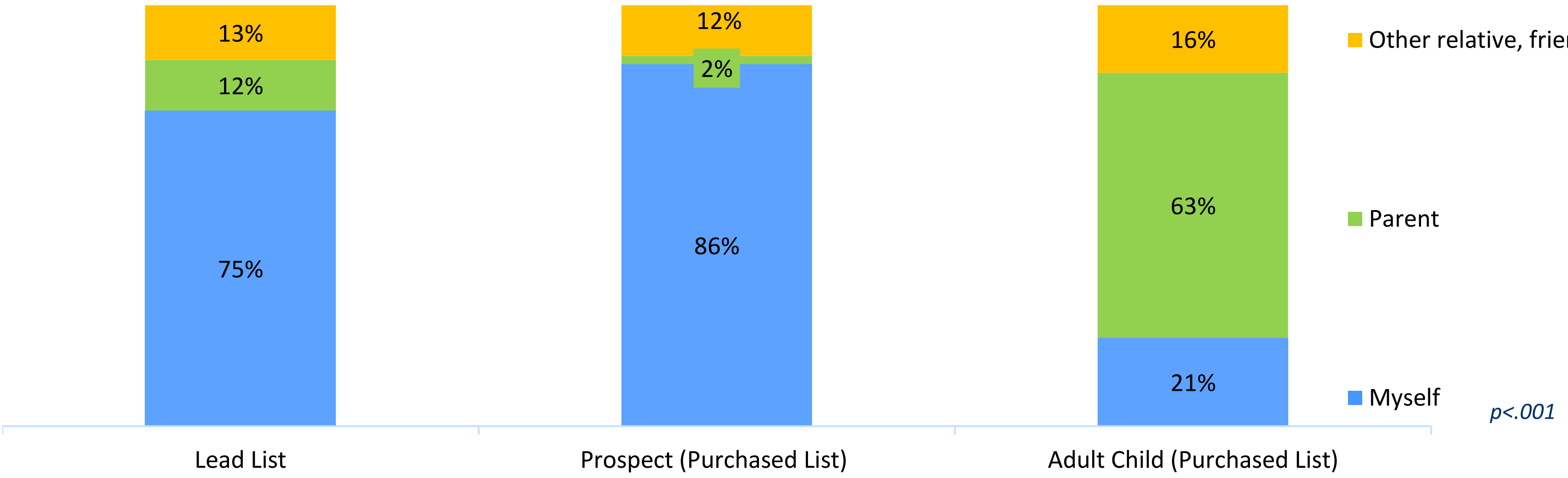
CURRENTLY SHOPPING

Eighty percent of the Lead List, 23% of the Prospect Purchased List (age 75+), and 47% of the Adult Child Purchased List (age 45 to 64) have been actively shopping for a retirement community within the past year. The proportion of active shoppers among the Adult Child Purchased List is up from December 2020 while the other proportions among Leads and the Prospect Purchased List virtually remained the same. We are unable to break down the Lead List group for this survey question into prospect and adult child responses because survey respondents had not yet indicated for whom they were responding, and the 20% not shopping within the past year were not asked further questions about their shopping behaviors.



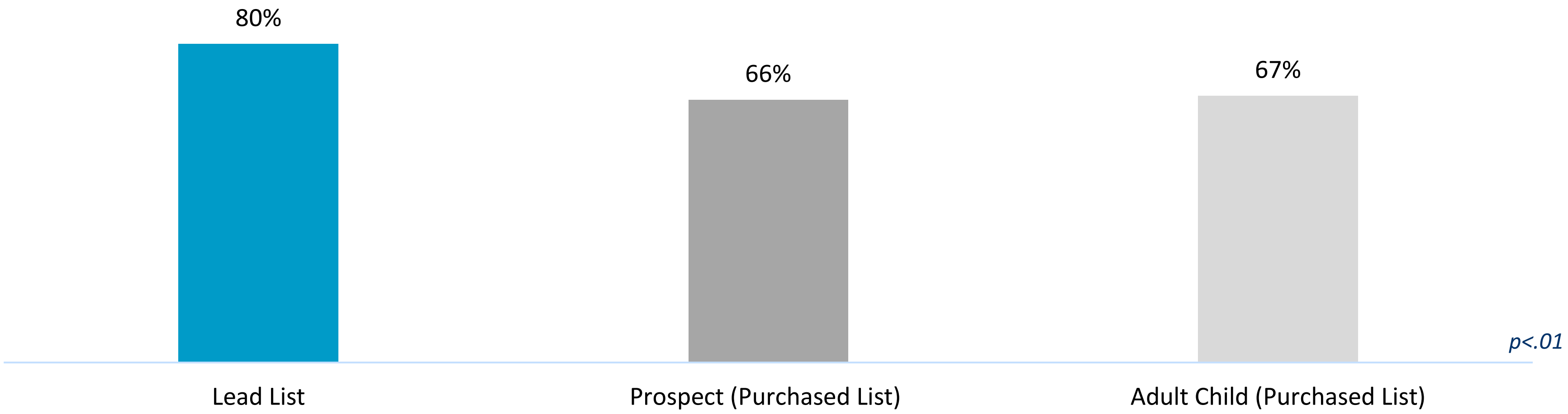
FOR WHOM THEY ARE CURRENTLY SHOPPING

The majority of Leads and households on the Prospect Purchased List were shopping for themselves (and/or for a spouse). As we would expect, those on the Adult Child Purchased List were primarily shopping for a parent.



AWARENESS OF COMMUNITIES FOR PEOPLE 55+ YEARS OF AGE

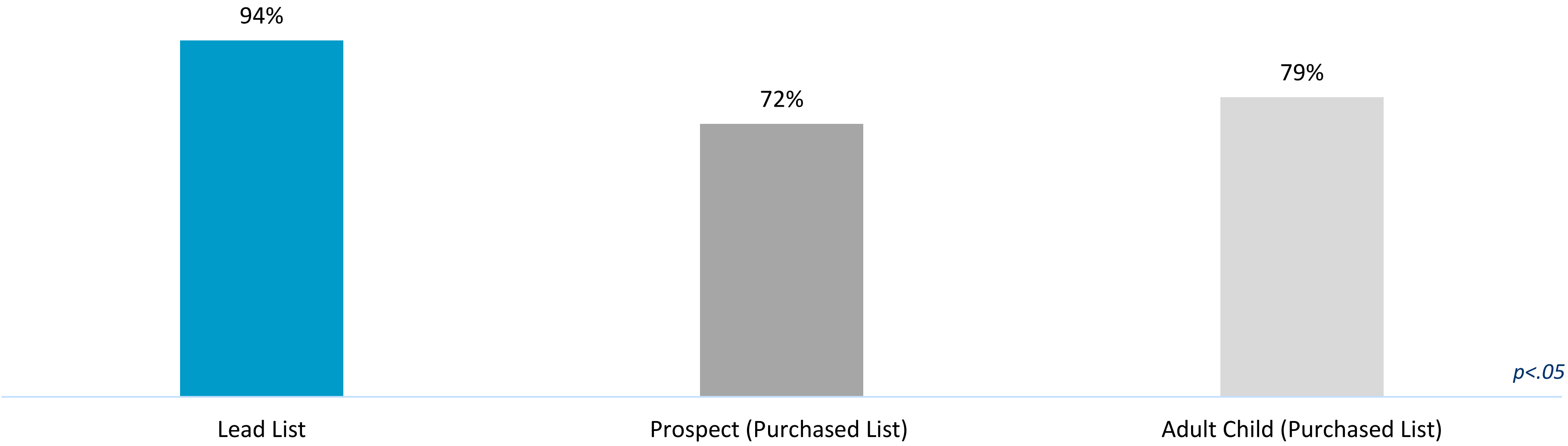
Awareness of 55+ communities, or active adult communities, was high among all three survey groups. A majority of Leads (80%) and both Prospect and Adult Child Purchased Lists (66% and 67%, respectively) were aware of at least one community for people 55+ years of age in their area.



Question Asked of Respondents: Are you aware of any active adult communities in your area? These are typically residential communities designed for people 55-plus years of age. Some have homes for purchase or rent; and others may be apartment communities. Typically, these communities do not offer the services offered by retirement communities. Examples of active adult communities include The Villages in Florida, or Sun City communities, located all over the US.

AWARENESS OF RETIREMENT COMMUNITIES

Nearly all households from the Lead List and roughly three quarters of both Purchased Lists were aware of at least one retirement community.



Question Asked of Respondents: Are you aware of any retirement communities in your area? These are residential communities that offer independent living residences, and some also offer assisted living, memory care, and/or nursing care services. These residences typically provide services such as dining, housekeeping, maintenance, transportation, medication management, personal care, educational, entertainment, and social activities, and social opportunities.

TRUSTED SOURCE OF INFORMATION

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

Trusted Source of Information: Active Adult

Source	Count
Myself	72
Family	64
Friends	49
Current residents	31
Online reviews	23
Doctor	19
CDC	5
Real estate agent	5
Social worker	5
Attorney	4
Word of mouth	4
AARP	3
Church	3
Financial advisor	2
Better Business Bureau	1
Medicare	1
Total	**291**

Trusted Source of Information: Independent Living

Source	Count
Family	66
Myself	50
Doctor	34
Friends	34
Current residents	30
Online reviews	20
Community administrators	12
Onsite visit	7
AARP	6
CDC	6
Spouse	6
Attorney	1
Church	1
Financial advisor	1
Life Senior Services	1
Medicare	1
Total	**276**

Trusted Source of Information: Assisted Living

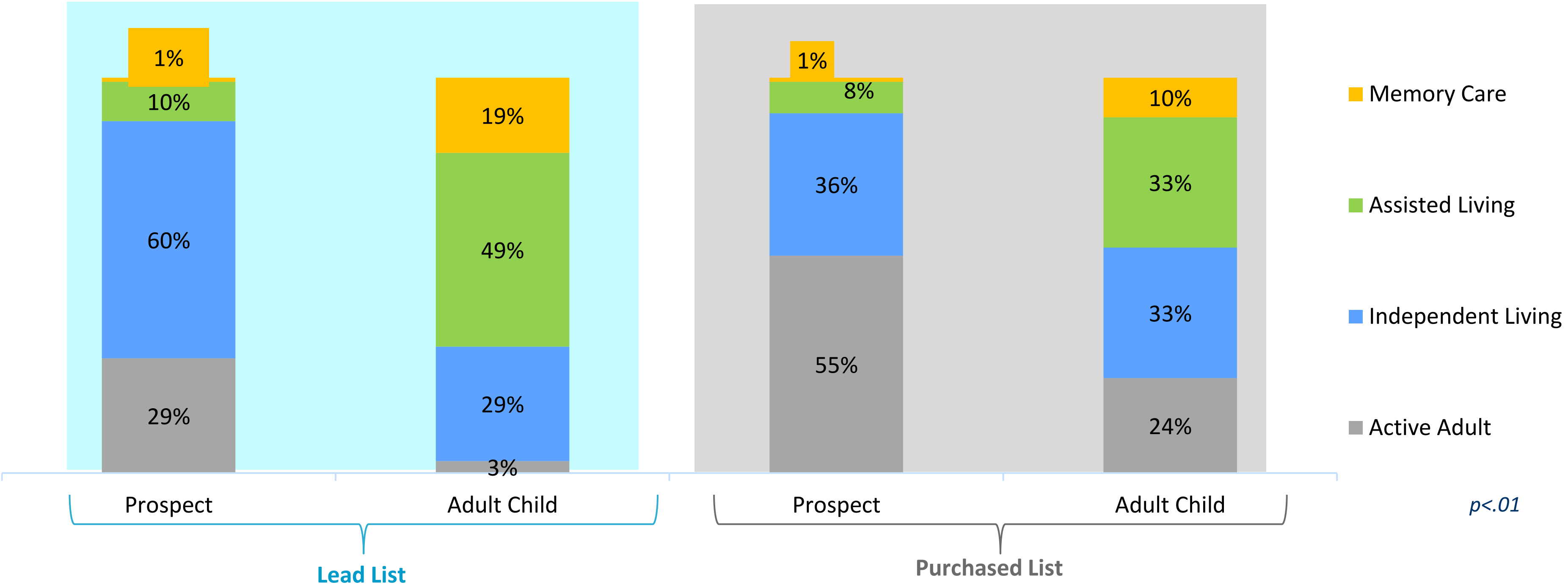
Source	Count
Doctor	44
Family	32
Friends	25
Online reviews	13
Current residents	9
Families of residents	8
Social worker	6
Myself	4
CDC	3
Referrals	3
Tour of facility	3
A community employee	2
Agency on Aging	2
AARP	2
Community administrators	2
Nurses	2
Total	**160**

Trusted Source of Information: Memory Care

Source	Count
Doctor	17
My family members	8
Myself	4
Info from the facility	3
Caregiver	2
Families with similar experiences	2
Internet	2
Experts in the field	1
Friends	1
Local and State CDC	1
Pastor	1
Total	**42**

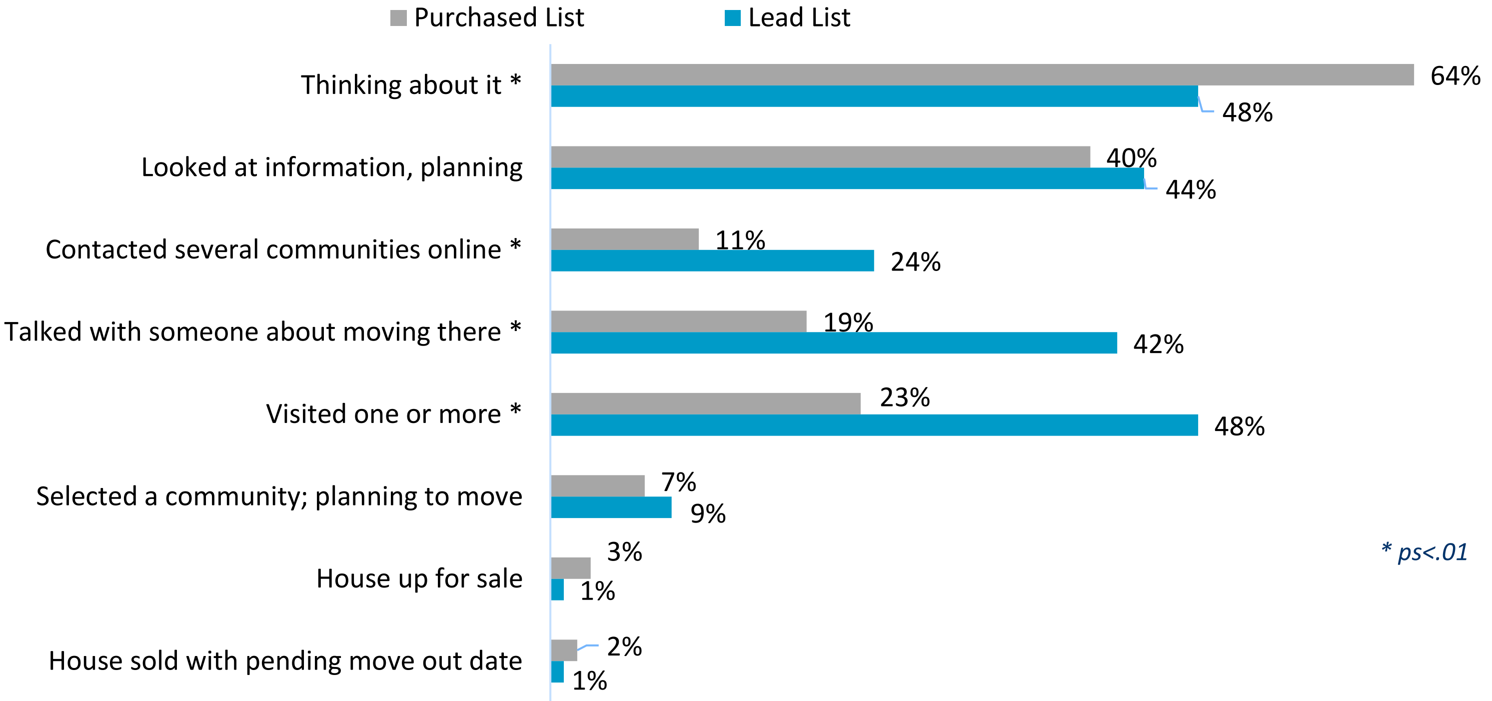
INTEREST IN LEVEL OF CARE

The majority of prospects from the Lead List were interested in Independent Living while prospects from the Purchased List were most interested in Active Adult. Nearly half of adult children from the Lead List were shopping for Assisted Living for a parent or loved one while equal proportions from the Purchased List were shopping for Independent Living or Assisted Living for a parent or loved one.



PROCESS OF MOVING- CURRENT STAGE

As has been the pattern of results over the past year, a greater proportion of households from the Lead List than the Purchased List are currently looking at information about communities and planning a move; or have visited, talked with, or contacted communities online. Households from the Purchased List are currently in the "thinking" stage of the moving process.



