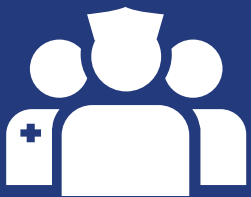


Perkins Eastman

2017

The State of Senior Living:

An Industry in Transition



65+



The State of Senior Living: An Industry in Transition

This is the third in a series of industry surveys conducted by Perkins Eastman. As memories from the great recession of 2008–2009 recede, we see early industry shifts that may signal new partnership formations similar to those suggested by the survey we conducted two years ago. In our latest survey, almost 200 respondents, largely not-for-profit life plan communities (formerly known as CCRCs), addressed five issues that “keep them up at night”: Boomer expectations, healthcare reform, recruitment and retention, for-profit competitive growth, and middle income needs.

Highlights of the survey (detailed graphic representation follows) include:

- Some questions were repeated from the 2009/2010 and 2015 surveys. Several years after the great recession, there appears to be **less concern about the LPC (CCRC) needing to reinvent itself**. While community-based service options are still ranked highly, other alternatives like rental, pay-as-you-go, and home-based services declined modestly (9-10%) since 2015. Interestingly, there was an uptick in interest for urban, intergenerational, co-housing and university-based options. Aging-in-place and aging-in-community appear to be on the upswing.
- Of the five areas that keep industry folks “up at night,” **staff recruitment and retention ranked #1**. Furthermore, at the 2016 LeadingAge conference in Indianapolis, Perkins Eastman conducted an on-the-spot survey in our booth and witnessed an outpouring of interest and concern about this

topic. The greatest unease appeared to be centered on wages significantly outpacing job empowerment, benefits, or training. Detailed follow-up suggests that as many as one-third of the respondents saw improvement in recruitment and retention with job role empowerment interventions, while another 40% felt it had no impact or resulted in recruitment and retention challenges.

- Boomer expectations and healthcare reform were close seconds. The respondents felt that **value (balance of price and quality) would be a clear determination** and that their **single largest concern was the lack of Boomer financial resources**. Perhaps as a result, the survey saw a strong need for Boomers to stay at home and to access services from the community, and that current long-term care settings would be least likely to meet Boomer expectations.
- Our 2015 survey saw a remarkable gap between the current alignment with healthcare systems (29% had no relationship) and their belief that an alignment was in the future (74%). What a difference two years makes! **Models involving strategic alliances, partnerships and primary referrals all saw significant growth** in the early phases of fulfilling the expectations so clearly identified in 2015.
- Addressing middle income needs and the growth of for-profit competition did not resonate as largely as we might have expected. This could be in part due to the large number (75%) of LPC and not-for-profit providers completing the survey. Concerns

about the for-profit competition centered on competition for customers and new, more attractive facilities. Interestingly, the survey did show a **respect for the for-profit investment in technology, sales and marketing acumen and their ability to be innovative** by pushing the boundaries of current standards. Community-based services, LPCs, staff recruitment and long-term care were viewed as being better provided by the not-for-profit organizations.

- Consistent with the overall view of the industry and Boomer needs, the survey showed a belief that **urban, intergenerational models with apartments for life (aging-in-place), rental model with à la carte services would prove attractive to both Boomers and middle-income customers**. Given the concern about Boomer finances, perhaps they were viewed as one and the same.

Given some of the shifts in concerns and priorities, we believe the survey does speak for an industry already in transition (2017) and not just poised for change (2015). What does this mean for you and your organization?

- **Alignment with healthcare systems is even more imperative** as reimbursement systems and a rapidly aging Boomer population sets in. Partnerships and strategic alliances with healthcare systems increased from 10% in 2015 to 36% in 2017. How does your organization's 2020 strategic plan address this?

- **Recruitment and retention are major concerns.** Are there issues beyond wages? Have we fully considered education, job role/empowerment, and technology... some respondents are seeing a positive impact after applying these strategies. How is your organization approaching “talent management?”
- **Increased pessimism that public reimbursement will improve** for long-term care or be provided for assisted living. Whether a response to the recent election or not, there is clear pressure on diversifying revenue streams with private pay sources.
- **Boomers will change and transform models of housing and services.** If the crystal ball is right, residences in the future will be largely community-based (networking services with the home), rental, urban, and intergenerational with the apartment for life model. This has not traditionally been the market focus of not-for-profit life plan communities. How will the industry morph and respond?

Industry disruptors are all around us. Boomers, middle-income, urban-seeking seniors, and healthcare systems will transform the way we think and act. Hopefully, this survey offers some insights into emerging patterns.



About the Respondents

1) What is your current role in the senior living industry?

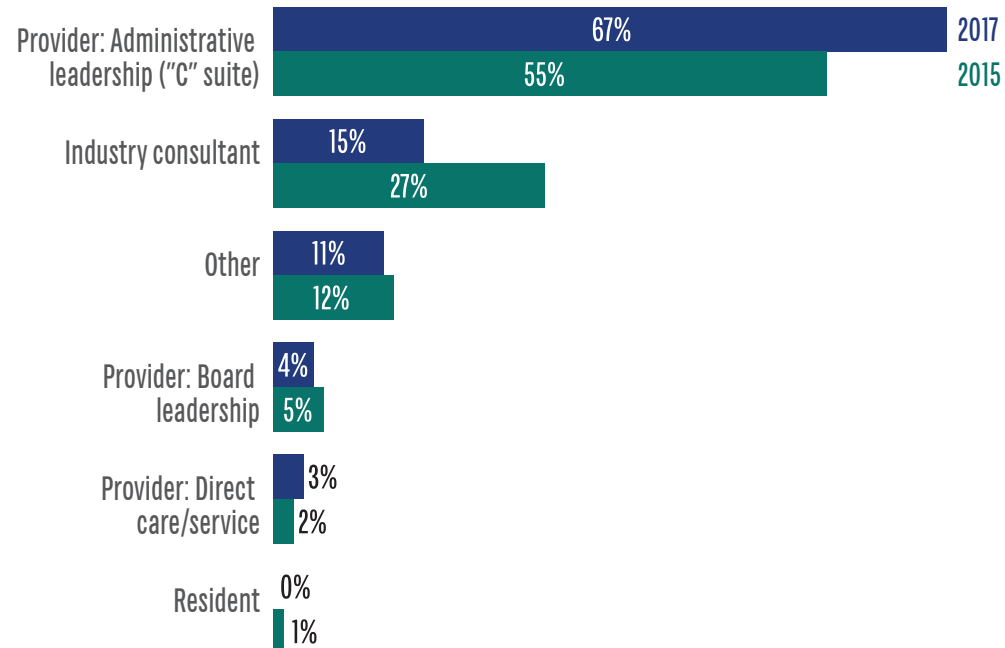
Both the quantity and types of respondents were similar between the 2015 and 2017 surveys. This time, however, we did see slightly more C-suite respondents and fewer industry consultants.
[Answered: 190 in 2017, 191 in 2015]

67%
of the respondents
are “C” suite

2) Do you primarily work at (or with) a...?

