



ASHA/ProMatura Consumer Sentiment Report

SPRING 2026



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Executive Summary

Consumer Sentiment on Senior Living

The challenge is not awareness—but converting interest into action

- Consumers are increasingly familiar with senior living options, but many are still early in their decision journey.
- Even in need-driven categories, many expect to move 3+ years out—suggesting decisions are often approached gradually rather than urgently.

Decisions are emotionally complex—and unfold over time

- Moving represents more than a housing decision—it involves major life transitions related to independence, identity, and home.
- This emotional weight often leads to longer consideration periods and more reactive decision-making.

Social connection and lifestyle benefits drive strong interest

- These benefits are compelling, but may not always be enough on their own to accelerate decision-making.
- Across all segments, the strongest motivators are social connection, reduced loneliness, and relief from home responsibilities.
- However, these benefits alone are not sufficient to overcome hesitation or trigger earlier decision-making.

Consumers are financially capable—but seek clearer value

- Most prospects have meaningful home equity and expect higher costs in senior living.
- Hesitation is driven less by affordability and more by perceived value, pricing transparency, and trust.

Executive Summary

Consumer Sentiment on Senior Living

The journey is self-directed—but often pauses before deeper engagement

- Consumers primarily begin their search online, but many never progress to exploring specific communities.
- Many do not progress to sharing contact information or engaging directly with communities.

Trust plays a central role in moving from research to decision

- While consumers have access to information, many are still building confidence in cost, care quality, and the overall decision process.

AI reflects a broader pattern: awareness is high, with adoption beginning to emerge

- Awareness of AI is widespread, and a meaningful segment is already engaging—particularly for early-stage research.
- Consumers are open to using AI to explore options, while continuing to rely on human interaction for final decisions.

The opportunity is to build trust and reduce friction earlier in the journey

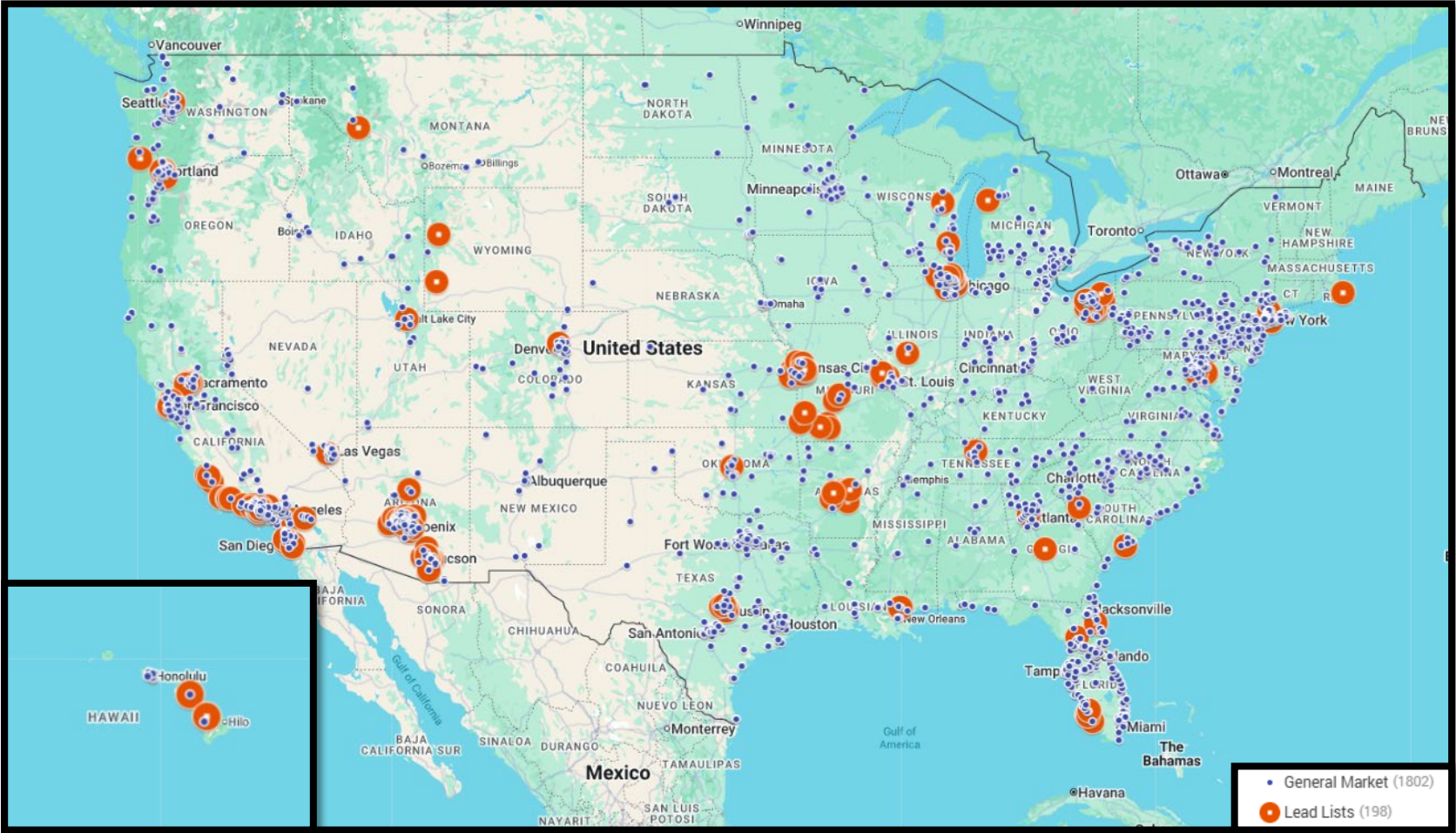
- Increasing transparency, simplifying engagement, and strengthening human connection are critical to driving action.
- Operators who reduce uncertainty and build confidence earlier are best positioned to convert interest into move-ins.

Profile of Survey Respondents

Profile of Survey Respondents: Location of Respondents

The consumer sentiment study was distributed among two lists of respondents: households on the lead lists of four ASHA member companies (Lead List), and among a purchased list of age- and income-qualified households from Dynata’s internet research panel (General Market). Households from the General Market were required to be 55+ years of age, with \$50,000+ annual household income, and not currently living in an independent living, assisted living or memory care community.

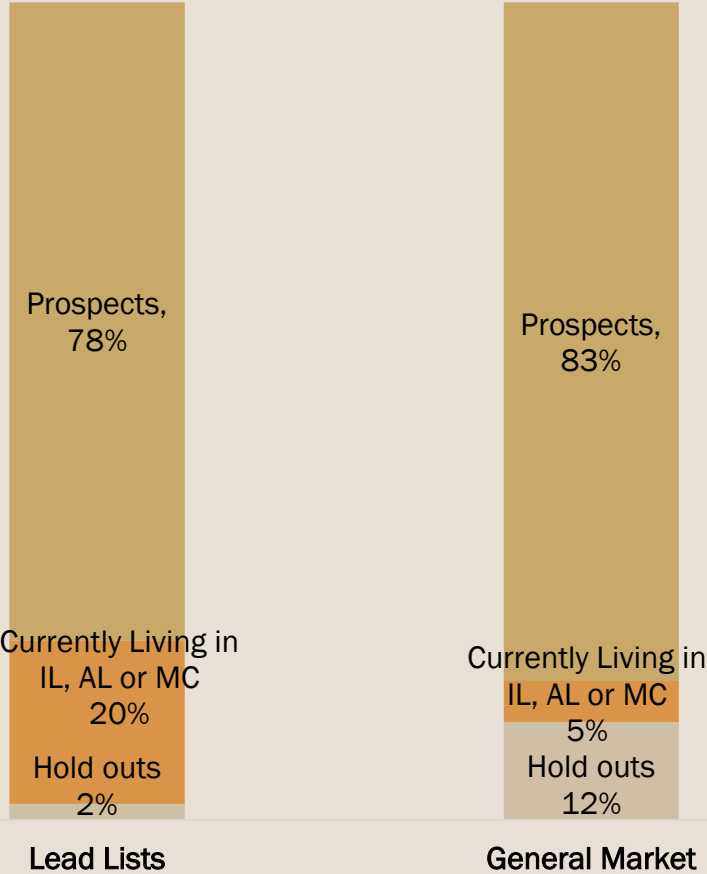
The ZIP code location of participating households are shown on the adjacent map.



Profile of Survey Respondents: Households Who Would At Least Consider a Move

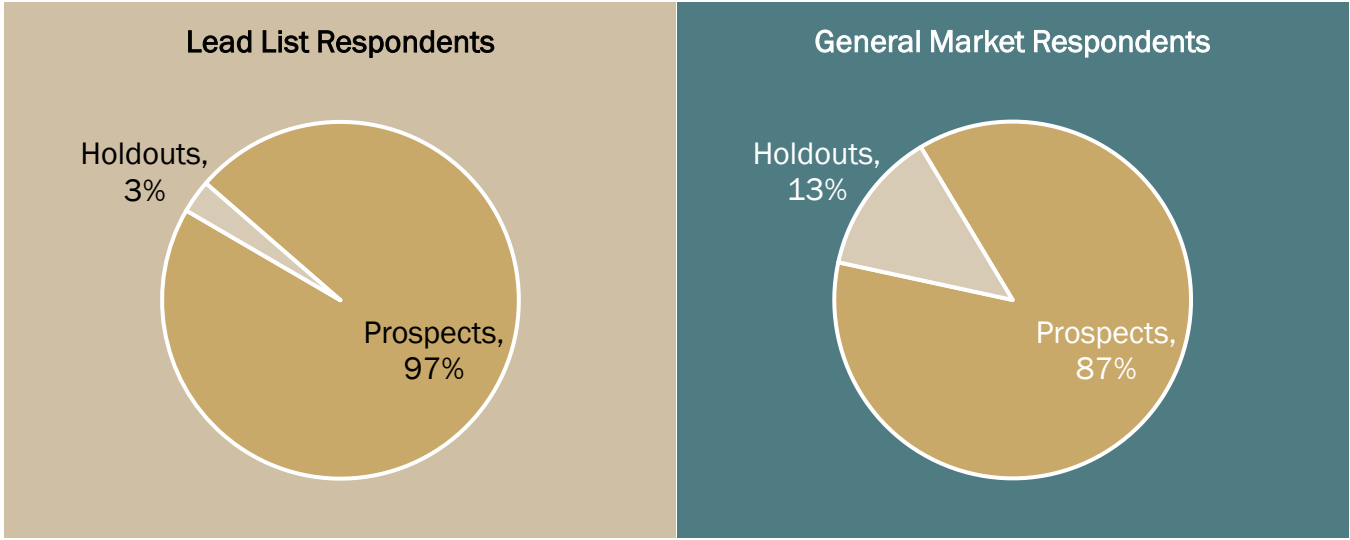
Households Who Would Consider Moving to an Active Adult or Senior Living Community

Lead List and General Market participants currently living in a senior living community were not included in the survey sample.



Among the 256 Lead List respondents, 51 or 20 percent are currently living in either an independent living, assisted living, or memory care community. Among the 2,138 General Market respondents, 104 or 5 percent currently live in some form of senior living community (IL, AL or MC).

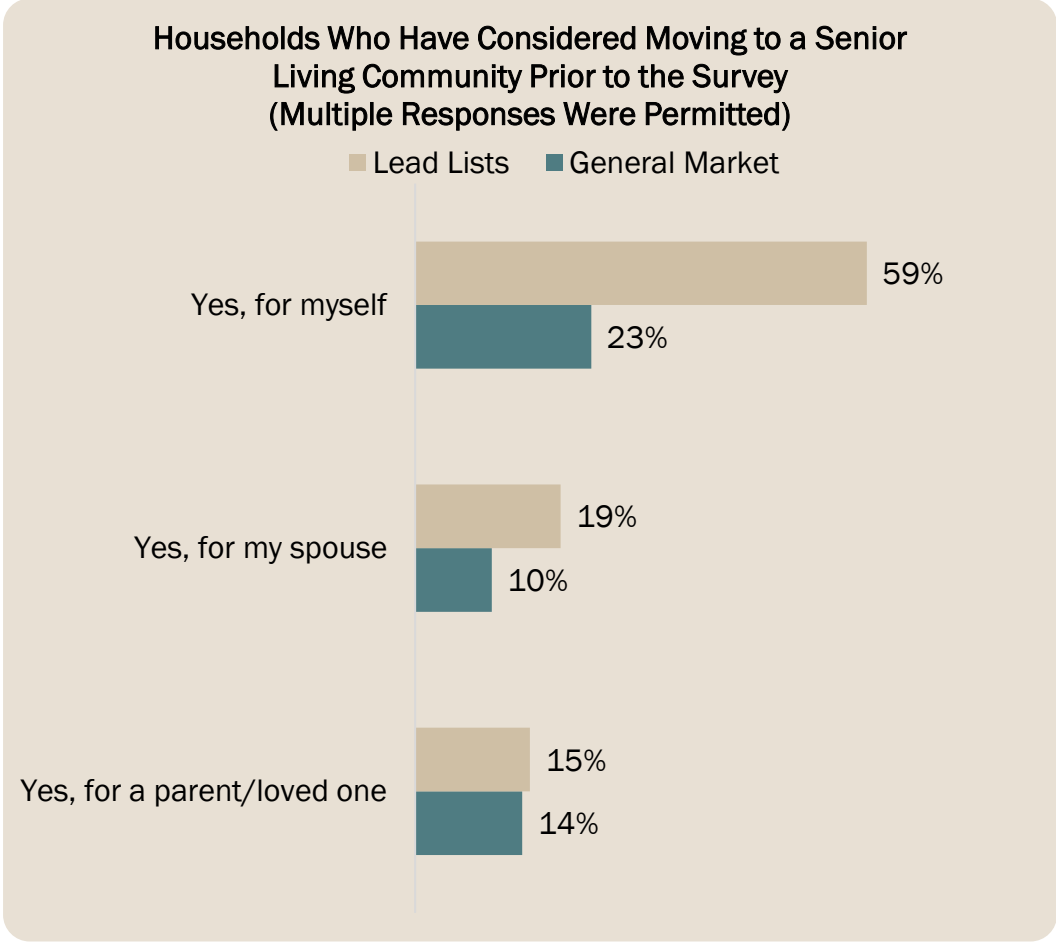
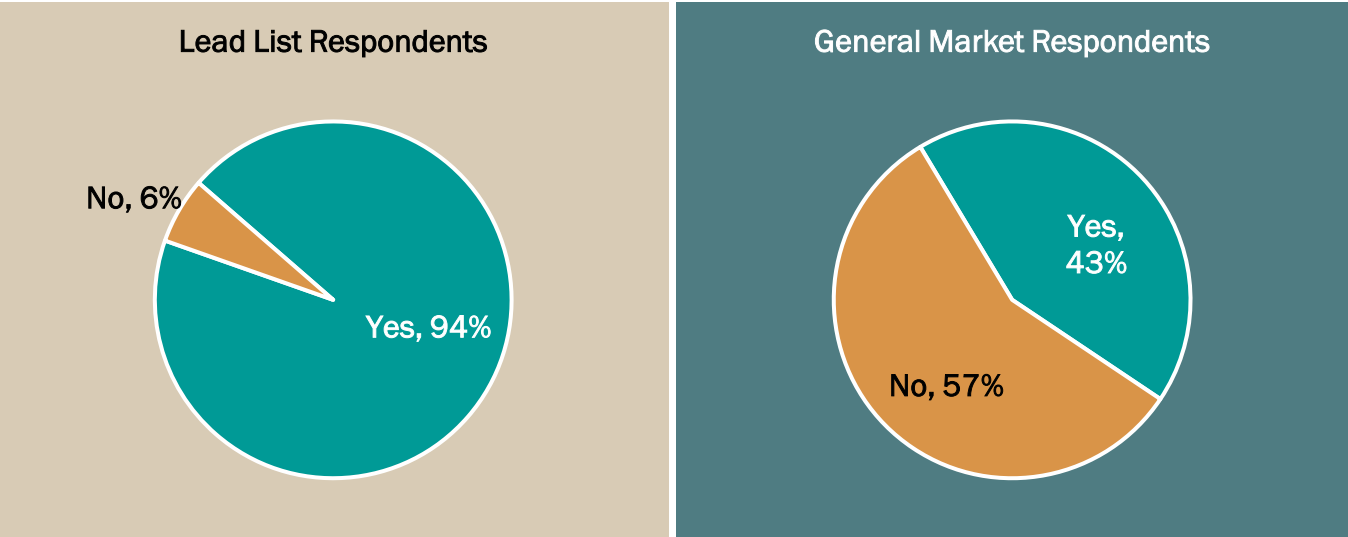
Among those who qualified to complete the full survey, 97 percent of Lead List respondents were at least considering a move to an active adult, independent living, assisted living or memory care community, compared to 87 percent of the general market considering a similar move.



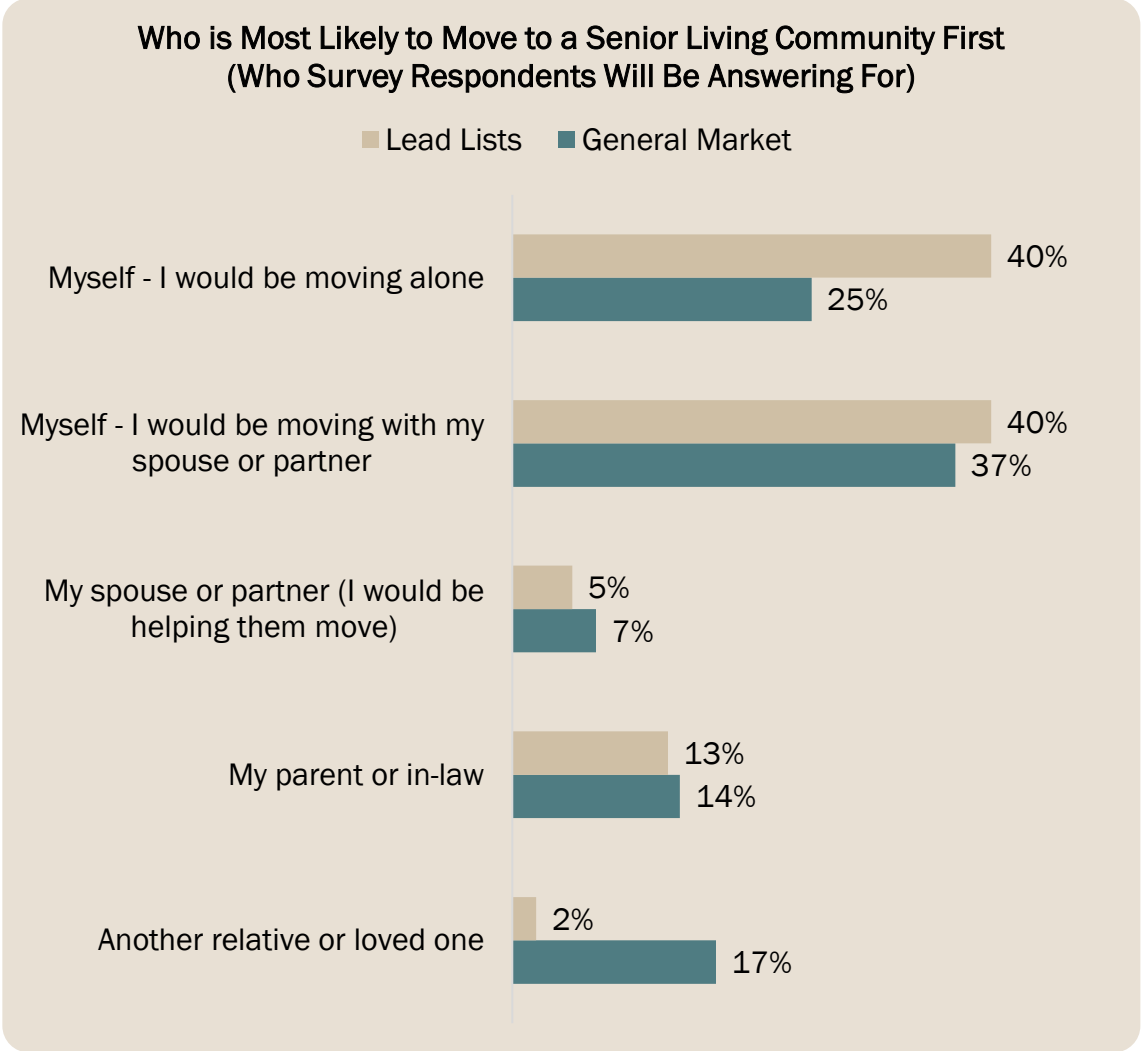
Profile of Survey Respondents: Considered a Senior Living Community Prior to the Survey

A greater proportion of Lead List respondents than General Market respondents have considered making a move to a senior living or active adult community prior to completing the survey.

The largest proportion of both groups were considering a move for themselves rather than for a spouse or a parent or other loved one.

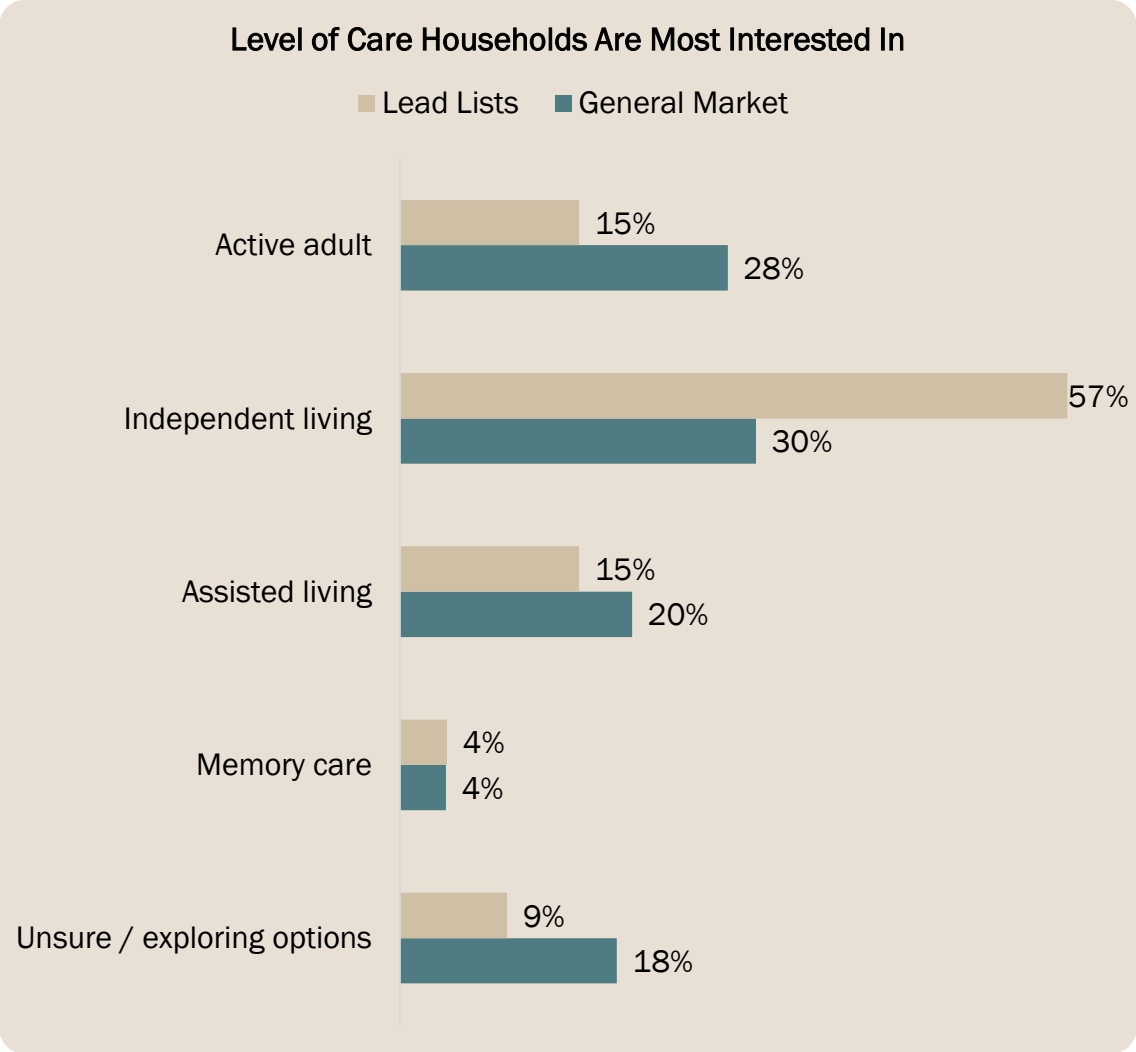


Profile of Survey Respondents: Who Will Likely Move to a Senior Living Community FIRST



When responding to survey questions, we asked respondents to think about the person in their lives who would be most likely to make a move to a senior living or active adult community first. The majority of both survey participant groups indicated that they, either alone or with a spouse, would be most likely to move, and therefore would be answering questions about themselves.

Profile of Survey Respondents: Level of Care



Independent living dominates interest—especially among lead lists.
Over half (57 percent) of lead list prospects are targeting independent living vs. 30 percent in the general market.

General market shows more interest in active adult and assisted living.
Indicates a broader mix of lifestyle-driven and needs-based demand.

A notable share remains undecided.
Higher “unsure” responses in the general market (18 percent) suggest earlier-stage exploration.

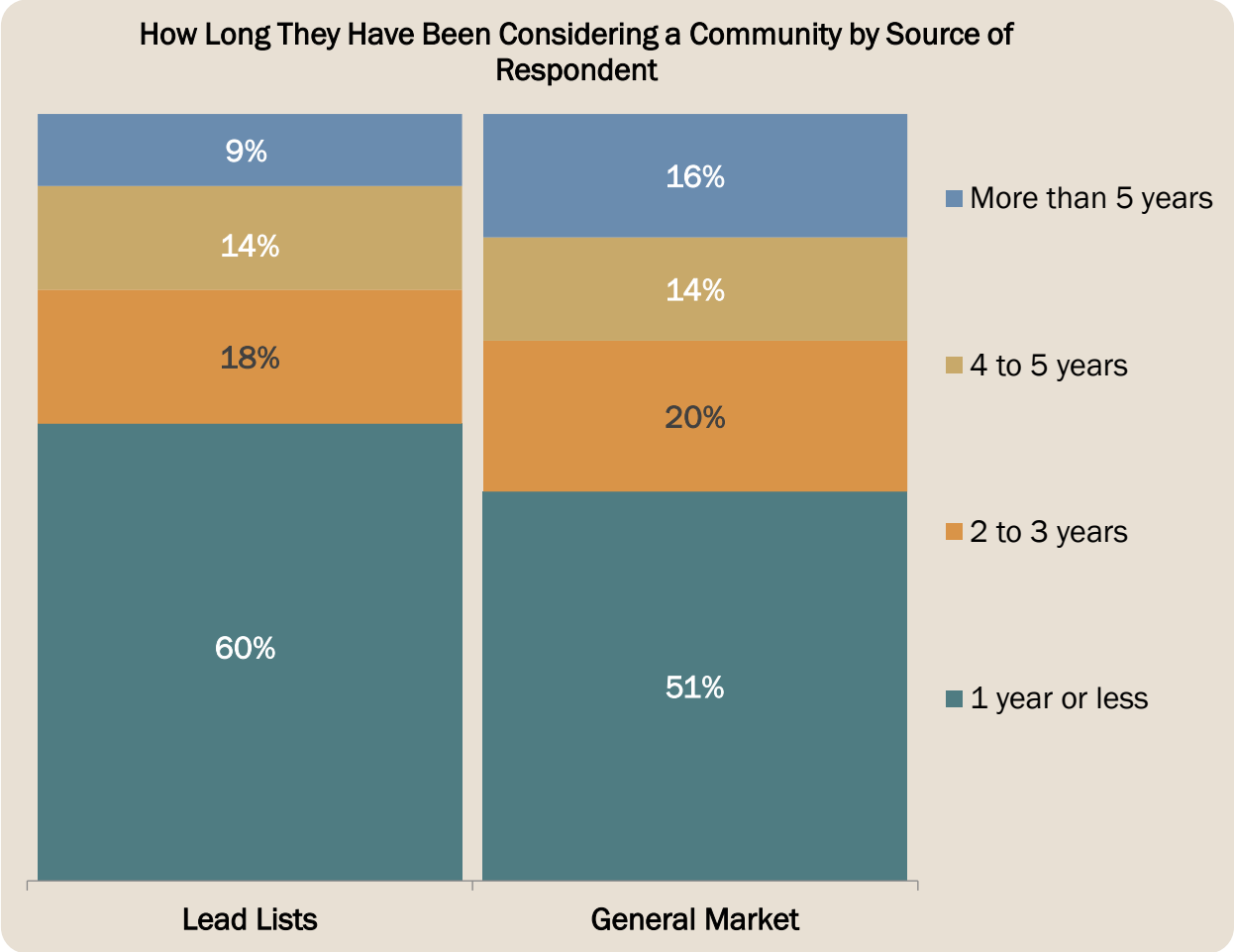
Profile of Survey Respondents:

How Long Prospects Have Been Considering a Community

Most prospects are in a near-term decision window.
 Over half have been considering for 1 year or less (51–60 percent).