** ps<.01*

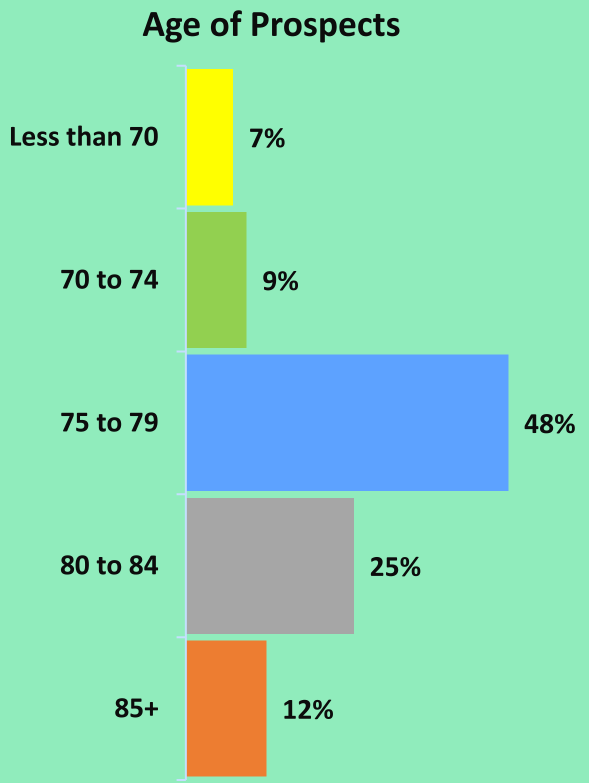
CHARACTERISTICS OF PROSPECTS

CHARACTERISTICS OF PROSPECTS (Lead List + Purchased List)

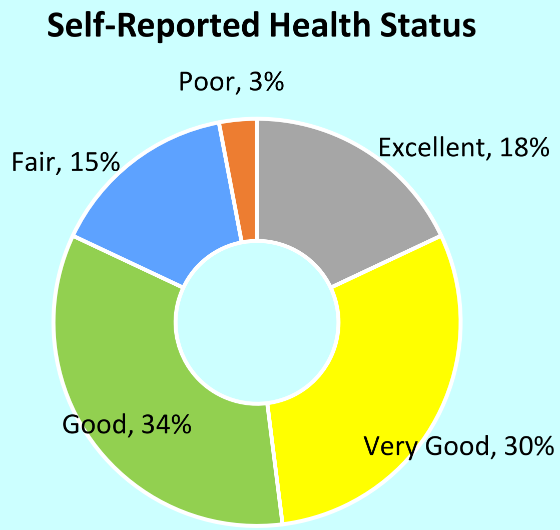
78.1 Years
Mean respondent age

54%
Female respondents

57%
Married respondents
21% were widowed, and
22% divorced or single.



35%
of Prospective Residents Have an Impairment or Health Problem



DIFFERENCES BETWEEN LEAD LIST PROSPECTS AND PURCHASED LIST PROSPECTS

Prospective residents from the Lead List differ significantly from those on the Purchased List on several demographic variables. The mean age of Lead List prospects was slightly younger than the mean age of Purchased List prospects. A minimum age criteria was set, however, for Purchased List survey participants.

More than twice as many prospects from the Purchased List were married and half as many were widowed than prospects on the Lead List.

A significantly greater proportion of Lead List prospects than Purchased List prospects reported having an impairment or health problem.

Mean respondent age (in years):

Lead List		Purchased List
76.9	*p<.001*	**78.9**

Female respondents:

Lead List		Purchased List
60%	*p<.05*	**52%**

Marital Status:

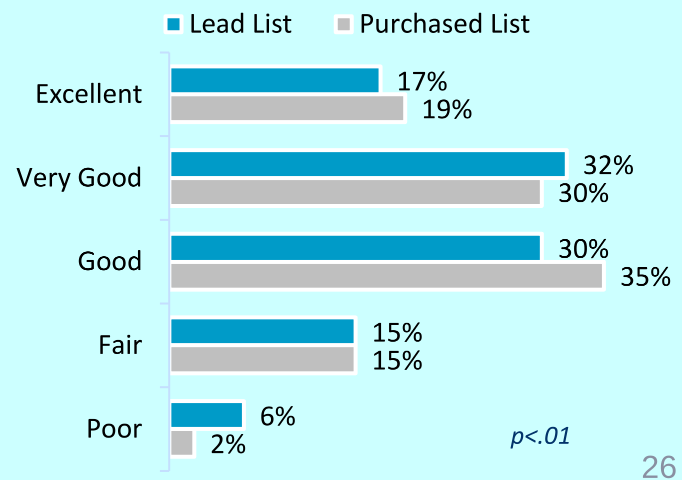
	Lead List	Purchased List
Married:	**31%**	**65%**
Widowed:	**34%**	**17%**

p<.001

Prospective Residents with an Impairment or Health Problem:

Lead List		Purchased List
49%	*p<.001*	**31%**

Self-Reported Health Status



TOTAL HOUSEHOLD INCOME OF PROSPECTIVE RESIDENTS

Prospects on the Lead List were less affluent than those on the Purchased List. While half of prospects on the Purchased List reported annual household incomes of $100,000 or more, only 29% of those on the Lead List reported $100,000+ annual household incomes. While this survey did not collect employment status, it could be the case that greater proportions of Purchased List prospects are still working and fewer have retired as compared to those on the Lead List. It also should be noted that the Purchased List had a minimum income requirement for participation.

		Lead List	Purchased List	
Less than $10,000		4%	1%	
$10,000 to $14,999	**14%**	3%		**2%**
$15,000 to $24,999		7%	1%	
$25,000 to $34,999		5%	7%	
$35,000 to $49,999		21%	9%	
$50,000 to $74,999	**58%**	20%	17%	**48%**
$75,000 to $99,999		12%	15%	
$100,000 to $149,999		15%	27%	
$150,000 to $199,999	**29%**	8%	14%	**50%**
$200,000 or more		6%	9%	
Total		**100%**	**100%**	

p<.001

HOME OWNERSHIP / VALUE OF PROSPECTIVE RESIDENTS

Fewer prospects from the Lead List currently own their own home as compared to households from the Purchased List. Likewise, prospects on the Lead List reported lower home values than did those from the Purchased List. It is possible that a greater proportion of the Lead List prospects have already sold the family home and have since purchased a smaller and/or less expensive home.

74% own their current home.

88% own their current home.

	Lead List	Purchased List
Less than $150,000	11%	9%
$150,000 to $199,999	5%	6%
$200,000 to $249,999	13%	9%
$250,000 to $299,999	10%	5%
$300,000 to $349,999	15%	10%
$350,000 to $399,999	11%	10%
$400,000 to $499,999	13%	15%
$500,000 to $749,999	15%	21%
$750,000 to $999,999	2%	7%
$1,000,000 or more	5%	8%
Total	**100%**	**100%**

61%

71%

p<.01

PSYCHOGRAPHICS

PSYCHOGRAPHIC PROFILE OF PROSPECTS

Survey respondents answered a series of questions that assessed their psychographic profiles. Prospects on the Lead List were more likely to agree or strongly agree that they were people-people, and enjoyed being around others than prospects on the Purchased List. Likewise, prospects on the Purchased List would rather be doing a task or hobby they enjoy than socializing with others than would Lead List prospects.

	List Source (Prospects Only)	Agree	Strongly Agree	Agree + Strongly Agree
The social opportunities of a retirement community would have a positive impact on my decision to move to a community.	**Lead List**	44%	40%	84%
	Purchased List	50%	34%	84%
I am a people person – I like being around other people.* ** p<.01*	**Lead List**	47%	33%	**80%**
	Purchased List	41%	24%	**65%**
I like doing things my own way.	**Lead List**	49%	15%	64%
	Purchased List	52%	24%	76%
I would rather be doing a task or hobby I enjoy than socializing with friends.** ** p<.001*	**Lead List**	12%	5%	**17%**
	Purchased List	23%	8%	**31%**

EMOTIONS FELT OVER THE PAST SIX MONTHS

With the world going through an unprecedented pandemic over the past year, we wanted to assess the extent to which prospects had been feeling a variety of emotions. Of the emotions tested, prospects from the Lead List and Purchased List differed significantly on the extent to which they felt the following emotions: sad, afraid, happy and anxious.

Prospects from the Lead List were more likely than those from the Purchased List to indicate they've felt sad, afraid, and anxious "quite a bit" where those on the Purchased List rather than the Lead List were more likely to indicate they have felt happy "quite a bit."

	Very slightly or Not at all		Moderately		Quite a bit	
	Lead List	Purchased List	Lead List	Purchased List	Lead List	Purchased List
Sad *	28%	41%	54%	50%	**18%**	**9%**
Excited	15%	20%	69%	65%	16%	16%
Afraid *	47%	55%	34%	37%	**19%**	**8%**
Angry	46%	48%	47%	41%	7%	10%
Enthusiastic	13%	16%	66%	62%	21%	23%
Happy *	18%	9%	48%	51%	**34%**	**40%**
Ashamed	84%	83%	13%	11%	3%	6%
Proud	24%	20%	51%	53%	25%	27%
Anxious *	24%	36%	49%	46%	**27%**	**18%**
Inspired	24%	23%	58%	54%	18%	23%

** ps<.01*

MEASURES OF LONELINESS

One of the major concerns during the COVID-19 pandemic was the dramatic increase in loneliness among those who were unable to visit with family and friends due to the need to shelter in place. Prospects on the Lead List answered items on the 10-item UCLA Loneliness Scale[1] in such a way that indicated they were experiencing higher levels of loneliness than Prospects from the Purchased List.

Prospects from the Lead List were less likely than those on the Purchased List to feel that they have a lot in common with people around them, to feel close to people, to feel there are people who understand them, and who they can talk to or turn to.

	Never		Sometimes		Always	
	Lead List	Purchased List	Lead List	Purchased List	Lead List	Purchased List
Lack companionship	17%	27%	72%	65%	11%	8%
Have a lot in common with people around me *	4%	3%	79%	75%	17%	**23%**
Close to people **	3%	2%	80%	72%	17%	**26%**
Left out	14%	23%	82%	73%	4%	4%
No one really knows me well	14%	22%	83%	72%	3%	6%
Isolated from others	21%	33%	71%	61%	8%	6%
There are people who really understand me **	2%	1%	81%	75%	17%	**24%**
People are around me but not with me	15%	17%	80%	77%	5%	6%
There are people I can talk to *	7%	2%	51%	47%	42%	**52%**
There are people I can turn to *	14%	2%	47%	45%	39%	**53%**

[1] Russell, D., Peplau, L. A., Cutrona, C. E. (1980). The Revised UCLA Loneliness Scale: Concurrent and Discriminant Validity Evidence. *Journal of Personality and Social Psychology*, *39*, 472–80.

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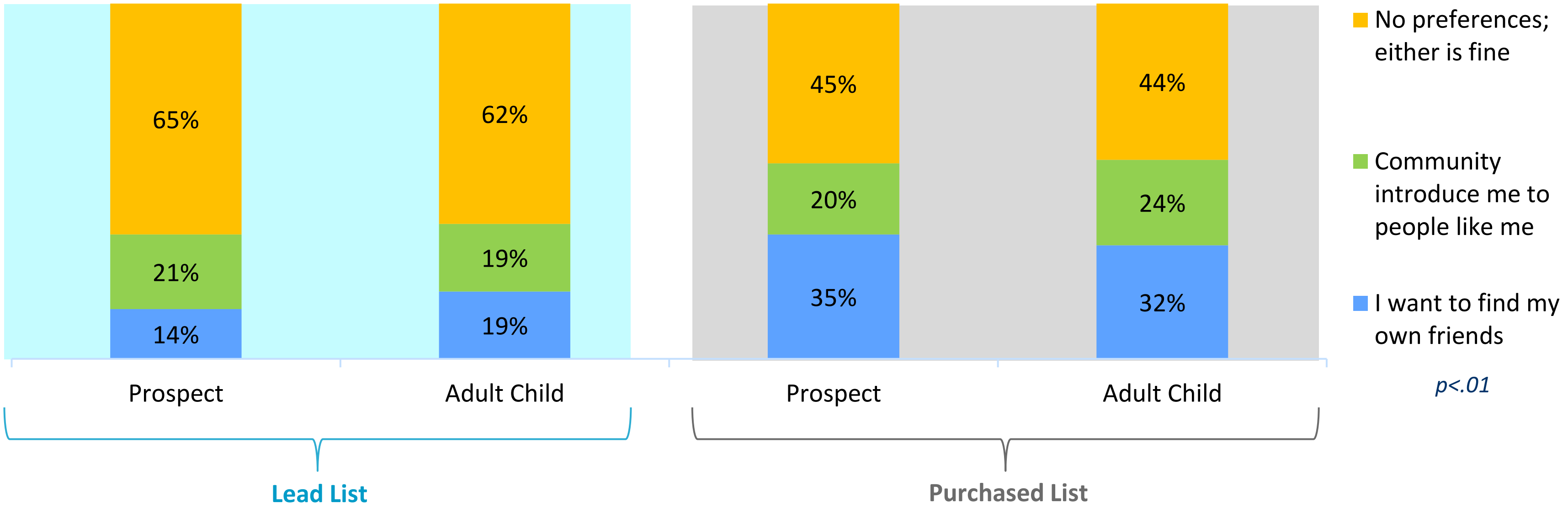
PREFERENCE FOR MAKING NEW FRIENDS

One of the biggest benefits of moving to a retirement community is the opportunity to combat loneliness by making new friends. Senior living communities provide ample opportunities to find and develop new friendships with like-minded individuals. Communities struggle, however, with knowing how far they should get involved in helping residents to form those new friendships. We asked survey respondents their preference for making new friends, if they were to move to a retirement community. While the largest proportions from all survey groups said that either option is fine, Prospects from the Lead List more so than Prospects from the Purchased List would like the community to introduce them to people like them. Prospects on the Purchased List prefer to find their own friends.



STRATEGY FOR MAKING NEW FRIENDS

We asked survey respondents the following question:

When you are in a situation where you don't know anyone or are new to a group of people, how do you make friends? In other words, what is your strategy for finding someone like you?

Just shy of half of the responses to this question mentioned simply joining in on conversations or asking questions during conversations so they can become part of the discussion. Others mentioned that they make friends by attending events or activities.

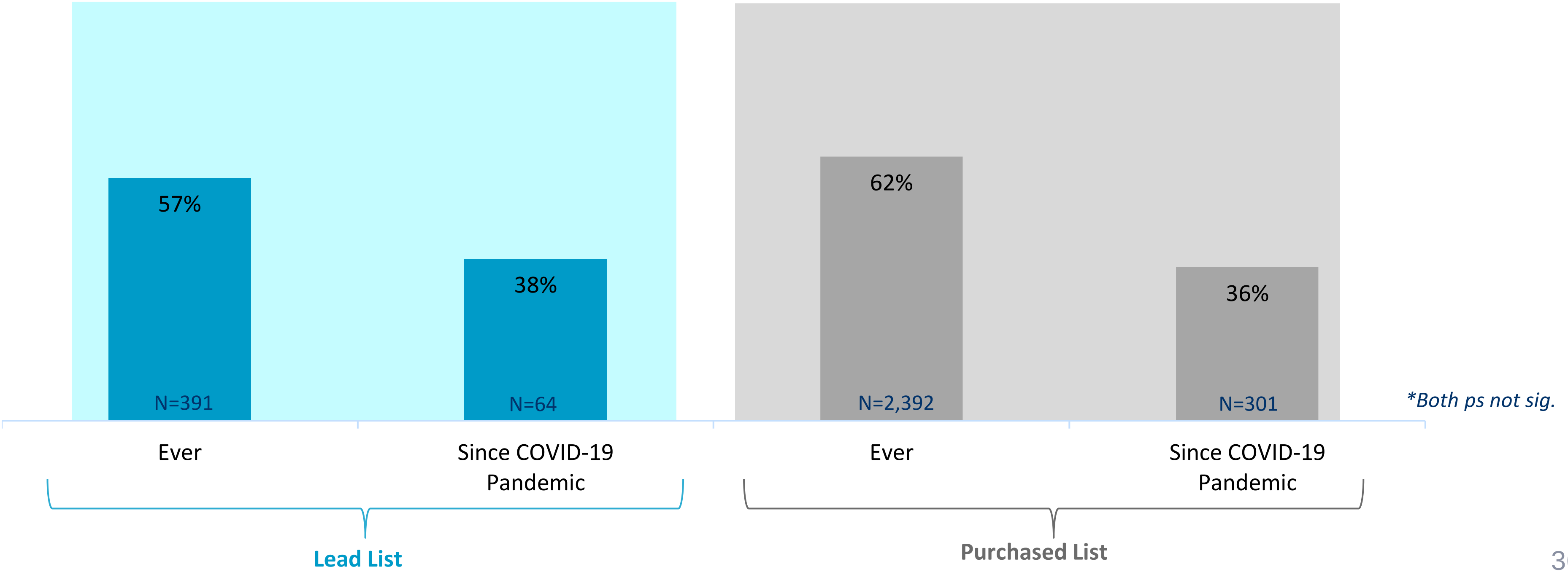
Strategy for Finding/Making Friends

Comment	Count	Percent
Join Conversations/Ask Questions	187	49%
Attend Events or Activities	45	12%
Introduce Myself	40	11%
Be a Good Listener	28	7%
Share Common Interest(s)	15	4%
Observe	13	3%
Wait For People To Approach Me	11	3%
Say Hello	8	2%
Mingle	6	2%
Compliment People	5	1%
Make Eye Contact	5	1%
Belong To Organizations	4	1%
Body Language	4	1%
Make People Laugh/Jokes	4	1%
Smile	3	1%
Be Yourself	2	1%
Total	**380**	**100%**