Most of the survey respondents were working at or with non-profit organizations. [Answered: 190]

88%
work at or with
not-for-profits

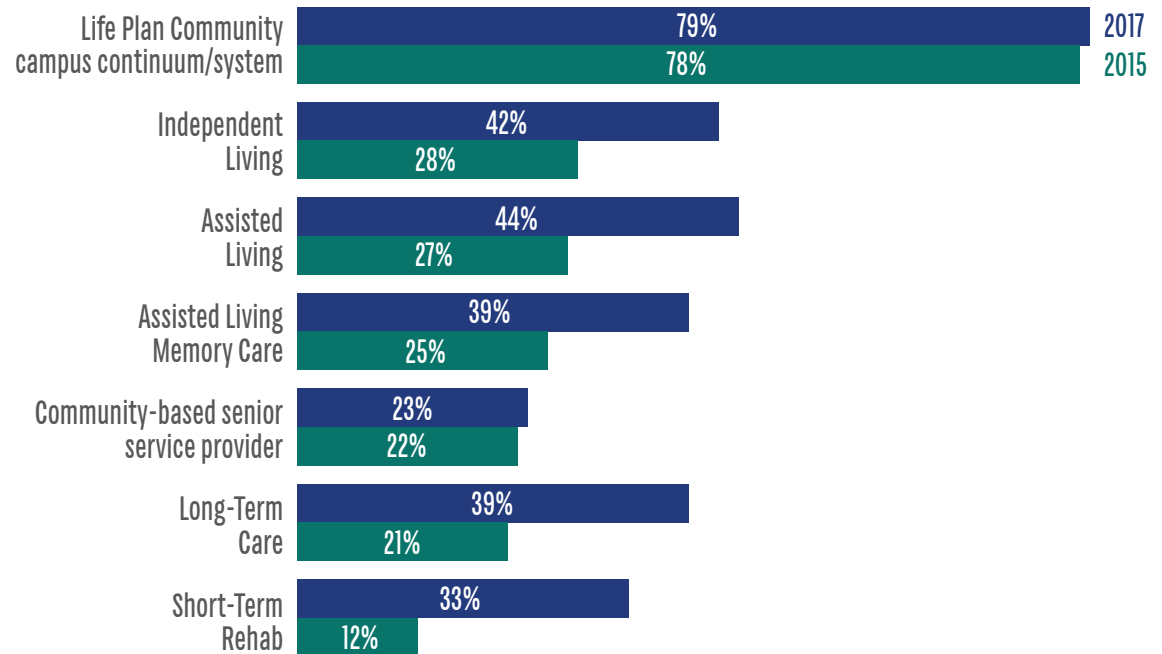


3) Do you work at (or with) a...?

Compared to 2015, the 2017 survey received more participation from people working with or at Independent Living, Assisted Living, Assisted Living Memory Care, Long-Term Care, and Short-Term Rehabilitation facilities. The percentage of respondents associated with life plan communities and community-based senior service providers, however, were about the same.

[Answered: 183 in 2017, 166 in 2015]

79%
work at or with a
Life Plan Community
(formerly CCRC)

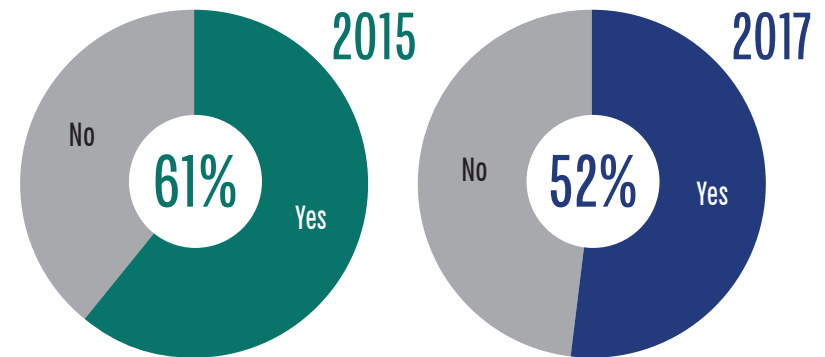


Senior Living Trends

4) Looking toward the future, is the “traditional” entry fee, “life care” Continuing Care Retirement Community (CCRC) endangered?

Though roughly half of the respondents still said yes, the traditional CCRC is endangered, when compared to the 2015 survey, 9% fewer people think this is the case. [Answered: 162 in 2017, 154 in 2015]

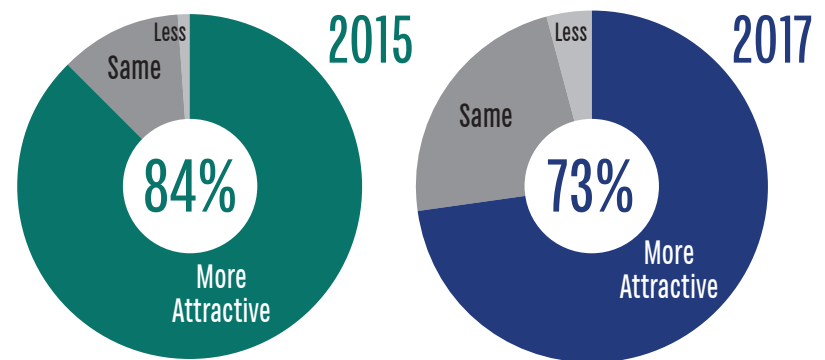
52%
believe the
traditional entry
fee CCRC is
endangered



5) Are existing and new models of housing and services more, the same, or less attractive than previously?

HOME-BASED SERVICES: Nearly three-quarters of the 2017 respondents said home-based services are more attractive now. However, compared to the 2015 survey, 11% fewer respondents think these are attractive. [Answered: 163 in 2017, 152 in 2015]

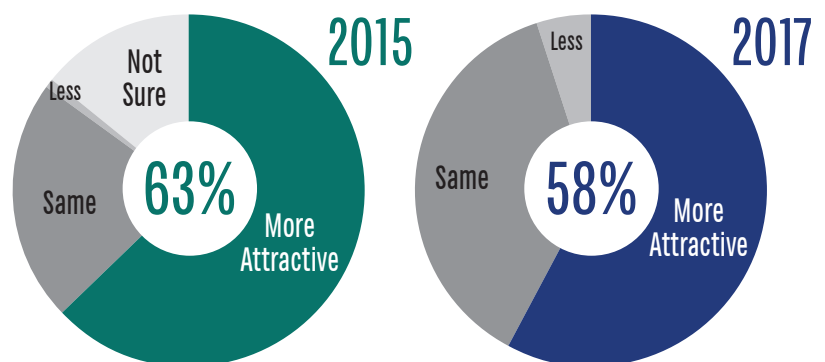
73%
said home-based
services are more
attractive



5) Continued...

AT-HOME COMMUNITY NETWORKS (I.E. BEACON VILLAGE): Over half of the 2017 respondents said at-home community networks (i.e., Beacon Village) are more attractive now. However, compared to the 2015 survey, 5% fewer respondents think these are attractive. [Answered: 161 in 2017, 153 in 2015]

58%
said at-home
community
networks are
more attractive

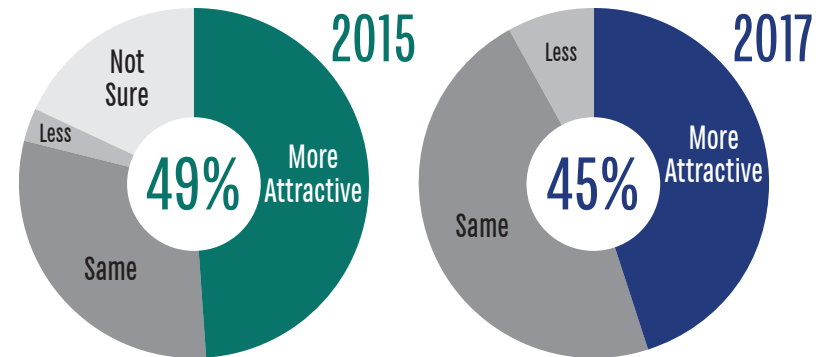


5) Continued...

SHARED SERVICES WITH NON-SENIOR PROVIDER:

A little less than half of the 2017 respondents said shared services with non-senior providers are more attractive now. However, compared to the 2015 survey, 4% fewer respondents think these are attractive. [Answered: 156 in 2017, 149 in 2015]

45%
said shared
services are more
attractive

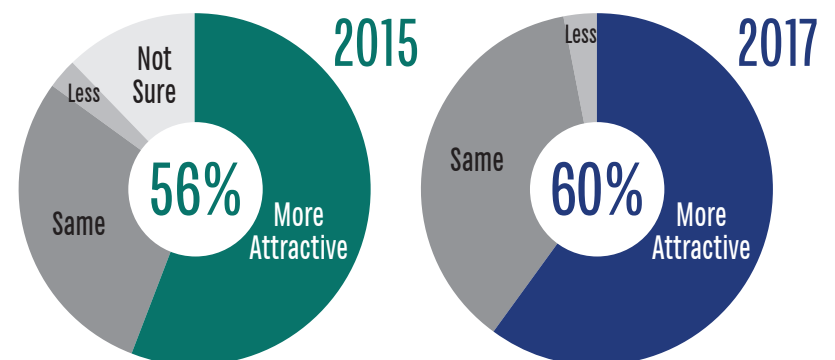


5) Continued...