Lead lists skew more immediate.
 A higher share in the <1 year category suggests more active, ready-to-move prospects.

General market includes more long-term planners.
 Higher representation in the 2+ year range indicates earlier-stage exploration.



Profile of Survey Respondents:

How Long Prospects Have Been Considering a Community

Decision timelines are relatively short.

Across all segments, the majority of prospects have been considering a move for 1 year or less, indicating that many decisions are reactive or need-driven rather than long-term planned.

Memory care stands out as most urgent.

With 66 percent in the “1 year or less” category, prospects considering memory care are significantly more likely to be in an immediate decision window—suggesting crisis-driven or health-triggered moves.

Active adult prospects show the longest consideration window.

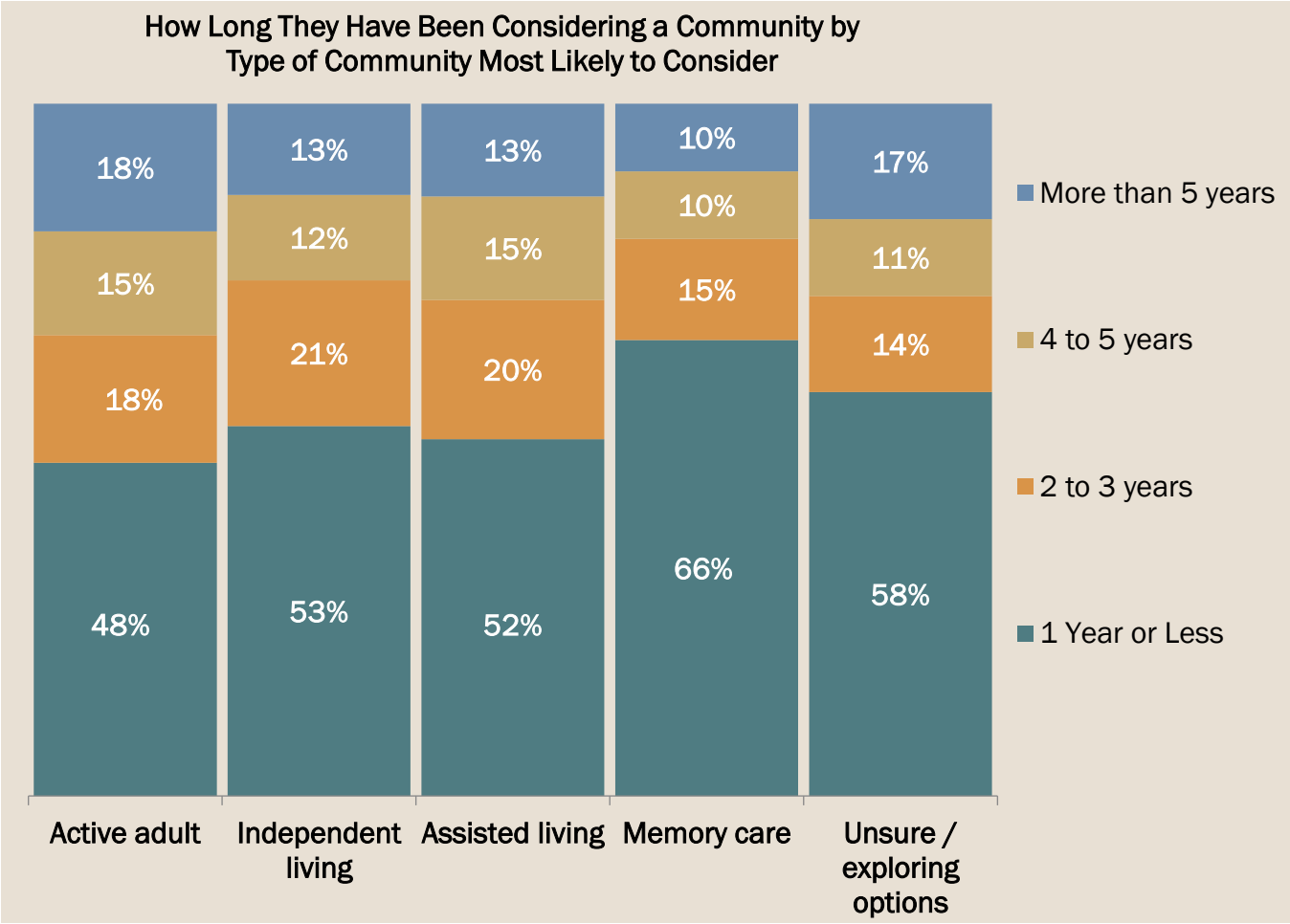
This group has the highest share of long-term planners (33 percent considering for 3+ years), reflecting a more lifestyle-oriented and discretionary decision process.

Independent living and assisted living sit in the middle.

Both segments show a balanced distribution, with about half deciding within a year and the rest taking a more extended evaluation period—indicating opportunity for ongoing nurture strategies.

A meaningful segment remains undecided.

Among those unsure/exploring options, a notable portion has been researching for multiple years, suggesting confusion or lack of clear differentiation in the market.



Profile of Survey Respondents: How Far Prospects Are Willing to Move

How Far Prospects Are Willing to Move		
	Lead Lists	General Market
Mean	244	130
Median	20	20

Most prospects prefer to stay local.

The majority are only willing to move within 50 miles, reinforcing that senior living decisions are highly tied to existing communities, family proximity, and familiar providers.

The “true trade area” is much tighter than many assume.

The median willingness to move is just 20 miles for both groups, indicating that most prospects are realistically shopping within a very localized radius.

Lead list prospects show greater geographic flexibility.

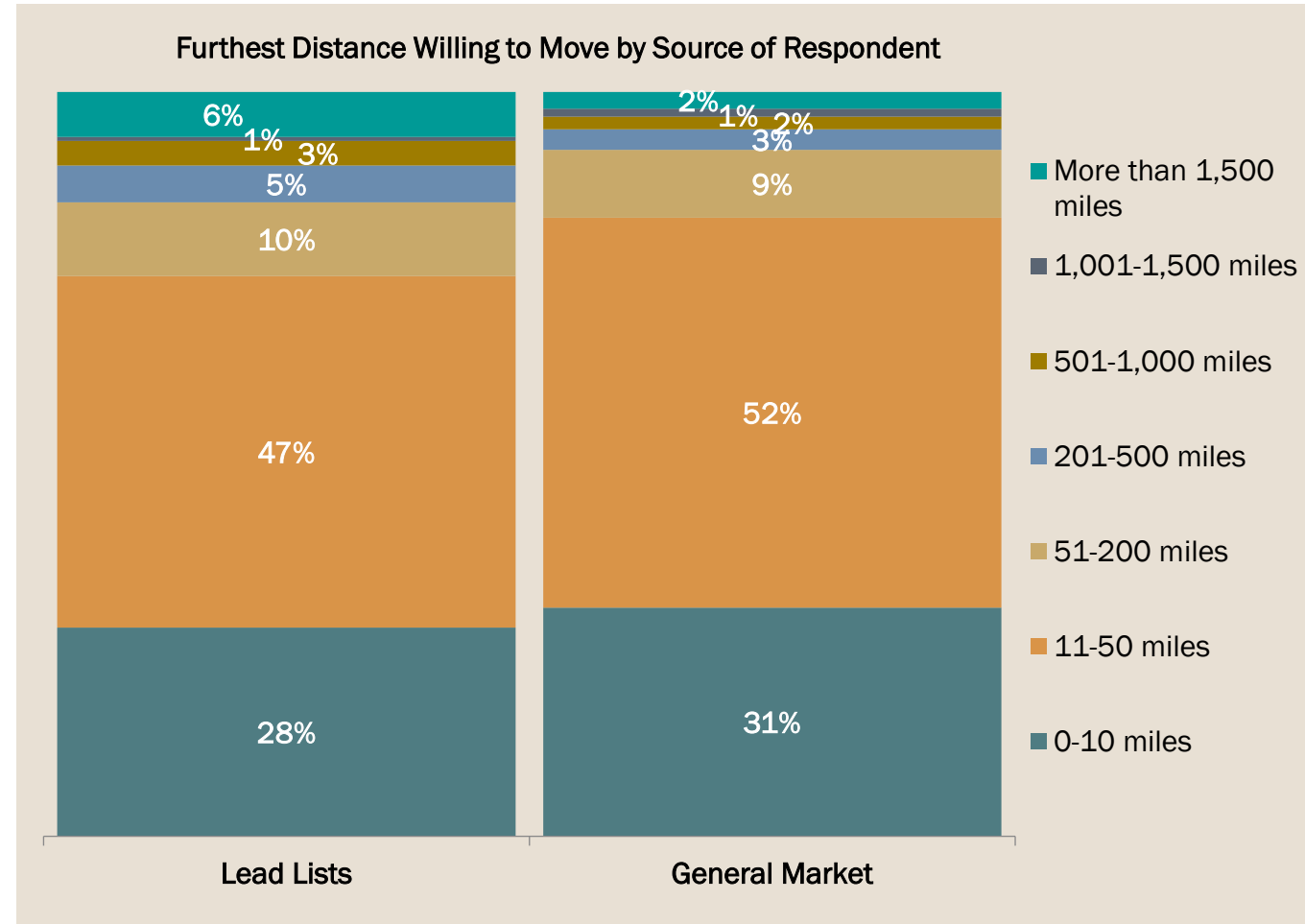
With a significantly higher average distance (244 miles vs. 130 miles) and more willingness to consider moves beyond 200+ miles, this group likely includes more digitally sourced or relocation-oriented prospects.

General market prospects are more place-bound.

A higher concentration within 0–50 miles (83 percent) suggests these individuals are more influenced by proximity to family, physicians, and existing routines.

Long-distance moves are the exception, not the rule.

Only a small share (roughly 5 percent or less) are willing to move 500+ miles, highlighting that national marketing strategies may have limited impact without a relocation trigger.



Profile of Survey Respondents: How Far Prospects Are Willing to Move

How Far Prospects Are Willing to Move					
	Active adult	Independent living	Assisted living	Memory care	Unsure / exploring options
Mean	231	127	75	39	127
Median	25	20	20	20	20

Distance tolerance decreases with acuity.

Prospects considering memory care (mean: 39 miles) and assisted living (75 miles) are significantly less willing to move far compared to active adult (231 miles)—reflecting urgency and reliance on nearby caregivers.

All segments are still locally anchored.

Despite differences in averages, the median distance is consistently ~20 miles across all levels of care, reinforcing that most decisions happen within a tight local radius.

Active adult prospects are the most geographically flexible.

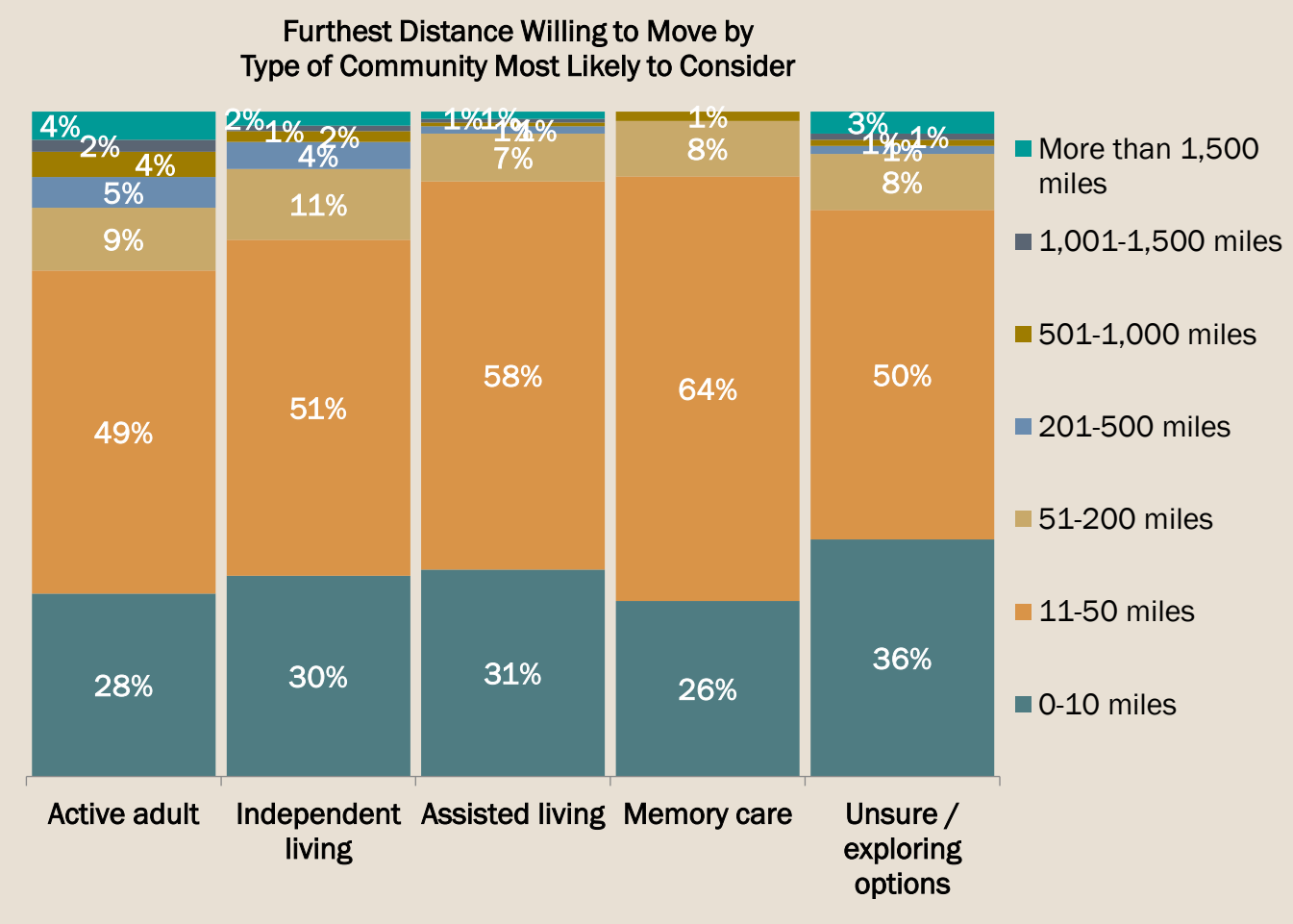
With the highest share willing to consider moves beyond 100+ miles, this group is more open to relocation and lifestyle-driven decisions.

Independent living sits between lifestyle and need-driven behavior.

While still locally focused, this group shows moderate flexibility, suggesting a mix of proactive planning and emerging care needs.

“Unsure” prospects behave more like early-stage planners.

Their higher willingness to move longer distances signals exploration rather than urgency—indicating an opportunity for education and early engagement.



Profile of Survey Respondents:

Age and Gender of Prospects

Core prospect age skews older—but varies by source.

The largest segment is 75–84, particularly among lead lists, where prospects skew more heavily toward 80+, indicating more immediate or need-driven demand.

General market captures earlier-stage prospects.

A significantly higher share of respondents under 70 (33 percent vs. 9 percent in lead lists) suggests this group includes more proactive planners and lifestyle-driven prospects.

Lead lists are more concentrated in higher-acuity age bands.

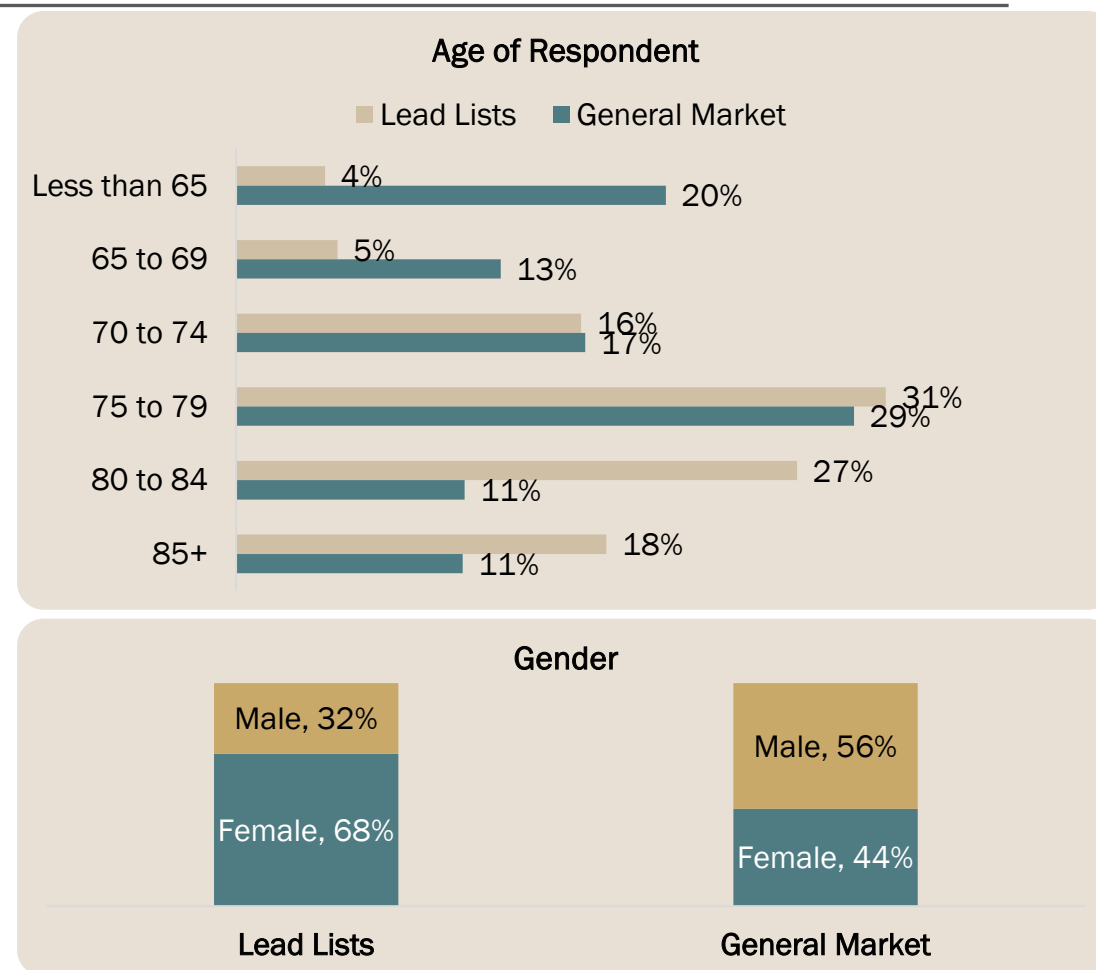
With 45 percent age 80+ (vs. 22 percent in general market), these prospects are more likely to be closer to a decision point and potentially require higher levels of care.

Female prospects dominate—especially in lead lists.

Women represent 68 percent of lead list respondents, reinforcing the importance of aligning messaging, programming, and sales approaches to a primarily female decision-maker.

Gender mix is more balanced in the general market.

While still female-skewed, the broader market shows a higher proportion of male prospects, indicating earlier-stage or couple-based decision dynamics.



Profile of Survey Respondents: Marital Status

Married prospects dominate—but skew differs by source.

The general market is more heavily married/partnered (71 percent), while lead lists are lower at 58 percent, indicating more couples in earlier-stage exploration.

Lead lists include a higher share of widowed prospects.

At 26 percent (vs. 12 percent), this group is more likely to be navigating a transition or loss—often a key trigger for considering senior living.

Single-person households are a major driver of demand.

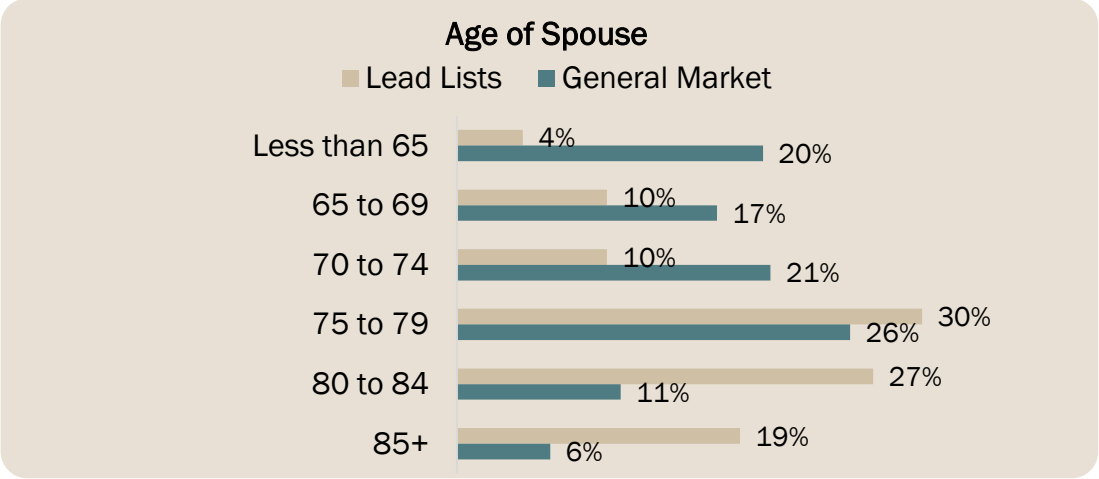
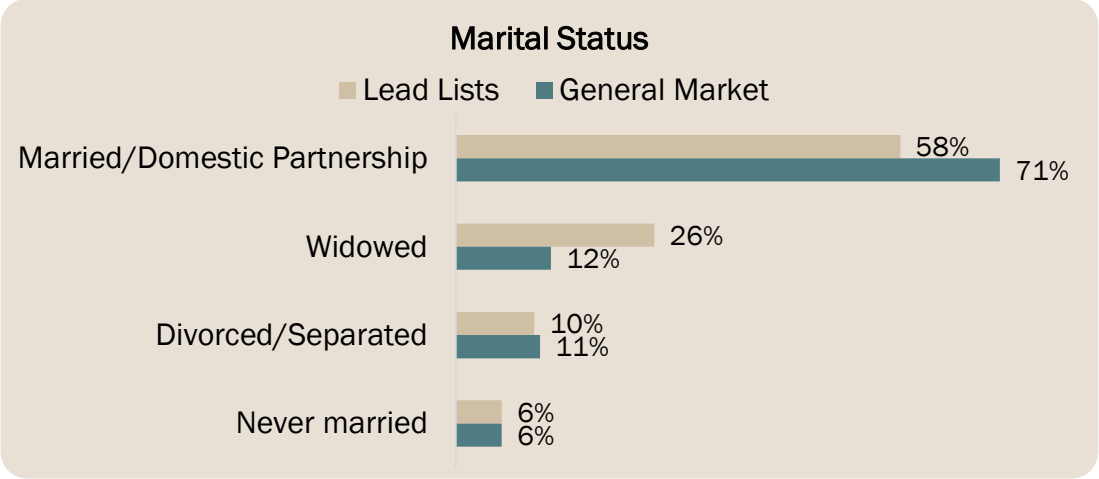
Combining widowed, divorced, and never married, 42 percent of lead list prospects are single, compared to 29 percent in the general market—highlighting greater need for support, safety, and social connection.

Spouses in the general market are younger.

A much higher share of spouses under 75 suggests that some couples could be planning earlier, before significant care needs arise.

Lead list spouses skew older and closer to need.

Higher concentrations in the 75+ age bands indicate more immediate or care-driven decision-making dynamics.



Profile of Survey Respondents: Current Health Status

Most prospects perceive themselves as relatively healthy.

Nearly 60 percent–70 percent rate their health as “very good” or “excellent,” indicating that many prospects—especially in the general market—are still in earlier stages of the aging journey.

Lead list prospects show slightly higher acuity.

Lower “excellent” ratings and higher reported impairments suggest this group is closer to needing support, aligning with more immediate decision-making behavior.

Health challenges are often driven by a spouse.

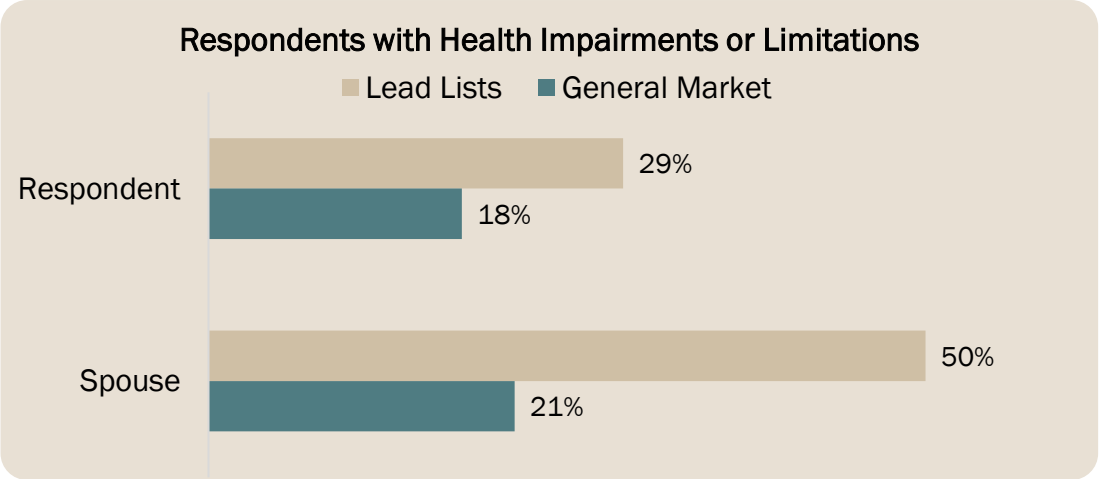
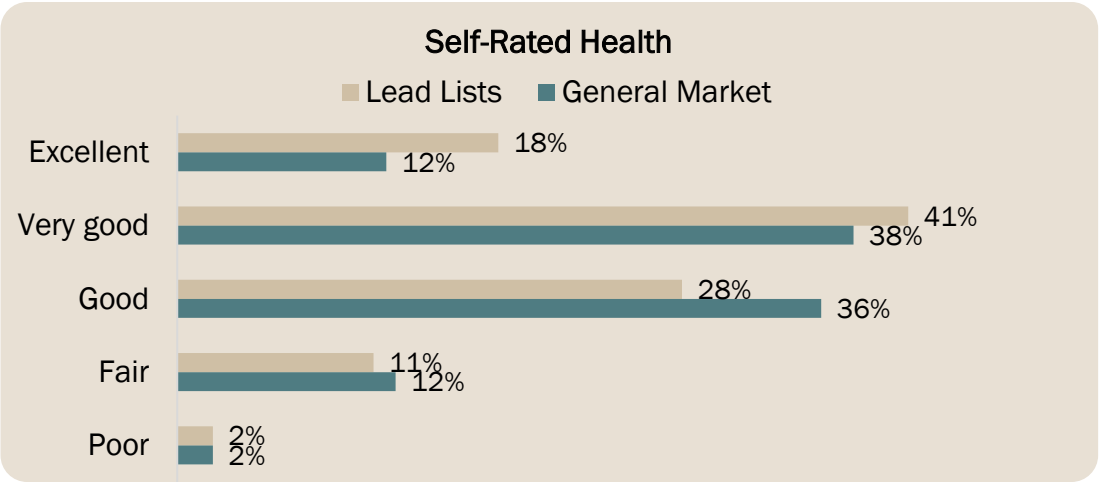
A significant share report spousal impairments (50 percent in lead lists vs. 21 percent general market)—highlighting that many decisions are triggered not by the respondent’s health, but their partner’s.