ACTIVE ADULT

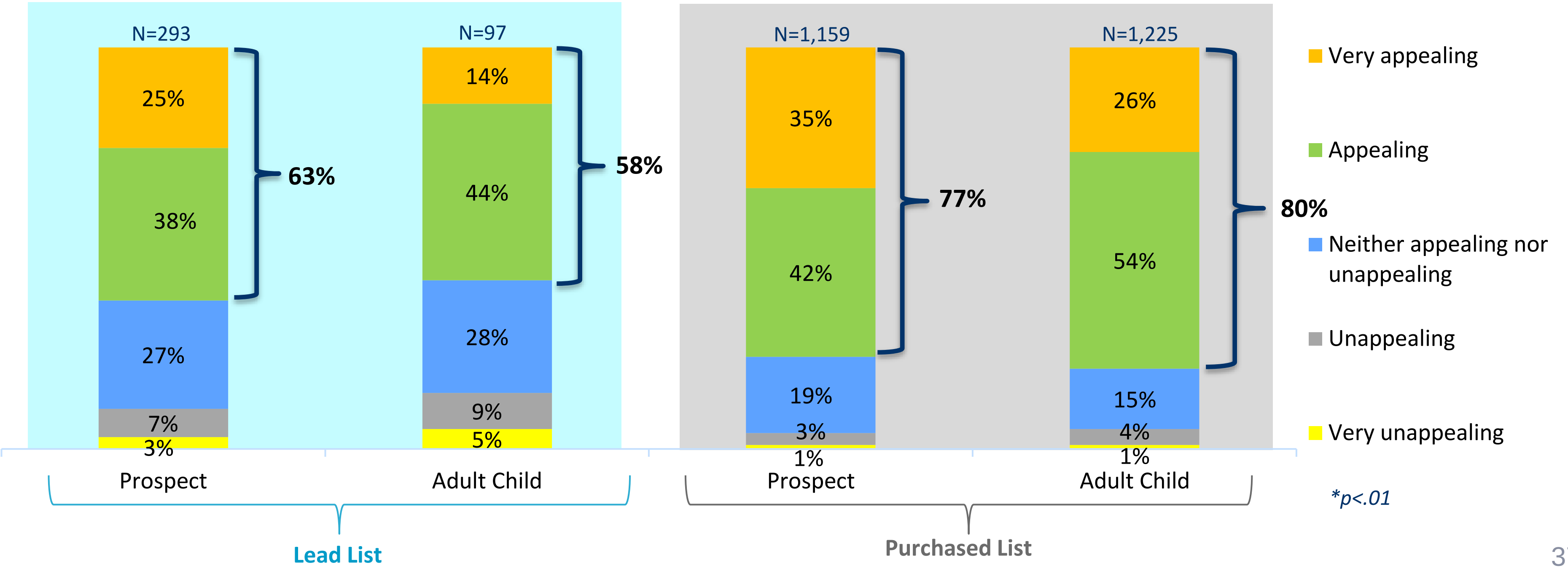
PROSPECTS WHO VISITED AN AA COMMUNITY

More than half of the households from the Lead and Purchased Lists had visited an active adult community at some point in time. Since the onset of COVID-19, only 38% of Leads and 36% of Purchased List households have visited an active adult community.



APPEAL OF AA COMMUNITIES

Both prospective residents and adult children from the Purchased List were significantly more likely to find active adult communities appealing or very appealing than households from the Lead List. More than three-quarters of households from the Purchased List found active adult communities appealing, compared to nearly two-thirds of households from the Lead List.



TOP REASONS FOR MOVING TO ACTIVE ADULT

Respondents were asked what their top reasons would be for moving to an active adult community. Most respondents said their current home is too hard to maintain (15%), they find the offered activities and programming appealing (12%), and they're interested in living in a community of people the same age and with similar interests (11%).

Top Reasons for Moving to an Active Adult Community

Comment	Count	Percent
No home maintenance/Home too hard to maintain	73	15%
Activities/programs	59	12%
People of the same age, and interests	56	11%
Meet new people	32	7%
Social interaction	32	7%
Sense of community	30	6%
Less responsibility/stress	27	6%
Companionship	25	5%
No yardwork	24	5%
Active lifestyle	23	5%
Downsize	23	5%
Safety	23	5%
Cost is less than maintaining large home	22	5%
Help available	21	4%
Living alone	17	3%
Total	**487**	**100%**

WHY ACTIVE ADULT IS UNAPPEALING

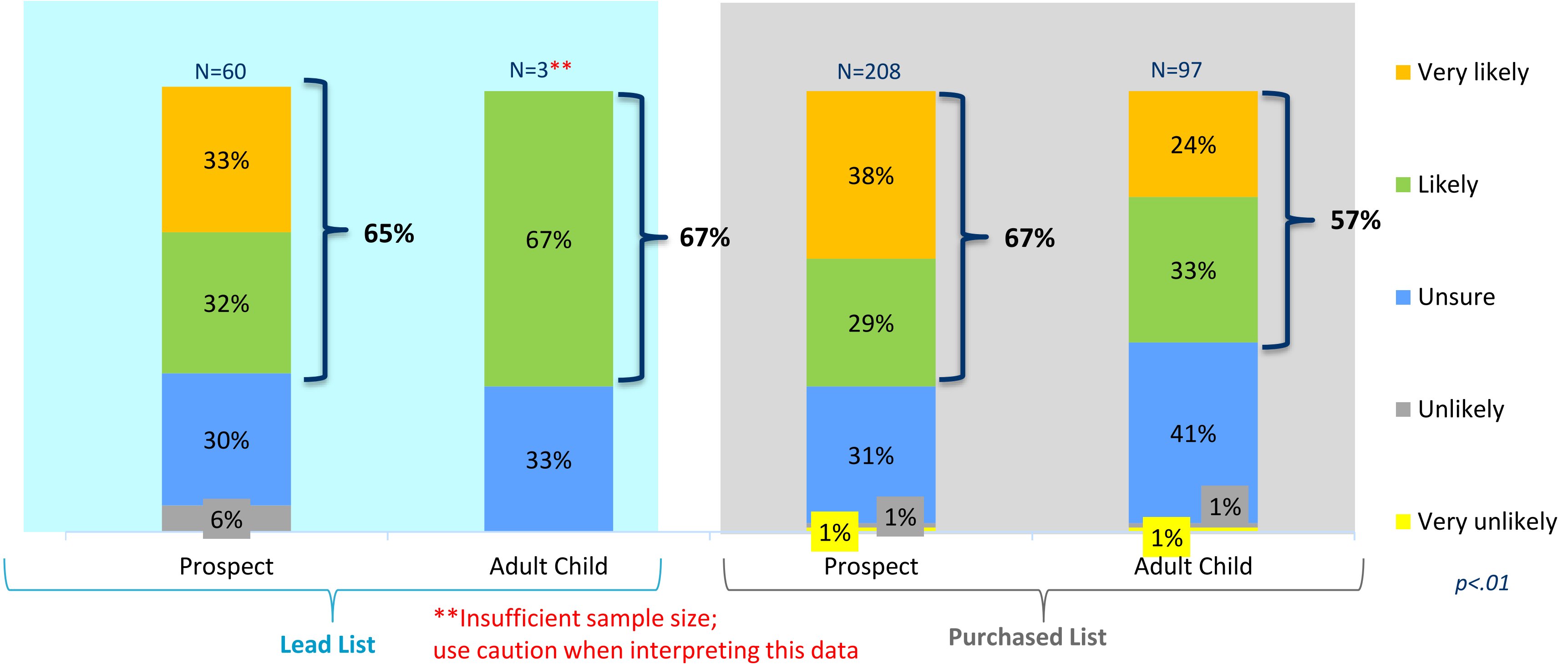
Those who found active adult communities unappealing provided their reasoning. Most respondents said they prefer their own home (26%), active adult communities are too expensive (22%), or they prefer intergenerational communities (12%).

Why Survey Respondents Find Active Adult Communities Unappealing

Comment	Count	Percent	Comment	Count	Percent
Prefer my own home	138	26%	Too large/ Too many people	9	2%
Too expensive	117	22%	All old people	8	1%
Prefer all age communities	63	12%	Don't want to live with strangers	5	1%
Doesn't fit my lifestyle	44	8%	Wouldn't want to give up pets	3	1%
Like my independence	32	6%	Don't like planned activities	2	0.4%
Happy where I am	19	4%	Family takes care of family	2	0.4%
Don't like rules, regulations	17	3%	Not able to have overnight guests	2	0.4%
Too depressing	16	3%	They only care about revenue	2	0.4%
No privacy	14	3%	55 is too young	1	0.2%
Introvert/Not social	13	2%	Prefer more culture	1	0.2%
I'm too young, healthy	11	2%	Residents don't seem to enjoy themselves	1	0.2%
Live with family/children	10	2%	They are not for "active" adults	1	0.2%
Institutional	9	2%	**TOTAL**	**540**	**100%**

LIKELIHOOD OF MOVING TO AN AA COMMUNITY

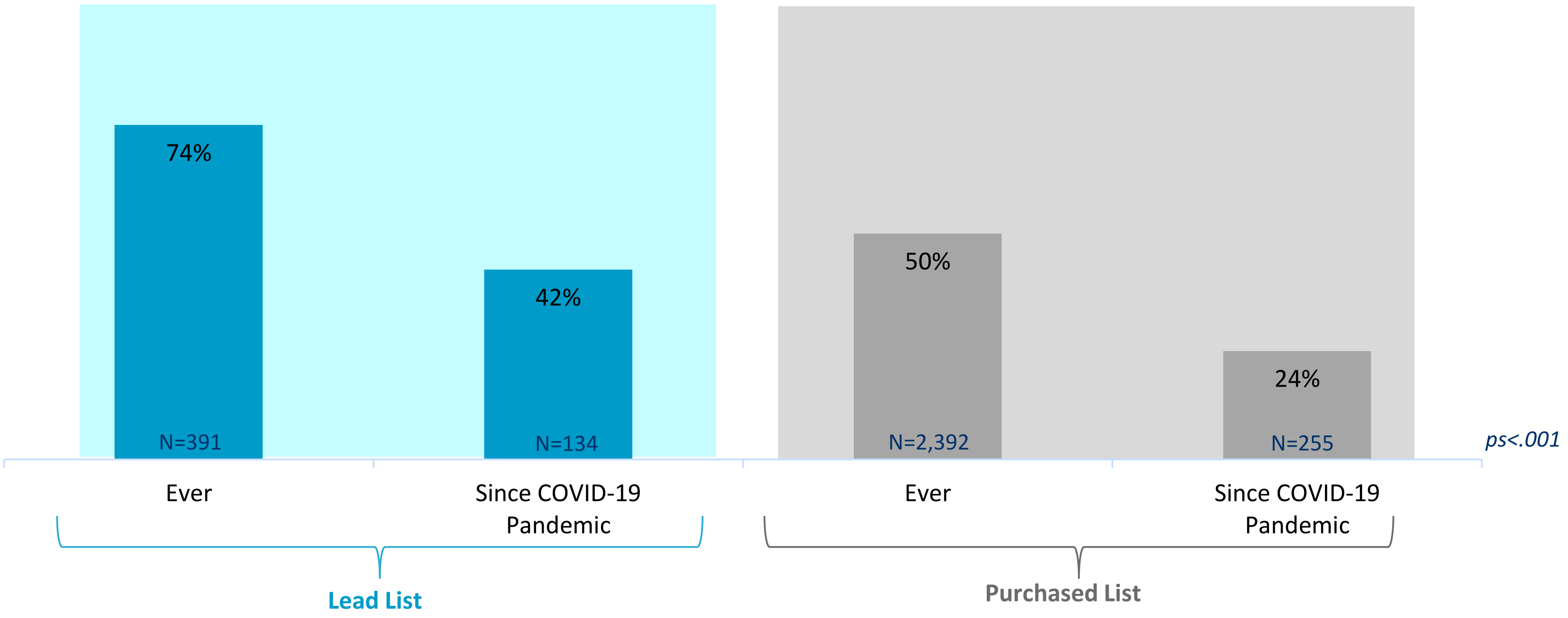
More than 60% of prospects from the Lead and Purchased Lists who have been shopping for an active adult community said they were likely or very likely to move to an active adult community at some point in the future.



INDEPENDENT LIVING

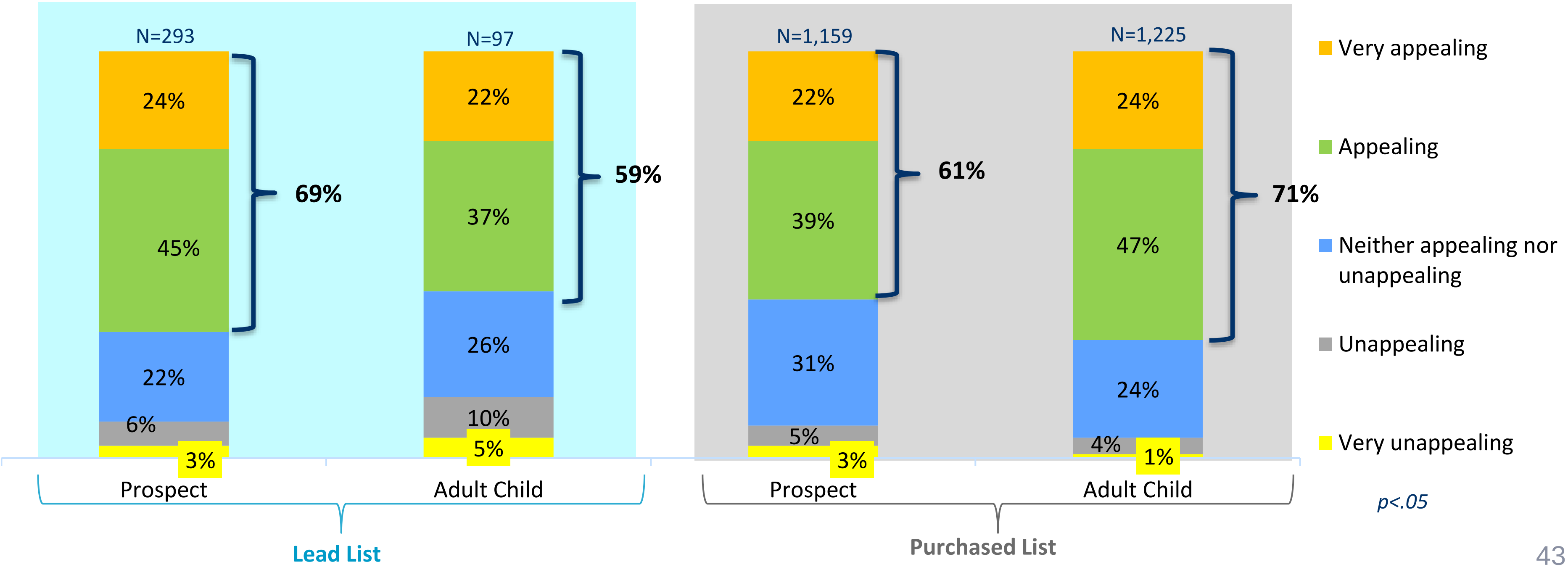
PROSPECTS WHO VISITED AN IL COMMUNITY

Nearly three-quarters (74%) of households from the Lead List and 50% from the Purchased List had visited an independent living community at some point. Since the onset of COVID-19, only 42% of Leads and 24% of Purchased List prospects have visited an independent living community.



APPEAL OF IL COMMUNITIES

Sixty-nine percent of prospects from the Lead List found independent living communities appealing or very appealing, compared to 61% from the Purchased List. Alternatively, 71% of adult children from the Purchased List found independent living communities appealing or very appealing, compared to 59% of adult children from the Lead List.



TOP REASONS FOR MOVING TO INDEPENDENT LIVING

Respondents were asked to list their top reasons for considering a move to an independent living community. Most respondents said they would move to an independent living community for the companionship and camaraderie (13%), little to no home maintenance in a community (11%), and if their health began to decline (9%).