URBAN/COMMUNITY INTEGRATED HOUSING:

Nearly two-thirds of the 2017 respondents said urban/community integrated housing is more attractive now. In fact, compared to the 2015 survey, 4% more respondents think this is attractive. [Answered: 156 in 2017, 150 in 2015]

60%
said urban/
community
integrated housing
is more attractive

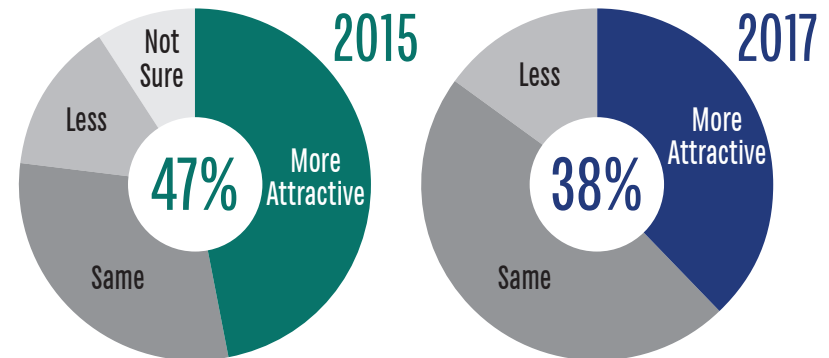


5) Continued...

“PAY AS YOU GO” ENTRY FEE LIFE PLAN COMMUNITY (FORMERLY KNOWN AS CCRC):

A little more than one-third of the 2017 respondents said “pay as you go” entry fee Life Plan Communities are more attractive now. However, compared to the 2015 survey, 9% fewer respondents think these are attractive. [Answered: 160 in 2017, 152 in 2015]

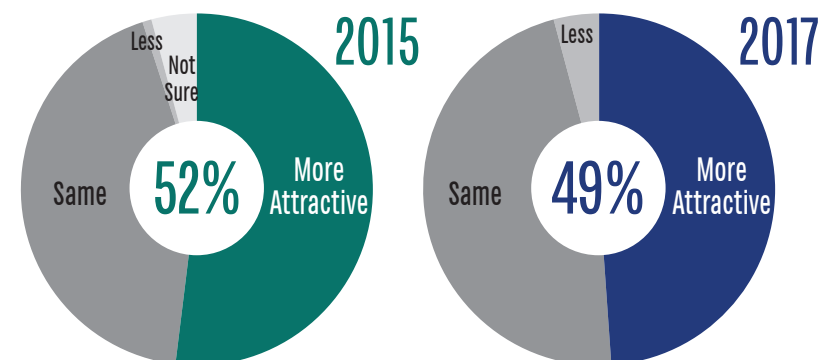
38%
said “pay as you go” is more attractive, a significant decline over 2015



5) Continued...

RENTAL HOUSING AND SERVICES: About half of the 2017 respondents said rental housing and services are more attractive now. However, compared to the 2015 survey, 3% fewer respondents think these are attractive. [Answered: 164 in 2017, 153 in 2015]

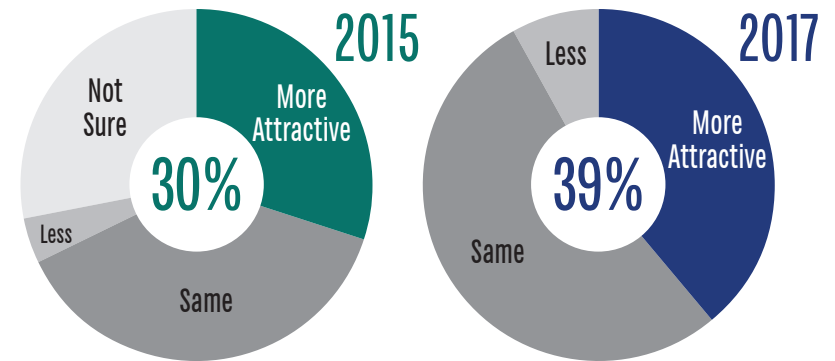
49%
said rental housing is more attractive



5) Continued...

SENIOR CO-HOUSING: Over one-third of the 2017 respondents said senior co-housing is more attractive now. In fact, compared to the 2015 survey, 9% more respondents think this is attractive. [Answered: 157 in 2017, 151 in 2015]

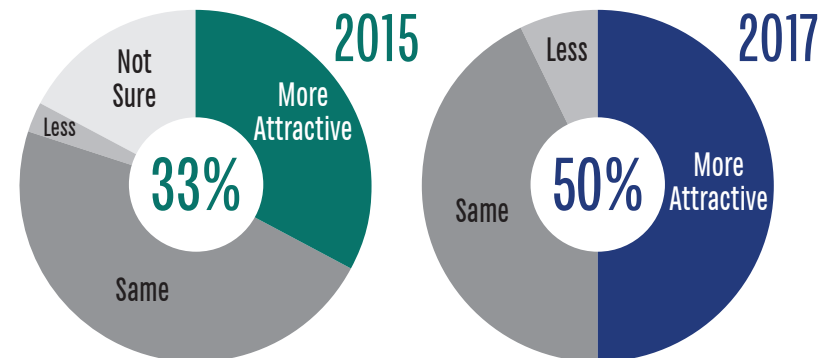
39%
said senior
co-housing is
more attractive



5) Continued...

INTERGENERATIONAL CAMPUS LIVING: Half of the 2017 respondents said intergenerational campus living is more attractive now. In fact, compared to the 2015 survey, 17% more respondents think this is attractive. [Answered: 160 in 2017, 132 in 2015]

50%
said inter-
generational
campus living is
more attractive

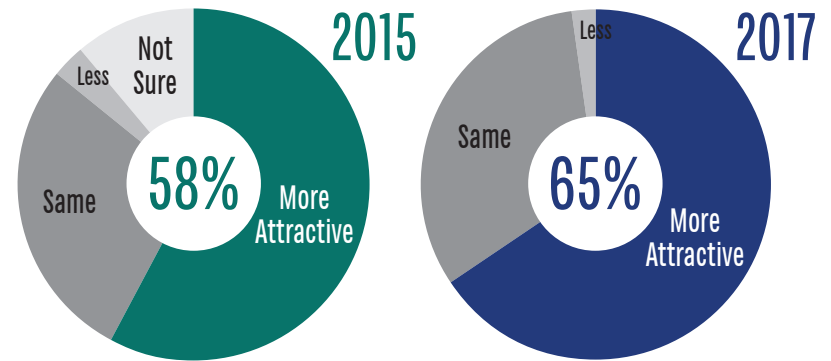


5) Continued...

“APARTMENTS FOR LIFE” / AGE-IN-PLACE:

Nearly two-thirds of the 2017 respondents said “apartments for life”/age-in-place is more attractive now. In fact, compared to the 2015 survey, 7% more respondents think this is attractive. [Answered: 162 in 2017, 148 in 2015]

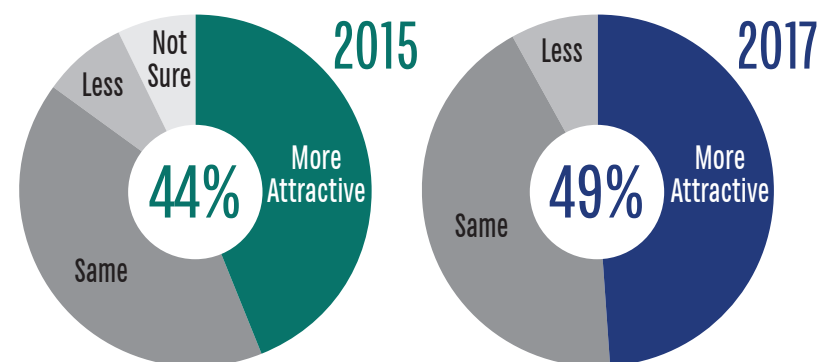
65%
said “apartments
for life” are more
attractive



5) Continued...