Individual impairments are also meaningful.

Nearly 1 in 3 lead list respondents report personal limitations, reinforcing that physical or cognitive challenges are a key catalyst for exploring senior living.

There is a disconnect between perceived health and need.

Even among those rating their health positively, many are still managing conditions or caregiving responsibilities—suggesting opportunity for education around “when is the right time to move.”



Profile of Survey Respondents: Home Health Services

Home health utilization is extremely low overall.

Only five percent of lead list and one percent of general market respondents report using home health services. Despite this, responses show clear exposure to care needs among those who do use services. Most prospects are not yet supported at home, even when needs may be emerging.

When services are used, they skew toward lighter, non-clinical support.

Companion care and ADL support make up a large share of mentions which indicates early-stage intervention rather than intensive medical care. There is a gap between early needs and formal service adoption.

Therapy and episodic care are key entry points.

PT/OT/rehab appears frequently relative to total responses, suggesting that many individuals enter the care system through post-acute events (e.g., surgery, injury). These moments are critical triggers for senior living consideration.

Services Received from Home Health Care Agencies	
	Number of Mentions
Companion / Supervision Support	5
Personal Care (ADLs)	4
Therapy Services (PT/OT/Rehab)	5
Skilled Nursing / Clinical Care	3
Medical / Physician Services	2
Specialized Medical Treatment	1
Informal (Family) Care	1
Comprehensive / Multi-Service	1
Financial Support (Non-care)	1

Profile of Survey Respondents: Current Home

Prospects are highly rooted in their current homes.

A significant share have lived in their homes for 20+ years (40 percent or more across both groups), reinforcing the emotional and psychological weight of the move decision.

The home is often a long-term anchor—not a temporary situation.

Many prospects are not transitioning from recent moves, but from decades of stability, which can slow decision-making and increase resistance.

Homeownership is the dominant situation.

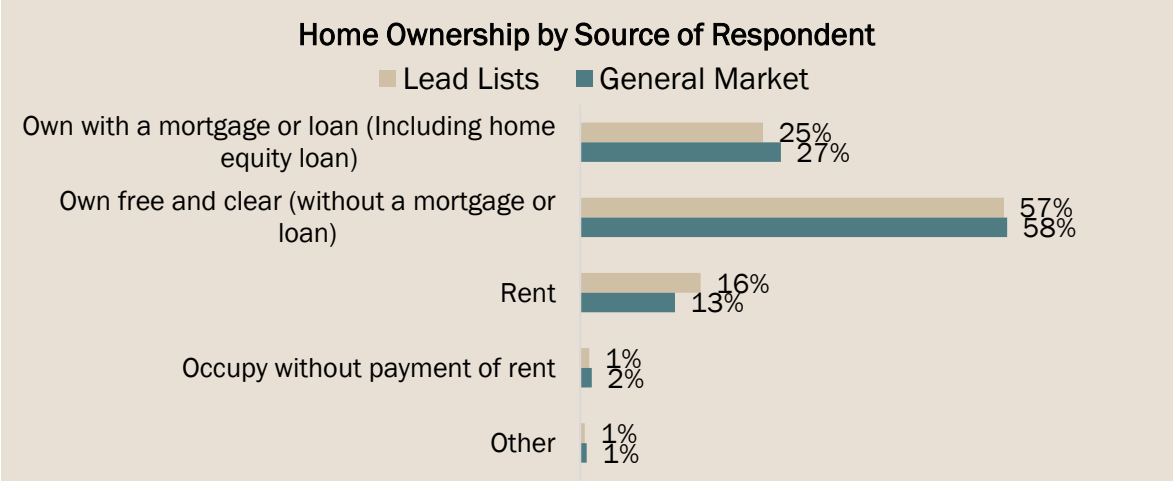
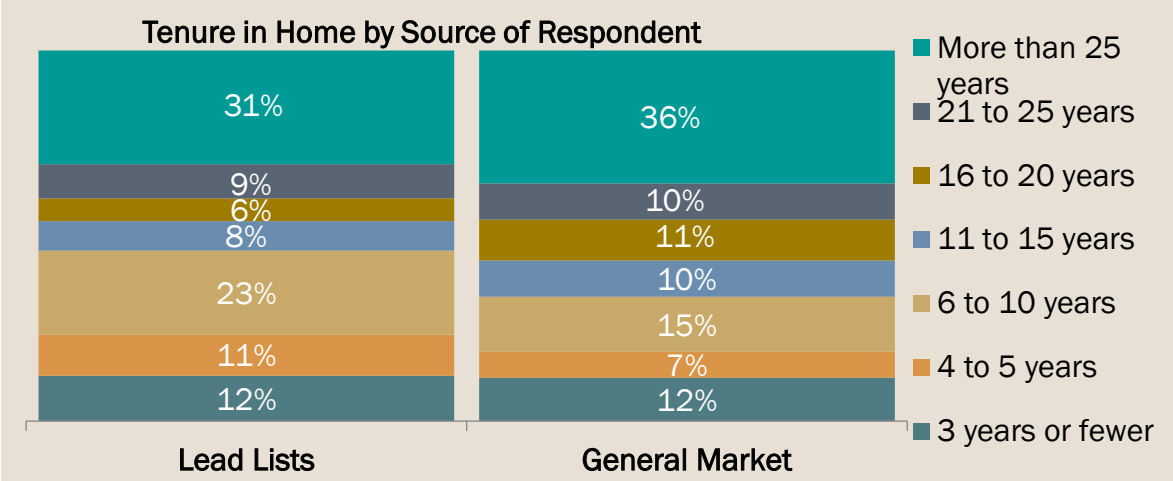
Nearly 80 percent or more own their homes, with the majority owning free and clear (~57–58 percent), representing substantial embedded equity.

Financial capacity is present—but not always activated.

High levels of home equity suggest many prospects can afford senior living, but may not yet be connecting that equity to funding a move.

Renters represent a smaller but potentially more flexible segment.

At 13–16 percent, renters may face fewer barriers to moving, though they represent a smaller portion of the market.



Profile of Survey Respondents:

Current Home Value

Lead list prospects skew significantly more affluent.

Nearly 40 percent have home values above \$1M (vs. ~14 percent in the general market), including a notable share at \$2M+ (19 percent).

General market is more concentrated in mid-range home values.

The largest segments fall between \$300K-\$750K, indicating a broader but less affluent base.

Substantial home equity exists across both groups.

Even outside the highest tiers, most prospects fall within \$300K+ home values, reinforcing strong underlying financial capacity.

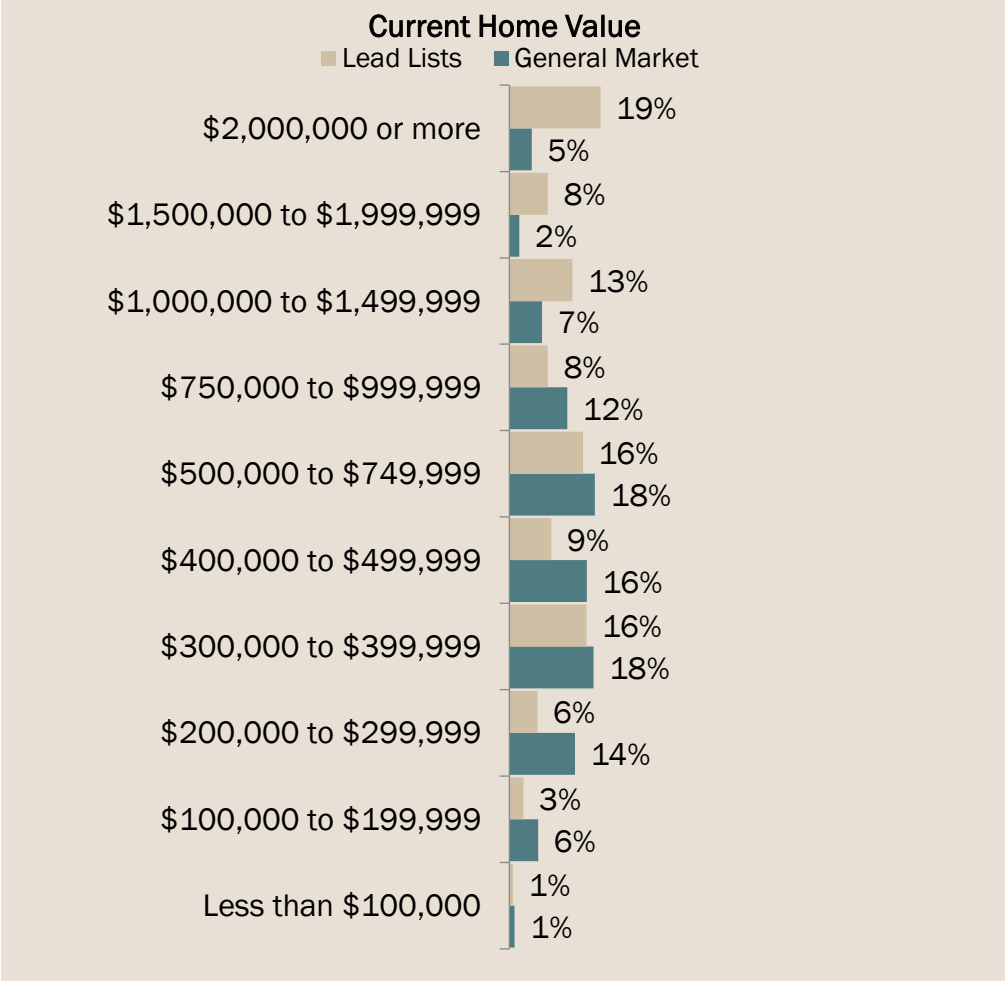
Affluence aligns with lead source behavior.

Higher home values among lead lists suggest these prospects may be:

- More actively researching
- More financially qualified
- Closer to decision-making

Lower-value segments remain meaningful but smaller.

Prospects with homes valued below \$300K represent a minority, but may require different pricing models or product offerings.



Profile of Survey Respondents: Current Monthly Rent Payment

Most renters are paying well below senior living price points.

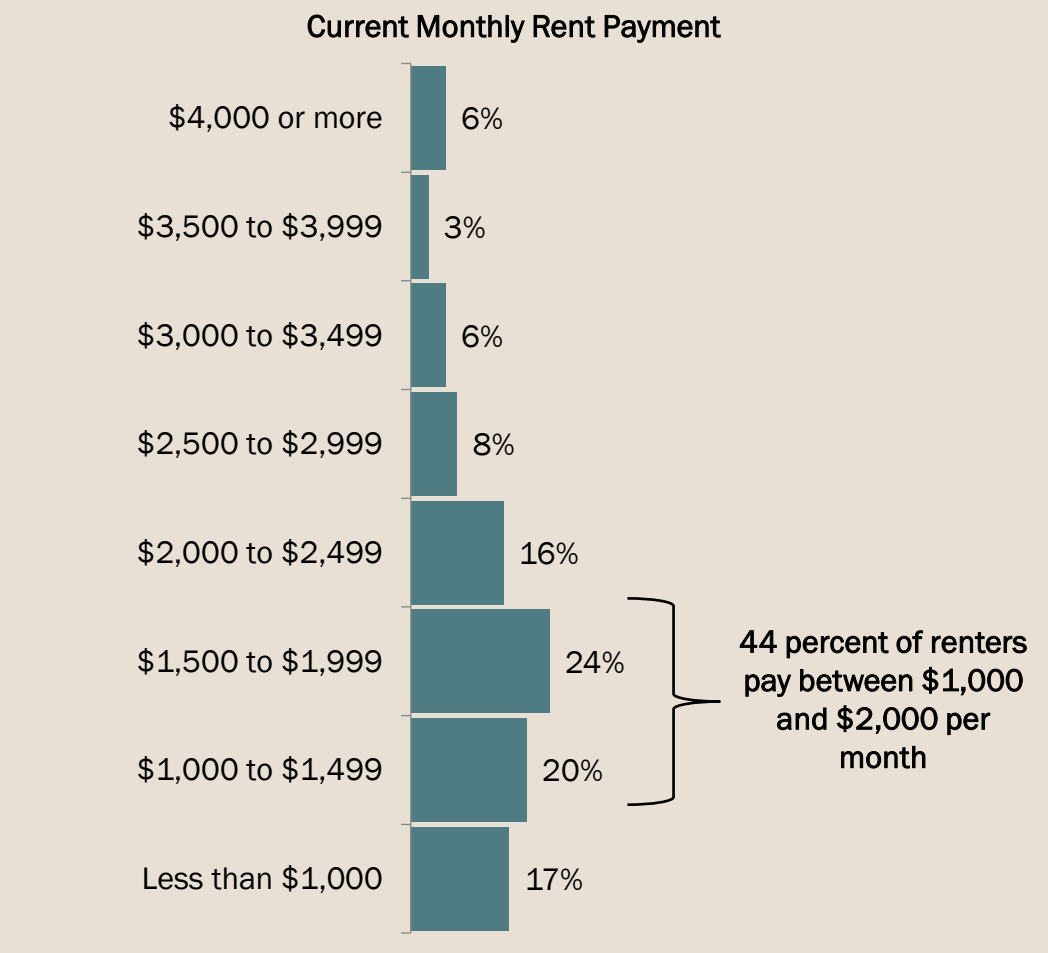
Nearly half (44 percent) pay between \$1,000–\$2,000/month, with another 17 percent under \$1,000.

A smaller segment is already closer to senior living pricing.

About 23 percent pay \$2,500+, representing a more immediately qualified renter segment.

Current rent does not equal willingness to pay.

Lower rent levels likely reflect historical housing costs, not true financial capacity.



Profile of Survey Respondents: Annual Household Income

Lead list prospects skew more affluent.

A higher share report incomes of \$100K+ (47 percent vs. 45 percent), including more in the \$200K+ range.

General market is more concentrated in mid-income bands.

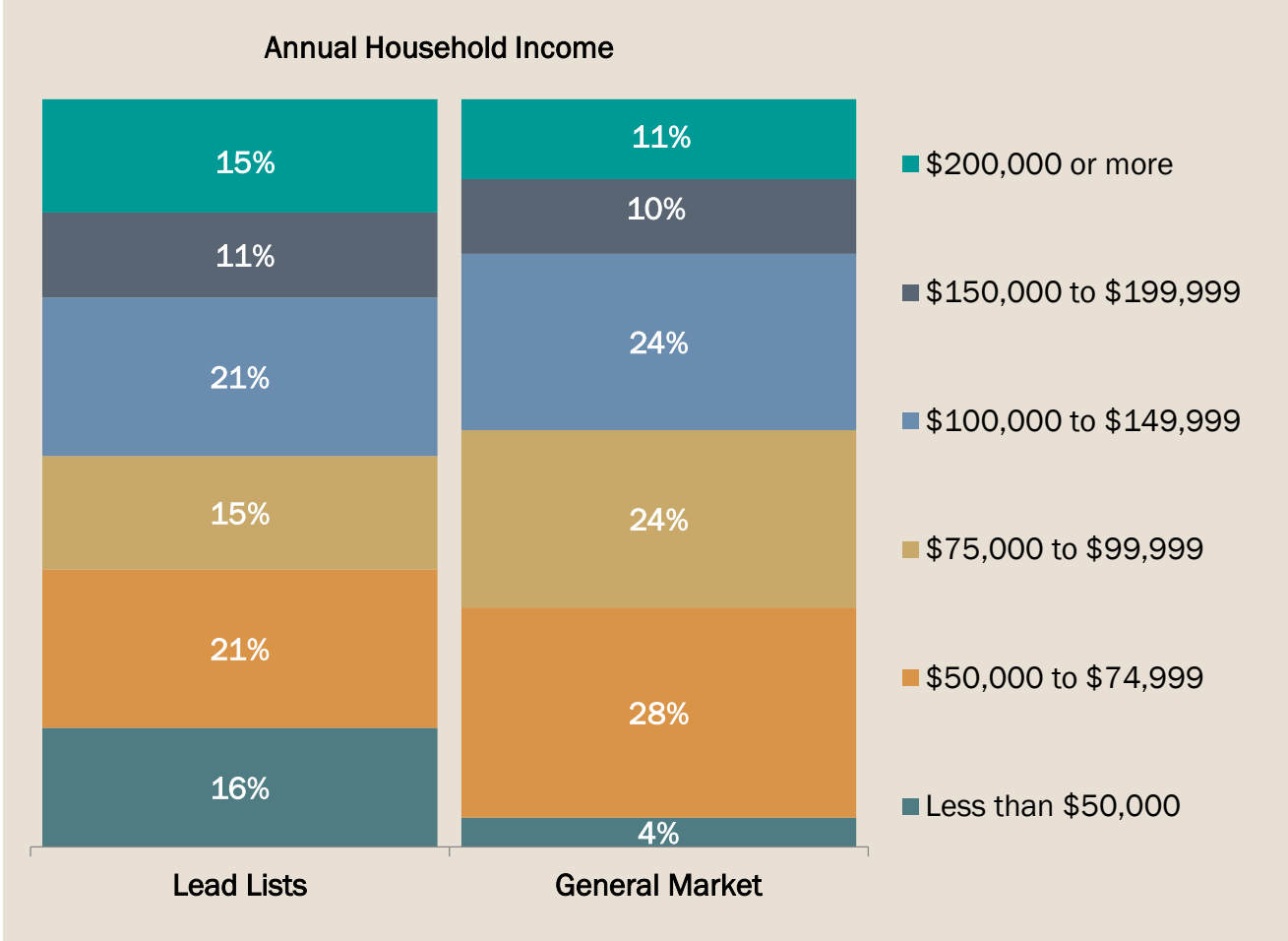
The largest segments fall between \$50K-\$100K, indicating a broader but less affluent base.

Very low-income households are limited.

Only a small share fall below \$50K, suggesting most prospects have at least moderate financial capacity.

Income alone doesn't tell the full story.

When paired with homeownership and home value, many prospects likely have greater financial flexibility than income suggests.



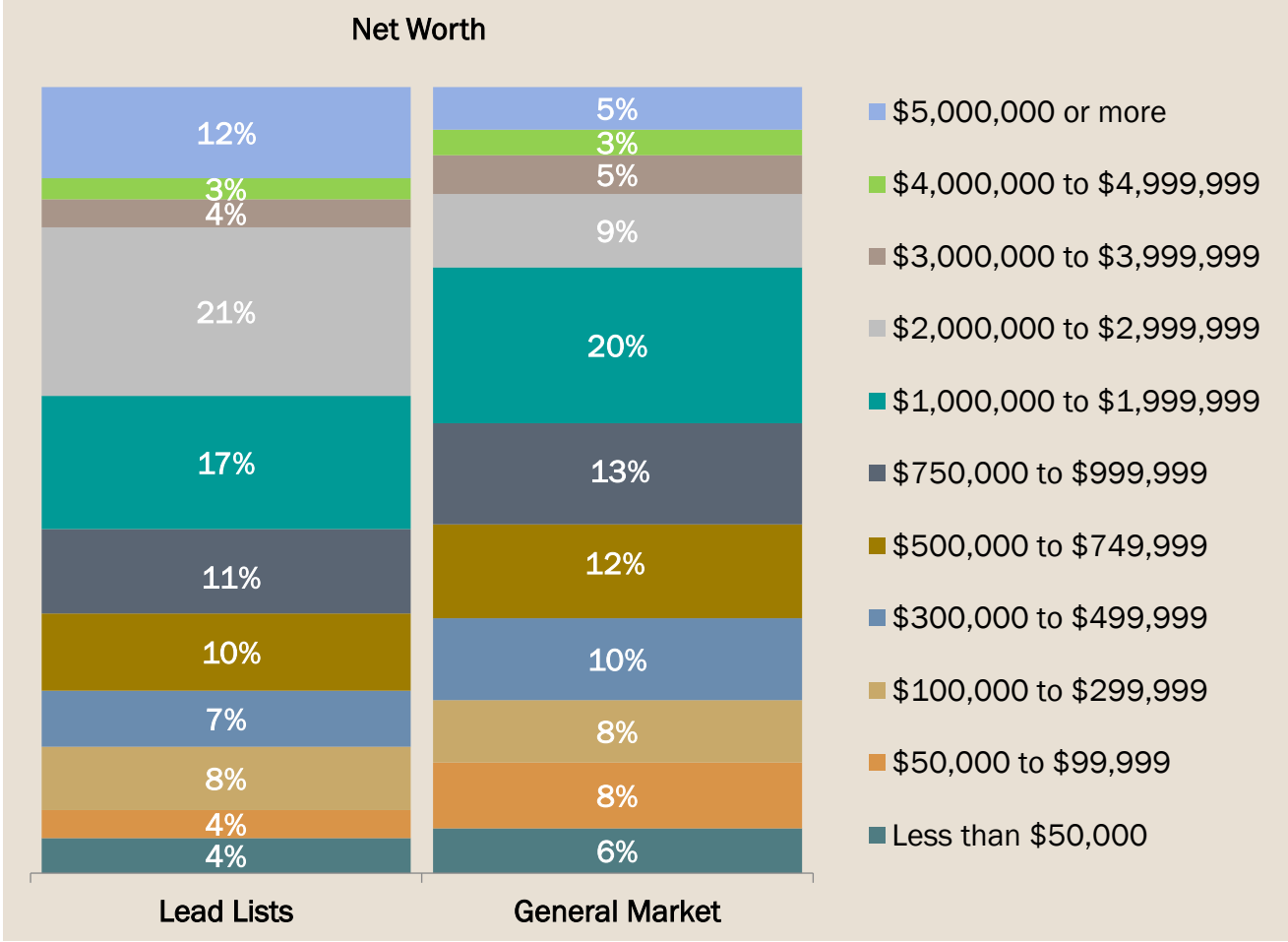
Profile of Survey Respondents: Net Worth

Lead list prospects are more likely to be high net worth.
A larger share fall in the \$2M+ range, including more at \$5M+, reinforcing stronger financial positioning.

General market skews more toward mid-level wealth.
More concentrated in the \$500K–\$2M range, indicating broader but less affluent distribution.

Most prospects have meaningful assets.
The majority across both groups exceed \$500K in net worth, suggesting capacity exists—even if not always recognized.

Wealth is often tied up in the home.
Net worth should be viewed alongside home value and ownership, not income alone.



Profile of Survey Respondents: Expected Monthly Expenses

Most prospects expect to pay more.

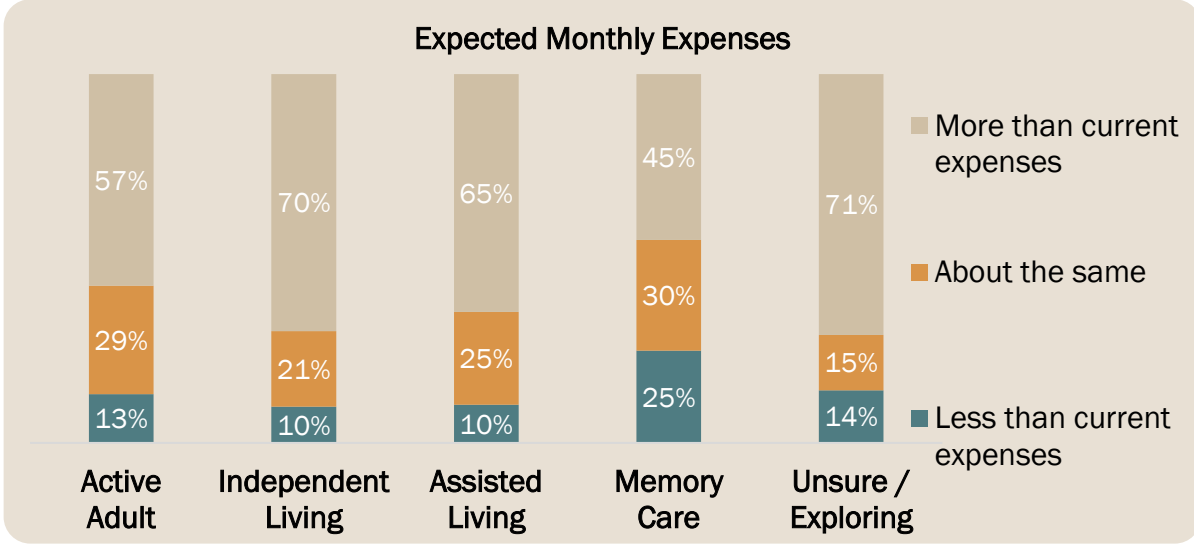
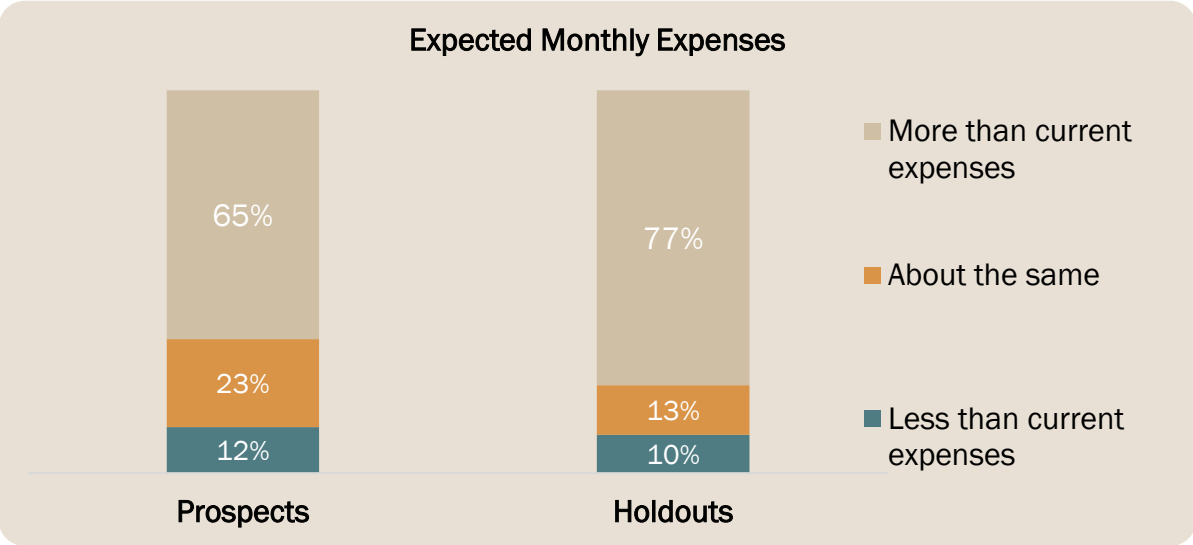
A strong majority (65 percent–77 percent) anticipate higher monthly expenses in senior living.

Expectation of higher cost is consistent across segments.

This holds across all levels of care, reinforcing broad awareness of pricing.

“Sticker shock” is not the primary barrier.

Many prospects already expect increased costs—suggesting hesitation is driven more by value perception than price alone.