Top Reasons for Moving to an Independent Living Community

Comment	Count	Percent	Comment	Count	Percent
Companionship/Camaraderie	98	13%	Don't want to live alone	18	2%
No home maintenance	79	11%	Amenities	14	2%
Declining health	67	9%	Can no longer drive	13	2%
Help available	58	8%	Death of spouse	13	2%
Meals	53	7%	Security	10	1%
Activities	46	6%	To combat loneliness	8	1%
Ease of living	38	5%	Beginning a new phase of life	4	1%
24/7 care available	33	4%	Doctors on site	3	0.4%
Around others the same age	33	4%	All inclusive	2	0.3%
Downsize	31	4%	Keep active	2	0.3%
No yard work	30	4%	No property taxes	2	0.3%
Safety	25	3%	Atmosphere	1	0.1%
Independence	24	3%	Good neighbors	1	0.1%
Location	21	3%	To get out of my daughter's house	1	0.1%
Affordable/Low cost	19	3%	**TOTAL**	**747**	**100%**

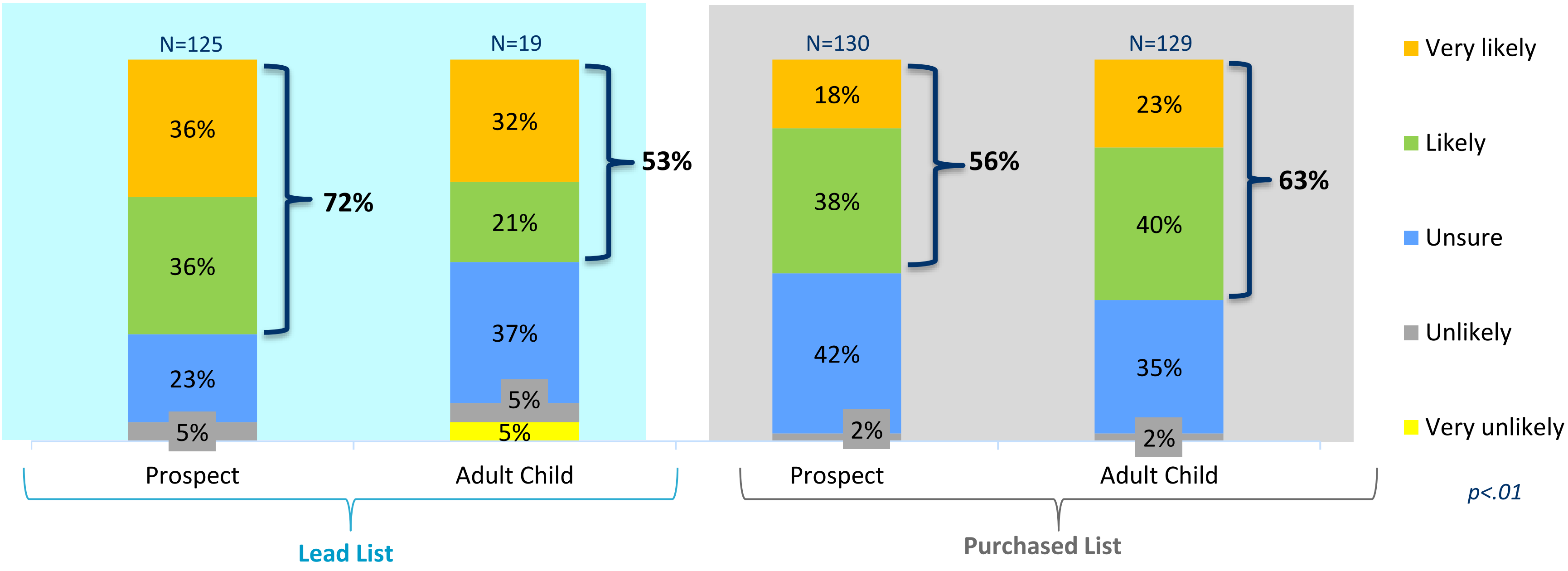
WHY INDEPENDENT LIVING IS UNAPPEALING

Respondents who found independent living unappealing were asked to list their reasons. Most respondents said independent living communities are too expensive (37%), they'd prefer to stay in their own home (19%), and that they do not need this type of community yet (11%).

Why Survey Respondents Find Independent Living Communities Unappealing					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Too expensive	168	37%	Units are too small	7	2%
Want to stay in my own home	86	19%	Don't want to live with strangers	3	1%
Don't need it yet	52	11%	The residents seem better fit for AL	3	1%
Prefer all age communities	33	7%	Forced socialization	2	0.4%
Can take care of myself	19	4%	Food is not good	1	0.2%
Too many restrictions, rules	17	4%	Have not like the communities visited	1	0.2%
Doesn't fit my lifestyle	14	3%	Family member had a bad experience	1	0.2%
I like my freedom/independence	14	3%	Not enough staff	1	0.2%
Don't like crowds	10	2%	They are like prisons	1	0.2%
Don't want to live with all older people	10	2%	We are too young	1	0.2%
Depressing	7	2%	We prefer land with our horses	1	0.2%
I like my privacy	7	2%	**TOTAL**	**459**	**100%**

LIKELIHOOD OF MOVING TO AN IL COMMUNITY

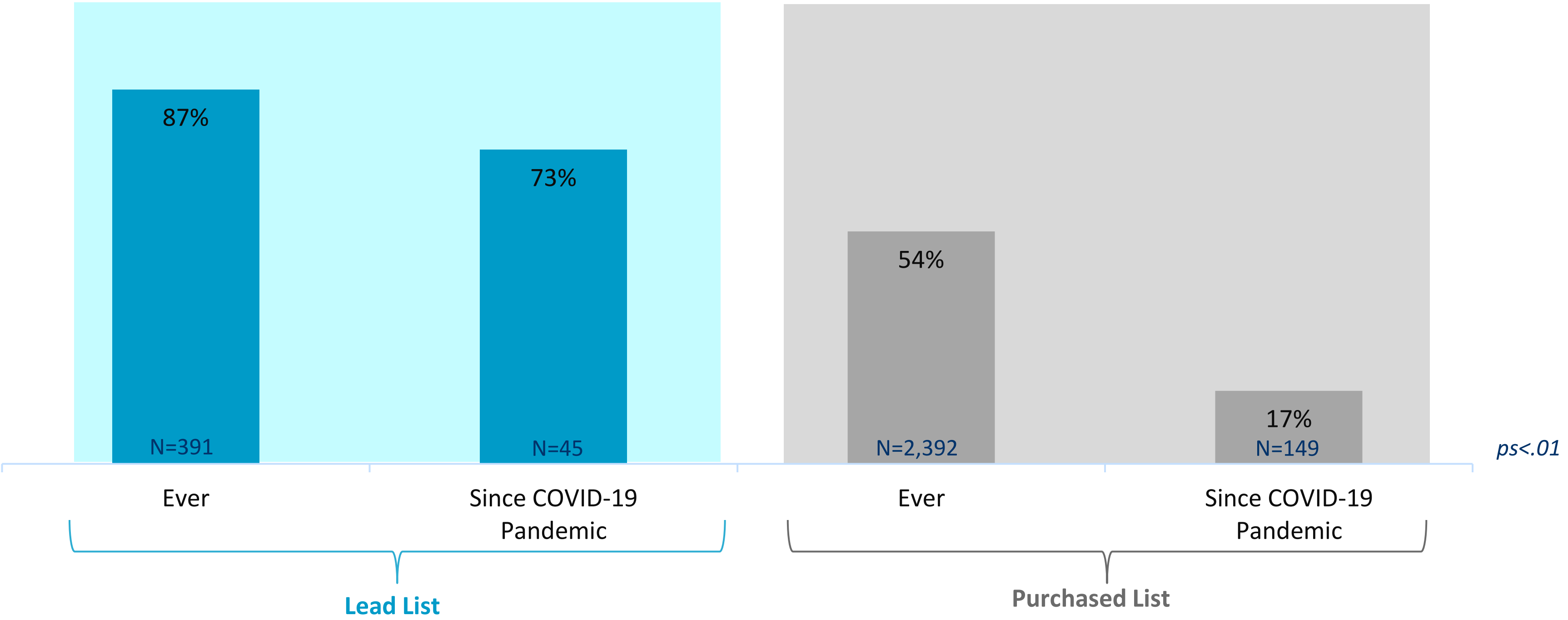
Prospective residents from the Lead List were the most likely respondent group to consider moving to an independent living community (72%); 56% of prospective residents from the Purchased List were likely or very likely to move to an independent living community. Fifty-three percent of adult children from the Lead List and 63% of adult children from the Purchased List said their parent or family member was likely to very likely to move to an IL community.



ASSISTED LIVING

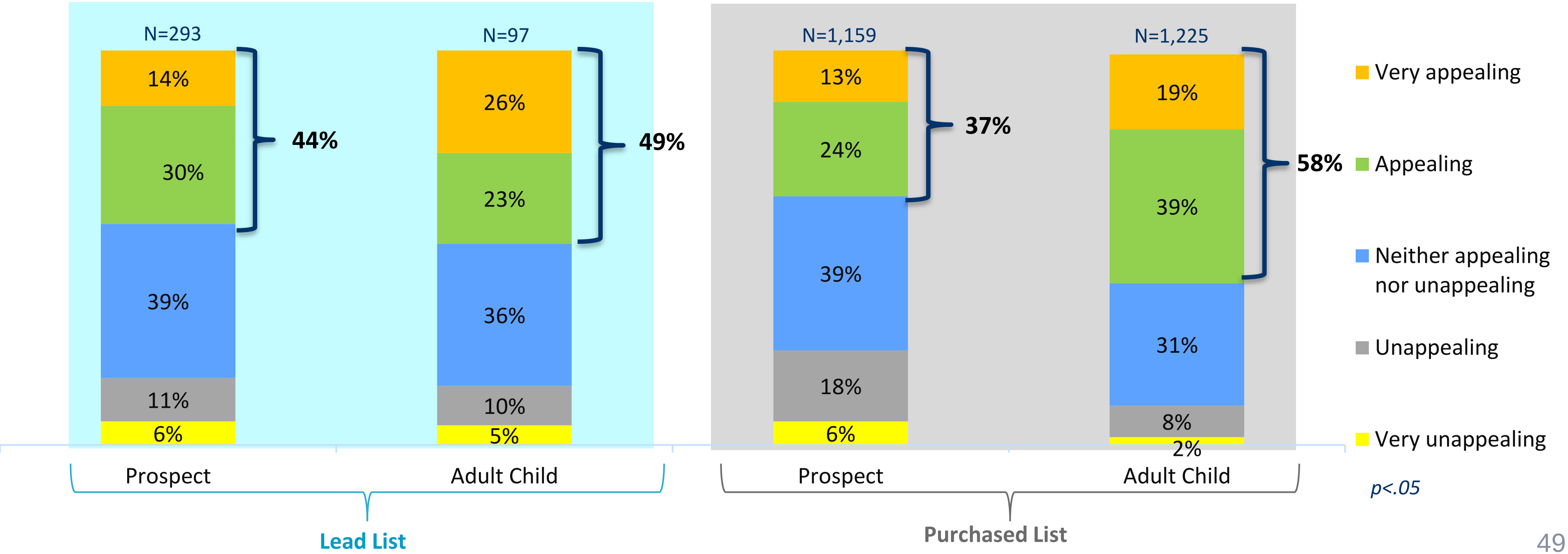
ADULT CHILDREN WHO HAVE VISITED AN AL COMMUNITY

Households from the Lead List were significantly more likely to have visited an assisted living community than households from the Purchased List. Since the onset of COVID-19, 73% of adult children from the Lead List have visited an AL community, compared to only 17% of adult children from the Purchased List.



APPEAL OF AL COMMUNITIES

Less than half of all households on the Lead List found assisted living communities appealing or very appealing. Thirty-seven percent of prospective residents and 58% of adult children from the Purchased List found assisted living communities appealing or very appealing.



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TOP REASONS FOR MOVING TO ASSISTED LIVING

Households were asked about their top reasons for considering a move to an assisted living community. Most respondents said they would move to an assisted living community because of the services available (14%), companionship and camaraderie (10%), and declining health issues (9%).

Top Reasons for Moving to an Assisted Living Community					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Services available at community	67	14%	Security	14	2%
Companionship/Camaraderie	46	10%	Transportation services	13	2%
Declining Health	41	9%	Bathing/Bathroom assistance	13	2%
Mobility Issues	39	8%	Activities offered at the community	10	1%
Help with daily tasks	32	7%	Combat loneliness	8	1%
Memory issues/Alzheimer's disease	31	7%	Can no longer drive	4	1%
Inability to live independently	34	7%	Closer to family	3	1%
Meals Available	28	6%	Convenience	2	1%
Inability to maintain home/yard	26	6%	Death of spouse	2	1%
Fall Risk	15	3%	Safety	2	1%
Safety	15	3%	Skilled nursing on-site	1	0.4%
24/7 care	14	3%	Affordability	1	0.2%
Medication management	8	2%	Want to downsize	1	0.2%
Peace of mind for family/children	8	2%	**Total**	**747**	**100%**

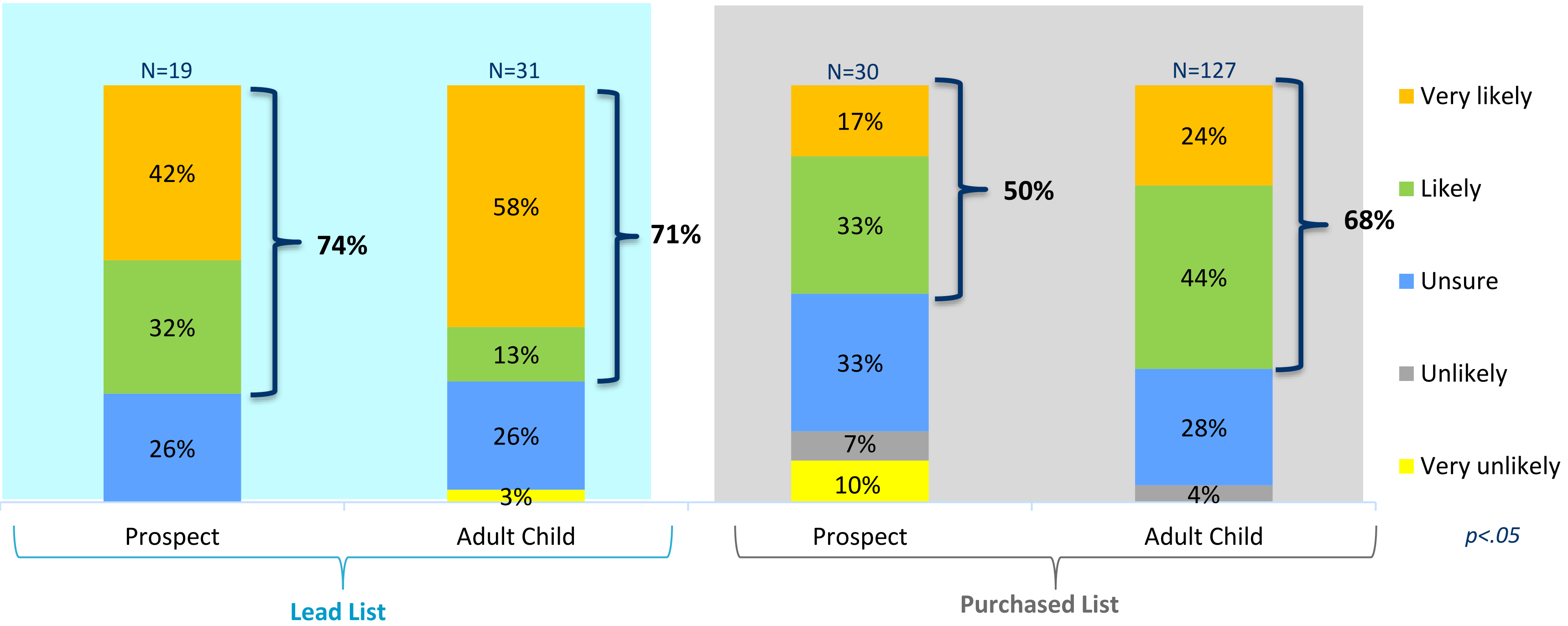
WHY ASSISTED LIVING IS UNAPPEALING

Survey respondents who found assisted living communities unappealing said it was because they are currently too healthy and do not need the services (29%) and assisted living communities are too expensive (23%).

Why Survey Respondents Find Assisted Living Communities Unappealing					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Too healthy/Don't need the services	170	29%	Don't want to live with strangers	6	1%
Too expensive	139	23%	Not enough staff	5	1%
Depressing environment	51	9%	Don't want to live with all old people	4	1%
Happy in my own home	50	8%	Everyone is disabled	4	1%
Hope to never need one	29	5%	No privacy	4	1%
Inconsistent care	25	4%	Too much abuse of the elderly in these facilities	4	1%
Loss of independence	20	3%	Friends who moved into them aged quickly	3	1%
Would rather have in home care	19	3%	Prefer all age communities	3	1%
Too confining, and restrictive	15	3%	Terrible food	3	1%
A place people go to die	10	2%	Chance of becoming ill	2	0.3%
They seem like nursing homes	9	2%	Aging at home is healthier	1	0.2%
The staff don't care about the resident	8	1%	Isolation from the outside world	1	0.2%
Will live with family	8	1%	**TOTAL**	**593**	**100%**

LIKELIHOOD OF MOVING TO AN AL COMMUNITY

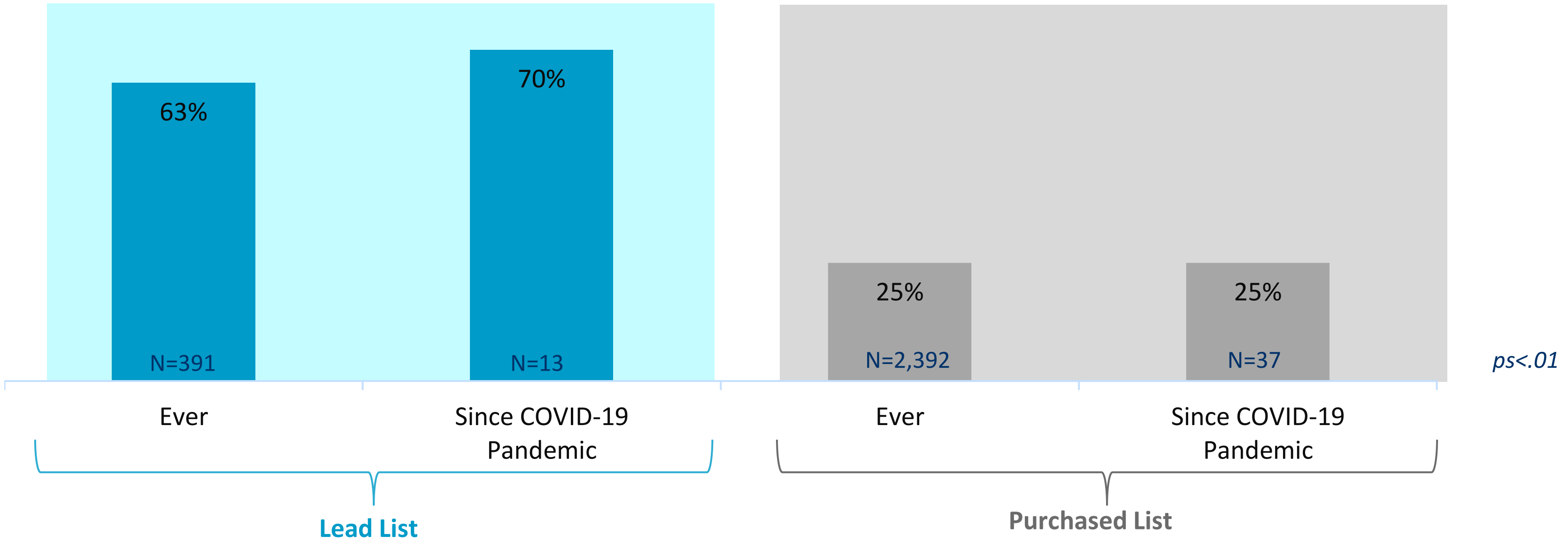
More than 70% of households from the Lead List said they or their family member were likely or very likely to move to an assisted living community. Fifty percent of prospective households and 68% of adult children from the Purchased List were likely or very likely to move (or move their loved one) to an assisted living community at some point in the future.