GREEN HOUSE® / SMALL HOUSE: About half of the 2017 respondents said Green House®/Small House is more attractive now. In fact, compared to the 2015 survey, 5% more respondents think this is attractive. [Answered: 161 in 2017, 152 in 2015]

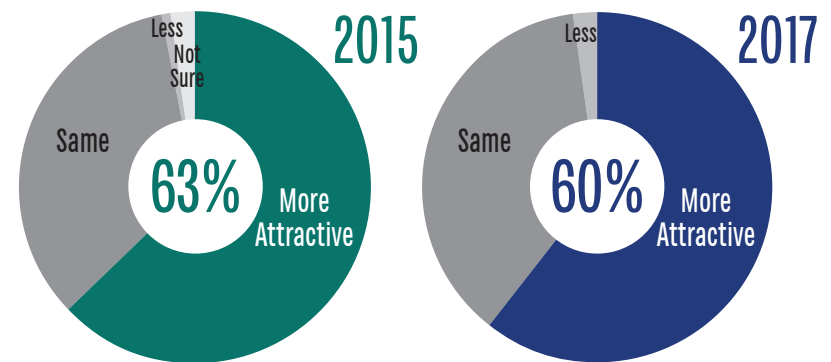
49%
said Green
House®/Small
House is more
attractive now



5) Continued...

MEMORY SUPPORT AL: Almost two-thirds of the 2017 respondents said Memory Support Assisted Living is more attractive now. However, compared to the 2015 survey, 3% fewer respondents think this is attractive. [Answered: 161 in 2017, 151 in 2015]

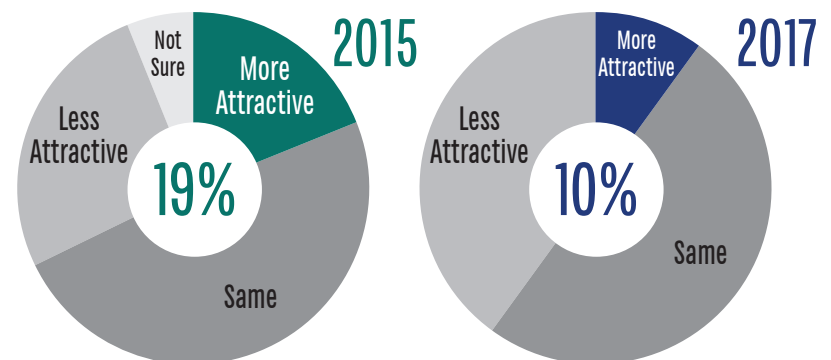
60%
said Memory
Support AL is
more attractive



5) Continued...

STAND-ALONE AL: Only 10% of the 2017 respondents said stand-alone Assisted Living is more attractive now; 40% said it is less attractive. In fact, compared to the 2015 survey, 14% more respondents think this is less attractive. [Answered: 159 in 2017, 151 in 2015]

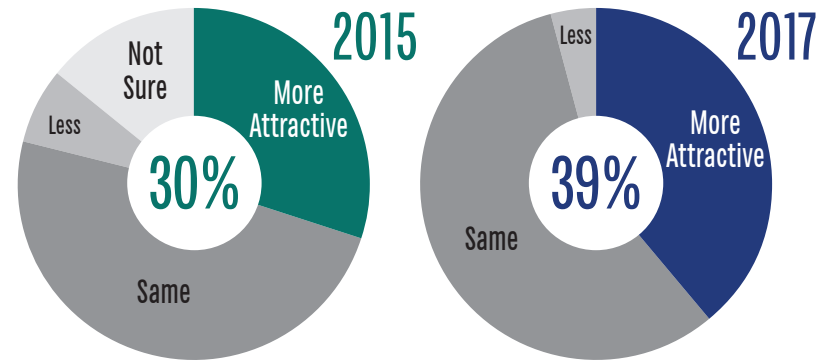
only
10%
said stand
alone AL is more
attractive



5) Continued...

UNIVERSITY / COLLEGE-AFFILIATED: Over one-third of the 2017 respondents said university/college affiliation is more attractive now. In fact, compared to the 2015 survey, 9% more respondents think this is attractive.
[Answered: 157 in 2017, 152 in 2015]

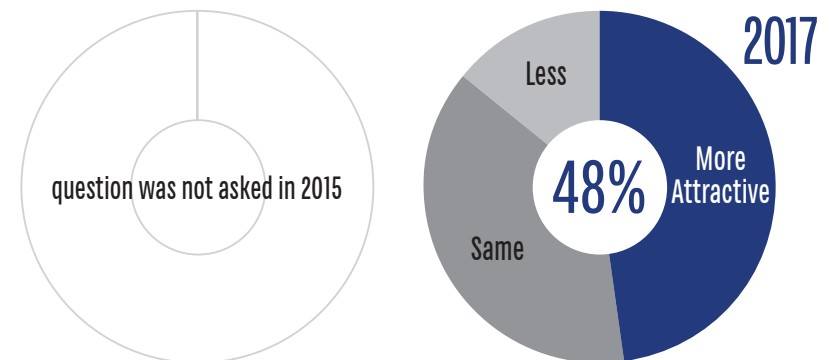
39%
said university/
college affiliation
is more attractive



5) Continued...

SHORT-TERM REHAB AL: Nearly half of the 2017 respondents said Short-Term Rehab Assisted Living is more attractive now. [Answered: 159 in 2017, not asked in 2015]

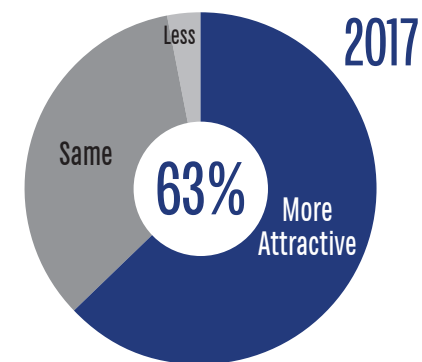
48%
said Short-Term
Rehab AL is more
attractive



5) Continued...

MIDDLE INCOME HOUSING: Almost two-thirds of the 2017 respondents said middle income housing is more attractive now. [Answered: 160 in 2017, not asked in 2015]

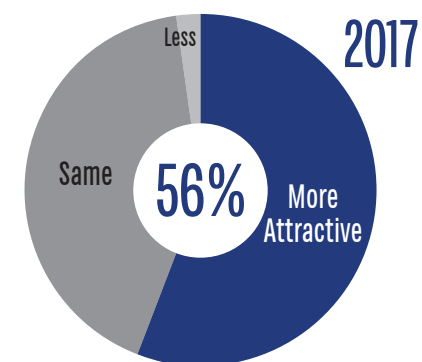
63%
said middle
income housing is
more attractive



5) Continued...

CENTER FOR HEALTHY LIVING: Over half of the 2017 respondents said centers for healthy living are more attractive now. [Answered: 160 in 2017, not asked in 2015]