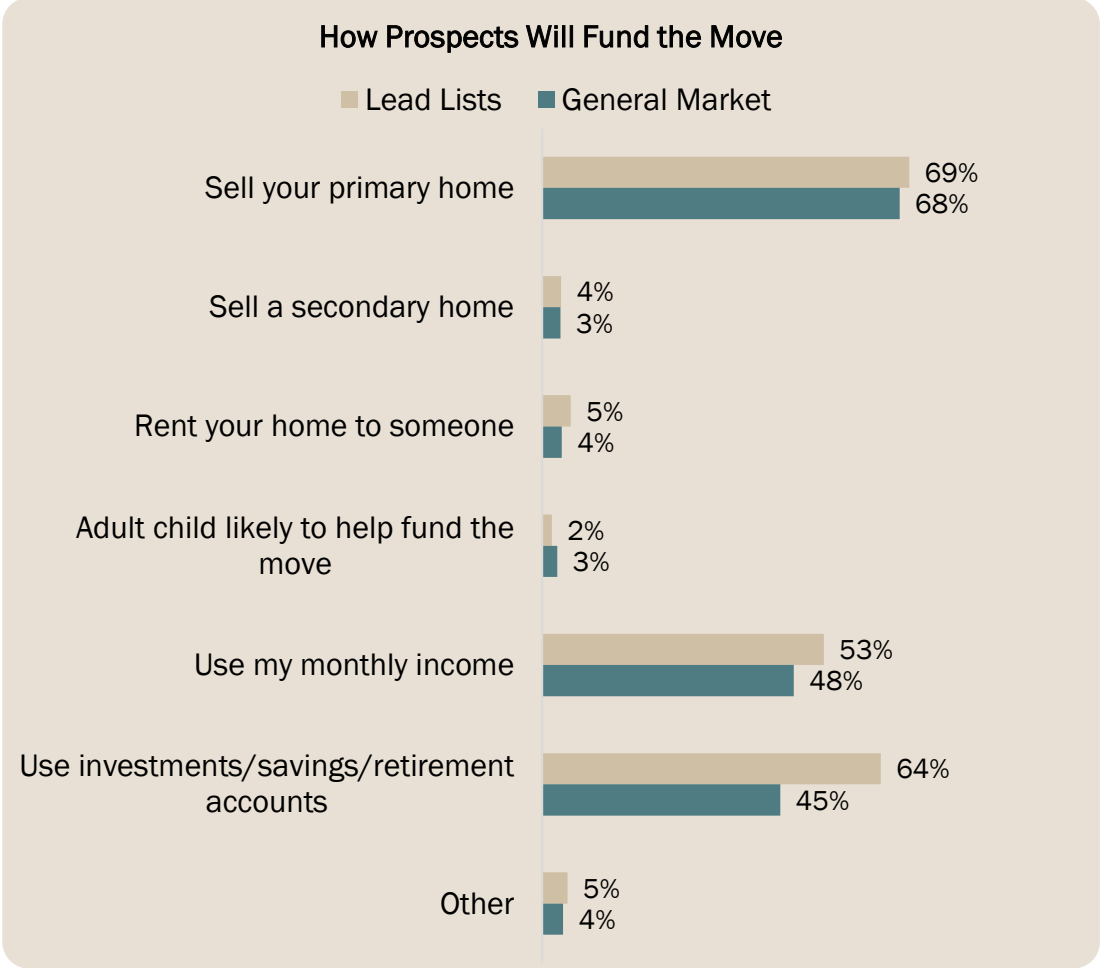
Profile of Survey Respondents: How Prospects Would Fund a Move

Home equity is the primary funding source.
 Nearly 70 percent plan to sell their primary home, making it the dominant path to affordability.

Most prospects will layer multiple funding sources.
 In addition to home sale, many expect to use savings/investments (45 percent–64 percent) and monthly income (48 percent–53 percent).

Family financial support plays a minimal role.
 Very few expect help from adult children, reinforcing financial independence.

Alternative strategies are limited.
 Renting or selling secondary homes are relatively uncommon approaches.



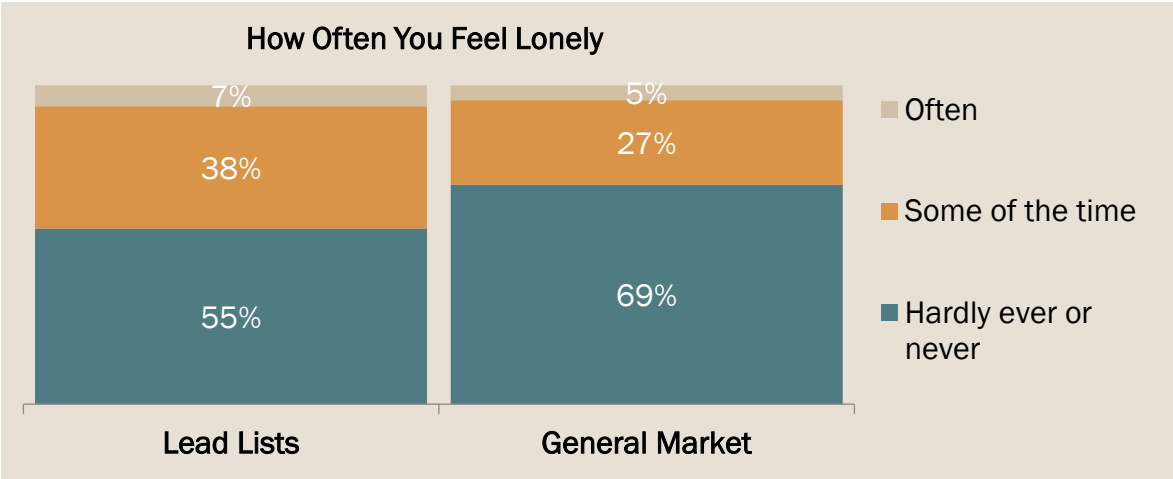
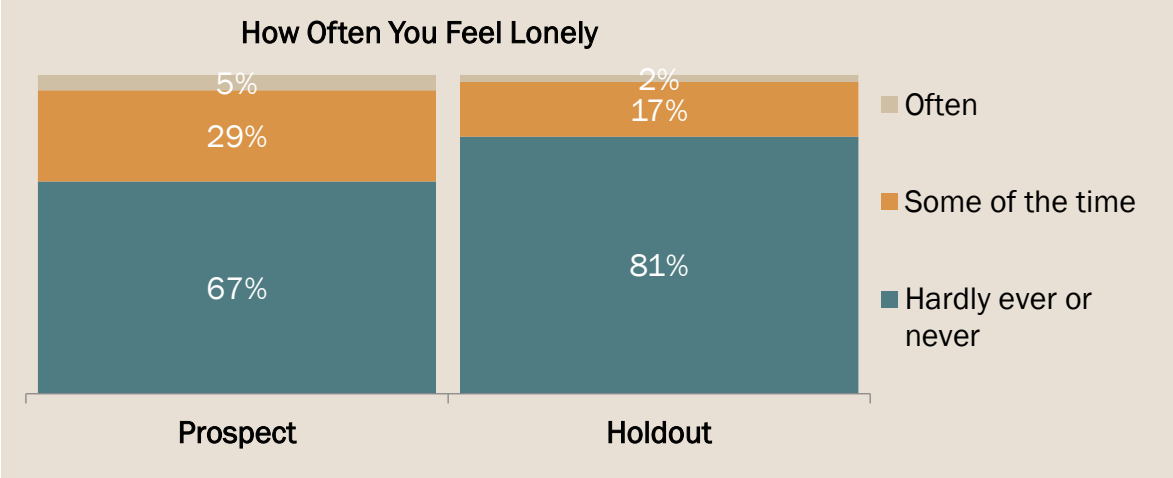
Profile of Survey Respondents: How Often You Feel Lonely

Prospects report higher levels of loneliness than Holdouts.
Only 67 percent “rarely or never” feel lonely vs. 81 percent of Holdouts, indicating a meaningful emotional gap.

Loneliness appears to be a driver—not just a condition.
Prospects are more likely to feel lonely at least some of the time (33 percent vs. 19 percent among Holdouts), suggesting social needs may be prompting consideration.

Lead list prospects show the highest levels of loneliness.
Nearly 45 percent experience loneliness at least sometimes, compared to 31 percent in the general market.

Lower loneliness may reduce motivation to move.
Lower reported loneliness may contribute to less urgency to consider a move, even if other needs emerge.

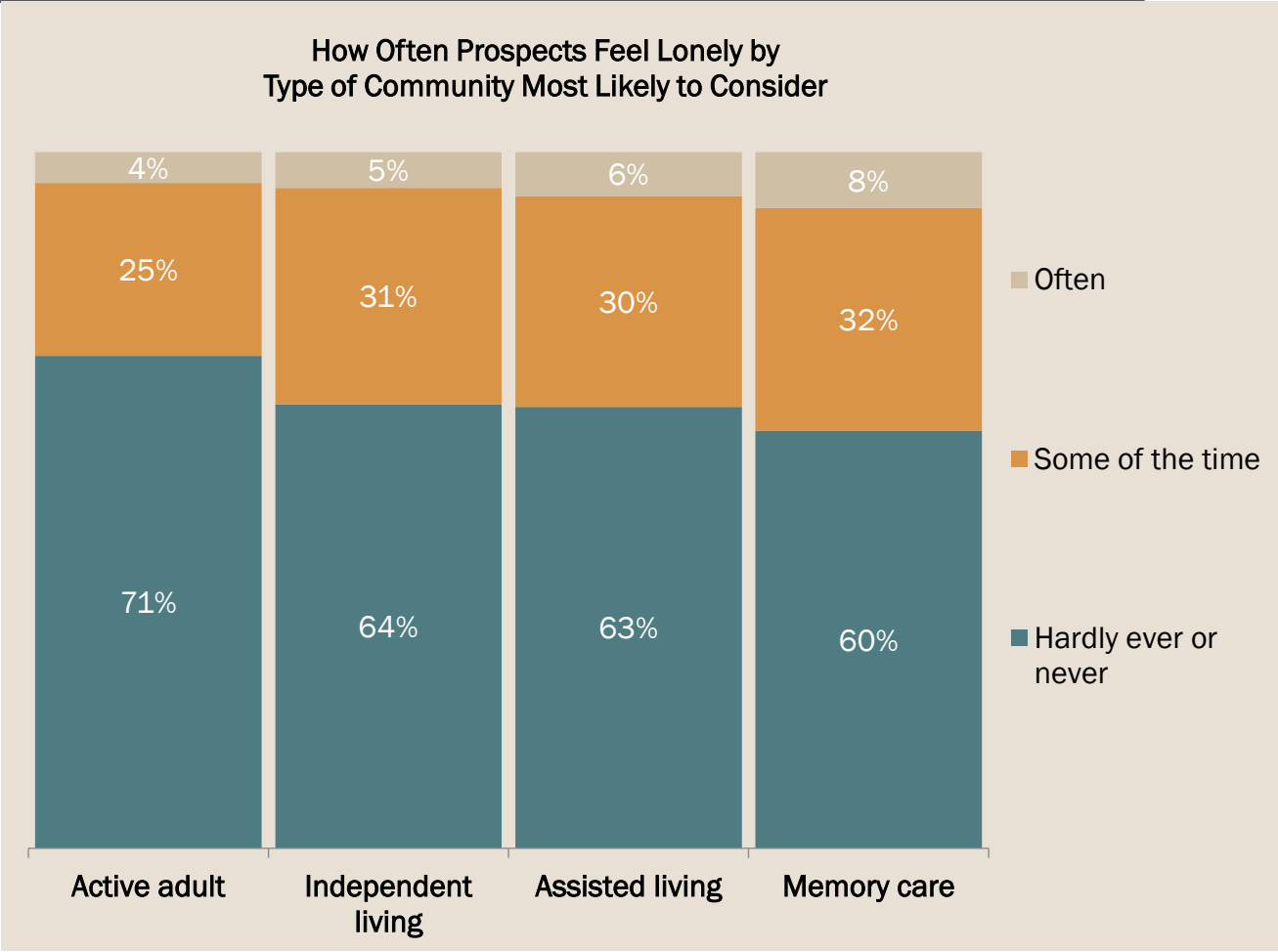


Profile of Survey Respondents: Loneliness by Level of Care

Loneliness increases with level of care.
Those considering assisted living and memory care report higher levels of loneliness than active adult prospects, potentially reflecting age-related loss, shrinking social circles, and increased longevity factors that may increase emotional and social support needs.

Active adult prospects are the least likely to feel lonely.
Over 70 percent rarely or never feel lonely, reinforcing a more lifestyle-driven decision.

Higher-acuity prospects show greater social need.
Up to 40 percent of memory care prospects experience loneliness at least sometimes, indicating a stronger emotional driver.



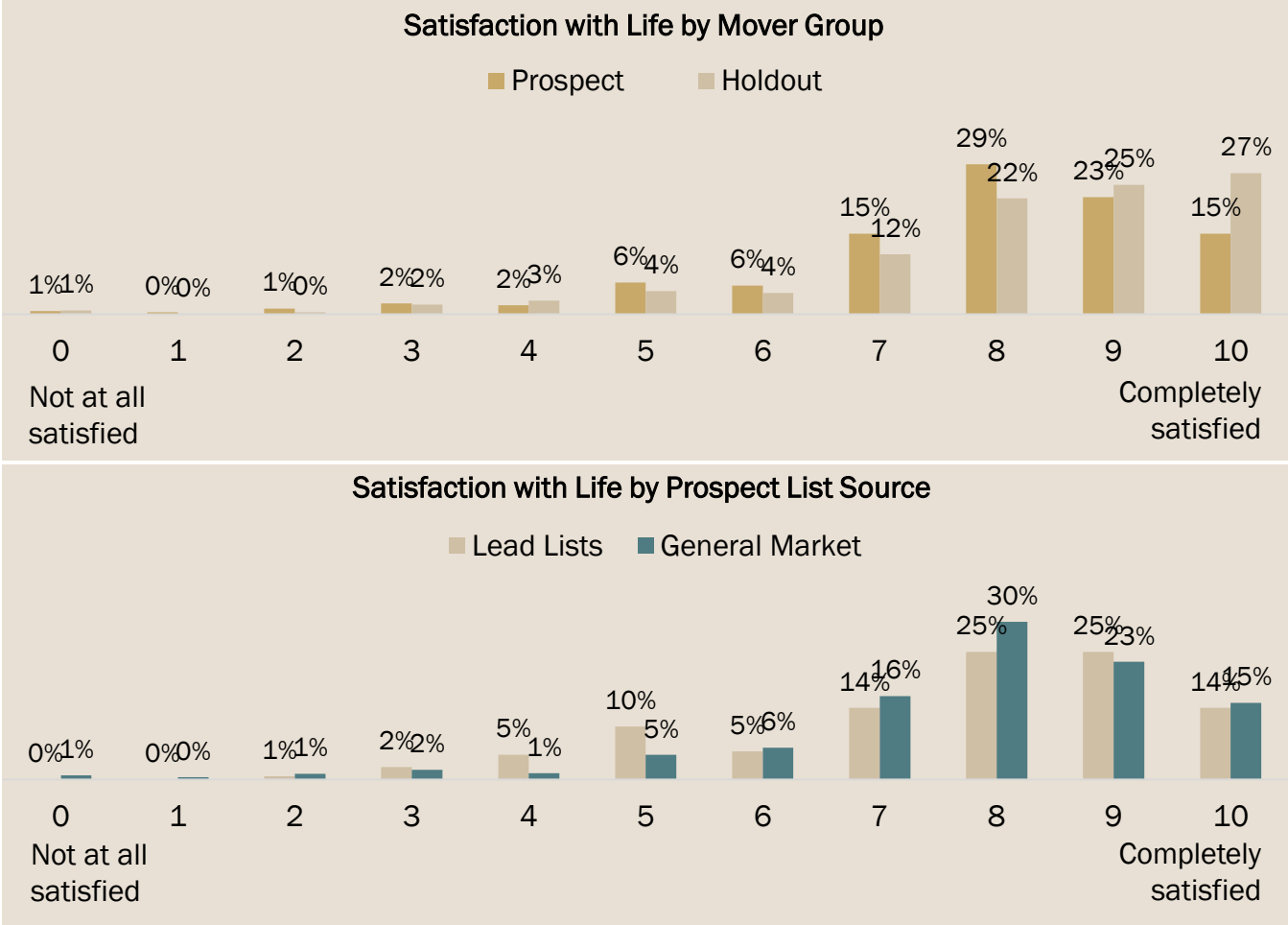
Profile of Survey Respondents: Satisfaction with Life

Overall life satisfaction is high across all groups.
The majority of respondents cluster in the 7–10 range, indicating generally positive life sentiment.

Holdouts report slightly higher satisfaction.
They skew more toward the top end (9–10), suggesting less perceived need for change.

Prospects show slightly more variability.
While still positive overall, they are more distributed across the scale—indicating more mixed experiences or unmet needs.

Lead list prospects trend slightly less satisfied than the general market.
Reinforces that this group may be closer to a trigger point for considering a move.



Profile of Survey Respondents:

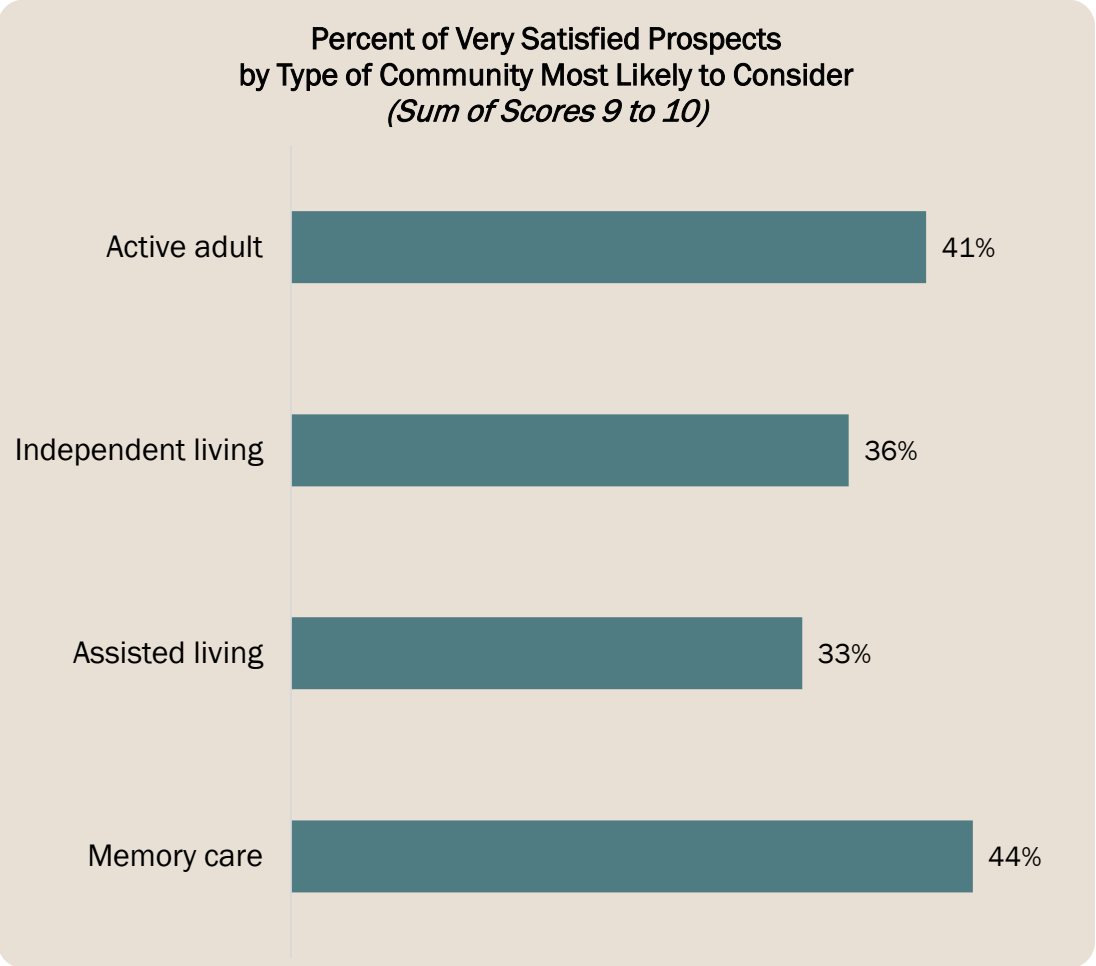
Satisfaction with Life by Level of Care

Life satisfaction varies modestly by level of care. “Very satisfied” rates range from 33 percent to 44 percent, indicating generally positive sentiment across segments.

Memory care prospects report the highest satisfaction. Despite higher acuity, they show the highest share of top scores (44 percent), suggesting strong support systems or caregiver involvement.

Assisted living prospects show slightly lower satisfaction. At 33 percent, this group may be experiencing more day-to-day challenges or transition stress.

Active adult prospects remain relatively satisfied. Higher satisfaction (41 percent) aligns with more lifestyle-driven, less need-based decision-making.



Profile of Survey Respondents: Willingness to Recommend Current Way of Living

Prospects are significantly less likely to recommend their current lifestyle.
NPS is 22 percent for prospects vs. 44 percent for holdouts, indicating a clear gap in satisfaction with the status quo.

Lower advocacy signals openness to change.

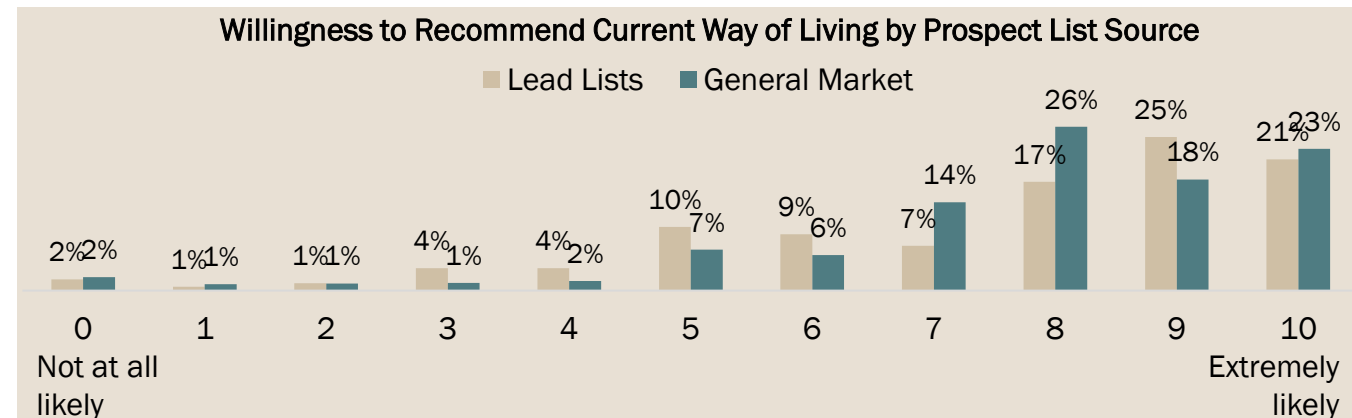
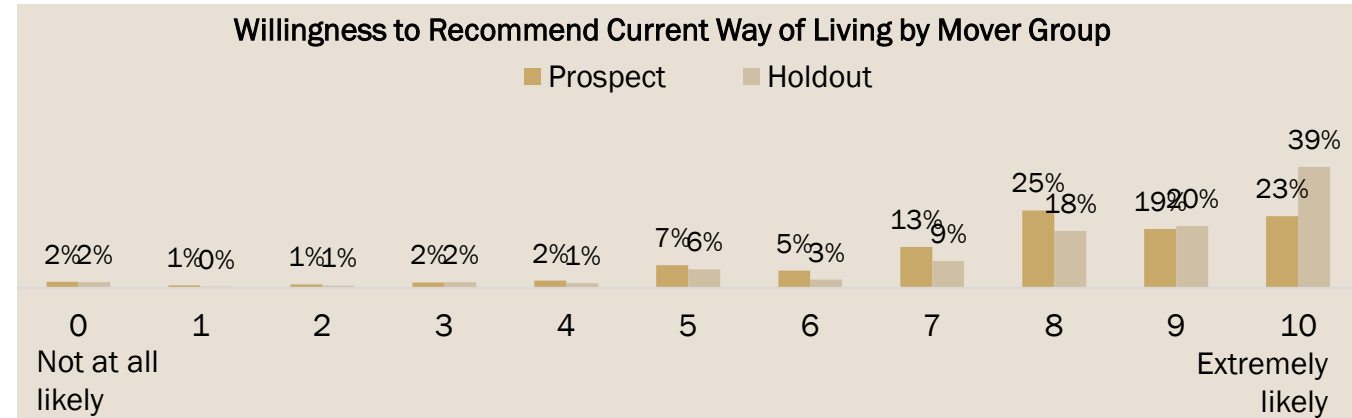
Prospects are less likely to strongly recommend their current situation, reinforcing underlying dissatisfaction as a driver of exploration.

Lead list prospects show the lowest satisfaction.

With an NPS of 15 percent, this group appears closest to a potential decision point.

General market prospects are more neutral.

Higher NPS (21 percent) suggests earlier-stage consideration with less urgency.



Question asked of respondents: "If a friend or family member asked you (or your loved one) about your current life, how likely would you be to recommend the way you are living now?"

Net Promoter Score (NPS):

% Promoters (Rated 9-10) – % Detractors (Rated 0-6)

Prospects: 22%

Holdouts: 44%

Lead List Prospects: 15%

General Market Prospects: 21%

Profile of Survey Respondents: Willingness to Recommend by Level of Care

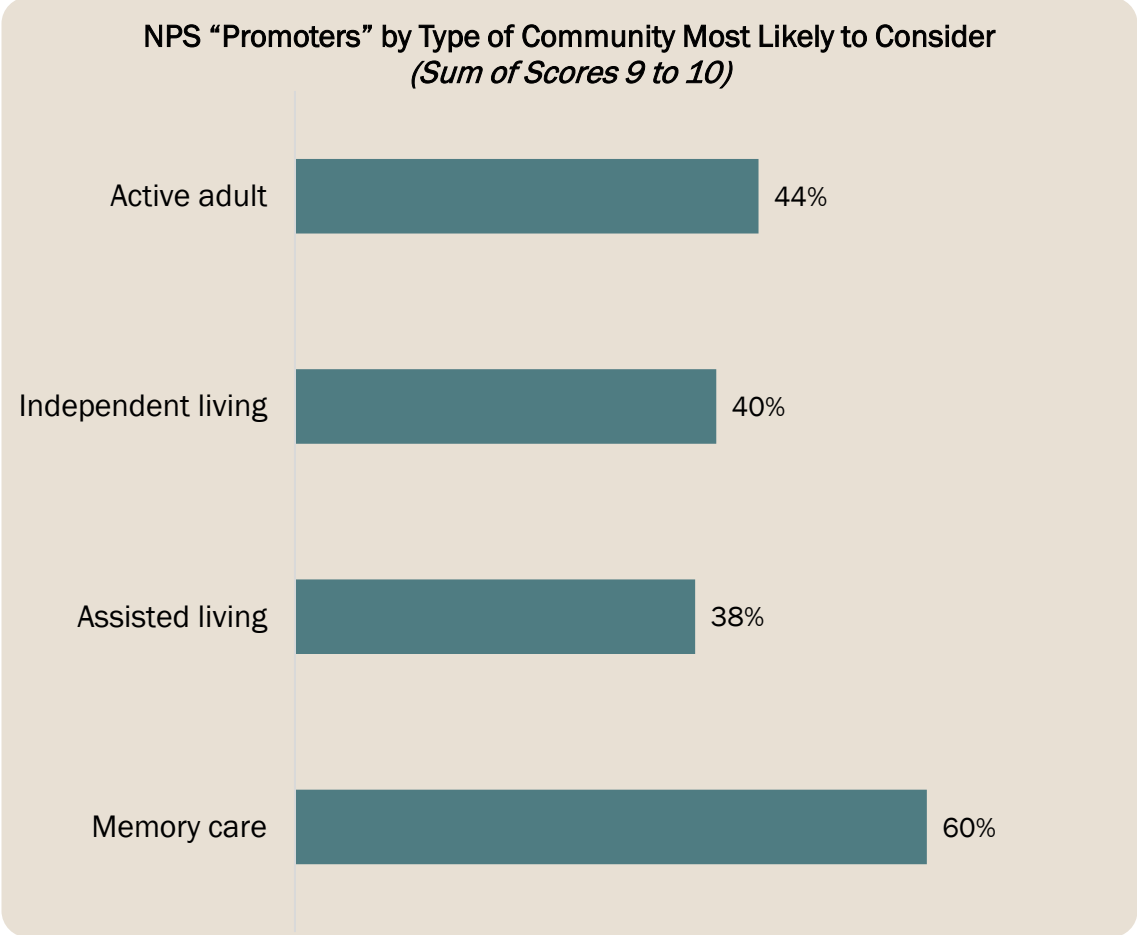
Willingness to recommend varies by level of care.
Promoter rates range from 38 percent to 60 percent, indicating different levels of satisfaction with current living situations.