MEMORY CARE

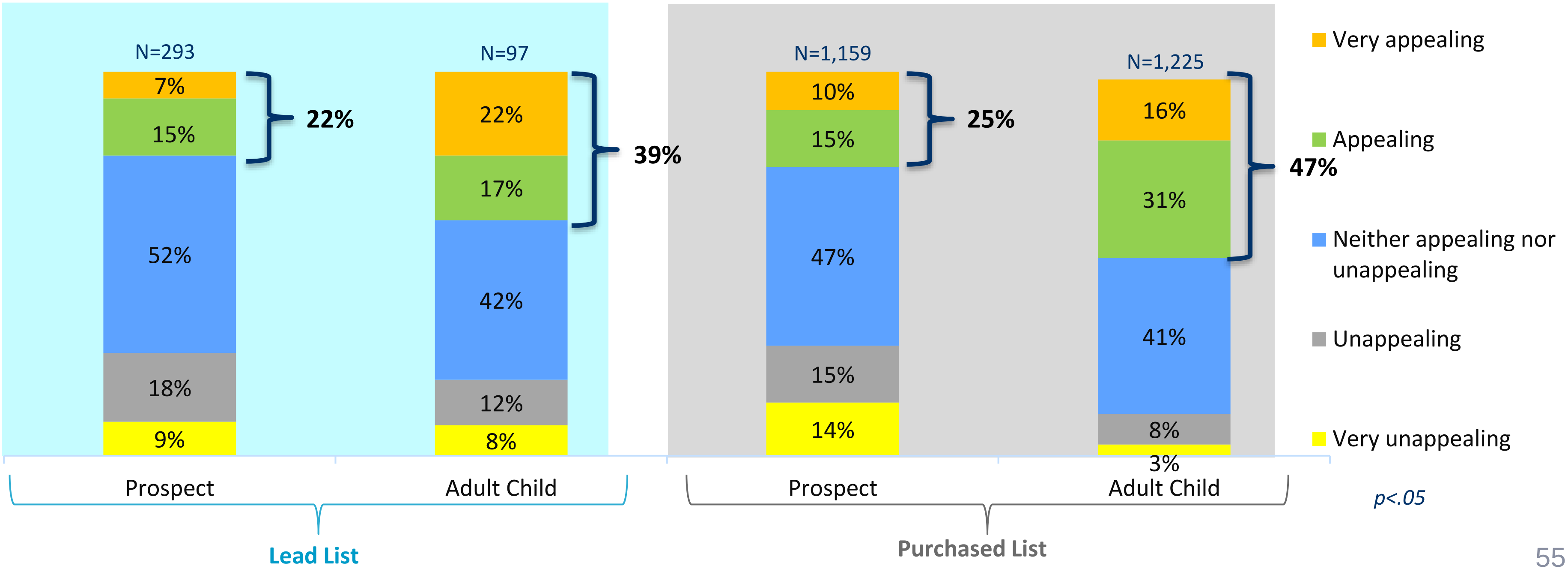
ADULT CHILDREN WHO HAVE VISITED A MC COMMUNITY

Only a quarter of households from the Purchased List had ever visited a memory care community, including since the onset of COVID-19. Nearly two-thirds of households from the Lead List had ever visited a memory care community, and 70% of prospective adult children have visited since the onset of COVID-19.



APPEAL OF MC COMMUNITIES

More adult children from the Purchased List said memory care communities were appealing or very appealing than adult children from the Lead List.



TOP REASONS FOR MOVING TO MEMORY CARE

Adult children said the top reasons for moving their parent or family member to a memory care community were memory decline and/or Alzheimer's disease (20%) and that they are unable to live independently at home (18%).

Top Reasons for Moving to a Memory Care Community					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Memory decline/Alzheimer's disease	24	20%	Safety	3	2%
Unable to live independently at home	22	18%	Help bathing and using the bathroom	2	2%
Declining health	11	9%	Medication Administration	2	2%
Want structured care	10	8%	Can't drive	1	1%
Want 24/7 care	9	7%	Death of spouse	1	1%
Mobility issues/fall risk	8	7%	Ease of burden on spouse	1	1%
Don't want to be a burden to family	7	6%	Peace of mind for family	1	1%
Activities provided by community	5	4%	Security	1	1%
Companionship	4	3%	Skilled care on site	1	1%
Meals	3	2%	Sleep problems	1	1%
More brain stimulation than at home	3	2%	**TOTAL**	**123**	**100%**
Need locked facility/wandering	3	2%			

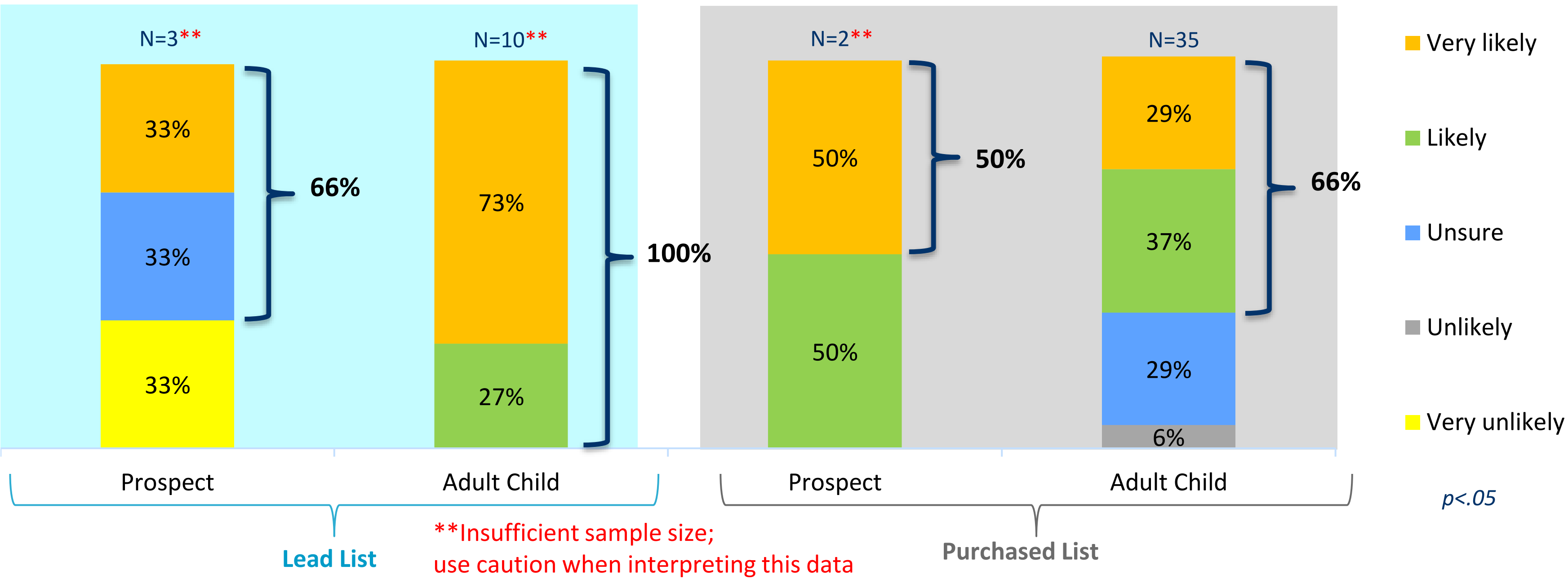
WHY MEMORY CARE IS UNAPPEALING

Adult children who found memory care communities unappealing said it was because their family member does not need it right now (37%) and that memory care communities are too expensive (22%).

Why Survey Respondents Find Memory Care Communities Unappealing					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Do not need it right now	237	37%	Loneliness	9	1%
Too expensive	140	22%	Resembles a hospital	6	1%
Communities seem sad/depressing	88	14%	Dislike locked/restrictive facility	6	1%
Prefer in-home care	35	5%	Do not know enough about MC	3	0.5%
Uneasy about quality of care	31	5%	Too similar to a nursing home	3	0.5%
Bad experience	30	5%	Dislike the environment	2	0.3%
Just not interested in memory care	24	4%	Lack of privacy	1	0.2%
Step before dying	13	2%	**TOTAL**	**637**	**100%**
Lack of independence	9	1%			

LIKELIHOOD OF MOVING TO A MC COMMUNITY

All of the adult children from the Lead List and 66% of adult children from the Purchased List said their parent or family member was likely or very likely to move into a memory care community at some point in the future.

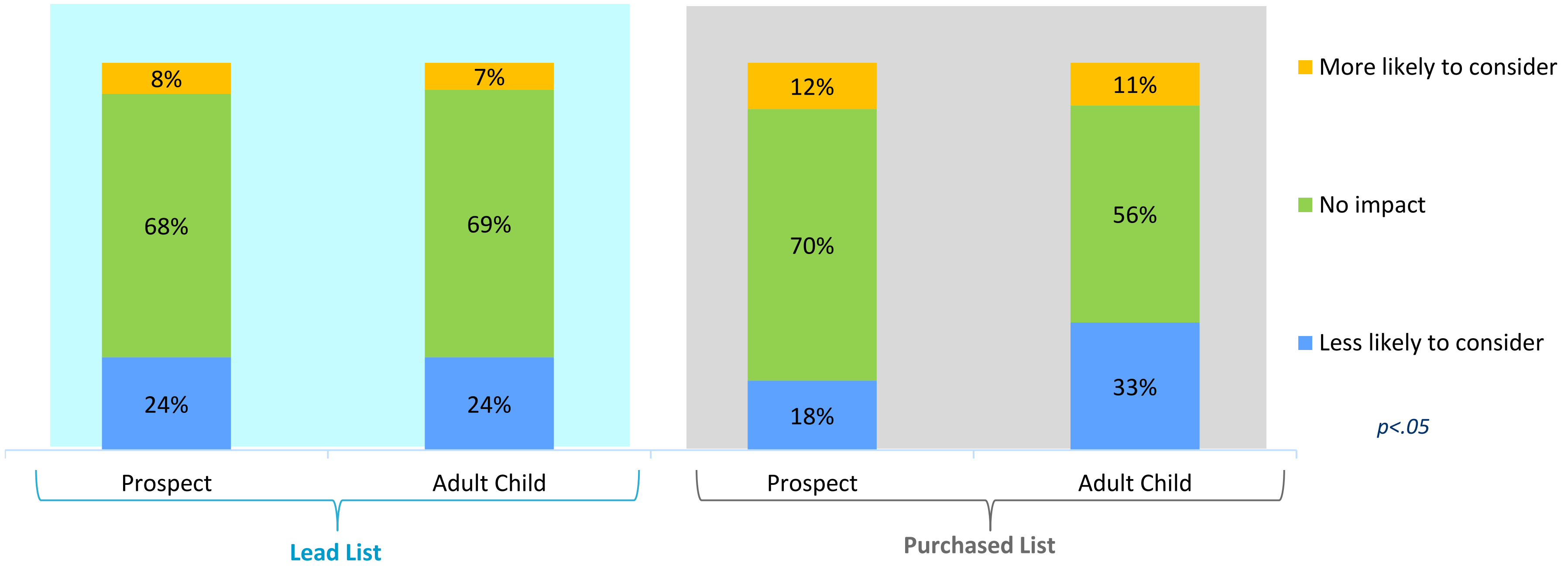


**Insufficient sample size;
use caution when interpreting this data

COVID-19 QS

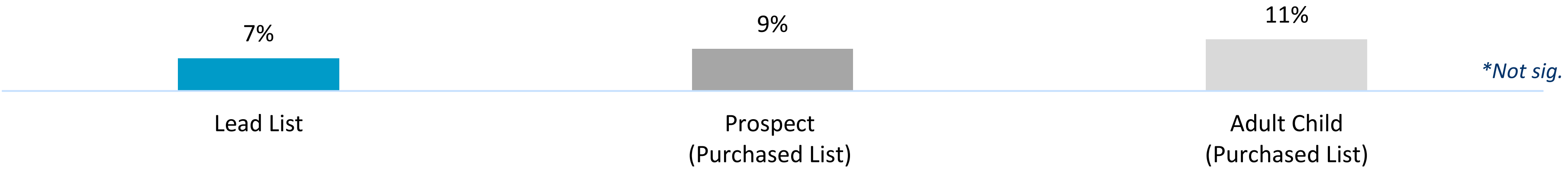
FEEL COVID-19 HAD AN IMPACT ON CONSIDERING A RETIREMENT COMMUNITY

Despite the fact that the impact of COVID-19 can be felt throughout the country and the rest of the world, the majority of prospects and adult children from both the Lead List and the Purchased List indicated that the COVID-19 pandemic had no impact on their likelihood to consider a retirement community. Only a small proportion said that COVID-19 had an impact, and of those, the majority said they are now less likely to consider a move.



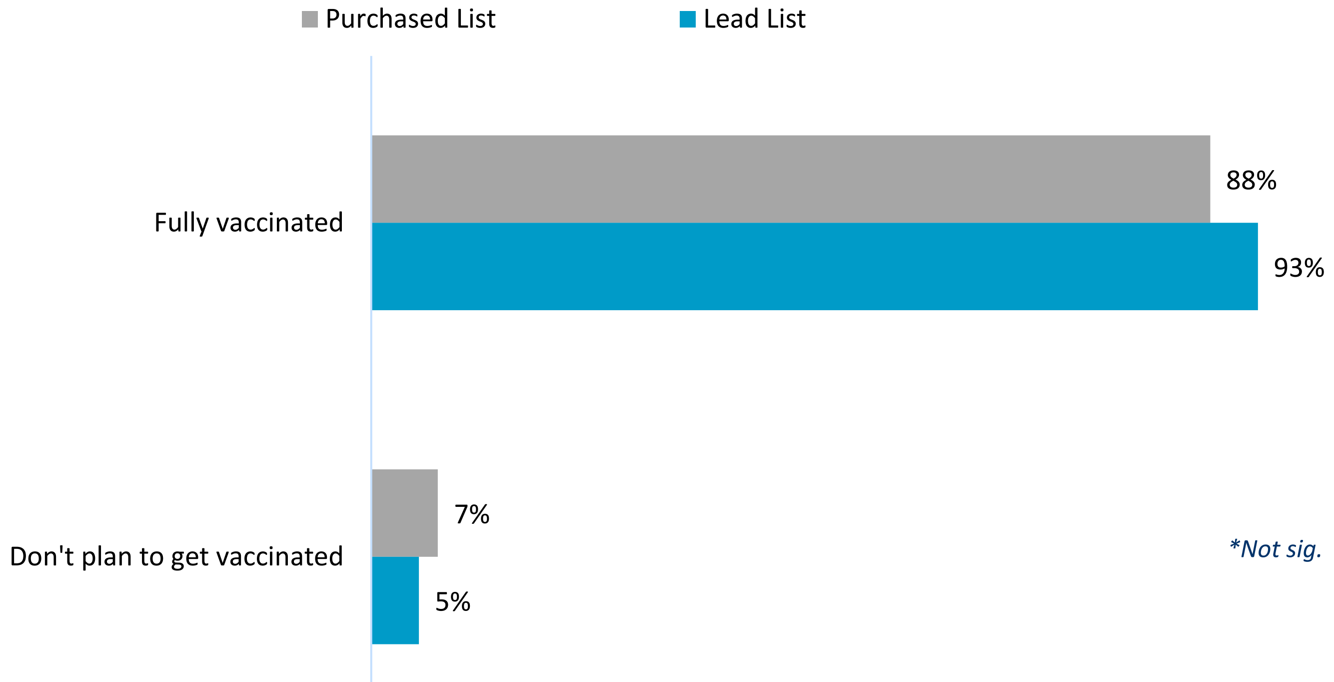
TESTED POSITIVE FOR COVID-19

Among the households who participated in the survey, only a small fraction of respondents had tested positive for COVID-19 since the beginning of the pandemic.