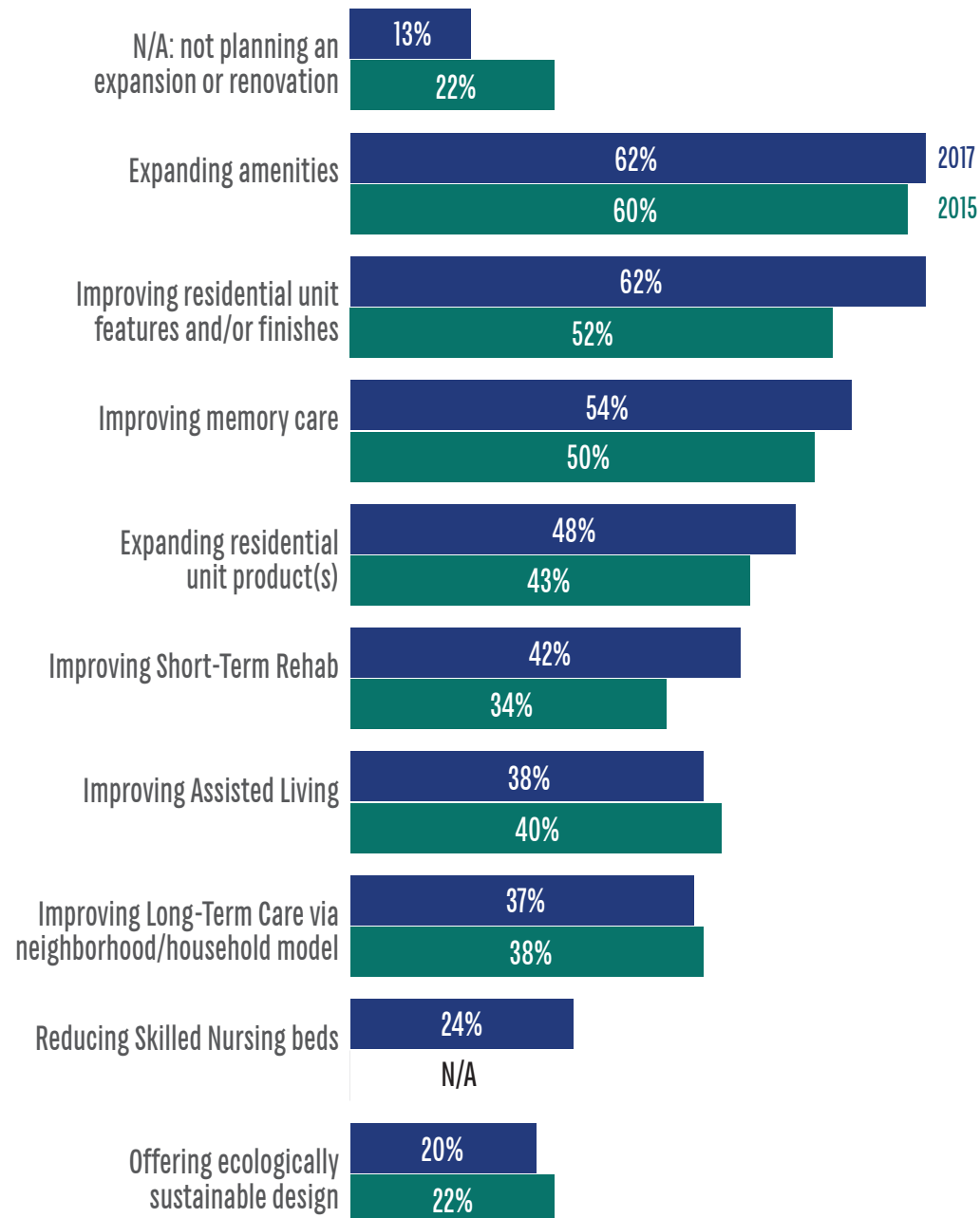
56%
said centers for
healthy living are
more attractive



6) What are you/your organization looking to achieve if planning an expansion and/or renovation at your community?

There was quite a bit of similarity in plans between the 2015 and 2017 survey responses, though there were several notable differences: 9% fewer communities are not planning an expansion or renovation—showing there are now more plans in the works, 10% more are looking to improve residential unit features and/or finishes, and 8% more are planning to improve their Short-Term Rehab. [Answered: 159 in 2017, 149 in 2015]

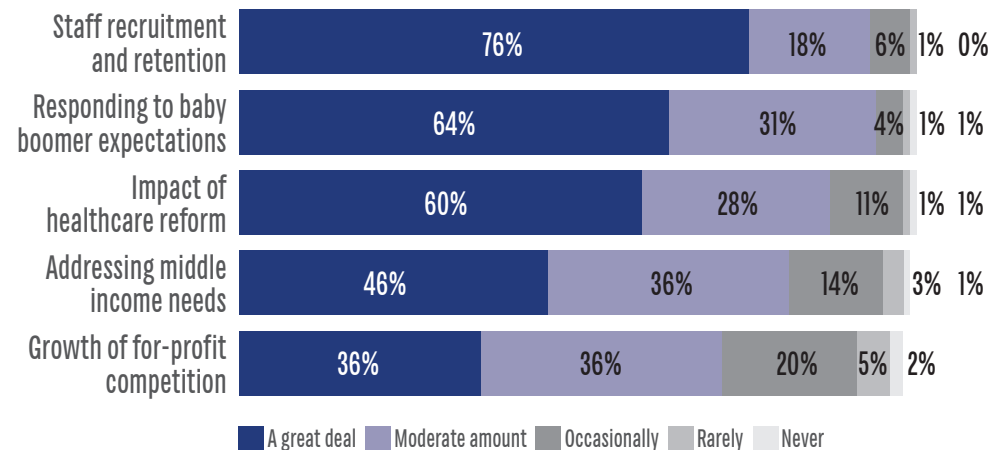
62%
are planning to
expand amenities
and/or improve
residential units



7) How frequently do you think about how the following things could impact the future of the senior living industry?

2017 survey participants reported that they think a lot about staff recruitment and retention, followed by responding to Baby Boomer expectations. [Answered: 160] At the 2016 LeadingAge conference in Indianapolis, Perkins Eastman conducted an on-the-spot survey in our booth asking attendees, "What keeps you up at night?" Their responses mirror what we found in the survey with staff recruitment and retention ranking #1.

76%
spend a great deal of time thinking about staff recruitment and retention



Average Rating Score (the higher the number, up to 4, the more it is thought about.)

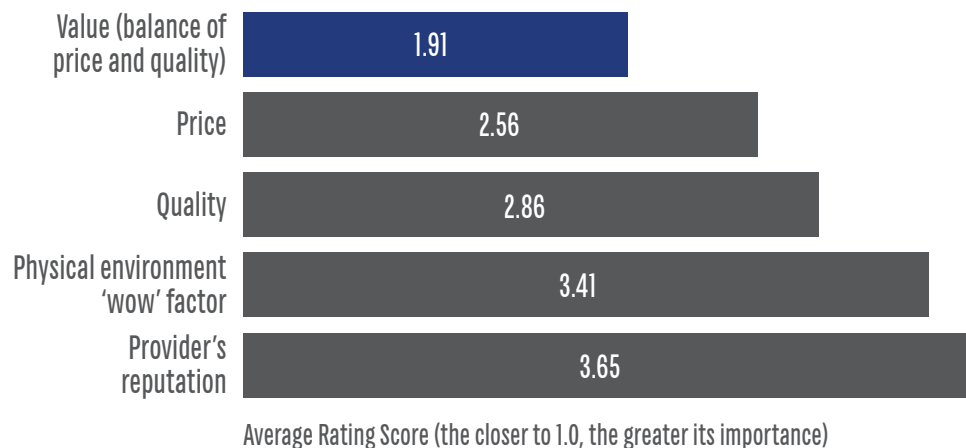
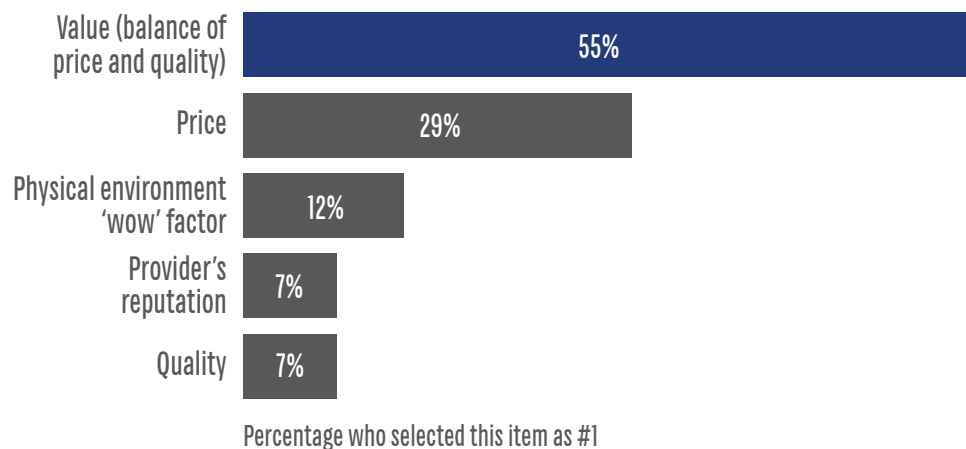
Boomer Expectations

8) Rank the characteristics you think will be the most important to Baby Boomers as they access senior-focused care and services.