Memory care prospects report the highest advocacy.
At 60 percent promoters, this likely reflects stronger support systems or caregiver-driven perspectives.

Assisted living prospects show the lowest advocacy.
At 38 percent, this group may be experiencing the greatest gap between needs and current living situation.

Active adult and independent living remain relatively high.
Higher promoter levels (40 percent–44 percent) align with more lifestyle-oriented, less urgent decision-making.

Lower advocacy in assisted living aligns with higher friction and unmet needs—key drivers of move consideration



Consumer Sentiment about Senior Living Communities

Consumer Sentiment: Rental Active Adult Communities

Key Insights: Rental Active Adult Communities

Awareness exists, but engagement is limited.

While most respondents are aware of rental active adult communities, only ~30 percent have visited and very few have direct experience.

Appeal is moderate—but not compelling.

Just 40 percent find the concept appealing, while the largest share (35 percent) remain neutral, indicating a lack of strong differentiation.

Perceptions are improving—but not translating into action.

Appeal has increased modestly since the last survey, but move intent remains low and uncertainty has grown, signaling a conversion gap.

Move intent is low and highly uncertain.

Nearly 60 percent are unlikely or unsure, with only a small share expressing near-term interest.

Decision timelines are long.

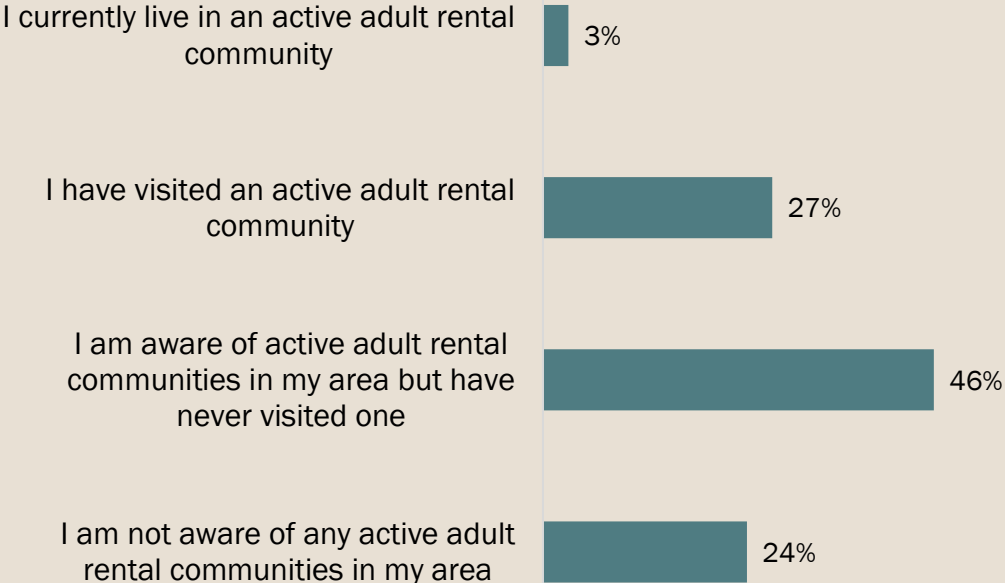
The majority (63 percent) say they would move 3+ years from now, reinforcing a deferred, lifestyle-driven decision.

Social proof is present but under-leveraged.

Despite 33 percent knowing someone in these communities, it has not translated into stronger consideration.

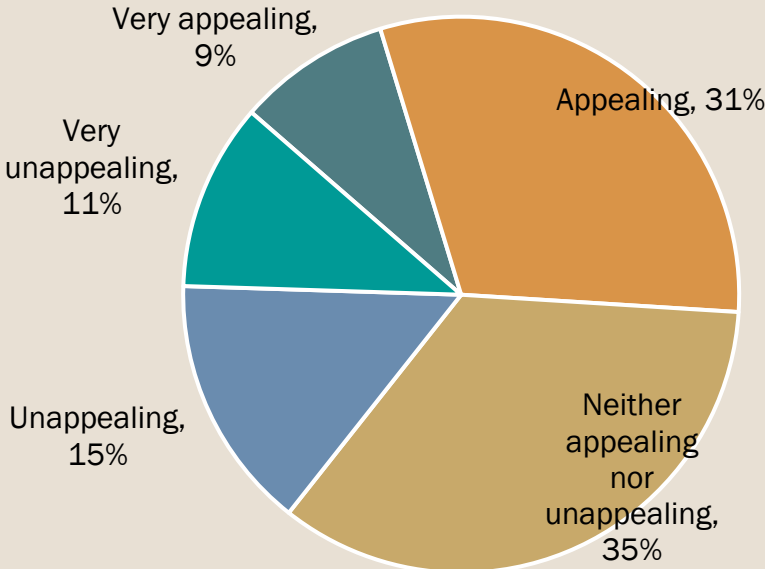
Consumer Sentiment: Rental Active Adult Communities

Experience with Rental Active Adult Communities



33% Have family or friends who have lived or currently live in a Rental AA Community

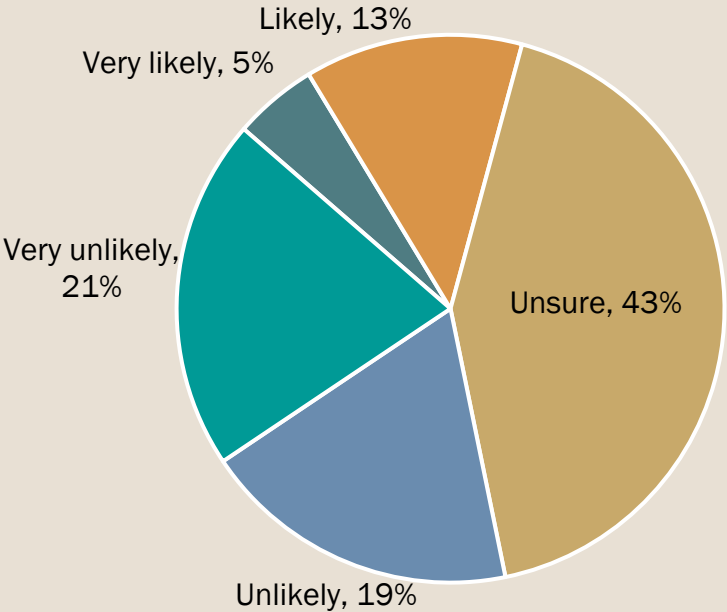
Appeal of Rental Active Adult Communities



From Winter 2025 Consumer Survey: (R-AA)
 Very appealing: 6%
 Appealing: 27%
 Neither appealing/unappealing: 38%
 Unappealing: 18%
 Very unappealing: 11%

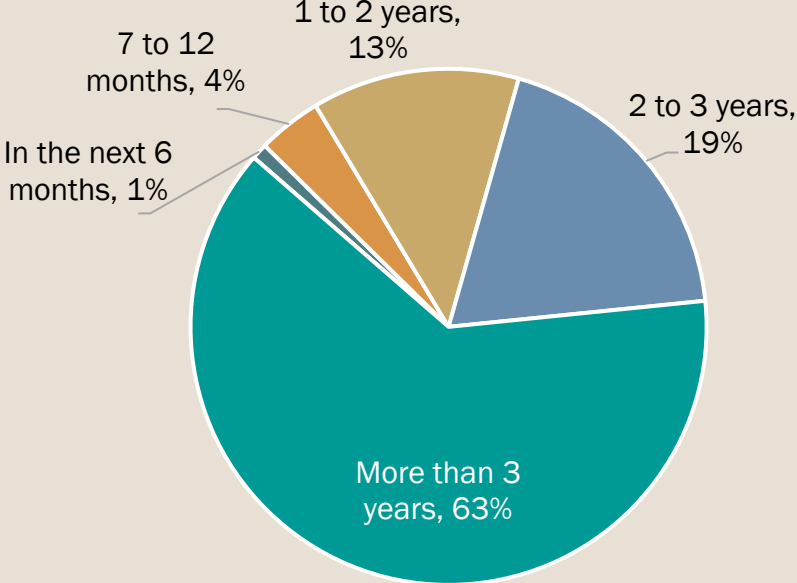
Consumer Sentiment: Rental Active Adult Communities

Likelihood of Moving to a Rental Active Adult Community



From Winter 2025 Consumer Survey: (R-AA)
 Very likely: 3%
 Likely: 12%
 Unsure: 40%
 Unlikely: 23%
 Very unlikely: 22%

Timeframe for Moving to a Rental Active Adult Community



Consumer Sentiment: For-Purchase Active Adult Communities

Key Insights: For-Purchase Active Adult Communities

Awareness is lower than rental—but engagement is more intentional.

A larger share (39 percent) are unaware, and fewer have visited, indicating a less developed but more selective market.

Appeal is similar—but slightly softer than rental.

About 37 percent find the concept appealing, with a large neutral segment (34 percent), suggesting continued need for clearer positioning.

Perceptions are stable, with limited momentum.

Minimal change vs. prior survey indicates no meaningful shift in perception or demand.

Move intent remains low and uncertain.

Only 14 percent express positive intent, while the majority are unlikely or unsure, reinforcing limited near-term demand.

Decision timelines are long and ownership-driven.

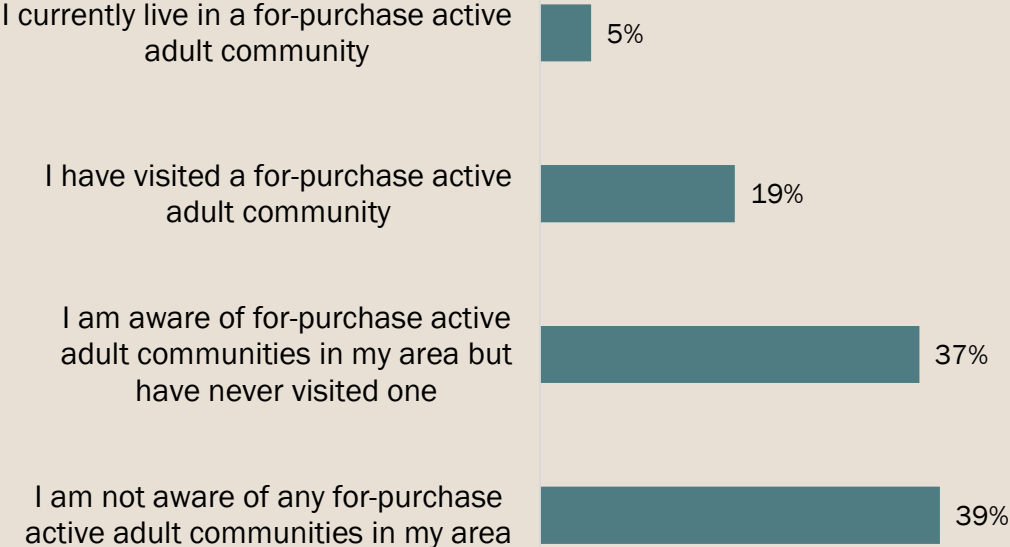
Nearly 70 percent expect to move 3+ years out, reflecting the complexity and commitment of a home purchase decision.

Social exposure exists but is not accelerating adoption.

While 29 percent know someone in these communities, it has not translated into stronger intent.

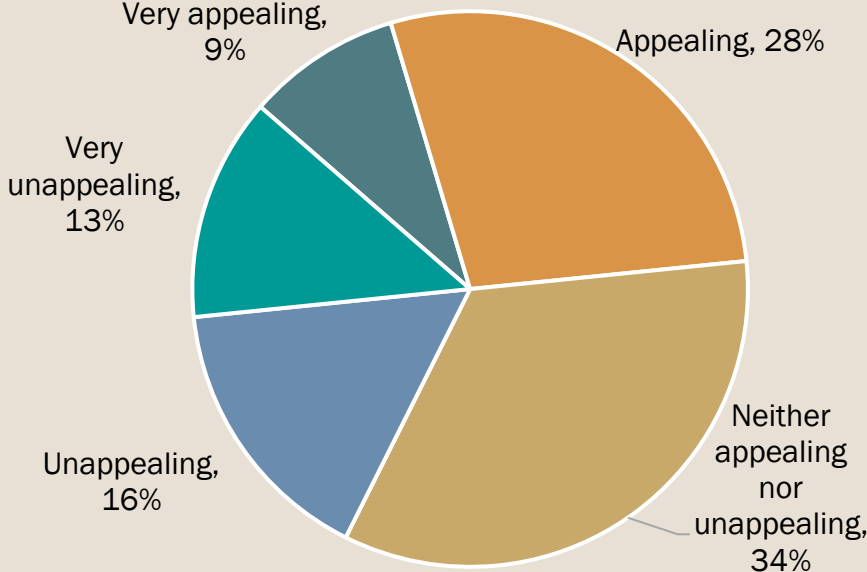
Consumer Sentiment: For-Purchase Active Adult Communities

Experience with For-Purchase Active Adult Communities



29% Have family or friends who have lived or currently live in a For-Purchase AA Community

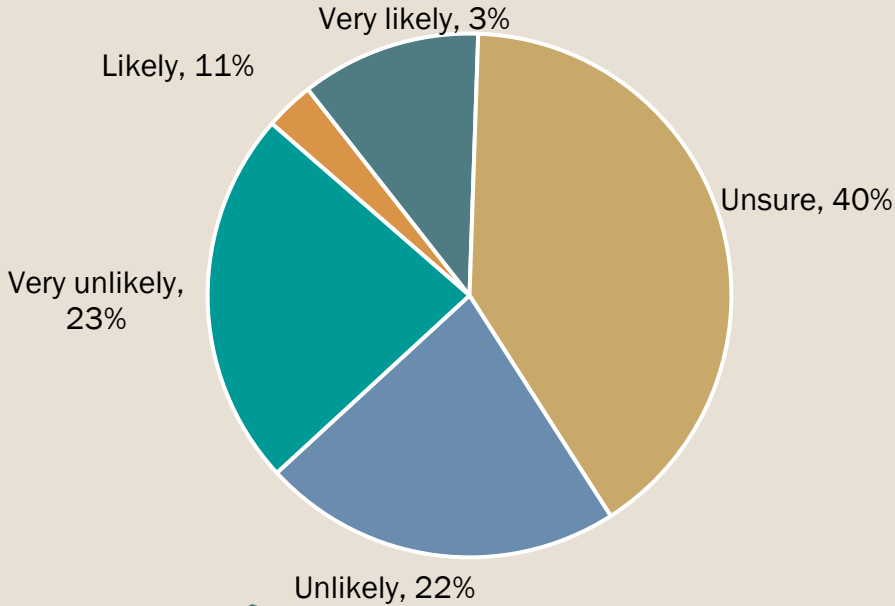
Appeal of For-Purchase Active Adult Communities



From Winter 2025 Consumer Survey: (FP-AA)
 Very appealing: 8%
 Appealing: 26%
 Neither appealing/unappealing: 37%
 Unappealing: 17%
 Very unappealing: 12%

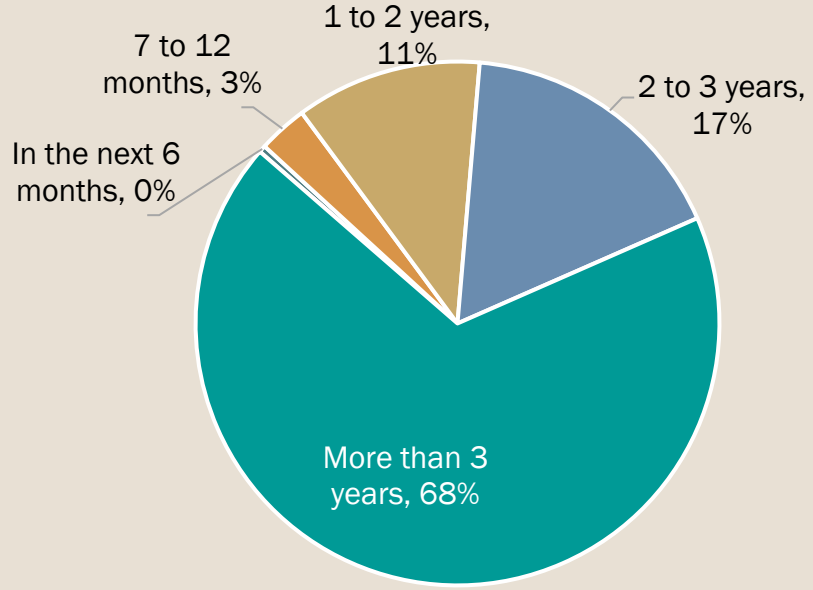
Consumer Sentiment: Rental Active Adult Communities

Likelihood of Moving to a For-Purchase Active Adult Community



From Winter 2025 Consumer Survey: (FP-AA)
 Very likely: 2%
 Likely: 9%
 Unsure: 39%
 Unlikely: 27%
 Very unlikely: 24%

Timeframe for Moving to a For-Purchase Active Adult Community



Consumer Sentiment: Independent Living Communities

Key Insights: Independent Living Communities

Awareness and engagement are significantly higher.

Only 20 percent are unaware, and nearly 40 percent have visited, indicating a more mature and understood category.

Familiarity is driven by social exposure.

38 percent know someone in independent living—the highest so far—helping normalize the option.

Appeal is steady but still tempered by neutrality.

About 41 percent find IL appealing, but 36 percent remain neutral, suggesting interest without urgency.

Perceptions have improved slightly over time.

Small gains in appeal and modest declines in “very unappealing” indicate gradual positive movement.

Intent is higher than Active Adult—but still not urgent.

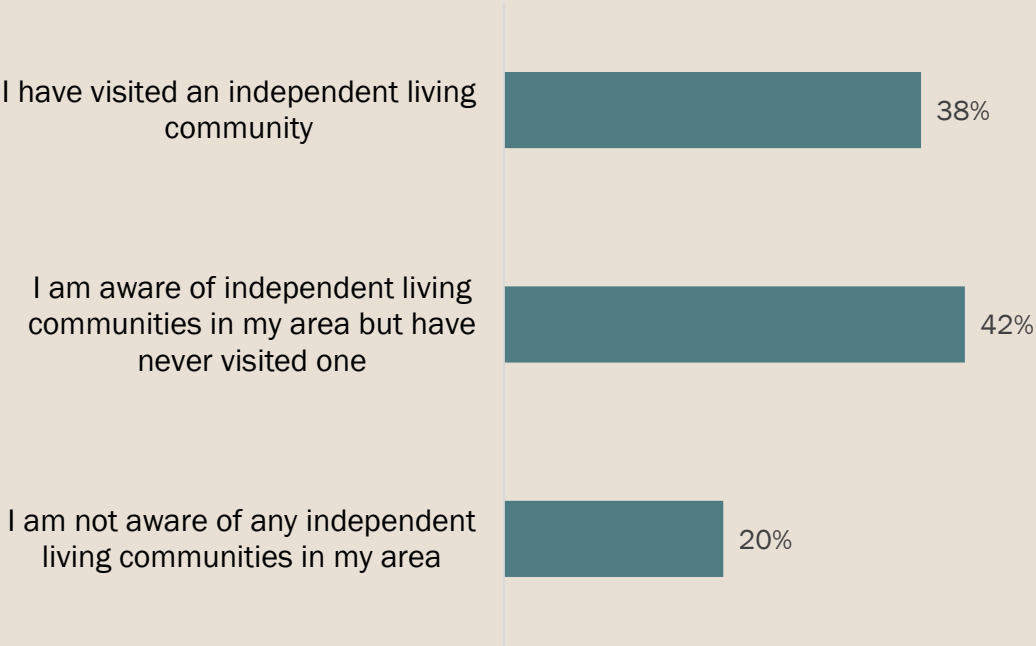
About 21 percent express likelihood to move, yet nearly half (45 percent) remain unsure.

Decision timelines remain long despite stronger familiarity.

Two-thirds expect to move 3+ years out, reinforcing that even informed consumers delay action.

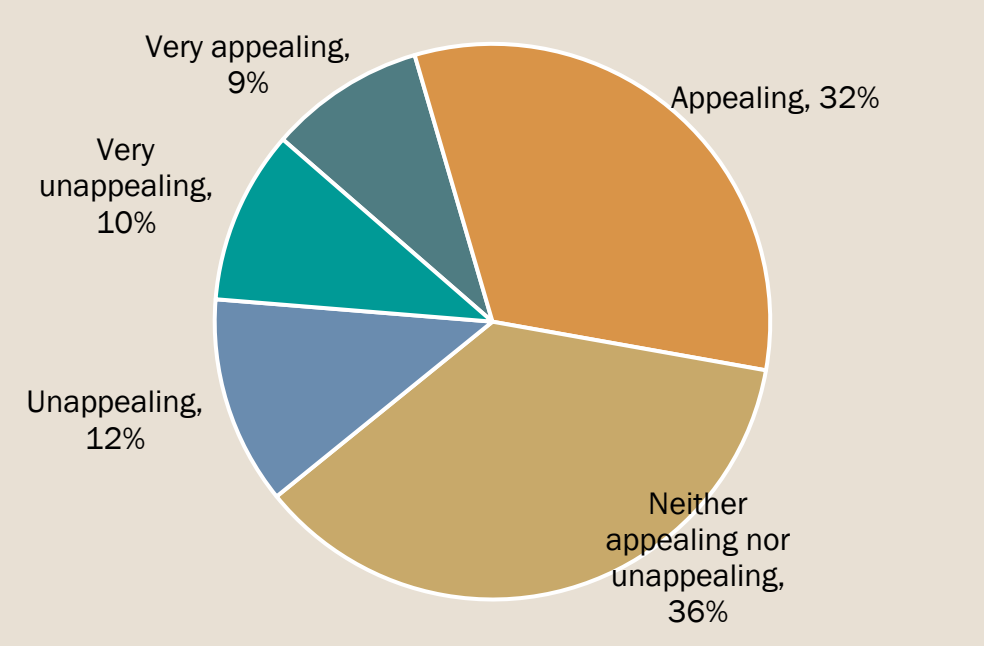
Consumer Sentiment: Independent Living Communities

Experience with Independent Living Communities



38% Have family or friends who have lived or currently live in an Independent Living Community

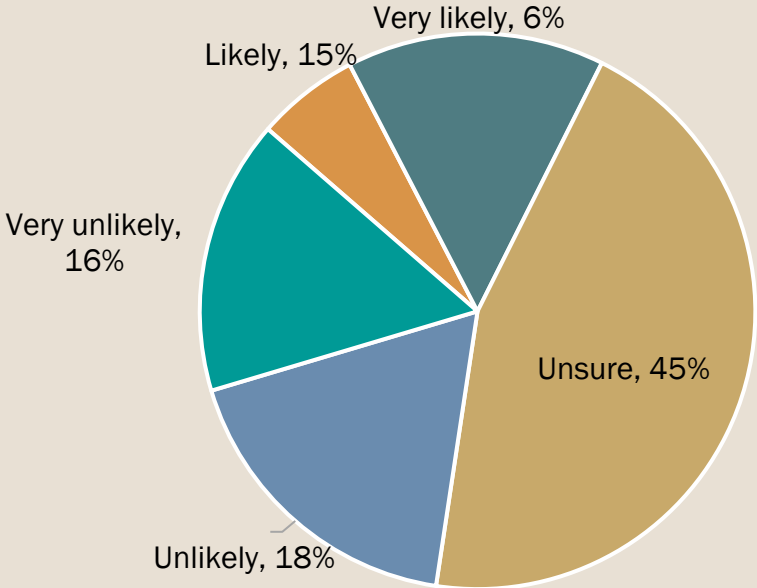
Appeal of Independent Living Communities



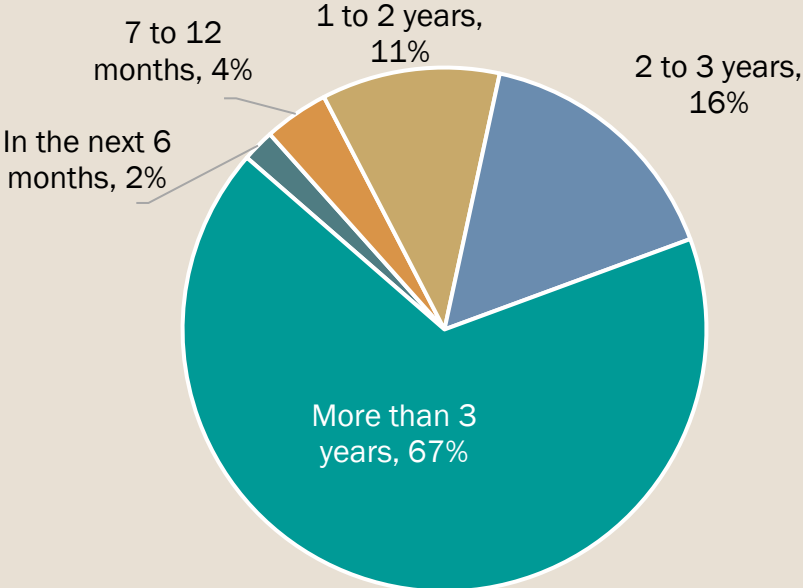
From Winter 2025 Consumer Survey: (IL)
 Very appealing: 8%
 Appealing: 31%
 Neither appealing/unappealing: 39%
 Unappealing: 14%
 Very unappealing: 8%

Consumer Sentiment: Independent Living Communities

Likelihood of Moving to a Independent Living Community



Timeframe for Moving to a Independent Living Community



From Winter 2025 Consumer Survey: (IL)
 Very likely: 5%
 Likely: 12%
 Unsure: 47%
 Unlikely: 20%
 Very unlikely: 16%

Consumer Sentiment: Assisted Living Communities

Key Insights: Assisted Living Communities

Awareness and engagement are high.

Only 15 percent are unaware, and over 40 percent have visited, reflecting a well-understood and highly visible category.

Social familiarity is strong.

38 percent know someone in assisted living, reinforcing normalization of the care setting.

Appeal remains moderate, with persistent neutrality.

About 36 percent find AL appealing, while 37 percent remain neutral, indicating mixed emotional positioning.

Perceptions are stable—but not strengthening.

Appeal metrics show little movement over time, suggesting limited momentum in improving perceptions.

Willingness to move has declined meaningfully.