RESPONDENT'S COVID-19 VACCINATION STATUS

Among those who participated in the survey, nearly all of the Lead List (93%) and the majority of the Purchased List (88%) were fully vaccinated against the COVID-19 virus.



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WHY RESPONDENTS ARE NOT GETTING VACCINATED

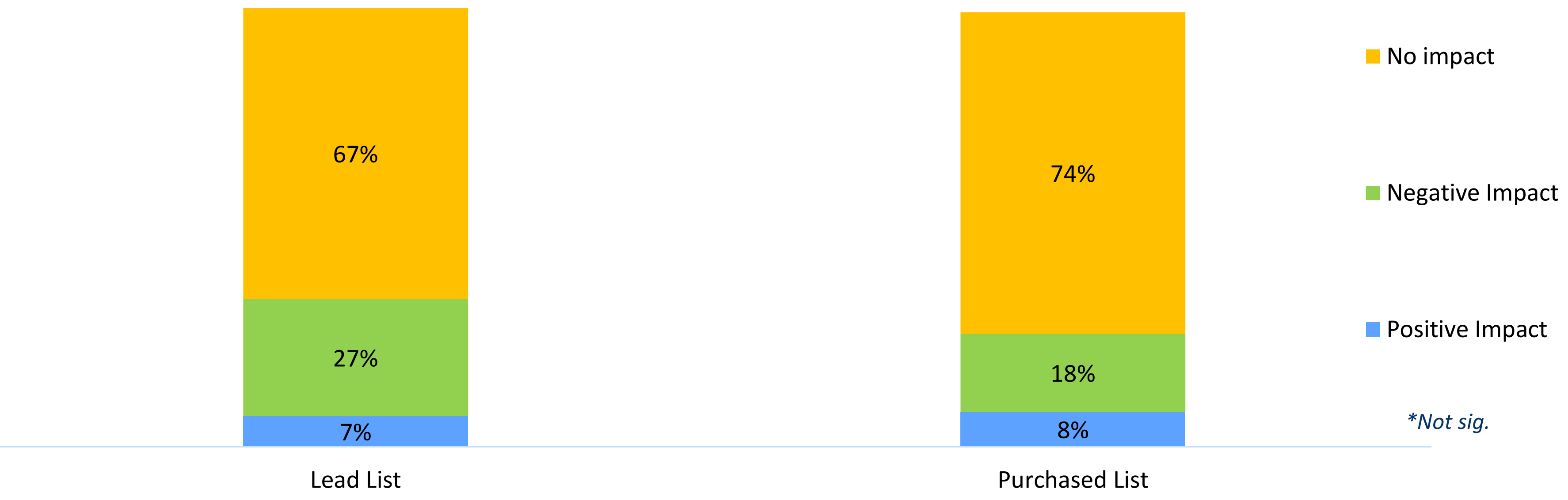
Those who had not been fully vaccinated or had no plans to get fully vaccinated provided the reason they had no plans to get vaccinated. Of the small proportion of survey respondents this question applied to, the most frequently provided response was because they don’t trust an experimental vaccine. Others mentioned that the vaccine hasn’t been tested long enough to know the potential side effects.

Why Survey Respondents Are Not Getting Vaccinated

Comment	Count	Percent
Don't Trust Experimental Vaccine	13	25%
Not Tested Long Enough To Know Side Effects	10	19%
Too Many Side Effects	6	11%
Already Had COVID-19	5	9%
Don't Trust The Government	4	8%
I Have Had Reactions To Vaccines In The Past	4	8%
I Don't Believe in Vaccines	2	4%
Politically Motivated	2	4%
Allergies, Advised Not To	1	2%
Don't Need It	1	2%
I Don't Fit In Any Risk Group	1	2%
I Have An Autoimmune Disease	1	2%
My Body, My Choice	1	2%
No Proof It Offers Immunity	1	2%
Systematic Racism	1	2%
Total	**53**	**100%**

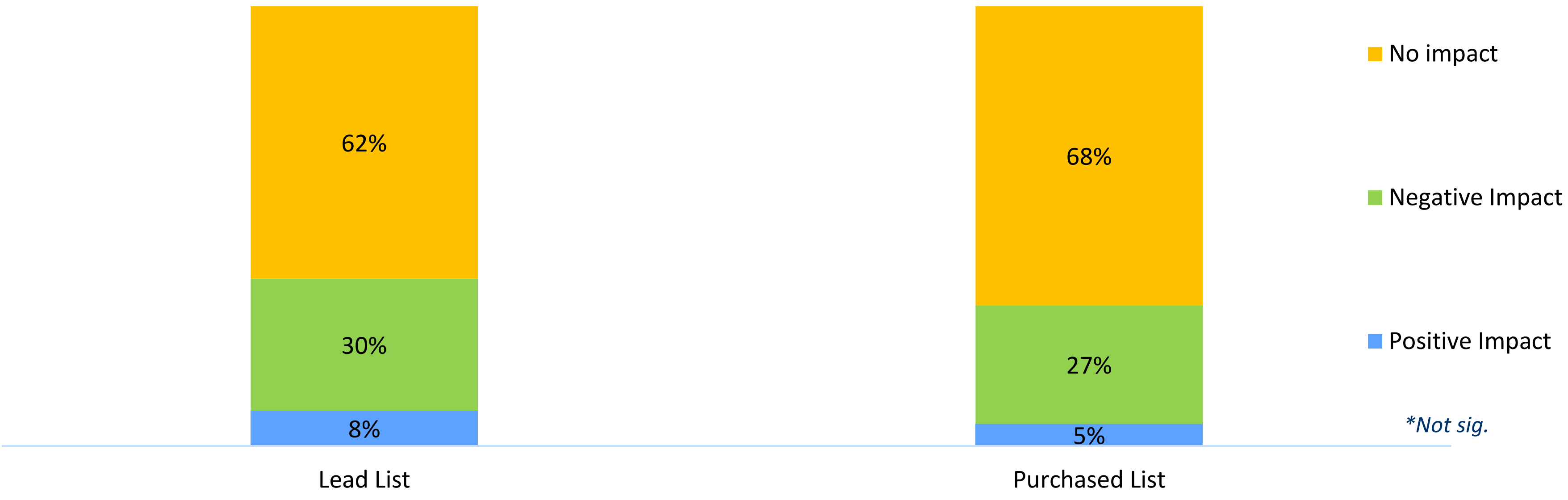
FEEL COVID-19 HAD AN IMPACT ON PHYSICAL HEALTH

Survey respondents, for the most part, indicated that the COVID-19 pandemic had no impact on their physical health. Two thirds of Leads and three-fourths of households from the Purchased Lists said that the pandemic had no impact on their physical health. Those that said that the pandemic *did* impact their physical health said it impacted it in a negative way.



FEEL COVID-19 HAD AN IMPACT ON MENTAL HEALTH

Survey respondents indicated that the COVID-19 pandemic had no impact on their mental or emotional health. Sixty-two percent of Leads and two-thirds of households from the Purchased Lists said that the pandemic had no impact on their mental health. Those that said that the pandemic *did* impact their mental health said it impacted it in a negative way.



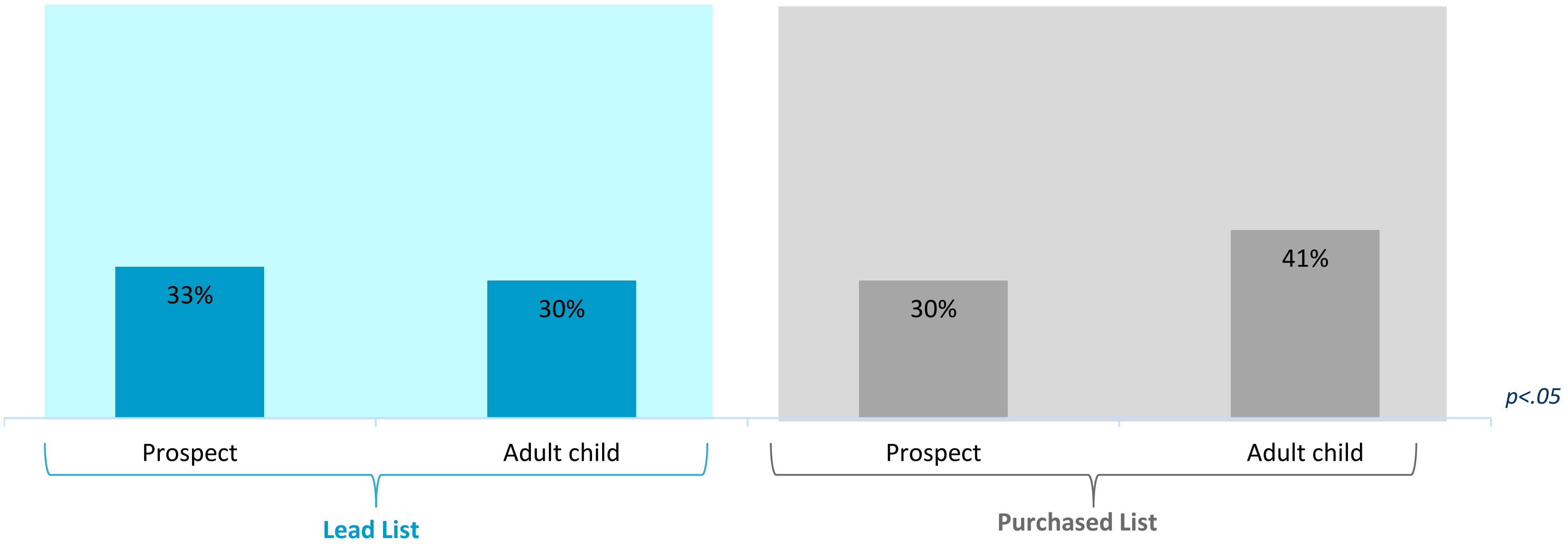
SHOULD BE REQUIRED TO GET COVID-19 VACCINE

We asked survey respondents their opinion of COVID-19 vaccine requirements for various individuals that a person would encounter at a retirement community. A majority of prospects across all levels of care indicated that all types of individuals that would be encountered at a retirement community should be required to get a COVID-19 vaccine. Fifty-eight percent or more indicated that residents, staff, visitors, and third-party vendors should all be required to be fully vaccinated before entering a retirement community. The lowest percent who said that vaccines should be mandatory was 58% among prospects of Active Adult communities who indicated that visitors should be required to be vaccinated prior to visiting.

	Active Adult	Independent Living	Assisted Living	Memory Care
Residents	78%	87%	85%	75%
Administrative staff	79%	84%	89%	80%
Non-administrative staff	75%	84%	89%	75%
Visitors	58%	66%	74%	65%
Third-party vendors	76%	83%	83%	70%

POSTPONED VISITING A COMMUNITY DUE TO COVID-19

One out of three prospects and 30% of adult children from the Lead List postponed visiting a retirement community due to the COVID-19 pandemic. Slightly more adult children from the Purchased List (41%) have postponed a visit to a retirement community because of concerns over the virus.



LEAD'S COMFORT LEVEL

While they seem to want everyone they might encounter at a retirement community to be vaccinated, prospects from the Lead List are currently very comfortable interacting with communities in a variety of ways. The table below shows the proportion of prospects from the Lead List, separated by the level of care they are most interested in, who indicated they are "very comfortable" doing the various activities at a community. The lowest proportion on the table below—53% among assisted living prospects who indicated they are very comfortable attending an indoor event—still represents a majority of respondents who are very comfortable doing the listed activity.

Lead List Comfort Level with Visiting with Communities (Percent Who Are Very Comfortable)

	Active Adult	Independent Living	Assisted Living	Memory Care
Visiting a family member/friend at the community in their personal residence	73%	72%	76%	69%
Having a meal in one of the dining venues at the community	63%	57%	56%	62%
Attending an indoor event at the community	63%	54%	53%	62%
Going on a tour of the community	67%	63%	67%	69%
Attending an outdoor event at the community	75%	76%	73%	69%

PURCHASED LIST'S COMFORT LEVEL

Prospects from the Purchased List were slightly less comfortable engaging with communities since the COVID-19 pandemic, especially among prospects of assisted living or memory care communities. Overall, prospects from the Purchased List seem most comfortable visiting a family member or friend in their personal residence or attending an outdoor event at the community.

Purchased List Comfort Level with Visiting with Communities (Percent Who Are Very Comfortable)

	Active Adult	Independent Living	Assisted Living	Memory Care
Visiting a family member/friend at the community in their personal residence	67%	59%	58%	60%
Having a meal in one of the dining venues at the community	51%	59%	**36%**	**38%**
Attending an indoor event at the community	**49%**	**44%**	**36%**	**32%**
Going on a tour of the community	61%	53%	**44%**	**41%**
Attending an outdoor event at the community	69%	62%	62%	57%

What can communities do to help prospects feel safer visiting?

HOW TO HELP PROSPECTS FEEL MORE COMFORTABLE VISITING - AA

We asked survey respondents what communities can do to help prospects feel more comfortable when visiting the communities. Their open-ended responses, separated by the level of care they were most interested in, are listed on the adjacent table, and on the tables on the following three pages.

The number one response across all four care levels was that a fully vaccinated community would make prospective customers more comfortable visiting the communities.

What Communities Can Do to Help Prospects Feel More Comfortable Visiting - AA

Comment	Count	Percent
Residents and staff fully vaccinated	42	37%
Published COVID-19 policies	14	12%
Wear masks	14	12%
Cleanliness	12	11%
Social distancing	7	6%
COVID-19 free	5	4%
Visitors and vendors fully vaccinated	4	4%
Regular COVID-19 testing	3	3%
Tour of the community	3	3%
Transparency	3	3%
Follow CDC guidelines	2	2%
Friendly	2	2%
Outdoor events	2	2%
Security/Safety	1	1%
TOTAL	**114**	**100%**

HOW TO HELP PROSPECTS FEEL MORE COMFORTABLE VISITING - IL

What Communities Can Do to Help Prospects Feel More Comfortable Visiting - IL					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Residents, staff, visitors fully vaccinated	46	35%	Do not try too sell to me too hard	2	2%
Practicing COVID-19 protocols	26	20%	Safety/Security	2	2%
Published COVID-19 policies	11	8%	Transparency	2	2%
Friendly staff	8	6%	Allow a weekend trial	1	1%
Cleanliness	7	5%	Fun activities or events	1	1%
Periodic COVID testing	6	5%	Herd immunity	1	1%
Affordable/Cost efficient	5	4%	Talk to residents in the community	1	1%
Follow CDC recommendations	4	3%	COVID numbers decrease in my state	1	1%
Eradication of COVID-19	3	2%	**TOTAL**	**130**	**100%**
Keep number of COVID cases down	3	2%			

HOW TO HELP PROSPECTS FEEL MORE COMFORTABLE VISITING - AL

What Communities Can Do to Help Prospects Feel More Comfortable Visiting - AL		
Comment	**Count**	**Percent**
Fully vaccinated residents and staff	36	47%
Masks/hand sanitizer/social distancing	19	25%
Enhanced cleaning protocols	7	9%
Full disclosure of relevant COVID information/policies upon entry	4	5%
Friendly and helpful staff	2	3%
All gatherings outdoors	2	3%
Open and transparent management	2	3%
Provide a wheelchair	2	3%
Visitation appointments	1	1%
Visitors must show proof of vaccination	1	1%
Outdoor visitation seating	1	1%
Total	**77**	**100%**

HOW TO HELP PROSPECTS FEEL MORE COMFORTABLE VISITING - MC

What Communities Can Do to Help Prospects Feel More Comfortable Visiting - MC		
Comment	**Count**	**Percent**
All residents and staff are vaccinated	9	41%
Social distancing and mask wearing	4	18%
More open community, less rules	3	14%
Clear display of COVID-19 policies	2	9%
Just hope the pandemic will be over soon	2	9%
Do more to mitigate isolation	1	5%
Visitors need to wear masks	1	5%
Total	**22**	**100%**

How do we help them feel safer about moving?

MUST OCCUR BEFORE MOVING TO A RETIREMENT COMMUNITY- AA

Survey respondents were asked to describe what has to happen, or what do they need to know, before they would feel confident about moving to a retirement community. Their responses, separated by level of care, are listed on the table below, and on the tables on the following three pages.

While prospects to active adult still hope to see a fully vaccinated community as well as a community following COVID-19 protocols, prospects to a more serviced-enriched community (independent living, assisted living or memory care) are more concerned with costs and affordability rather than the COVID-19 virus—a significant change from the pattern of responses in earlier rounds of this consumer sentiment survey conducted in June/July 2020 and December 2020.