Based on the average ratings as well as the frequency of which characteristic was selected as the #1 most important, 2017 survey respondents felt that value will be the most important characteristic to Baby Boomers as they access senior-focused care and services, followed (logically) by price. A provider's reputation was considered the least important characteristic. [Answered: 149]

55%

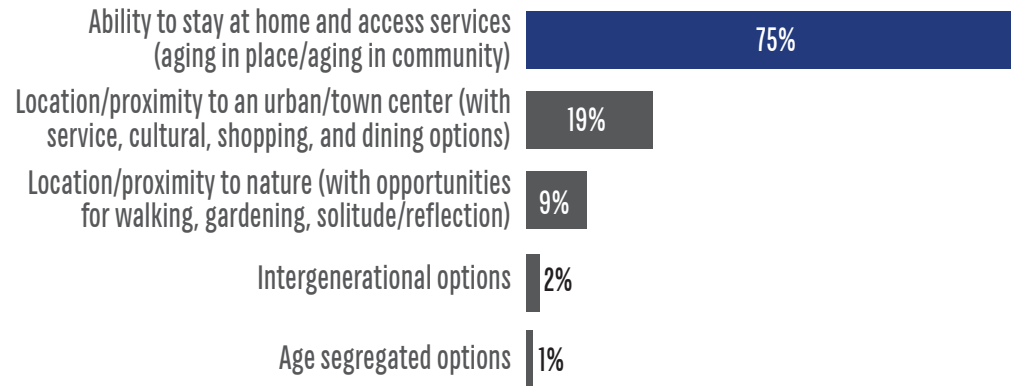
believe value (a balance of price and quality) is the most important to Baby Boomers as they access senior-focused care and services



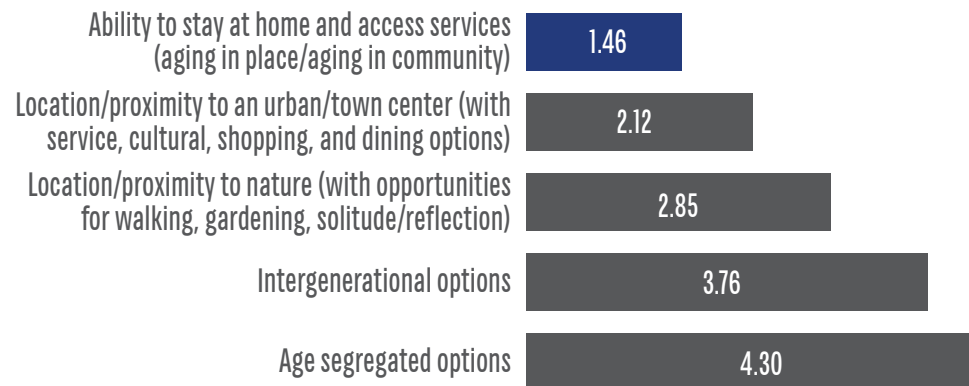
9) Rank the characteristics you think will be the most important to Baby Boomers as they look for supportive housing.

Based on the average ratings as well as the frequency of which characteristic was selected as the #1 most important, 2017 survey respondents felt that the ability to stay at home and access services (aging in place/aging in community) will be the most important characteristic to Baby Boomers as they look for supportive housing, followed (logically) by location/proximity to an urban/town center (with service, cultural, shopping, and dining options). Age segregated options was considered the least important. [Answered: 144]

75%
believe the ability
to stay at home and
access services is most
important to Baby
Boomers as they look
for supportive housing



Percentage who selected this item as #1



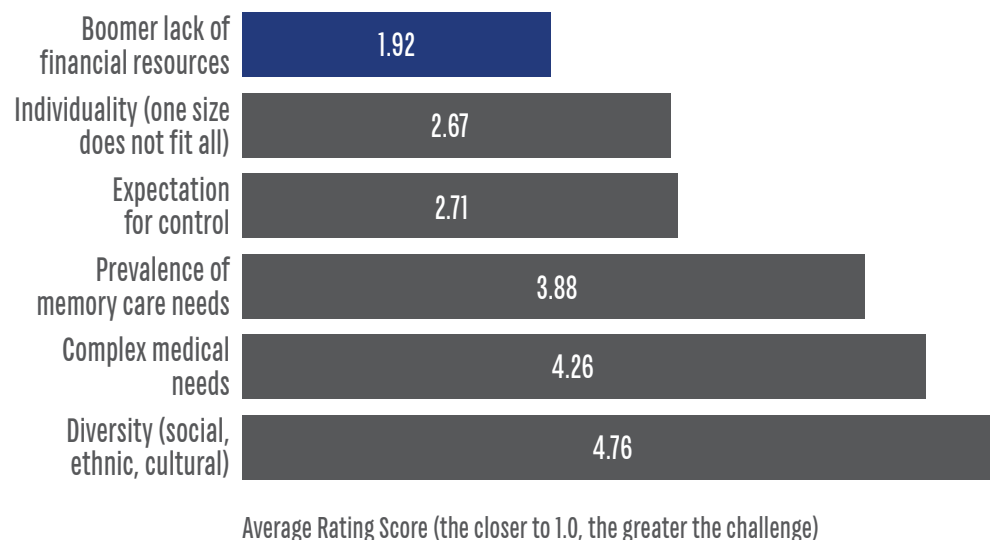
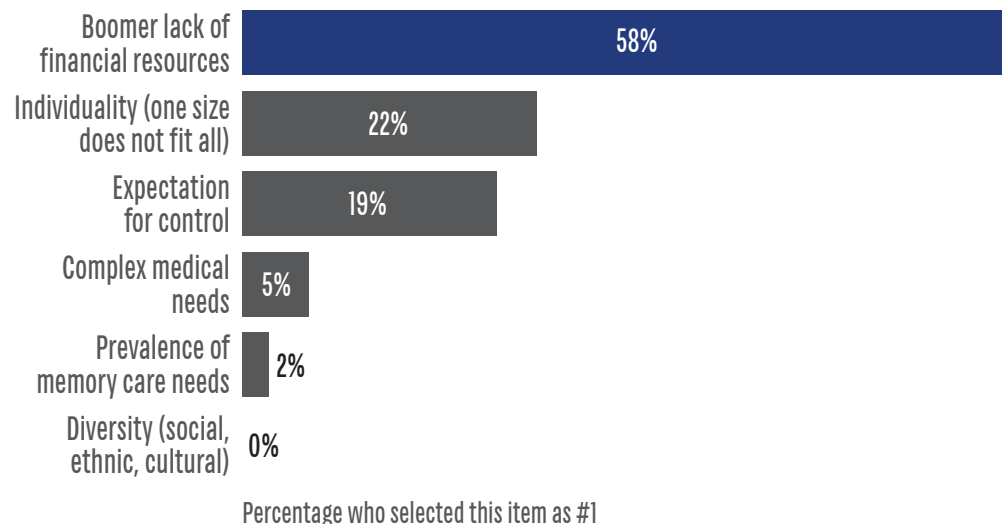
Average Rating Score (the closer to 1.0, the greater its importance)

10) What challenges do you see in providing care and services to the Baby Boomer generation?