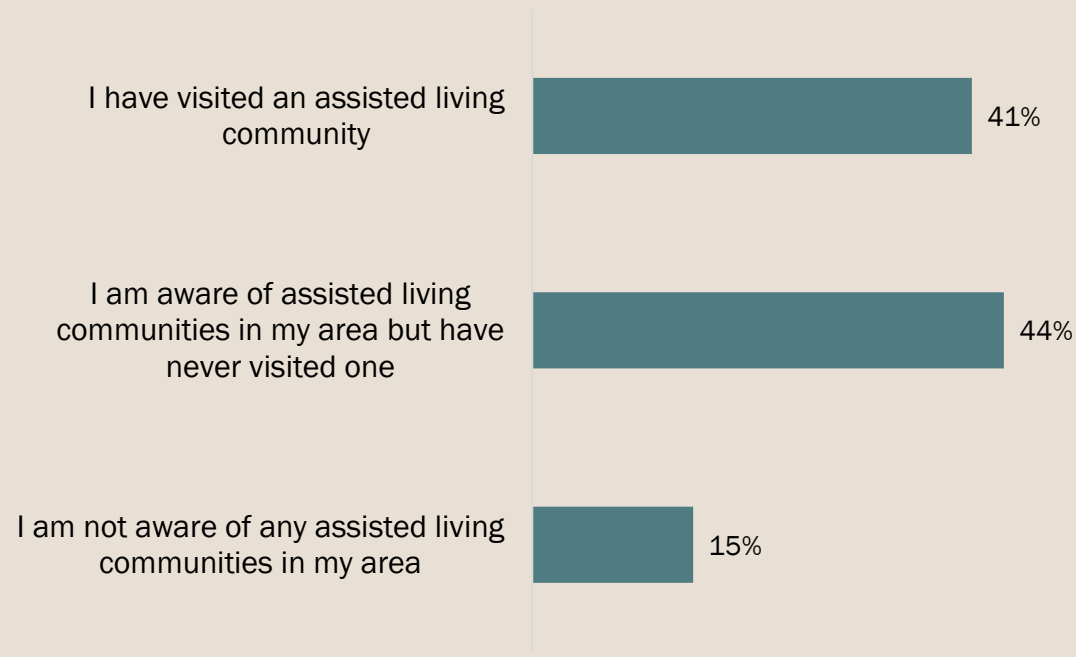
Compared to the previous study, intent has dropped sharply, with fewer likely to move and more shifting to “unsure” or “unlikely.”

Decision timelines are the longest across segments.

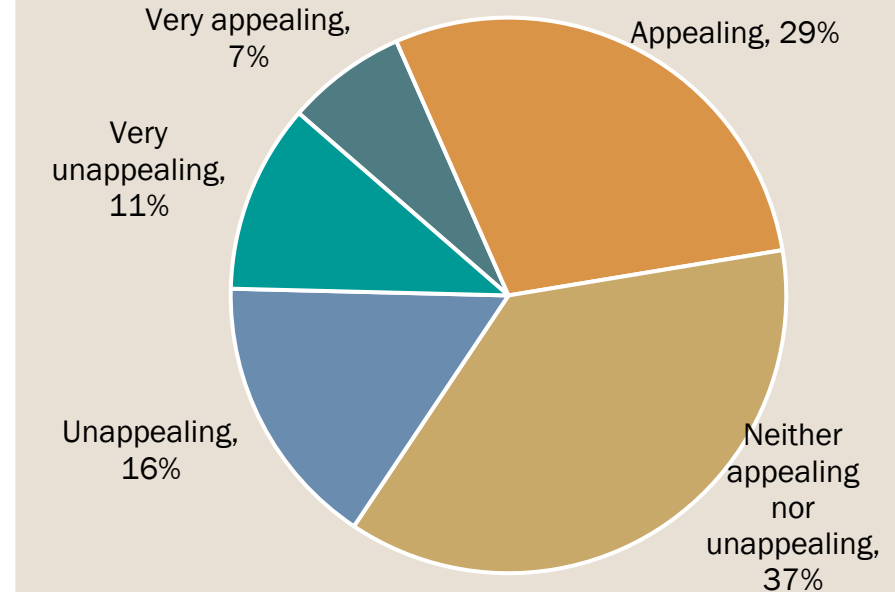
Nearly 80 percent expect to move 3+ years out, reinforcing that even need-based categories are delayed.

Consumer Sentiment: Assisted Living Communities

Experience with Assisted Living Communities



Appeal of Assisted Living Communities



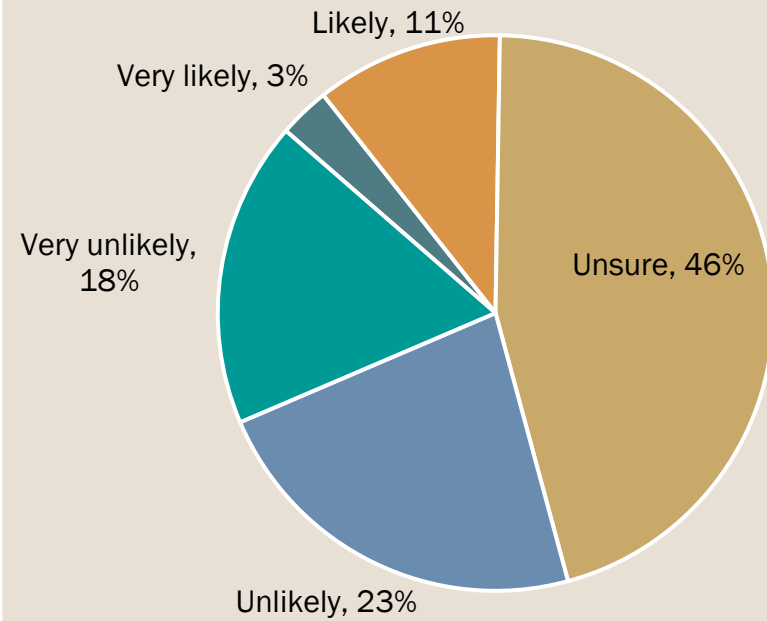
From Winter 2025 Consumer Survey: (AL)

- Very appealing: 5%
- Appealing: 32%
- Neither appealing/unappealing: 38%
- Unappealing: 16%
- Very unappealing: 9%

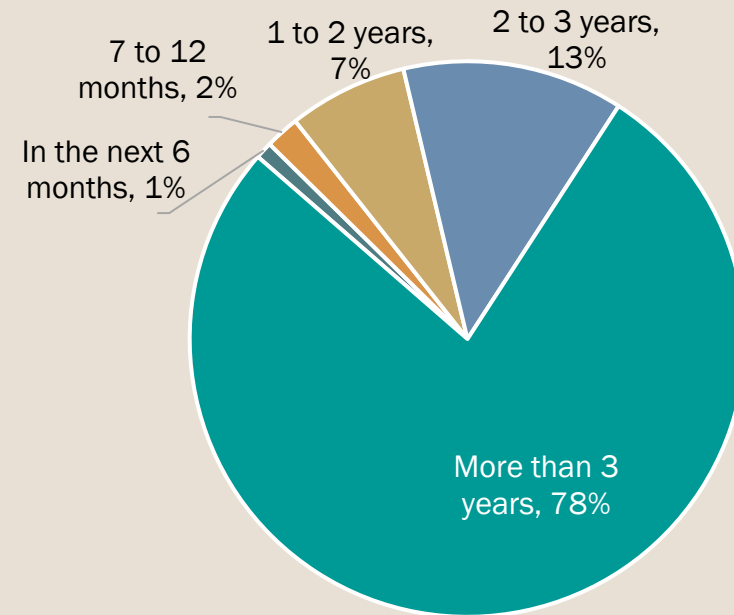
38% Have family or friends who have lived or currently live in an Assisted Living Community

Consumer Sentiment: Assisted Living Communities

Likelihood of Moving to an Assisted Living Community



Timeframe for Moving to an Assisted Living Community



From Winter 2025 Consumer Survey: (AL)

- Very likely: 7%
- Likely: 32%
- Unsure: 39%
- Unlikely: 13%
- Very unlikely: 9%

Consumer Sentiment: Memory Care Communities

Key Insights: Memory Care Communities

Awareness drops compared to other care types.

Over one-third (36 percent) are unaware, and only 21 percent have visited, reflecting lower familiarity and exposure.

Limited personal experience shapes perceptions.

Just 19 percent know someone in memory care—the lowest across segments—contributing to uncertainty.

Appeal is the weakest of all care types.

Only 25 percent find it appealing, while a large 43 percent remain neutral, indicating emotional distance or lack of understanding.

Perceptions have softened slightly over time.

Small declines in appeal and increases in “unappealing” suggest growing hesitation or discomfort with the category.

Intent remains low—but more stable than Assisted Living.

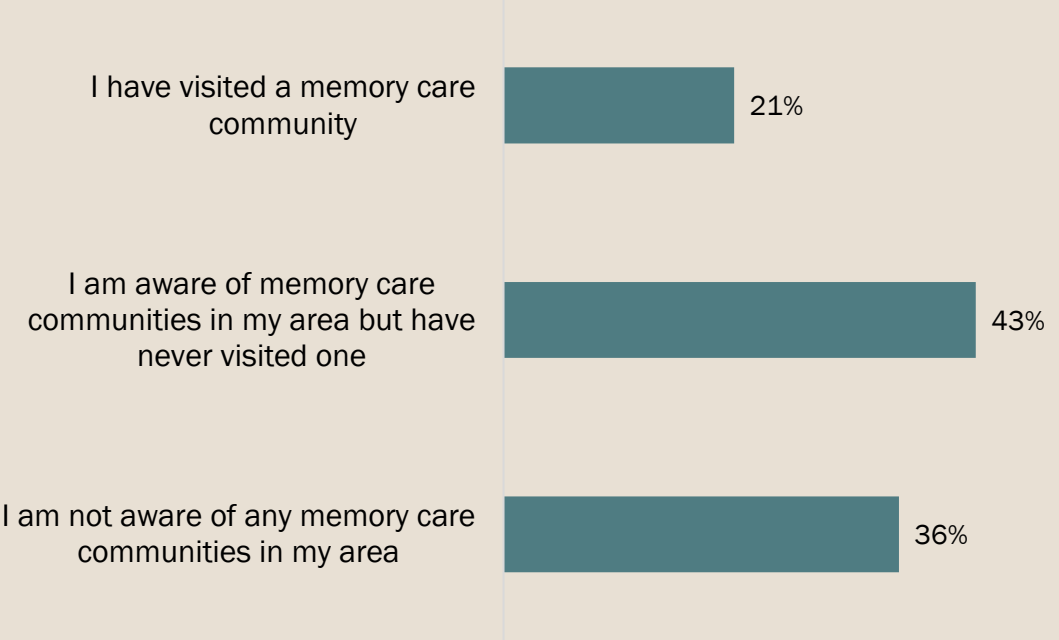
About 26 percent express likelihood to move, with a large 45 percent unsure, showing continued hesitation but less dramatic decline than AL.

Timelines are the longest across all segments.

An overwhelming 90 percent expect to move 3+ years out, reinforcing that memory care is viewed as a distant, last-resort decision.

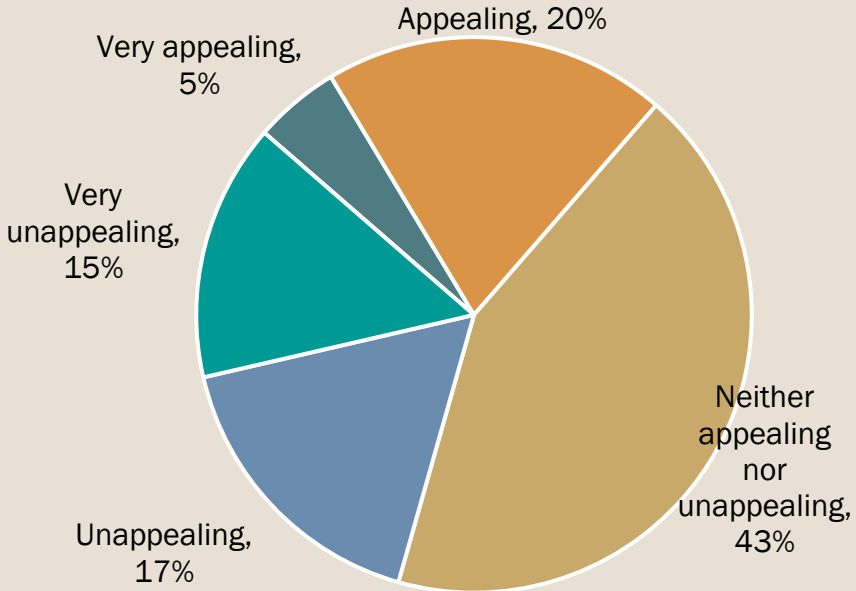
Consumer Sentiment: Memory Care Communities

Experience with Memory Care Communities



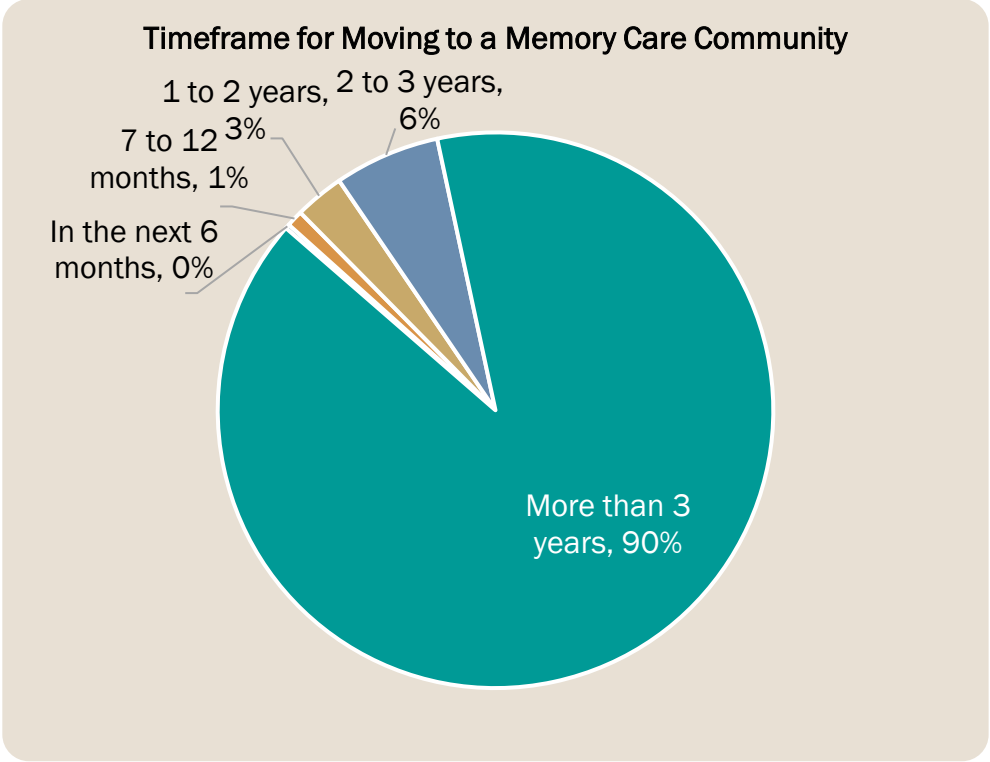
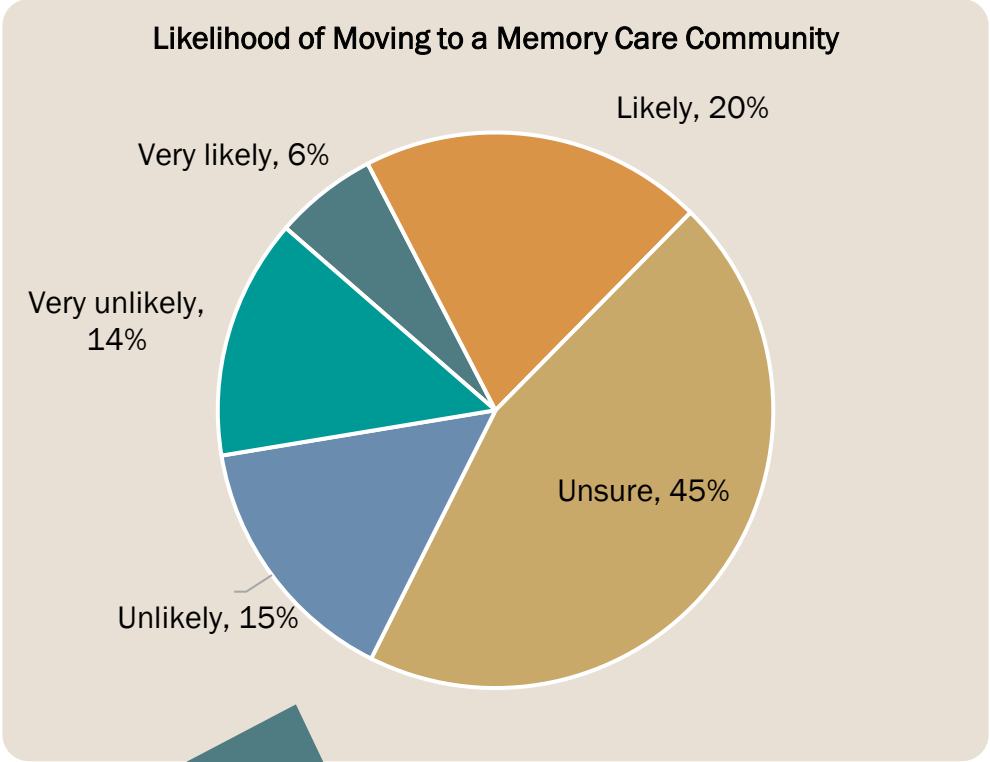
19% Have family or friends who have lived or currently live in a Memory Care Community

Appeal of Memory Care Communities



From Winter 2025 Consumer Survey: (MC)
 Very appealing: 5%
 Appealing: 23%
 Neither appealing/unappealing: 41%
 Unappealing: 19%
 Very unappealing: 12%

Consumer Sentiment: Memory Care Communities



From Winter 2025 Consumer Survey: (MC)
 Very likely: 7%
 Likely: 28%
 Unsure: 42%
 Unlikely: 13%
 Very unlikely: 10%

Consumer Sentiment:

Cross-Segment Key Insights: Consumer Decision Journey

Awareness increases with care needs—but urgency does not

Awareness and familiarity increase with care intensity...

Consumers are more likely to know, visit, and understand Independent Living and Assisted Living than Active Adult or Memory Care.

...but urgency does not follow the same pattern.

Across all segments, the majority expect to move 3+ years in the future—even in need-driven categories.

Neutrality dominates decision-making.

The largest share of consumers across segments are “unsure” or neutral, indicating a lack of conviction—not outright rejection.

Barriers shift by segment—but lead to the same outcome: delay.

- Active Adult → Low urgency / lifestyle trade-offs
- Independent Living → Familiar but not necessary yet
- Assisted Living → Known but increasingly resisted
- Memory Care → Less understood and emotionally avoided

Momentum is limited—and in some cases reversing.

While most segments show stability, Assisted Living stands out with declining intent, signaling growing hesitation even where need is highest.

The core challenge is not awareness—it’s activation.

Even as consumers become more informed, they are not moving earlier or more decisively.

Exploring Senior Living Options

Exploring Senior Living Options: How Prospects Learn More about Senior Living Options

The internet is the primary entry point.

Digital search is the leading way consumers first learn about options (45 percent lead lists / 36 percent general market), reinforcing the importance of online presence and discoverability.

Discovery is largely self-directed—not referral-driven.

Most consumers begin their journey independently rather than through healthcare professionals or formal referrals.

In-person engagement plays a meaningful early role.

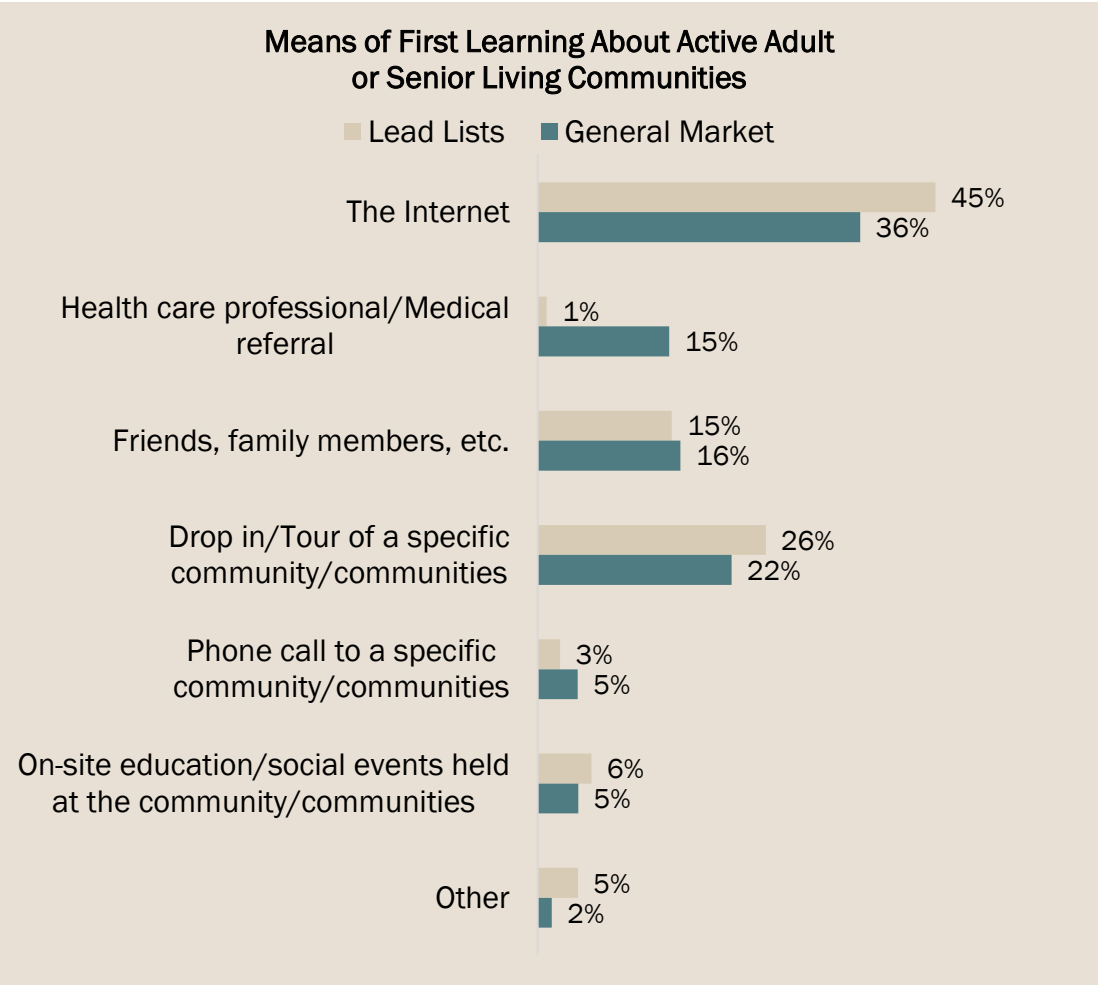
A significant share first learn through community tours or drop-ins, highlighting the importance of physical visibility and accessibility.

Healthcare referrals are not a primary driver—except in the general market.

While minimal among leads (1 percent), referrals are more present in the general market (15 percent), suggesting a later-stage or need-triggered entry point.

Word-of-mouth remains steady but not dominant.

Friends and family influence is consistent (~15–16 percent) but does not lead discovery.



Exploring Senior Living Options: Visited Website of Specific Community

Website visits are a key step—but not universal.

While 90 percent of lead list respondents have visited a community website, only 33 percent of the general market have done so—highlighting a major gap in early-stage engagement.

Digital engagement increases with intent—but remains limited overall.

Even among prospects, only ~40–46 percent across segments have visited a specific community website.

Most consumers are not progressing beyond awareness.

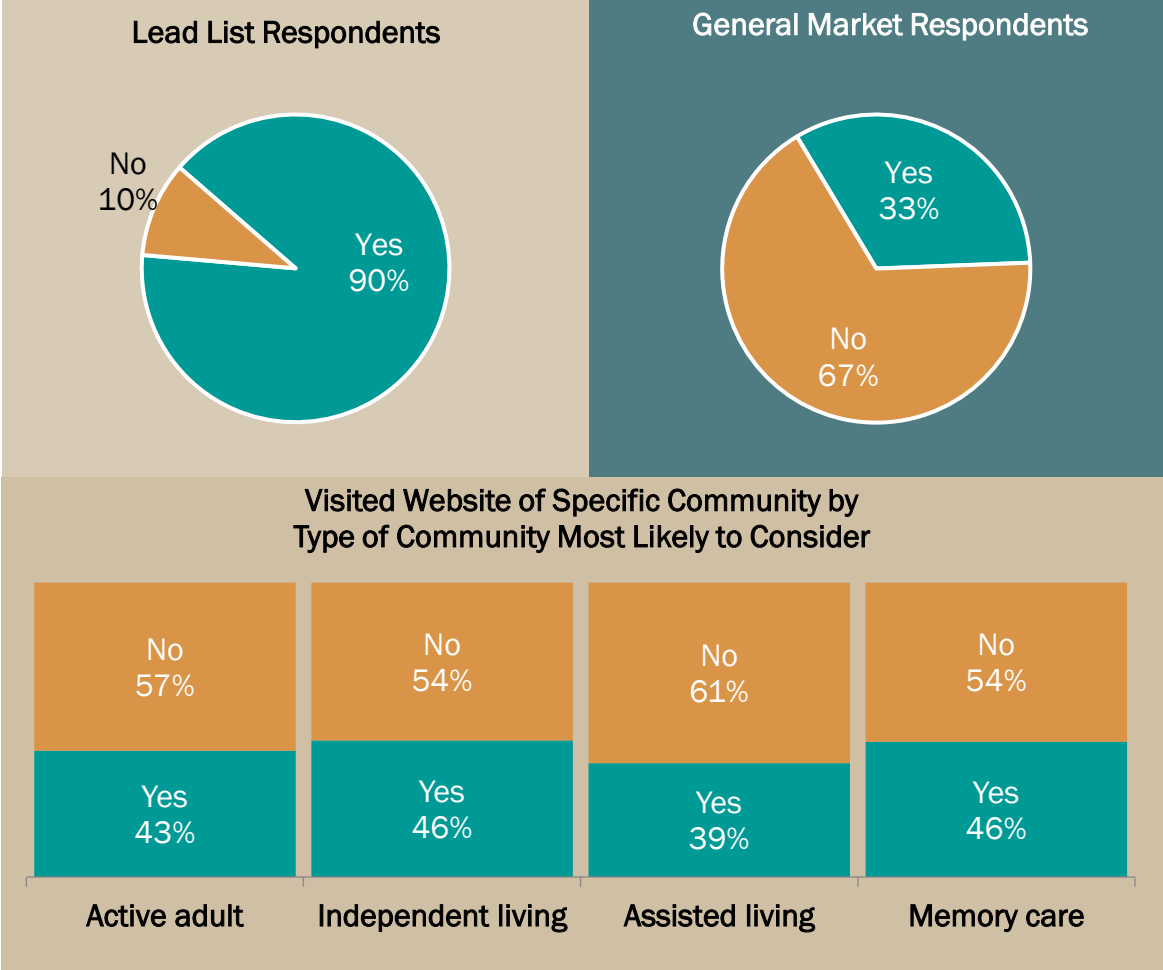
Across all care types, the majority (54–61 percent) have not visited a community website, reinforcing that many remain in passive consideration mode.

Website visits do not significantly vary by care type.

Engagement levels are relatively consistent across Active Adult, Independent Living, Assisted Living, and Memory Care—suggesting a systemic, not segment-specific, barrier.

The funnel drop-off occurs before direct engagement.

Consumers are learning about senior living (as seen in prior slide), but fewer are taking the next step to explore specific options.