What Must Occur Before Prospects Are Comfortable Moving to an Active Adult Community

Comment	Count	Percent	Comment	Count	Percent
Residents, staff, visitors fully vaccinated	46	35%	Do not try too sell to me too hard	2	2%
Practicing COVID-19 protocols	26	20%	Safety/Security	2	2%
Published COVID-19 policies	11	8%	Transparency	2	2%
Friendly staff	8	6%	Allow a weekend trial	1	1%
Cleanliness	7	5%	Fun activities or events	1	1%
Periodic COVID testing	6	5%	Herd immunity	1	1%
Affordable/Cost efficient	5	4%	Talk to residents in the community	1	1%
Follow CDC recommendations	4	3%	COVID numbers decrease in my state	1	1%
Eradication of COVID-19	3	2%	**TOTAL**	**130**	**100%**
Keep number of COVID cases down	3	2%			

MUST OCCUR BEFORE MOVING TO A RETIREMENT COMMUNITY- IL

What Must Occur Before Prospects Are Comfortable Moving to an Independent Living Community					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Cost/Affordability	52	24%	Plenty of activities and programming	7	3%
Change in my health	35	16%	Cleanliness	6	3%
Residents and staff full vaccinated	19	9%	CCRC	3	1%
COVID is under control	15	7%	Eradication of COVID	3	1%
Published COVID-19 policies	14	6%	Diverse community	2	1%
Provide safety/security	11	5%	Good atmosphere of the community	2	1%
Ability to sell my home	9	4%	Available services	1	0.5%
Change in my spouse's health	8	4%	Community follows CDC guidelines	1	0.5%
No longer able to maintain home	8	4%	Insurance coverage	1	0.5%
Preferred unit size available	8	4%	Medical services nearby	1	0.5%
Good rapport between staff and residents	7	3%	Single-family homes available	1	0.5%
No quarantine requirements	7	3%	**TOTAL**	**221**	**100%**

MUST OCCUR BEFORE MOVING TO A RETIREMENT COMMUNITY- AL

What Must Occur Before Prospects Are Comfortable Moving to an Assisted Living Community

Comment	Count	Percent	Comment	Count	Percent
Affordability of community	27	18%	Must offer good activities/services	3	2%
If I/my parent can no longer take care of myself/themselves	19	13%	Prefer a doctor to be on campus	3	2%
Residents and staff fully vaccinated	15	10%	Comfortable community	2	1%
Published COVID-19 policies	13	9%	Community is financially stable	2	1%
Convincing my parent it's time to move	12	8%	Must have good reviews	2	1%
No COVID-19 cases in the community	11	7%	Want recommendation from doctor	2	1%
Visitation allowed	7	5%	If I/my parent lost my/their spouse	2	1%
Acceptance/approval from family	6	4%	Reputation of community	2	1%
Well-trained staff	6	4%	Want a continuum of care	2	1%
Visit/tour communities	5	3%	Resident satisfaction scores are good	1	1%
Safety/security	4	3%	**TOTAL**	**150**	**100%**
Need to get my house ready to sell	4	3%			

MUST OCCUR BEFORE MOVING TO A RETIREMENT COMMUNITY- MC

What Must Occur Before Prospects Are Comfortable Moving to a Memory Care Community		
Comment	**Count**	**Percent**
Cost/affordability	6	17%
If I/my parent needs it	6	17%
Once COVID is more under control	6	17%
Difficulty with activities of daily living	5	14%
Great care	3	8%
Cleanliness	2	6%
Unable to maintain my home	2	6%
Accessibility to loved ones	1	3%
Financial assistance available	1	3%
Fully vaccinated staff and residents	1	3%
Good quality	1	3%
If I/my parent got sick	1	3%
Safety	1	3%
TOTAL	**36**	**100%**

How do we convince them our communities are safe and healthy?

MUST DO TO BE CONSIDERED SAFE AND HEALTHY - AA

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

What Active Adult Communities Must Do to Be Considered Safe and Healthy					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
24/7 Security	24	17%	Good food	4	3%
Gated community	17	12%	Low COVID-19 infection rates	4	3%
Cleanliness	15	10%	Transparency	4	3%
Published COVID-19 policies	12	8%	Published protocols for emergencies	2	1%
Friendly, available staff	10	7%	Regular check ins	2	1%
Plenty of activities and programming	8	6%	Transportation within the community	2	1%
Affordability	7	5%	Clear understanding of HOA	1	1%
Medical care nearby	7	5%	Follows CDC safety guidelines	1	1%
Residents and staff fully vaccinated	7	5%	Good management	1	1%
Visitors allowed	5	3%	Nearby services and amenities	1	1%
Well maintained community	5	3%	Onsite nurse	1	1%
Diverse community	4	3%	**TOTAL**	**144**	**100%**

MUST DO TO BE CONSIDERED SAFE AND HEALTHY - IL

What Independent Living Communities Must Do to Be Considered Safe and Healthy					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Affordability/Cost	45	27%	Good location	4	2%
Control of COVID-19	25	15%	Multiple levels of care offered	4	2%
Safety measures in place to keep clean, and disinfected	19	11%	Good ratings from residents who live there	3	2%
Staff and residents are vaccinated	15	9%	Accreditation/license	2	1%
Right size accommodations	10	6%	Comfortable with staff	2	1%
Activities offered	9	5%	COVID-19 vaccine not required	2	1%
A vibrant/quality community	6	4%	Medical services nearby	1	1%
Amenities offered	6	4%	No smoking allowed	1	1%
Good meals/Quality of food	6	4%	Secure building	1	1%
Offer a sense of freedom/privacy	5	3%	**TOTAL**	**166**	**100%**

MUST DO TO BE CONSIDERED SAFE AND HEALTHY - AL

What Assisted Living Communities Must Do to Be Considered Safe and Healthy					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Provide a sense of safety and security	29	20%	Consult with friends/family/doctors	5	3%
Published current COVID-19 protocols	16	11%	Cost/affordability	4	3%
All staff, residents, visitors vaccinated	15	10%	Community has good reviews	4	3%
Cleanliness	11	8%	Background checks	2	1%
Fully staffed	9	6%	CCRC	2	1%
Tour of the community	8	6%	Regular communication with family	2	1%
Written/published health guidelines	8	6%	Accredited community	1	1%
Active staff with the residents	7	5%	Distance to hospital	1	1%
Care 24/7	7	5%	Community has resident council	1	1%
Visitors allowed	7	5%	**TOTAL**	**126**	**100%**
Masks/hand sanitizer/social distancing	6	4%			

MUST DO TO BE CONSIDERED SAFE AND HEALTHY - MC

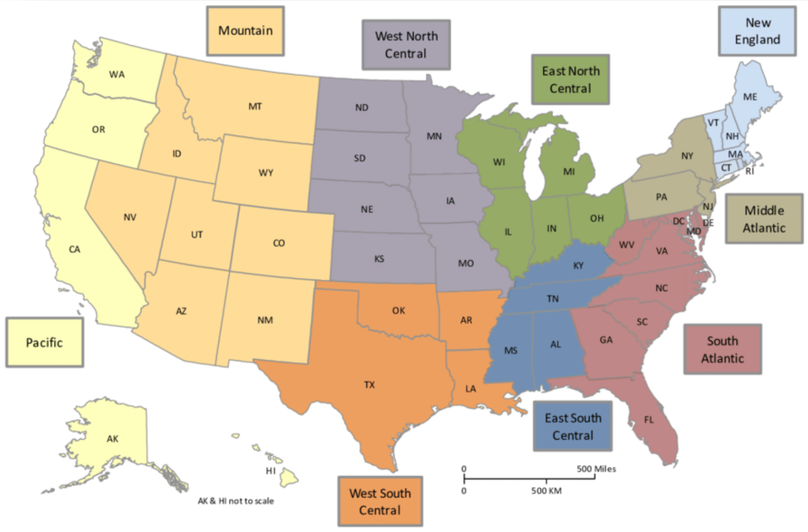
What Memory Care Communities Must Do to Be Considered Safe and Healthy					
Comment	**Count**	**Percent**	**Comment**	**Count**	**Percent**
Community with good reviews	4	18%	Good quality	1	5%
24/7 care	2	9%	Kind staff	1	5%
Abides by state regulations	2	9%	Once the pandemic has passed	1	5%
Adequate staff	2	9%	Required vaccines	1	5%
Following COVID protocol	2	9%	Safety of residents	1	5%
Affordable	1	5%	Safety record	1	5%
Community with good reviews	1	5%	Video feed for adult children to view	1	5%
Frequent, open communication	1	5%	**TOTAL**	**22**	**100%**

Appendix
Analyses of Survey Data By Census Region

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

Location of Participant's Primary Residence by List Source

	Lead List		Purchased List	
Census Region	Count	Percent	Count	Percent
East North Central	56	19%	277	12%
East South Central	1	0%	32	1%
Middle Atlantic	59	20%	489	21%
Mountain	63	21%	197	9%
New England	7	2%	55	2%
Pacific	42	14%	428	19%
South Atlantic	34	11%	459	20%
West North Central	6	2%	91	4%
West South Central	34	11%	267	12%
Refused	1	0%	4	0%
Total	303	100%	2,299	100%



Appendix
Analyses of Survey Data By Census Region

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

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
Currently Shopping for a Community (Within the Past Year)*												
Yes	70%	35%	73%	32%	81%	34%	88%	62%	82%	30%	97%	39%
No	30%	65%	27%	68%	19%	66%	12%	68%	18%	70%	3%	61%
For Whom They Are Shopping *												
Themselves	85%	43%	67%	47%	82%	51%	70%	55%	79%	55%	73%	48%
Parent, Other Relative or Friend	15%	57%	33%	53%	18%	49%	28%	45%	21%	45%	21%	52%
Other	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	6%	0%
Interest in Level of Care												
Active Adult	23%	39%	23%	46%	23%	45%	24%	42%	14%	41%	21%	26%
Independent Living	59%	35%	51%	28%	61%	31%	49%	33%	50%	37%	42%	46%
Assisted Living	18%	21%	16%	20%	12%	21%	19%	20%	29%	16%	27%	23%
Memory Care	0%	5%	9%	6%	4%	3%	8%	4%	7%	7%	9%	5%

Appendix

Analyses of Survey Data By Census Region

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	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
Age Group of Prospective Residents *												
<70	9%	43%	22%	38%	25%	30%	17%	33%	18%	36%	15%	43%
70 to 74	25%	1%	15%	0%	14%	0%	24%	0%	9%	0%	21%	1%
75 to 79	29%	36%	25%	39%	22%	44%	21%	40%	35%	40%	24%	30%
80 to 84	14%	14%	22%	17%	21%	19%	24%	20%	21%	19%	24%	19%
85+	23%	6%	15%	6%	18%	6%	14%	7%	18%	4%	18%	7%
Gender of Prospective Residents												
Female	63%	54%	76%	49%	59%	45%	67%	48%	59%	51%	59%	54%
Male	37%	46%	24%	51%	41%	55%	33%	52%	41%	49%	41%	46%
Marital Status of Prospective Residents												
Married/domestic partnership	32%	71%	41%	69%	48%	74%	57%	67%	56%	69%	32%	71%
Widowed	27%	14%	31%	14%	24%	16%	31%	12%	24%	14%	32%	17%
Divorced	21%	9%	16%	9%	24%	7%	7%	13%	15%	12%	24%	8%
Separated	0%	0%	2%	1%	0%	2%	0%	1%	0%	1%	3%	1%
Single, never married	20%	6%	10%	7%	5%	2%	5%	7%	6%	5%	9%	3%
Health Compared to Others The Same Age as Prospective Residents												
Poor	4%	0%	2%	2%	3%	1%	0%	4%	3%	2%	9%	2%
Fair	11%	11%	16%	13%	21%	13%	13%	13%	24%	14%	12%	11%
Good	39%	37%	32%	39%	35%	34%	21%	34%	32%	37%	35%	29%
Very good	25%	37%	39%	34%	21%	35%	38%	31%	29%	33%	26%	36%
Excellent	21%	15%	12%	11%	21%	19%	28%	18%	12%	15%	18%	22%

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Analyses of Survey Data By Census Region

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	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
Prospective Residents Limited by an Impairment or Health Problem												
Yes	36%	19%	40%	22%	41%	21%	28%	26%	41%	24%	47%	22%
No	64%	81%	60%	78%	59%	79%	72%	74%	59%	76%	53%	78%
Total Household Income of Prospective Residents *												
Less than $10,000	0%	0%	4%	1%	2%	0%	7%	0%	0%	0%	3%	2%
$10,000 to $14,999	4%	0%	2%	0%	6%	2%	3%	0%	0%	0%	0%	1%
$15,000 to $24,999	7%	1%	6%	1%	13%	1%	0%	0%	3%	2%	3%	2%
$25,000 to $34,999	9%	7%	6%	5%	6%	7%	3%	4%	3%	5%	3%	7%
$35,000 to $49,999	27%	8%	20%	6%	11%	8%	3%	10%	3%	10%	30%	8%
$50,000 to $74,999	20%	19%	16%	14%	13%	19%	7%	15%	34%	21%	17%	18%
$75,000 to $99,999	11%	15%	18%	12%	15%	16%	28%	13%	10%	12%	17%	13%
$100,000 to $149,999	13%	30%	8%	33%	19%	29%	21%	30%	21%	24%	13%	30%
$150,000 to $199,999	4%	11%	8%	18%	4%	10%	21%	17%	14%	16%	3%	11%
$200,000 or more	4%	9%	14%	11%	11%	7%	7%	11%	10%	9%	10%	9%

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	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
Home Ownership Method of Prospective Residents *												
Own	78%	92%	74%	85%	79%	86%	85%	87%	76%	87%	76%	89%
Rent	22%	7%	22%	12%	16%	12%	10%	12%	18%	10%	18%	9%
Occupy without paying	0%	1%	3%	2%	5%	3%	5%	1%	6%	3%	6%	2%
Current Market Value of Home of Prospective Residents * *												
Less than $150,000	13%	15%	11%	7%	5%	5%	4%	4%	0%	10%	14%	9%
$150,000 to $199,999	16%	11%	9%	5%	3%	2%	0%	2%	0%	7%	5%	12%
$200,000 to $249,999	11%	13%	9%	7%	10%	7%	0%	1%	14%	11%	24%	13%
$250,000 to $299,999	18%	17%	6%	7%	3%	8%	0%	3%	5%	8%	14%	14%
$300,000 to $349,999	8%	14%	14%	13%	23%	7%	0%	4%	10%	12%	24%	13%
$350,000 to $399,999	5%	9%	11%	8%	8%	11%	4%	4%	14%	12%	5%	13%
$400,000 to $499,999	13%	7%	11%	13%	15%	19%	7%	8%	14%	16%	10%	6%
$500,000 to $749,999	13%	9%	20%	26%	25%	25%	26%	23%	19%	16%	5%	11%
$750,000 to $999,999	3%	2%	6%	9%	8%	7%	15%	20%	10%	5%	0%	7%
$1,000,000 or more	0%	1%	3%	7%	3%	8%	44%	30%	14%	4%	0%	3%
Awareness of Retirement Communities (Active Adult)												
Yes	75%	65%	70%	66%	84%	70%	88%	65%	91%	72%	79%	67%
No	25%	35%	30%	34%	16%	30%	12%	35%	9%	28%	21%	33%
Awareness of Retirement Communities (IL, AL, or MC) *												
Yes	98%	77%	86%	73%	92%	75%	100%	75%	97%	73%	94%	73%
No	2%	23%	14%	27%	8%	25%	0%	25%	3%	27%	6%	27%

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	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
Appeal of Active Adult Communities *												
Appealing	14%	12%	25%	16%	25%	18%	19%	12%	26%	15%	29%	21%
Very appealing	36%	34%	46%	31%	27%	34%	38%	30%	24%	34%	29%	31%
Neither appealing nor unappealing	36%	36%	17%	33%	30%	28%	38%	32%	38%	36%	24%	32%
Unappealing	11%	12%	8%	10%	14%	8%	5%	14%	3%	7%	12%	8%
Very unappealing	4%	6%	3%	10%	3%	12%	0%	12%	9%	8%	6%	7%
Prospects Who Visited an Active Adult Community*												
Ever	48%	30%	53%	36%	56%	38%	83%	35%	56%	39%	56%	31%
Since COVID-19 Pandemic	52%	70%	47%	64%	44%	62%	17%	65%	44%	61%	44%	69%
Appeal of Independent Living Communities												
Appealing	27%	9%	22%	10%	30%	9%	12%	8%	12%	10%	32%	17%
Very appealing	38%	31%	47%	27%	38%	27%	45%	28%	32%	30%	32%	30%
Neither appealing nor unappealing	27%	41%	24%	38%	21%	38%	40%	35%	32%	40%	21%	37%
Unappealing	7%	9%	3%	15%	11%	11%	2%	15%	18%	12%	3%	7%
Very unappealing	2%	10%	3%	10%	0%	15%	0%	14%	6%	8%	12%	9%
Prospects Who Visited an Independent Living Community												
Ever	86%	34%	69%	31%	78%	32%	86%	36%	59%	33%	68%	32%
Since COVID-19 Pandemic	14%	66%	31%	69%	22%	68%	14%	64%	41%	67%	32%	68%