Based on the average ratings as well as the frequency of which was selected as the #1 biggest challenge, 2017 survey respondents felt that Baby Boomer's lack of financial resources will be the biggest challenge to providing care and services, followed by individuality (one size does not fit all). Diversity (social, ethnic, cultural) was considered the smallest challenge facing providers. [Answered: 146]

58%

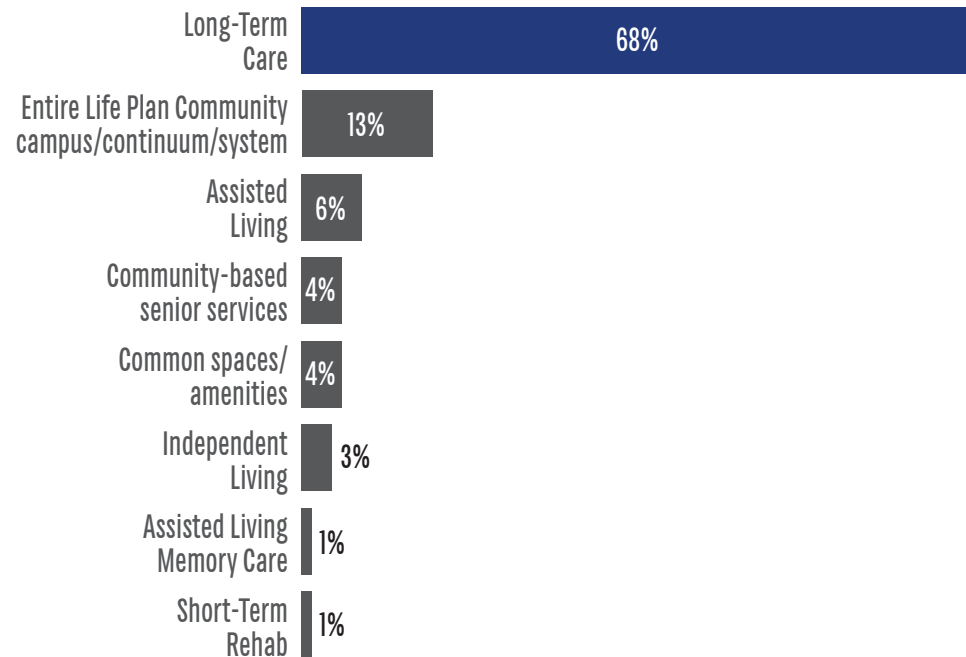
believe the lack of financial resources is the biggest challenge to providing care/services



11) When you look at current senior-focused settings and services, which is the **LEAST** likely to meet Boomer expectations?

Most of the 2017 survey respondents said Long-Term Care is the setting that is the **LEAST** likely to meet Boomer expectations. [Answered: 146]

68%
believe Long-Term
Care is least likely to
meet the expectations
of Baby Boomers, an
overwhelming majority

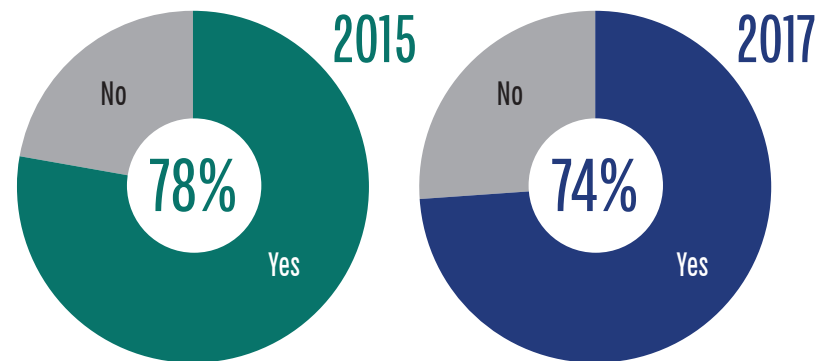


Impact of Healthcare Reform

12) Will reimbursement/healthcare reform drive the convergence of the healthcare and senior living sectors?

Compared to the 2015 survey, 2017 respondents feel roughly the same: most agree that reimbursement/healthcare reform will drive the convergence of the healthcare and senior living sectors. [Answered: 139 in 2017, 127 in 2015]

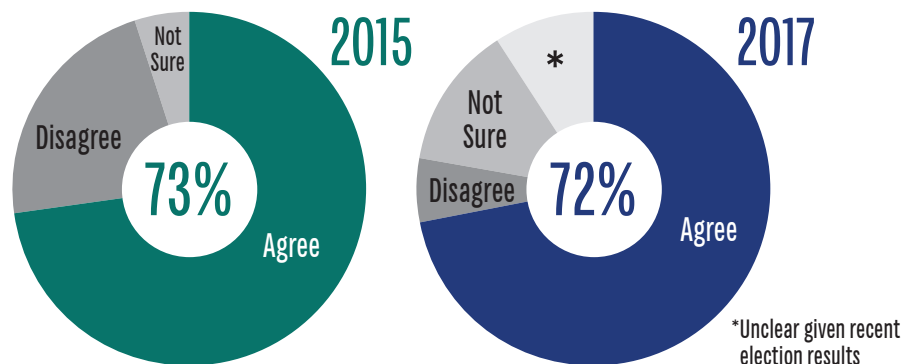
74%
believe
reimbursement/
healthcare
reform will drive
convergence



13) How will future government healthcare and reimbursement policy reform impact long-term care?

THERE WILL BE FEWER LONG-TERM CARE PROVIDERS. Compared to 2015, almost the same percentage of respondents in 2017 agree that there will be fewer Long-Term Care providers. However, there is greater uncertainty as to what the future may hold, with more people saying they are not sure or that it's unclear given the results of the recent presidential election. [Answered: 141 in 2017, 126 in 2015]

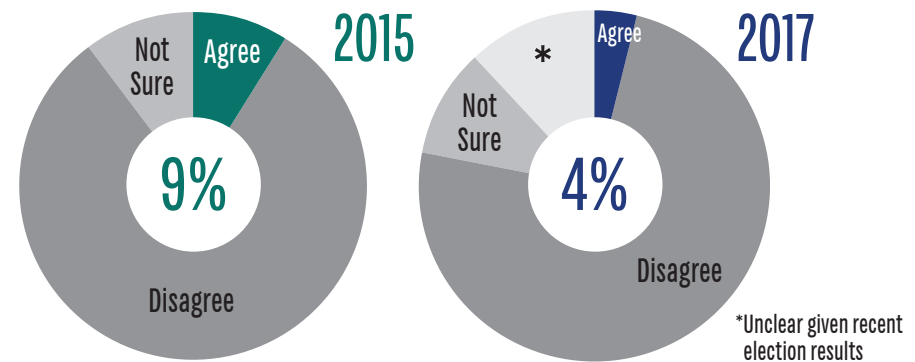
72%
believe there
will be fewer
Long-Term Care
providers



13) Continued...

REIMBURSEMENT FOR LONG-TERM CARE WILL IMPROVE. Compared to 2015, slightly fewer respondents in 2017 disagree that reimbursement for Long-Term Care will improve. [Answered: 142 in 2017, 127 in 2015]

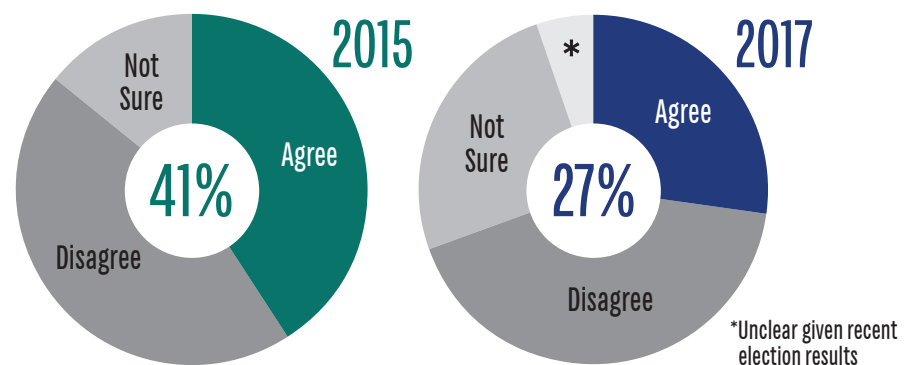
only
4%
believe Long-Term Care reimbursement will improve



13) Continued...

PRIVATE LONG-TERM CARE INSURANCE WILL INCREASE IN POPULARITY. Compared to 2015, nearly the same percentage of respondents in 2017 disagree that private Long-Term Care insurance will increase in popularity. However, substantially fewer people agree that private Long-Term Care insurance will increase in popularity, with greater uncertainty as to what the future may hold. [Answered: 139 in 2017, 127 in 2015]

only
27%
believe Long-Term Care insurance will increase in popularity

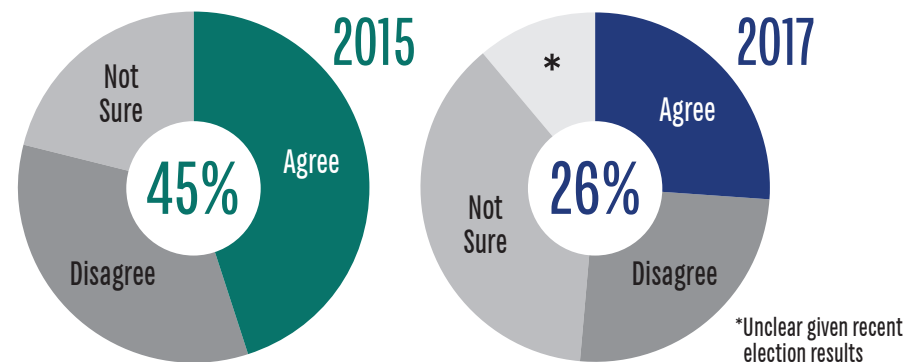


13) Continued...