Exploring Senior Living Options: Likelihood of Sharing Contact Information

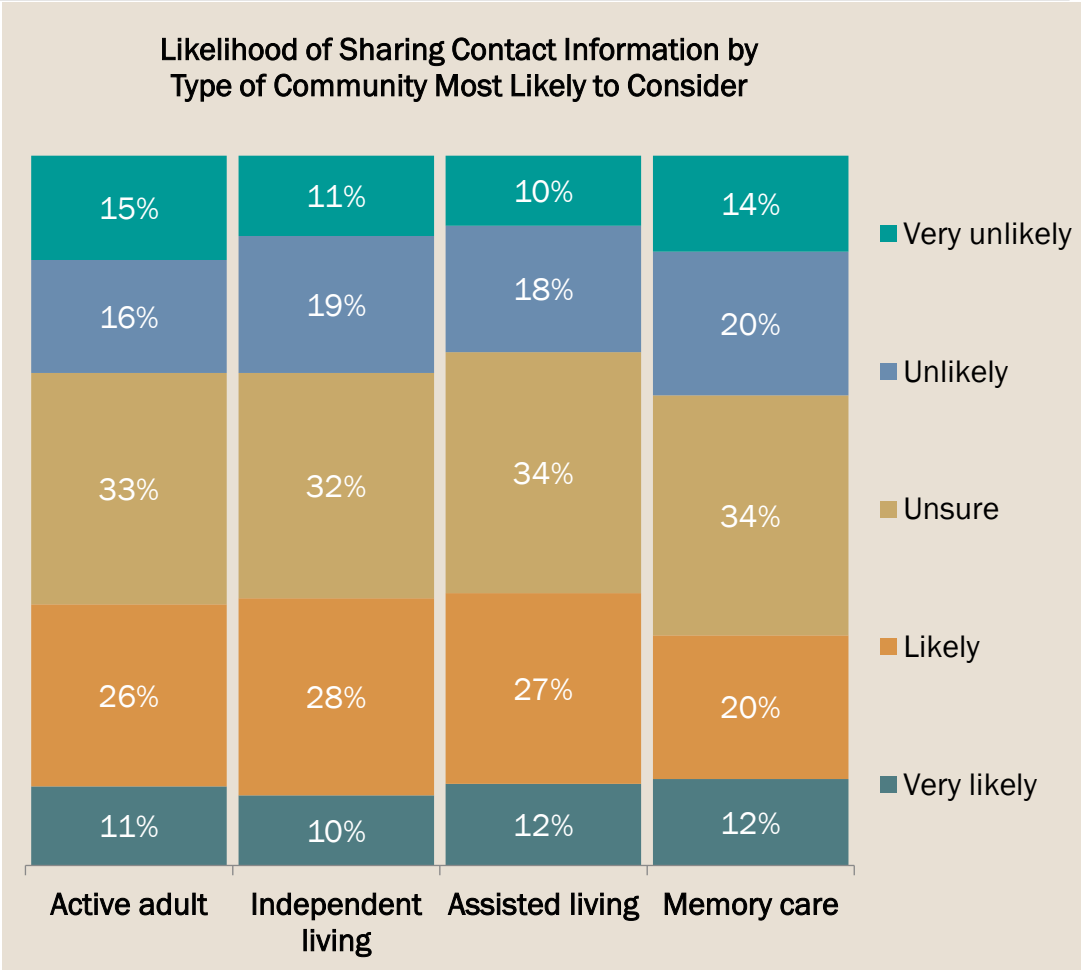
Consumers are highly reluctant to engage directly.
Only ~30–40 percent across segments are likely to share contact information, while the majority are unsure or unwilling.

Uncertainty is the dominant response.
Roughly one-third of respondents across all care types select “unsure,” signaling hesitation rather than outright rejection.

Resistance remains consistent across segments.
Willingness to share contact information shows minimal variation by care type, indicating a system-wide barrier to deeper engagement.

Even high-interest segments show limited conversion.
Assisted Living and Independent Living—where awareness and need are higher—do not demonstrate meaningfully higher willingness to engage.

The biggest drop-off occurs at the point of personal commitment.
Moving from anonymous research to identified engagement (sharing contact info) represents the most significant friction point in the journey.



Exploring Senior Living Options: Section Summary

Consumers are curious—but cautious to engage

Discovery is happening, primarily online.

The internet is the dominant entry point, especially for lead lists, reinforcing the importance of digital presence early in the journey.

Consumers stall at passive exploration.

While many are aware of options, far fewer take action to explore specific communities (e.g., website visits).

The funnel narrows sharply before direct engagement.

A majority of consumers never progress to visiting websites or engaging with specific communities.

Sharing contact information is the biggest barrier.

Even among interested prospects, most remain unsure or unwilling to provide personal information, signaling hesitation around commitment and/or trust.

This pattern is consistent across care types.

Engagement challenges are systemic, not segment-specific, indicating broad behavioral barriers rather than niche issues.

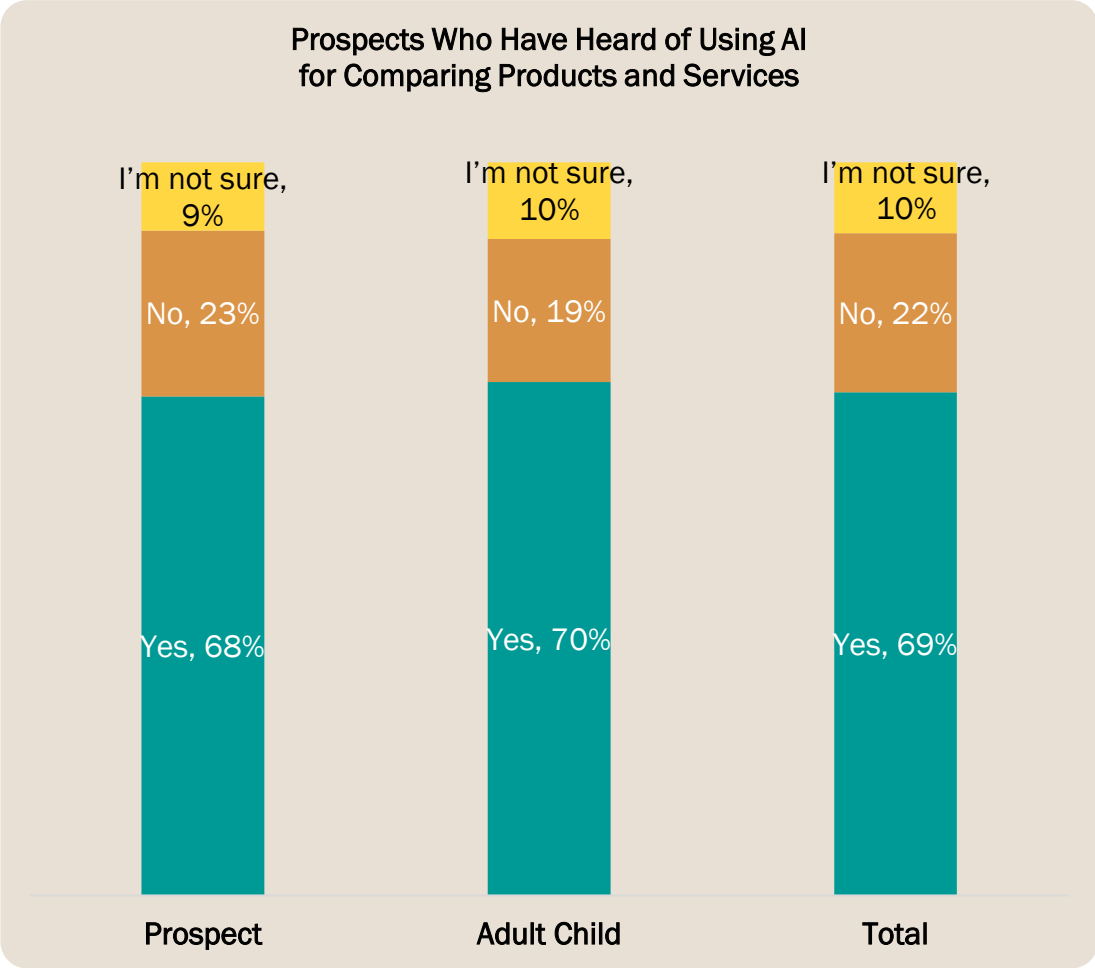
Experience with and Opinions of AI

Experience with and Opinions of AI: Heard of Using AI for Comparing Products and Services

AI awareness is already mainstream.
Nearly 7 in 10 respondents (69 percent) have heard of AI tools that help compare products and services.

Awareness is consistent across audiences.
Similar levels among prospects (68 percent) and adult children (70 percent) suggest broad familiarity—not a niche behavior.

AI is already part of the consumer mindset.
Consumers are entering the decision journey with baseline familiarity, creating a foundation for future adoption.



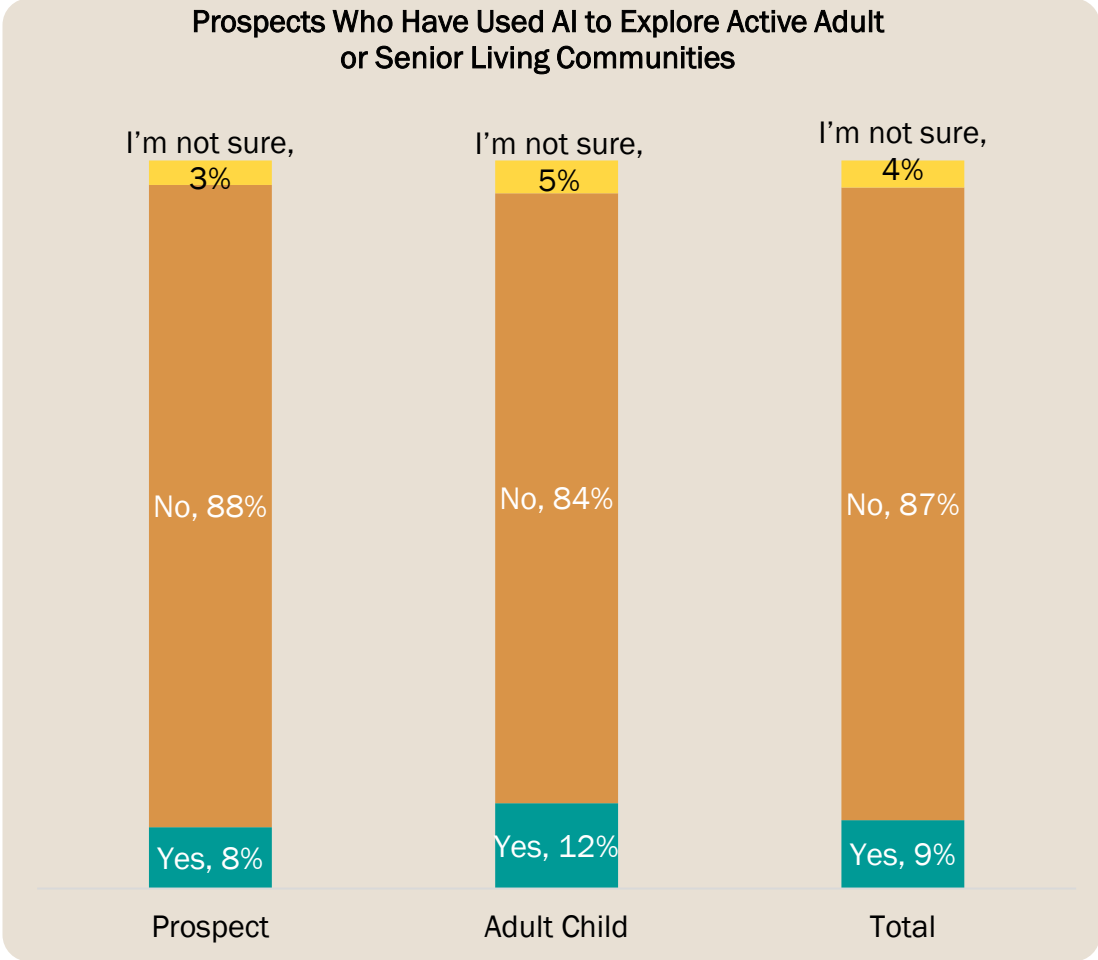
Experience with and Opinions of AI: Prospects Who Have Used AI to Compare Communities

Early adoption is already underway.

Nearly 1 in 10 consumers have already used AI to explore senior living or active adult communities. This represents an early adopter segment engaging with AI in a high-consideration category.

Significant opportunity remains to expand adoption.

While most have not yet used AI for this purpose, awareness levels suggest strong potential for growth as use cases become clearer.

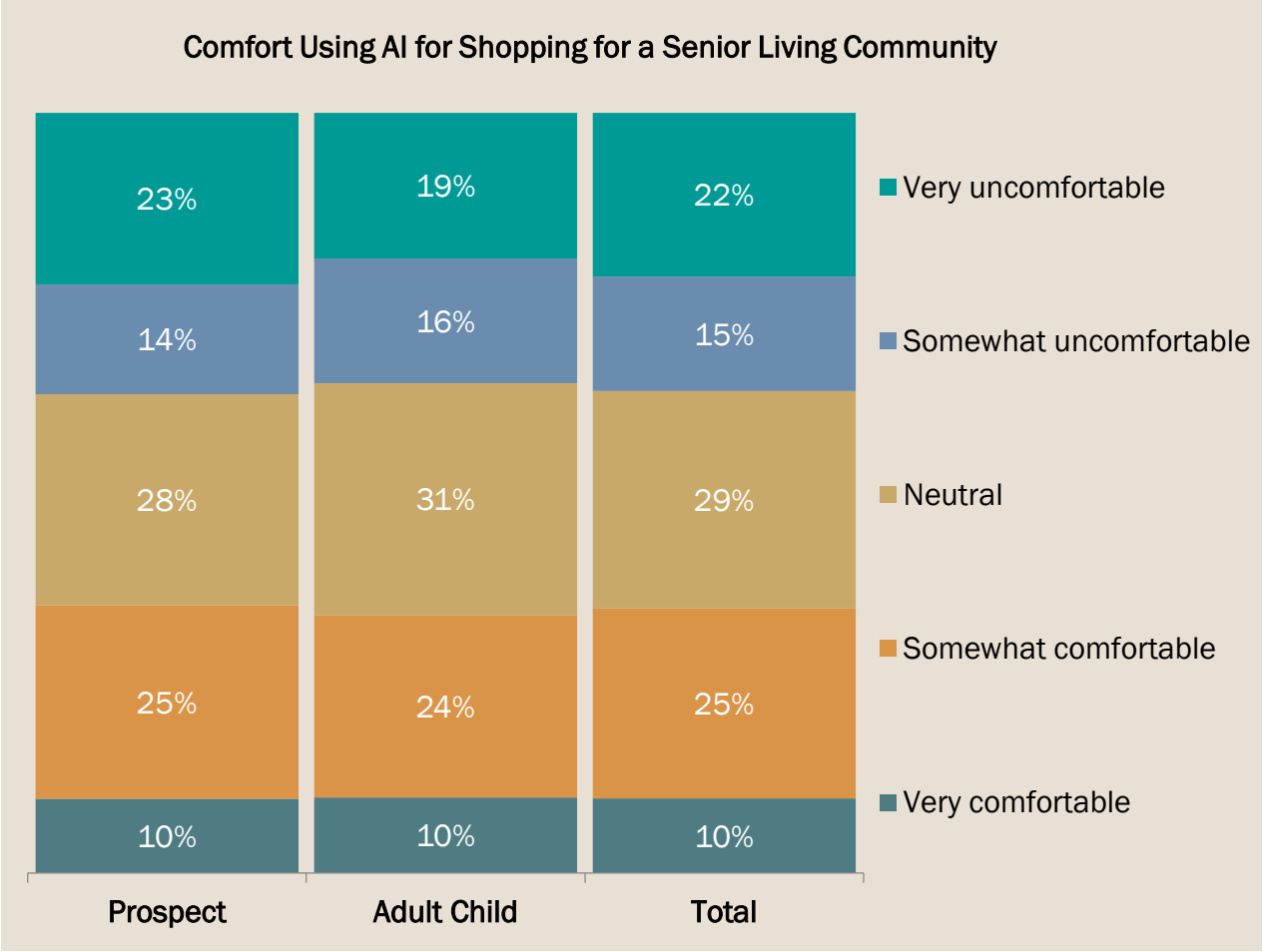


Experience with and Opinions of AI: Comfort Using AI to Help Shop for Senior Living Communities

A meaningful segment is already comfortable using AI.
About 35 percent of consumers express comfort using AI to shop for or compare senior living communities. This indicates an emerging base of users open to AI-supported decision-making.

Many consumers are still forming opinions.
Nearly 3 in 10 feel neutral, suggesting attitudes are not fixed and may shift with increased exposure and trust.

Opportunity exists to move consumers along the adoption curve.
As familiarity and confidence grow, more consumers may transition from neutral to comfortable.

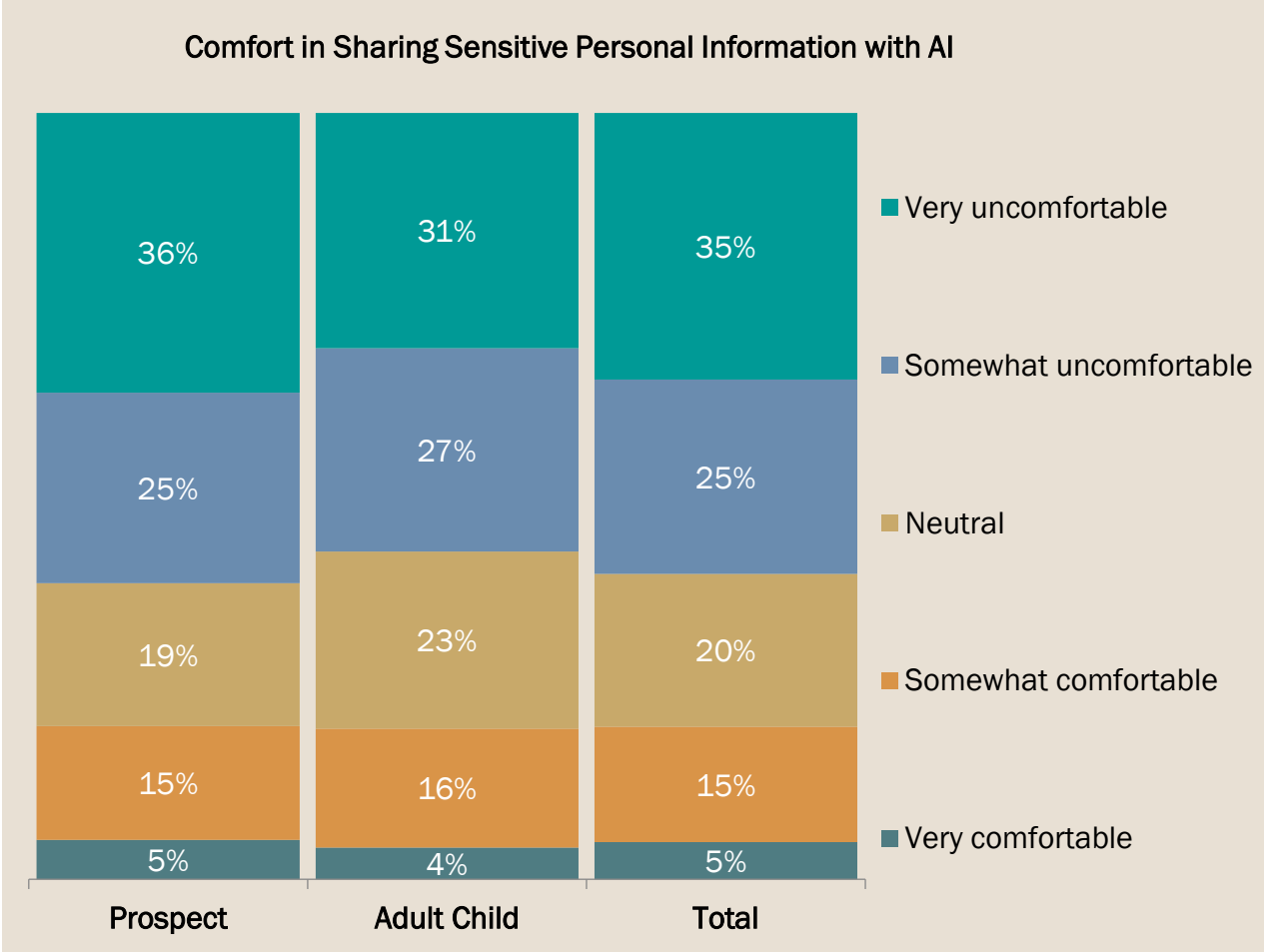


Experience with and Opinions of AI: Comfort in Sharing Sensitive Information with AI

Early comfort with AI is already established among a meaningful segment.
About 20 percent of consumers are at least somewhat comfortable sharing sensitive personal information with AI, including 5 percent who are very comfortable. This reflects an emerging group of early adopters open to deeper engagement.

The majority remain cautious—but not closed off.
A significant share of consumers are neutral or hesitant, indicating that trust is still developing rather than absent.

Trust-building will be critical to broader adoption.
Addressing concerns around privacy, security, and transparency will be key to expanding comfort levels.

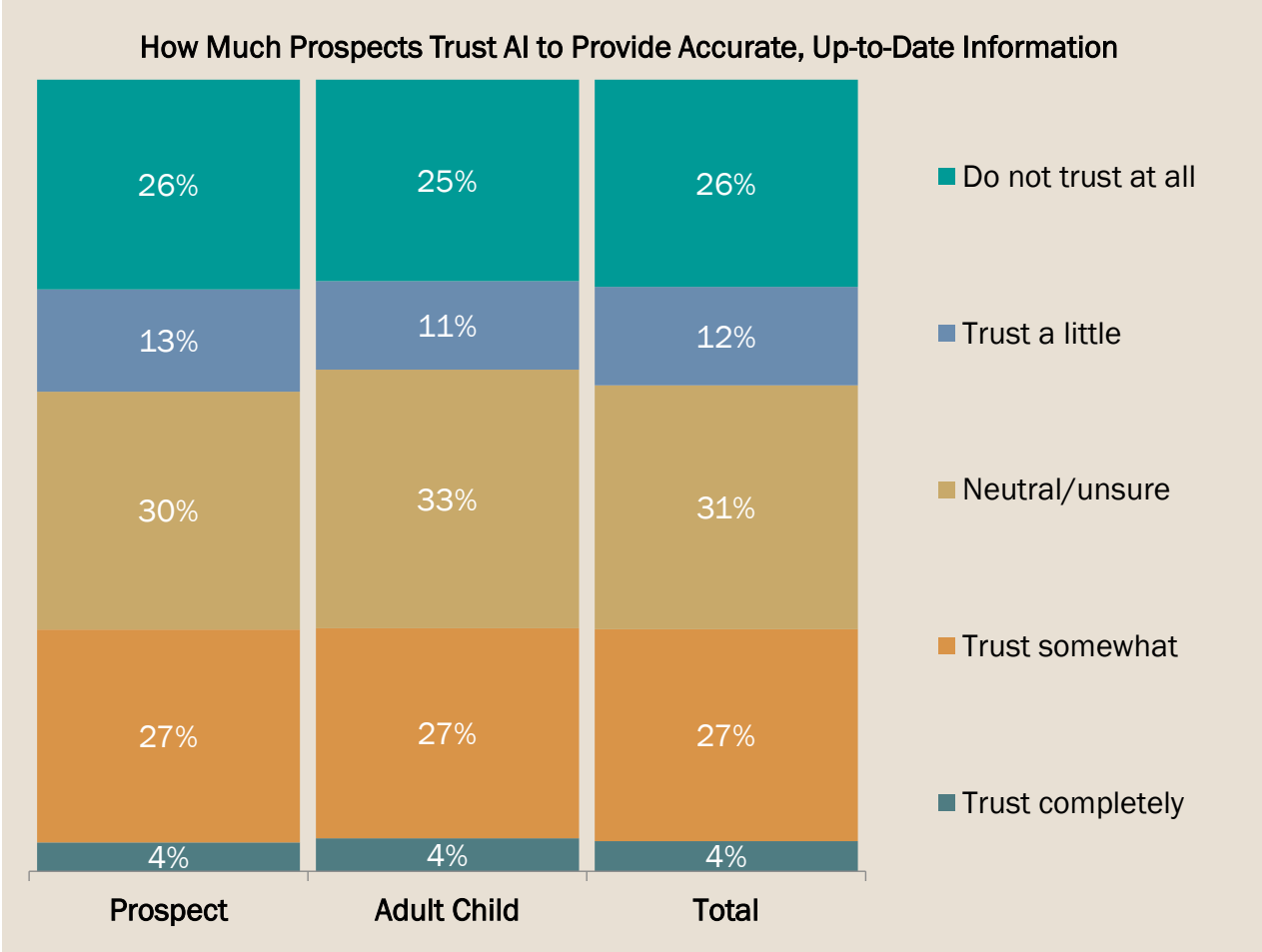


Experience with and Opinions of AI: How Much Prospects Trust AI to Provide Accurate Information

Trust in AI is emerging, with a foundation already in place.
About 31 percent of consumers express at least some level of trust in AI to provide accurate, up-to-date information. This represents a meaningful starting point for adoption.

A large segment remains undecided.
Nearly one-third are neutral or unsure, reinforcing that opinions are still forming.

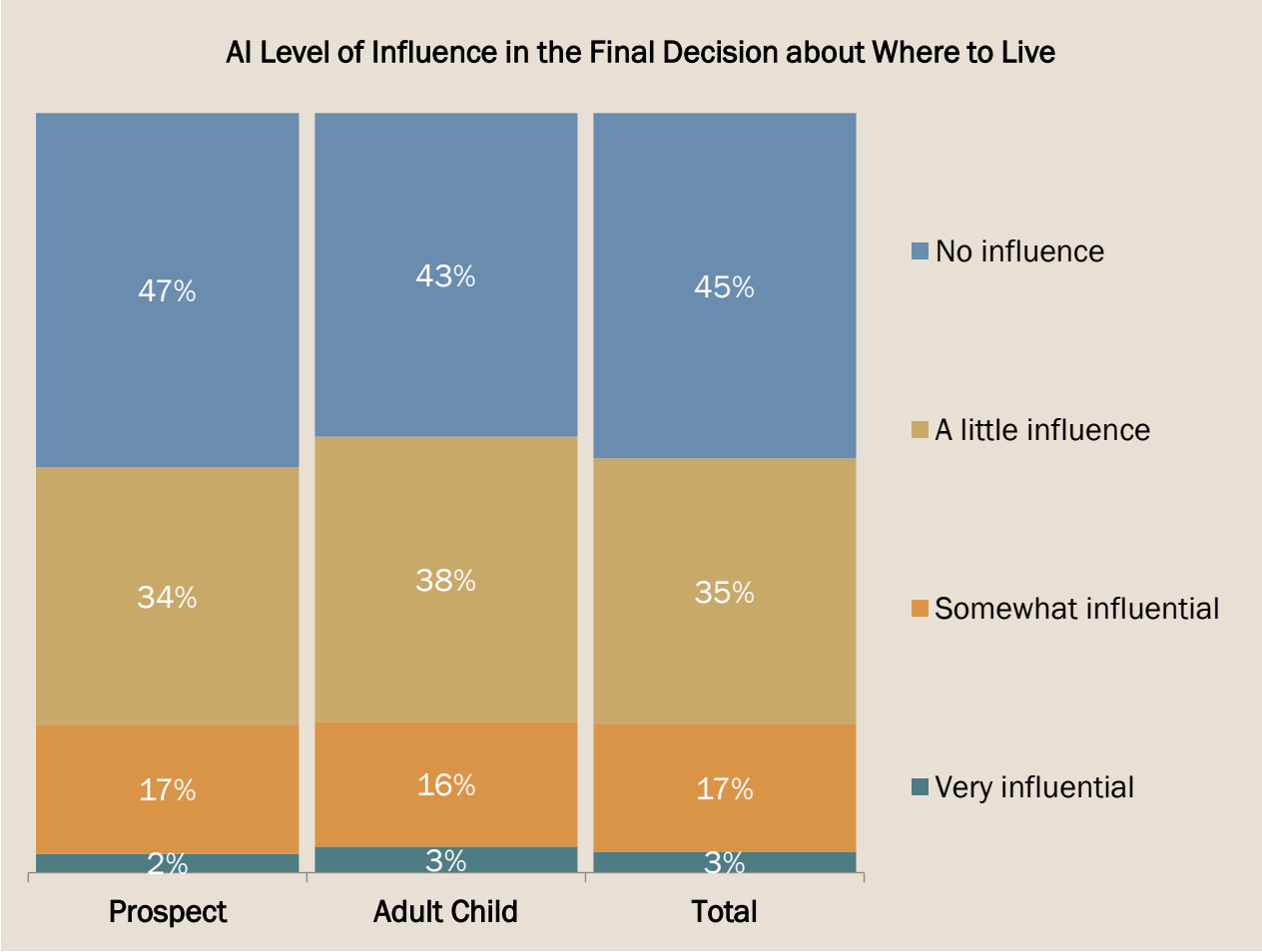
Building confidence is the next phase of adoption.
Improvements in accuracy, transparency, and reliability will be critical to increasing trust over time.