Appendix

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

Analyses of Survey Data By Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
Appeal of Assisted Living Communities *												
Appealing	16%	7%	19%	8%	8%	5%	14%	5%	26%	8%	26%	13%
Very appealing	30%	25%	25%	18%	27%	20%	40%	23%	29%	20%	15%	18%
Neither appealing nor unappealing	32%	43%	41%	40%	48%	35%	31%	35%	35%	44%	38%	46%
Unappealing	16%	16%	14%	19%	11%	18%	10%	19%	6%	16%	12%	13%
Very unappealing	5%	10%	2%	15%	6%	22%	5%	18%	3%	12%	9%	10%
Adult Children Who Visited an Assisted Living Community												
Ever	70%	40%	64%	33%	59%	32%	79%	37%	71%	36%	74%	37%
Since COVID-19 Pandemic	30%	60%	36%	67%	41%	68%	21%	63%	29%	64%	26%	63%
Appeal of Memory Care Communities *												
Appealing	7%	7%	15%	4%	3%	3%	14%	6%	12%	7%	18%	9%
Very appealing	23%	17%	7%	14%	19%	13%	17%	18%	18%	13%	6%	17%
Neither appealing nor unappealing	46%	44%	61%	47%	59%	45%	43%	42%	41%	52%	44%	44%
Unappealing	14%	19%	15%	17%	10%	17%	19%	12%	24%	12%	21%	17%
Very unappealing	9%	13%	2%	17%	10%	22%	7%	23%	6%	16%	12%	13%
Adult Children Who Visited a Memory Care Community												
Ever	45%	21%	37%	10%	40%	16%	50%	15%	56%	14%	38%	18%
Since COVID-19 Pandemic	55%	79%	63%	90%	60%	84%	50%	85%	44%	86%	62%	82%

Appendix
Analyses of Survey Data By Census Region

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

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
Retirement communities are safer than staying at home												
Strongly disagree	4%	2%	3%	4%	0%	6%	2%	6%	9%	4%	6%	3%
Disagree	16%	9%	15%	10%	14%	11%	17%	12%	9%	10%	15%	11%
Neither agree nor disagree	34%	42%	41%	42%	46%	44%	52%	43%	29%	41%	26%	38%
Agree	38%	38%	27%	35%	22%	35%	14%	32%	35%	35%	24%	33%
Strongly agree	9%	9%	14%	9%	17%	5%	14%	8%	18%	9%	29%	15%
Retirement communities allow one to feel less isolated than they would staying at home												
Strongly disagree	2%	1%	3%	2%	0%	4%	0%	5%	3%	4%	3%	1%
Disagree	4%	8%	3%	7%	3%	8%	7%	8%	6%	7%	6%	8%
Neither agree nor disagree	18%	17%	14%	22%	25%	25%	12%	27%	26%	21%	15%	22%
Agree	50%	56%	61%	48%	43%	50%	52%	45%	50%	51%	29%	45%
Strongly agree	27%	18%	19%	21%	29%	14%	29%	15%	15%	18%	47%	23%

Appendix

Analyses of Survey Data By Census Region

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

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
The COVID-19 outbreak has made staying at home a more appealing option than moving to a retirement community												
Strongly disagree	4%	3%	2%	3%	5%	4%	12%	3%	0%	4%	6%	3%
Disagree	13%	6%	12%	10%	21%	9%	5%	7%	15%	8%	15%	9%
Neither agree nor disagree	29%	26%	42%	27%	30%	31%	36%	26%	44%	28%	41%	32%
Agree	32%	36%	27%	34%	25%	32%	43%	37%	18%	34%	21%	34%
Strongly agree	23%	29%	17%	26%	19%	23%	5%	26%	24%	26%	18%	22%
The COVID-19 outbreak has made retirement communities a more appealing option than staying at home *												
Strongly disagree	13%	19%	8%	21%	11%	19%	12%	25%	12%	21%	12%	12%
Disagree	36%	38%	31%	31%	30%	37%	43%	34%	21%	32%	18%	34%
Neither agree nor disagree	43%	27%	44%	32%	41%	32%	40%	32%	59%	32%	50%	36%
Agree	5%	12%	7%	12%	10%	9%	5%	7%	6%	11%	15%	12%
Strongly agree	4%	4%	10%	4%	8%	3%	0%	2%	3%	4%	6%	7%

Appendix

Analyses of Survey Data By Census Region

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

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
Impact of COVID-19 and Moving to a Retirement Community												
More likely to consider	8%	19%	10%	11%	6%	3%	3%	11%	7%	10%	6%	18%
No impact	58%	59%	69%	62%	70%	73%	78%	62%	67%	65%	72%	53%
Less likely to consider	34%	22%	21%	27%	24%	24%	19%	27%	26%	25%	22%	29%
Tested Positive for COVID-19												
Yes	8%	13%	2%	8%	8%	11%	6%	8%	7%	9%	10%	17%
No	92%	87%	98%	92%	92%	89%	94%	92%	93%	91%	90%	83%
COVID-19 Vaccination Status												
I am fully vaccinated	97%	87%	95%	92%	90%	92%	92%	92%	96%	86%	91%	82%
I have received one dose and plan to get the second dose	0%	1%	2%	1%	0%	0%	0%	2%	4%	2%	3%	3%
I have received one dose/no plans to get the second dose	0%	0%	0%	1%	2%	0%	0%	0%	0%	1%	0%	0%
I have not received a vaccine but plan to	0%	6%	0%	0%	0%	0%	0%	2%	0%	5%	3%	5%
I do not plan to get vaccinated against COVID-19	3%	5%	2%	7%	8%	8%	8%	4%	0%	7%	3%	10%

Appendix
Analyses of Survey Data By Census Region

	East North Central	Middle Atlantic	Mountain	Pacific	South Atlantic	West South Central
Likelihood of Moving to an ACTIVE ADULT Community – Today	**n=45**	**n=81**	**n=42**	**n=66**	**n=60**	**n=34**
Very likely	20%	36%	48%	18%	37%	53%
Likely	29%	33%	29%	32%	30%	24%
Unsure	49%	31%	21%	45%	30%	21%
Unlikely	2%	0%	2%	2%	3%	3%
Very unlikely	0%	0%	0%	3%	0%	0%
Likelihood of Moving to an INDEPENDENT LIVING Community – Today	**n=57**	**n=65**	**n=51**	**n=62**	**n=63**	**n=61**
Very likely	23%	26%	35%	24%	19%	31%
Likely	44%	31%	35%	37%	38%	36%
Unsure	33%	37%	25%	35%	41%	30%
Unlikely	0%	6%	4%	3%	2%	2%
Very unlikely	0%	0%	0%	0%	0%	2%

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

Appendix
Analyses of Survey Data By Census Region

	East North Central	Middle Atlantic	Mountain	Pacific	South Atlantic	West South Central
Likelihood of Moving to an ASSISTED LIVING Community – Today*	**n=25**	**n=36**	**n=19**	**n=33**	**n=28**	**n=32**
Very likely	28%	22%	42%	24%	29%	34%
Likely	40%	39%	32%	45%	39%	25%
Unsure	32%	31%	16%	21%	29%	38%
Unlikely	0%	6%	5%	0%	4%	3%
Very unlikely	0%	3%	5%	9%	0%	0%
Likelihood of Moving to a MEMORY CARE Community – Today	**n=4**	**n=9**	**n=4**	**n=8**	**n=9**	**n=7**
Very likely	0%	44%	50%	50%	44%	57%
Likely	25%	22%	25%	38%	44%	29%
Unsure	50%	33%	25%	13%	11%	0%
Unlikely	25%	0%	0%	0%	0%	0%
Very unlikely	0%	0%	0%	0%	0%	14%

** p<.05*

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

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

Appendix
Analyses of Survey Data By Census Region

	East North Central	Middle Atlantic	Mountain	Pacific	South Atlantic	West South Central
Should Be Required to get Vaccine at ACTIVE ADULT Communities	**n=45**	**n=81**	**n=42**	**n=66**	**n=60**	**n=34**
Residents	78%	74%	67%	80%	67%	65%
Administrative Staff*	80%	83%	76%	80%	65%	68%
Non-Administrative Staff	62%	62%	55%	68%	57%	56%
Visitors	62%	62%	55%	68%	57%	56%
Third-Party Vendors*	76%	79%	67%	79%	68%	74%
Should Be Required to get Vaccine at INDEPENDENT LIVING Communities	**n=57**	**n=65**	**n=51**	**n=62**	**n=63**	**n=61**
Residents*	75%	86%	88%	90%	86%	70%
Administrative Staff*	79%	89%	90%	90%	89%	77%
Non-Administrative Staff	58%	63%	71%	77%	76%	56%
Visitors	58%	63%	71%	77%	76%	56%
Third-Party Vendors*	74%	91%	84%	89%	86%	72%

** p<.05*

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

Appendix
Analyses of Survey Data By Census Region

	East North Central	Middle Atlantic	Mountain	Pacific	South Atlantic	West South Central
Should Be Required to get Vaccine at ASSISTED LIVING Communities	**n=25**	**n=36**	**n=19**	**n=33**	**n=28**	**n=32**
Residents	96%	83%	84%	85%	86%	81%
Administrative Staff	100%	92%	89%	85%	79%	88%
Non-Administrative Staff	88%	72%	63%	76%	75%	69%
Visitors	88%	72%	63%	76%	75%	69%
Third-Party Vendors	96%	83%	74%	82%	82%	81%
Should Be Required to get Vaccine at MEMORY CARE Communities	**n=4**	**n=9**	**n=4**	**n=8**	**n=9**	**n=7**
Residents	25%	89%	100%	75%	56%	86%
Administrative Staff	25%	89%	100%	88%	67%	100%
Non-Administrative Staff	25%	78%	75%	75%	56%	71%
Visitors	25%	78%	75%	75%	56%	71%
Third-Party Vendors	25%	78%	75%	88%	56%	100%

* *p<.05*

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

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Appendix
Analyses of Survey Data By Census Region

	East North Central		Middle Atlantic		Mountain		Pacific		South Atlantic		West South Central	
	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL	LL	PL
	n=56	n=277	n=59	n=489	n=63	n=197	n=42	n=428	n=34	n=459	n=34	n=267
COVID-19 Had An Impact on Physical Health												
No impact	77%	74%	67%	73%	57%	78%	49%	70%	65%	78%	71%	74%
Positive	5%	7%	3%	9%	10%	7%	5%	9%	9%	6%	3%	9%
Negative	18%	18%	29%	18%	33%	15%	46%	21%	26%	16%	26%	17%
COVID-19 Had An Impact on Mental Health												
No impact	64%	64%	66%	70%	57%	74%	62%	64%	67%	71%	53%	69%
Positive	4%	4%	5%	4%	13%	4%	0%	7%	6%	4%	6%	6%
Negative	32%	32%	29%	26%	30%	23%	38%	29%	27%	25%	41%	24%
Postponed Visiting a Community Due to COVID-19												
Yes	32%	40%	29%	40%	26%	29%	36%	36%	33%	32%	44%	36%
No	68%	60%	71%	60%	74%	71%	64%	64%	67%	68%	56%	64%

Appendix
Analyses of Survey Data By Census Region

	East North Central n=267	Middle Atlantic n=369	Mountain n=240	Pacific n=314	South Atlantic n=293	West South Central n=257
Current Stage of Moving to a Community – (Multiple Responses Allowed)						
Thinking about it	31%	31%	23%	31%	32%	32%
Looked at information about communities, planning	22%	22%	20%	19%	22%	20%
Contacted several communities online	9%	10%	14%	11%	12%	7%
Talked with someone at one or more communities about moving	13%	14%	14%	13%	9%	14%
Visited one or more communities	16%	15%	17%	15%	12%	13%
Selected a community and have begun to plan for the move	3%	4%	4%	4%	4%	4%
House up for sale	1%	1%	0%	0%	1%	1%
House sold with pending move out date	1%	0%	0%	1%	1%	2%
None of these	3%	3%	7%	6%	6%	7%

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

Appendix
Analyses of Survey Data By Census Region

	East North Central	Middle Atlantic	Mountain	Pacific	South Atlantic	West South Central
What Respondents are Very Comfortable with at an ACTIVE ADULT Community	**n=45**	**n=81**	**n=42**	**n=66**	**n=60**	**n=34**
Visiting a family member/friends at the community in their personal residence	69%	65%	71%	58%	67%	85%
Having a meal in one of the dining venues at the community	47%	52%	60%	45%	53%	71%
Attending an indoor event at the community	49%	43%	57%	44%	55%	62%
Going on a tour of the community	58%	62%	62%	52%	63%	74%
Attending an outdoor event at the community	67%	75%	71%	53%	73%	79%
What Respondents are Very Comfortable with at an INDEPENDENT LIVING Community	**n=57**	**n=65**	**n=51**	**n=62**	**n=63**	**n=61**
Visiting a family member/friends at the community in their personal residence*	63%	65%	73%	58%	63%	67%
Having a meal in one of the dining venues at the community	60%	57%	57%	44%	49%	51%
Attending an indoor event at the community	53%	49%	51%	48%	46%	44%
Going on a tour of the community	54%	63%	67%	56%	52%	52%
Attending an outdoor event at the community	70%	68%	71%	69%	67%	69%

** p<.05*

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

Appendix
Analyses of Survey Data By Census Region

	East North Central	Middle Atlantic	Mountain	Pacific	South Atlantic	West South Central
What Respondents are Very Comfortable with at ASSISTED LIVING	**n=25**	**n=36**	**n=19**	**n=33**	**n=28**	**n=32**
Visiting a family member/friends at the community in their personal residence	52%	50%	63%	64%	68%	72%
Having a meal in one of the dining venues at the community	20%	39%	47%	39%	43%	50%
Attending an indoor event at the community	36%	31%	42%	36%	46%	44%
Going on a tour of the community	36%	42%	58%	55%	61%	50%
Attending an outdoor event at the community	44%	60%	68%	70%	64%	69%
What Respondents are Very Comfortable with at MEMORY CARE	**n=4**	**n=9**	**n=4**	**n=8**	**n=9**	**n=7**
Visiting a family member/friends at the community in their personal residence	75%	67%	75%	38%	78%	71%
Having a meal in one of the dining venues at the community	25%	44%	50%	25%	67%	43%
Attending an indoor event at the community	50%	44%	50%	25%	67%	29%
Going on a tour of the community	25%	33%	100%	25%	67%	57%
Attending an outdoor event at the community	75%	56%	100%	38%	78%	57%

** p<.05*

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

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

Appendix
Analyses of Survey Data By Census Region

	East North Central n=333	Middle Atlantic n=548	Mountain n=260	Pacific n=470	South Atlantic n=493	West South Central n=301
Psychographic Profile of Prospects (Strongly Agree + Agree)						
The social opportunities of a retirement community would have a positive impact on my decision to move to a community.*	65%	64%	65%	59%	65%	68%
I am a people person – I like being around other people.	61%	59%	54%	55%	56%	64%
I like doing things my own way.	82%	82%	79%	80%	80%	82%
I spend too much time worrying about tomorrow instead of enjoying today.	21%	23%	17%	18%	19%	24%
I would rather be doing a task or hobby I enjoy than socializing with friends.	32%	30%	35%	33%	33%	34%
Being close to nature is important to me.	63%	55%	61%	63%	60%	60%
I like doing things that are new and different.	62%	56%	58%	54%	57%	59%
I like the challenge of doing something I have never done before.*	59%	53%	52%	52%	57%	57%
I have experienced a defining moment, event, or situation that has led me to think about moving from my home.	22%	22%	22%	20%	23%	25%
The transportation services of a community would have a positive impact on my decision to move there.*	56%	52%	53%	53%	50%	54%

** p<.05*

Appendix

Analyses of Survey Data By Census Region

	East North Central n=333	Middle Atlantic n=548	Mountain n=260	Pacific n=470	South Atlantic n=493	West South Central n=301
Emotions Felt Over Past Six Months (Extremely + Quite a Bit)						
Sad	7%	9%	10%	9%	7%	9%
Excited*	23%	16%	19%	12%	21%	25%
Afraid	6%	5%	4%	6%	5%	9%
Angry	6%	7%	5%	8%	8%	9%
Enthusiastic	29%	23%	27%	20%	25%	28%
Happy	49%	42%	47%	43%	49%	51%
Ashamed*	2%	3%	4%	7%	3%	5%
Proud*	29%	27%	32%	24%	35%	35%
Anxious	11%	11%	11%	16%	12%	15%
Inspired	23%	19%	21%	18%	26%	27%

** p<.05*

Appendix
Analyses of Survey Data By Census Region

	East North Central n=333	Middle Atlantic n=548	Mountain n=260	Pacific n=470	South Atlantic n=493	West South Central n=301
Preference for Making New Friends						
I want to find my own friends	35%	32%	38%	35%	34%	38%
I want the community to introduce me to people like me	15%	17%	15%	15%	16%	16%
No preference; either is fine	50%	50%	47%	50%	50%	47%
Measure of Loneliness (Always)						
Lack companionship	5%	5%	4%	4%	3%	6%
Have a lot in common with the people around you	23%	22%	19%	18%	23%	24%
Close to people	25%	26%	26%	23%	26%	30%
Left out	2%	2%	3%	3%	2%	4%
No one really knows you well	4%	4%	6%	6%	5%	6%
Isolated from others	3%	3%	6%	3%	2%	5%
There are people who really understand you	28%	28%	21%	24%	24%	26%
People are around you but not with you	4%	5%	7%	4%	4%	6%
There are people you can talk to	53%	53%	48%	53%	55%	51%
There are people you can turn to	55%	53%	53%	55%	57%	55%

** p<.05*

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