Experience with and Opinions of AI: How Much Influence AI Will Have in Deciding Where to Live

AI is positioned as an early-stage influence—not a final decision driver. Consumers expect AI to play a limited role in final decisions, with most anticipating little to no influence. This aligns with AI’s current role as a research and comparison tool.

There is opportunity to expand influence earlier in the journey. AI can play a meaningful role in shaping awareness, consideration, and shortlisting of options.

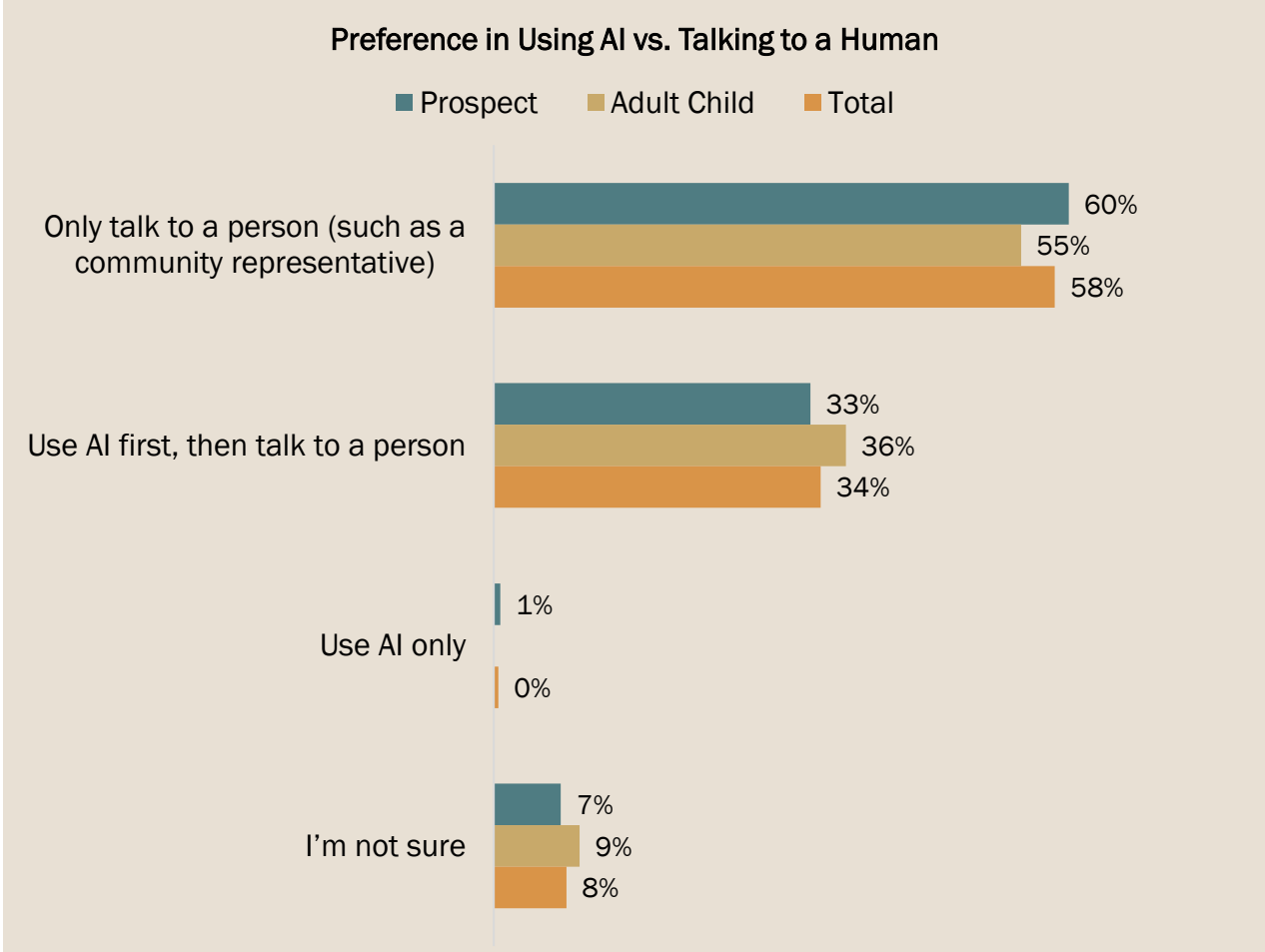


Experience with and Opinions of AI: Preference for Using AI vs. Talking to a Human

Human interaction remains central to the decision process.
A majority prefer to speak directly with a person when making senior living decisions. This reinforces the importance of human connection in high-stakes, emotional choices.

AI is viewed as a complementary starting point.
About one-third are open to using AI first, then engaging with a person—highlighting a clear hybrid model.

AI’s role is to support—not replace—human interaction.
The opportunity is to enhance the early journey while preserving human connection at key decision points.

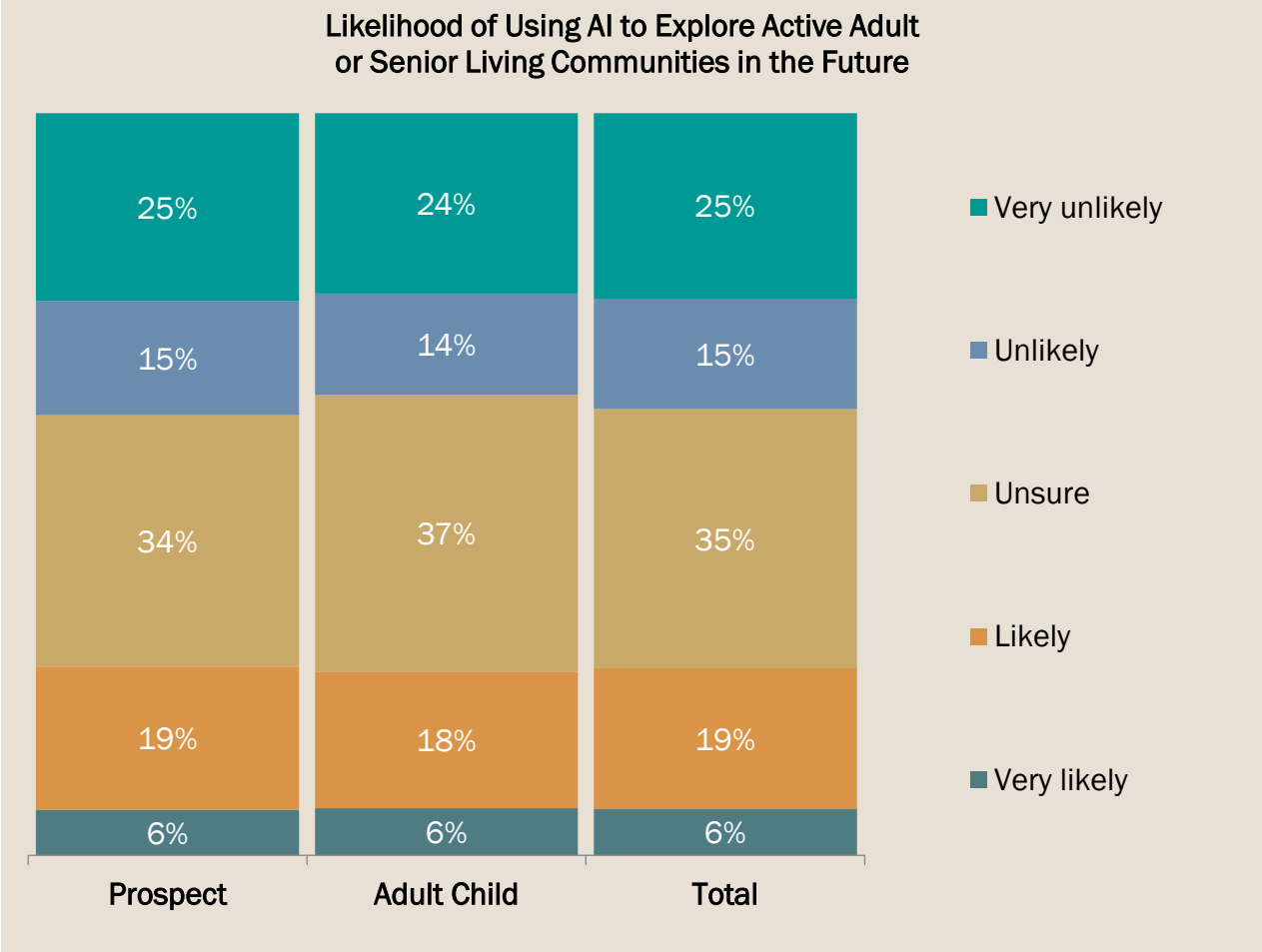


Experience with and Opinions of AI: Likelihood of Using AI to Explore Senior Living Communities

Future adoption remains open and evolving.
A meaningful share of consumers are unsure about future use, indicating openness rather than resistance.

Interest and hesitation are balanced.
About 1 in 4 are likely to use AI in the future, while others remain cautious—reflecting an early-stage adoption curve.

Growth will depend on trust and experience.
As consumers gain familiarity and confidence, adoption is likely to expand over time.



Experience with and Opinions of AI: Advice in Using AI in Sales for Senior Living Communities

AI can support early research—but must align with consumer expectations.

Consumers are open to using AI to gather information and compare options—but expect human interaction for final decisions.

Early adopters are already engaging—but broader adoption requires trust.

A meaningful segment is comfortable using AI, but expansion depends on addressing concerns around accuracy and privacy.

AI must be simple, transparent, and optional.

Consumers expect clear explanations, easy-to-use tools, and the ability to engage with a human at any point.

The opportunity is to enhance—not replace—the decision journey.

AI is best positioned as a supportive tool that reduces friction and improves access to information—while maintaining trust and human connection.

Advice Prospects Give Active Adult and Senior Living Communities about Using AI

Theme	Approx. Prevalence	What Respondents Are Saying
Human Touch is Essential	~35–40%	AI should complement—not replace—real human interaction, especially for emotional, high-stakes decisions.
Preference for Human-First Interaction	~25–30%	Many prefer to begin with a person, viewing human guidance as more trustworthy and personalized.
Accuracy & Verification Considerations	~20–25%	Consumers want confidence that information is accurate, current, and can be easily verified.
Privacy & Data Security Expectations	~20%	Clear safeguards and transparency are expected when sharing personal or financial information.
AI as a Helpful Early-Stage Research Tool	~15–20%	AI is seen as useful for gathering information, comparing options, and narrowing choices early in the process.
Need for Transparency & Disclosure	~10–15%	Consumers want clarity on when and how AI is being used, and how recommendations are generated.
Ease of Use & Simplicity	~10–15%	Tools should be intuitive, easy to navigate, and designed with a wide range of users in mind.
Optionality (Choice of AI vs. Human)	~10–15%	AI should be available as an option—not a requirement—with seamless access to human support at any point.
Limited Familiarity with AI	~10–15%	Some consumers are still building understanding of how AI works and how it can be used effectively.

Experience with and Opinions of AI:

Section Summary

AI in Senior Living Search: Emerging Adoption with Clear Role in the Journey

Awareness is high, with early adoption already underway.

Most consumers are familiar with AI, and a meaningful segment has begun using it—signaling early momentum.

AI is positioned as a starting point in the decision journey.

Consumers are open to using AI for research, comparisons, and narrowing options early on.

Trust is still developing—but not absent.

Many are neutral or selective in their trust, creating an opportunity to build confidence through transparency and accuracy.

Human interaction remains essential in final decisions.

Consumers expect to engage with a person at key moments, especially for emotional or high-stakes choices.

Future adoption remains open and evolving.

Many consumers have not yet formed strong opinions, indicating room to grow as familiarity and trust increase.

AI can enhance discovery while reinforcing human connection.

The greatest opportunity is to use AI to reduce friction and improve access to information—while preserving trust and personal interaction.

Most Positive Aspects and Biggest Concerns about Moving

Most Positive Aspect and Biggest Concern about Moving: Most Positive Aspect of Active Adult Communities

Social connection is the dominant driver—by far

Nearly half of responses center on being around people their age, making friends, and avoiding isolation. Active Adult = social lifestyle decision, not care-driven.

Maintenance relief is the #2 unlock

Strong appeal of “no yard work, no repairs, no chores.” Framed less as burden and more as freeing up time for enjoyment.

Activities reinforce (not replace) social motivation

Activities matter—but mainly as a vehicle for connection and staying engaged. Not just amenities → structured opportunities to interact.

This is an independence-first mindset

Mentions of care/support are secondary and light-touch. Positioning: “I’m still active—I just want life to be easier and more social.”

Emotional framing: freedom + belonging

Core emotional combo: Freedom from responsibility & belonging to a peer community.

Active Adult living is about trading homeownership burdens for a more social, active, and simplified lifestyle.

Most Positive Aspect of Moving to Active Adult (Asked of Prospects Most Interested in Active Adult)		
Theme	Approx. Prevalence	What It Represents
Friendship & Community	~45–50%	Being with peers, making friends, avoiding loneliness, sense of belonging
Maintenance-Free Lifestyle	~25–30%	No yard work, repairs, home upkeep, fewer responsibilities
Activities & Amenities	~20–25%	Organized activities, fitness, pools, clubs, staying active
Ease & Simplicity of Living	~15–20%	Convenience, less stress, simplified daily life
Safety & Security / Peace of Mind	~10–15%	Feeling safe, emergency help available, neighbors nearby
Access to Help (Light Support)	~10–15%	Assistance if needed, but still largely independent
Independence with Convenience	~10%	Maintaining independence while gaining benefits/services



Most Positive Aspect and Biggest Concern about Moving: Most Positive Aspect of Independent Living Communities

Social connection remains the top driver—but with more depth than Active Adult

Still the #1 theme, but shifts from “fun and lifestyle” → “avoiding loneliness and maintaining emotional wellbeing.”

Maintenance-free living is now about necessity, not convenience

Stronger tone of: “I can’t / don’t want to manage a home anymore.” Transition from lifestyle benefit → functional relief.

Safety + support become central to the value proposition

Major step-up vs Active Adult. Frequent mentions of: Emergency response, Staff availability, “Someone there if something happens.” This is a psychological safety decision as much as a practical one.

“Care availability” emerges—even if not immediately needed

Many respondents explicitly value: Future care access, aging in place, even independent prospects are thinking ahead.

Independence is still important—but redefined

Not “doing everything yourself.” Instead: “Living independently with support nearby.”

Family burden is a meaningful secondary driver

Clear theme: “I don’t want my kids to have to take care of me.” Emotional + practical motivator.

**Most Positive Aspect of Moving to Independent Living
(Asked of Prospects Most Interested in Independent Living)**

Theme	Approx. Prevalence	What It Represents
Community & Companionship	~40–45%	Being around peers, avoiding loneliness, friendships, belonging
Maintenance-Free Living	~30–35%	No home/yard upkeep, fewer responsibilities
Safety & Security / Peace of Mind	~20–25%	Emergency support, safer environment, reassurance for self/family
Access to Care (Now or Future)	~20–25%	Help available if needed, aging in place, continuum of care
Convenience & Simplified Lifestyle	~20–25%	Meals, services, everything in one place, easier daily life
Activities & Engagement	~15–20%	Organized activities, staying active, mental/physical stimulation
Reducing Burden on Family	~10–15%	Not relying on children, peace of mind for loved ones



Most Positive Aspect and Biggest Concern about Moving: Most Positive Aspect of Assisted Living Communities

Care is the primary driver—this is a needs-based decision

Nearly half of responses explicitly reference: Help with daily living; 24/7 care; medical support.

This is a clear shift from: Active Adult → lifestyle
 Independent Living → balance
 Assisted Living → care-first

Safety becomes non-negotiable

Strong emphasis on: Monitoring, Emergency response, Fall prevention
 Language shifts to: “being watched over,” “someone there,” “not being alone in an emergency”

Friendships still matter—but as emotional support

Still important, but reframed as: Combating loneliness; maintaining mental wellbeing; less about “fun,” more about human connection and dignity.

Emotional framing: security + care + dignity

Core emotional bundle: “I will be taken care of,” “I will be safe,” “I won’t be alone.”

Assisted Living is driven by the need for reliable care, safety, and daily support—while preserving dignity and human connection.

Most Positive Aspect of Moving to Assisted Living (Asked of Prospects Most Interested in Assisted Living)		
Theme	Approx. Prevalence	What It Represents
Access to Care / Help with Daily Living	~45–50%	24/7 care, help with ADLs, medical support, supervision
Safety & Security	~30–35%	Emergency response, monitoring, fall prevention, peace of mind
Community & Companionship	~25–30%	Being around others, avoiding loneliness, community
Relief from Home Responsibilities	~20–25%	No maintenance, cooking, cleaning, household burden
Peace of Mind for Family	~15–20%	Reducing burden on children, reassurance for loved ones
Convenience & Daily Support Services	~15–20%	Meals, housekeeping, structured support
Activities & Engagement	~10–15%	Organized activities, staying mentally/physically active



Most Positive Aspect and Biggest Concern about Moving: Most Positive Aspect of Memory Care Communities

Care is overwhelmingly the core value

More than half of responses center on: Specialized care, supervision, and meeting needs that families cannot. This is the clearest “care-first” segment of all.

Safety is critical and assumed—not optional

Strong emphasis on: Monitoring, secure environments, and immediate response
Language reflects vulnerability: “looked after,” “supervised,” “taken care of”

The decision is as much about the family as the resident

Much stronger than any other segment: Relieving caregiver burden, providing peace of mind. This is often framed as: “what’s best for my loved one.”

Sense of Community = stimulation, not lifestyle

Activities and interaction matter, but for cognitive engagement and preventing decline. Not framed as “fun”—more as therapeutic and necessary.

Trust in providers becomes critical

Mentions of professional staff, quality care, and proper training implies that the decision hinges on credibility and trust, not amenities.

**Most Positive Aspect of Moving to Memory Care
(Asked of Prospects Most Interested in Memory Care)**

Theme	Approx. Prevalence	What It Represents
Specialized Care & Supervision	~50–55%	Alzheimer’s/dementia care, trained staff, 24/7 supervision
Safety & Security	~35–40%	Constant monitoring, safe environment, emergency response
Peace of Mind for Family	~25–30%	Relief for caregivers, knowing loved one is cared for
Community & Engagement	~20–25%	Interaction, stimulation, structured activities
Relief from Responsibilities	~15–20%	No home upkeep, meals, daily care handled
Quality of Care / Professional Staff	~15–20%	Trust in trained, consistent, professional care



Most Positive Aspect and Biggest Concern about Moving: Biggest Concern about Active Adult Communities

Cost is the biggest barrier—by far

Dominates responses: “too expensive,” “rising costs,” “uncertain fees”

Not just affordability today → fear of long-term financial risk.

Independence loss is the core emotional tension

Strong resistance to rules (HOA, structure), loss of control over daily life. This directly conflicts with the “freedom” benefit they want

Biggest contradiction: They want freedom from responsibility—but not loss of autonomy.

“This will make me feel old” is a real concern

Repeated themes: “Only old people,” “Feels like a nursing home,” “Boring / nothing to do”

Social risk > social benefit (for some)

While a sense of community is a top positive, concerns include not fitting in, being surrounded by people they don’t relate to, and forced interaction.

Leaving home = emotional + identity loss

Not just logistics but losing their neighborhood, losing routines, losing identity tied to home.

Biggest Concern About Moving to Active Adult
(Asked of Prospects Most Interested in Active Adult Communities)

Theme	Approx. Prevalence	What It Represents
Cost & Affordability	~40–45%	High monthly costs, fees, uncertainty about future increases
Loss of Independence & Freedom	~30–35%	Rules, restrictions, loss of autonomy, HOA control
Loss of Privacy / Space	~25–30%	Smaller homes, proximity to neighbors, lack of personal space
Social Fit & Lifestyle Concerns	~20–25%	Fear of boredom, not fitting in, “too old” environment
Distance from Family & Current Life	~20–25%	Moving away from home, friends, community, routine
Quality Concerns (Staff / Community)	~15–20%	Fear of poor management, understaffing, profit-driven operators
Downsizing & Transition Stress	~15–20%	Letting go of home, possessions, emotional difficulty of moving



Most Positive Aspect and Biggest Concern about Moving: Biggest Concern about Independent Living Communities

Cost concerns evolve into long-term financial fear

Not just affordability today—fear of outliving savings and rising fees dominates. This is about financial security, not price.

Loss of independence becomes a defining emotional barrier

Strong concerns about loss of control, rules and structure, feeling “institutionalized.” Independence is no longer preference—it’s identity.

Leaving home is a major psychological hurdle

Deep attachment to long-time homes, familiar routines, personal space. Moving is perceived as a life disruption, not just relocation.

Trust in care quality and operators is a growing concern

Fears of understaffing, financial instability of communities. Decision requires confidence in the provider, not just the product.

Social environment creates both hope and anxiety

While community is appealing, concerns include loneliness, not fitting in, or being surrounded by decline. Community does not automatically equal connection.

Biggest Concern About Moving to Independent Living
(Asked of Prospects Most Interested in Independent Living Communities)

Theme	Approx. Prevalence	What It Represents
Cost & Long-Term Affordability	~45–50%	High monthly costs, rising fees, fear of outliving savings
Loss of Independence & Control	~35–40%	Rules, schedules, loss of autonomy, institutional feel
Loss of Privacy / Space	~30–35%	Smaller units, shared walls, less personal freedom
Social Fit & Isolation Concerns	~25–30%	Loneliness, not fitting in, “too old” environment, cliques
Leaving Home / Emotional Attachment	~25–30%	Difficulty leaving long-time home, identity loss
Quality of Care & Staff Trust	~20–25%	Fear of neglect, abuse, understaffing, inconsistent care
Downsizing & Transition Stress	~20–25%	Selling home, giving up belongings, adjusting to new life
Distance from Family / Social Network	~20–25%	Losing proximity to friends, family, familiar routines
Health & Decline Exposure	~15–20%	Being surrounded by illness, death, or decline

Most Positive Aspect and Biggest Concern about Moving: Biggest Concern about Assisted Living Communities

Cost remains the top barrier—but now tied to care value

Still dominant, but framed as “Am I paying for good care?” or “Will costs rise as needs increase?”
Shift from IL: cost + care quality are now inseparable.

Trust in care is a defining concern

Strong fears around understaffing, poorly trained caregivers. This is the biggest new escalation vs. Independent Living.

Loss of independence becomes loss of dignity

Not just control—but being “taken care of,” loss of agency, feeling like a patient. Emotional shift from independence to dignity + self-worth.

Assisted Living is often perceived as institutional

Language includes “Warehouse,” “Glorified nursing home,” “Dorm-like.”
Perception problem: Feels like a step into decline—not support.

Emotional fears intensify: isolation, aging, and identity loss

Concerns include loneliness, being surrounded by illness or death, losing connection to family and life outside.

Biggest Concern About Moving to Assisted Living
(Asked of Prospects Most Interested in Assisted Living Communities)

Theme	Approx. Prevalence	What It Represents
Cost & Long-Term Affordability	~45–50%	High cost, rising fees, fear of running out of money
Quality of Care & Staff Trust	~35–40%	Fear of understaffing, poor training, poor quality staff
Loss of Independence & Dignity	~30–35%	Loss of autonomy, control, and personal decision-making
Loss of Privacy / Institutional Feel	~25–30%	Shared spaces, lack of privacy, “facility-like” environment
Emotional & Social Concerns	~25–30%	Loneliness, isolation, being around decline, leaving home/family

Most Positive Aspect and Biggest Concern about Moving: Biggest Concern about Memory Care Communities

Safety and quality of care overwhelmingly dominate

Core fears include neglect, inadequate supervision, unqualified staff. This is the #1 decision driver—by far.

Decision-making shifts from self → caregiver responsibility

Many responses reflect adult children making decisions, protecting a loved one, monitoring care. This is no longer about preference—it’s about duty and protection.

Emotional guilt and loss are central to the decision

Themes: “Losing connection,” “Not seeing loved ones,” feeling like you’re “sending someone away.”

Trust in caregivers is critical—and fragile

Concerns about staff competence, compassion, being treated “like family.” Trust isn’t assumed—it must be earned and demonstrated.

Cost still matters—but is secondary to care and safety

Still a major concern, BUT framed as “is it worth it for proper care?” Clear shift from price sensitivity → willingness to pay for safety.

Biggest Concern About Moving to Memory Care
(Asked of Prospects Most Interested in Memory Care Communities)

Theme	Approx. Prevalence	What It Represents
Quality of Care & Safety	~45–50%	Fear of neglect, poor supervision, safety risks
Cost & Financial Burden	~30–35%	High cost, ongoing expense, value vs. care received
Emotional Guilt & Family Separation	~30–35%	Feeling of “placing” a loved one, loss of connection
Loss of Independence & Dignity (for resident)	~25–30%	Loss of autonomy, identity, control
Trust in Staff & Operators	~25–30%	Concern about staff compassion, training, and intentions
Loss of Privacy / Institutional Environment	~15–20%	Regimentation, lack of personalization, restrictive setting

Most Positive Aspect and Biggest Concern about Moving: Cross-Segment Synthesis

The decision shifts from lifestyle → necessity

Early stages = aspirational, Later stages = reactive/required
 The emotional tone changes from “Do I want this?” → “Do I need this?”

Cost is universal—but means different things at each stage

- Active Adult: Lifestyle affordability
- Independent Living: Long-term financial risk
- Assisted Living: Cost vs. care quality
- Memory Care: “Whatever it takes for safety”

Independence is the central emotional thread across all stages

Starts as freedom/flexibility, evolves into control, then dignity, then loss (accepted but painful).
 This is the single most consistent emotional driver.

Trust becomes increasingly critical as care needs rise

Minimal in Active Adult, emerging in Independent Living, critical in Assisted Living, non-negotiable in Memory Care

Social promise vs. social reality is a recurring tension

People want community and connection but fear isolation, not fitting in, being surrounded by decline.
 Community is both a top benefit and a top concern.

The Core Tradeoff by Level of Care

Level of Care	Positive Aspect	Biggest Concern	Core Tension
Active Adult	Social lifestyle, freedom from home maintenance	Cost + loss of independence	“Will this enhance my lifestyle—or limit it?”
Independent Living	Convenience + light support + social opportunities	Cost + loss of control + leaving home	“Am I giving up too much too soon?”
Assisted Living	Access to care, safety, and daily support	Quality of care + loss of dignity	“Will I be cared for—and respected?”
Memory Care	Safety, supervision, and specialized care	Trust in care + emotional guilt	“Will my loved one be safe—and am I doing the right thing?”



Most Positive Aspect and Biggest Concern about Moving: Concerns about Inheritance Impacting Timing of Move

Beyond affordability, some prospects are also weighing how a move impacts their financial legacy.

- Inheritance is not a primary driver, but it does influence timing for a meaningful minority
- Nearly 1 in 4 prospects report it has shaped or delayed their decision
- More engaged prospects are more likely to factor inheritance into timing
- Move decisions are influenced by a balance of personal needs and financial legacy planning

This is a reminder that moving decisions aren't purely personal—they're often financial and generational.