ASSISTED LIVING WILL HAVE PUBLIC REIMBURSEMENT.

Compared to 2015, substantially fewer respondents in 2017 agree that Assisted Living will have public reimbursement. In addition, there is much greater uncertainty as to what the future may hold, with more people saying they are not sure or that it's unclear given the results of the recent presidential election. [Answered: 140 in 2017, 125 in 2015]

only
26%
believe Assisted
Living will
have public
reimbursement

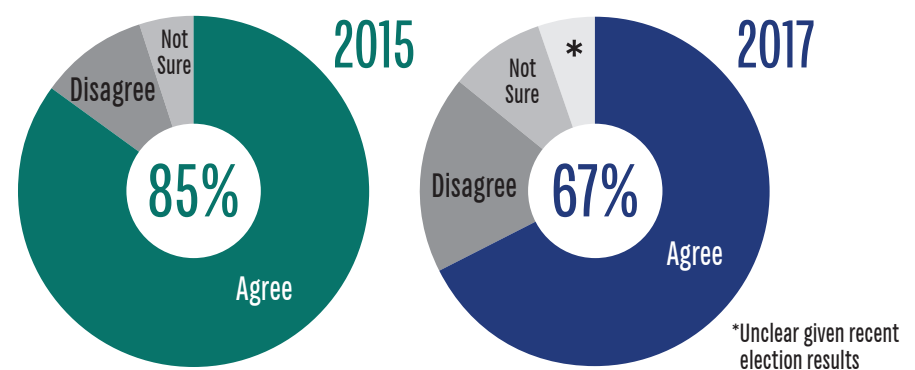


13) Continued...

SHORT-TERM STAY SUB-ACUTE AND REHAB WILL INCREASE IN DEMAND.

Compared to 2015, considerably fewer respondents in 2017 agree that Short-Term Stay Sub-Acute and Rehab will increase in demand. [Answered: 141 in 2017, 125 in 2015]

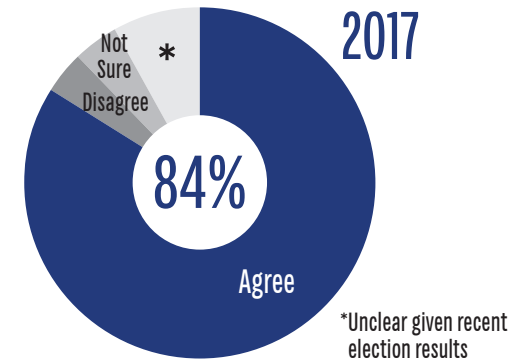
67%
believe Short-
Term Stay will
increase in
demand



13) Continued...

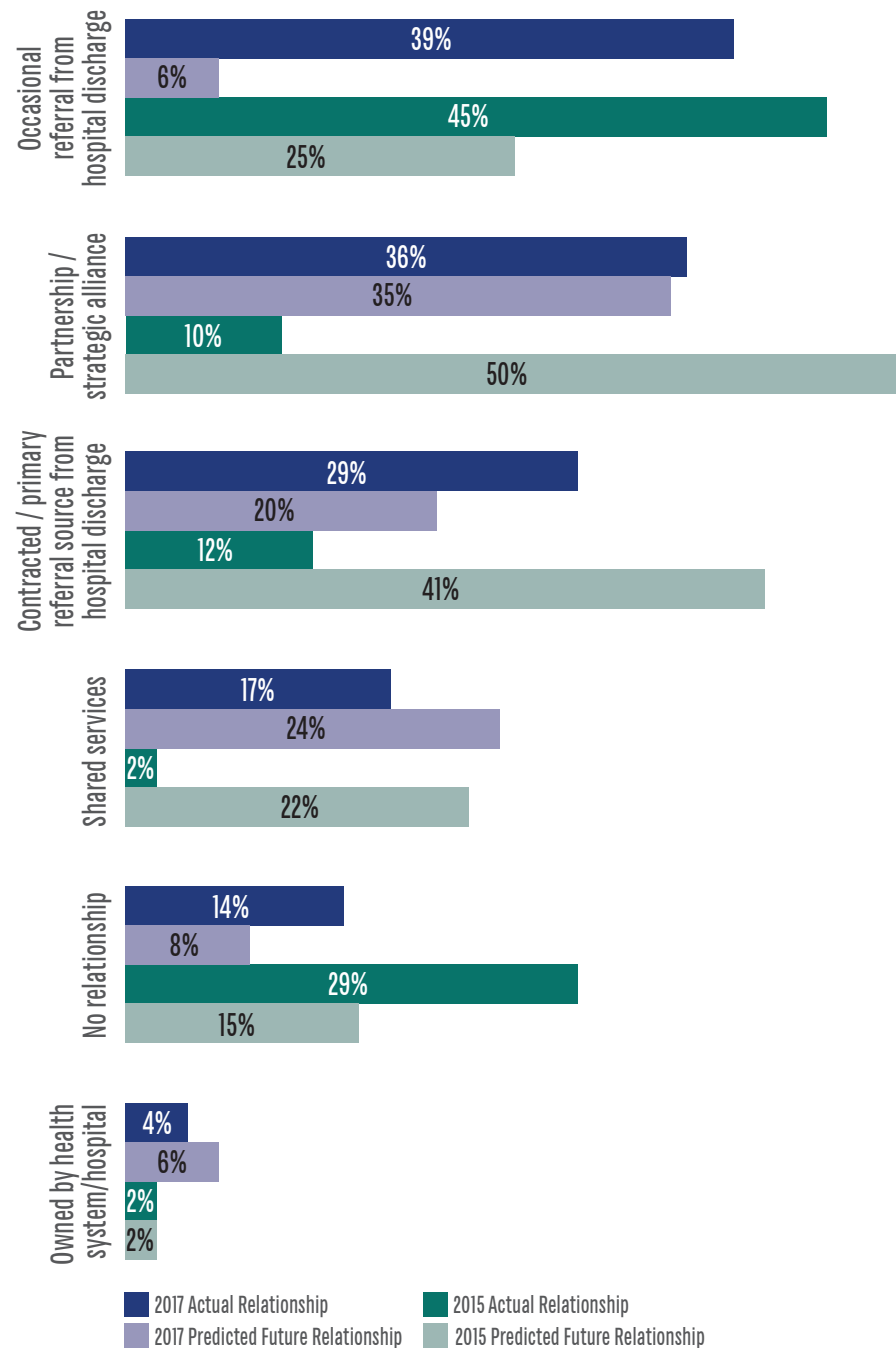
ALIGNMENT WITH HEALTHCARE SYSTEMS WILL BECOME MORE IMPORTANT. A clear majority of the 2017 respondents agree that alignment with healthcare systems will become more important. [Answered: 142 in 2017, not asked in 2015]

84%
believe alignment
with healthcare
will become more
important



14) Indicate the type of relationship your organization has with healthcare systems (e.g., community hospitals, physician practice groups, academic medical centers, etc.)?

Compared to the 2015 survey responses, in 2017, roughly the same percentage of respondent organizations are owned by a health system/hospital (now and expected in the future). However, considerably more 2017 respondents currently share services, though about the same expect this future relationship when compared to 2015 percentages. Similarly, many more respondents today report an existing partnership/strategic alliance. In regards to contracted/primary referrals, 2017 respondents again report greater instances of this current relationship. Overall, the relationships—both current and expected—among senior living and healthcare providers is growing; convergence is indeed happening. [Answered: 139 in 2017, 124 in 2015]

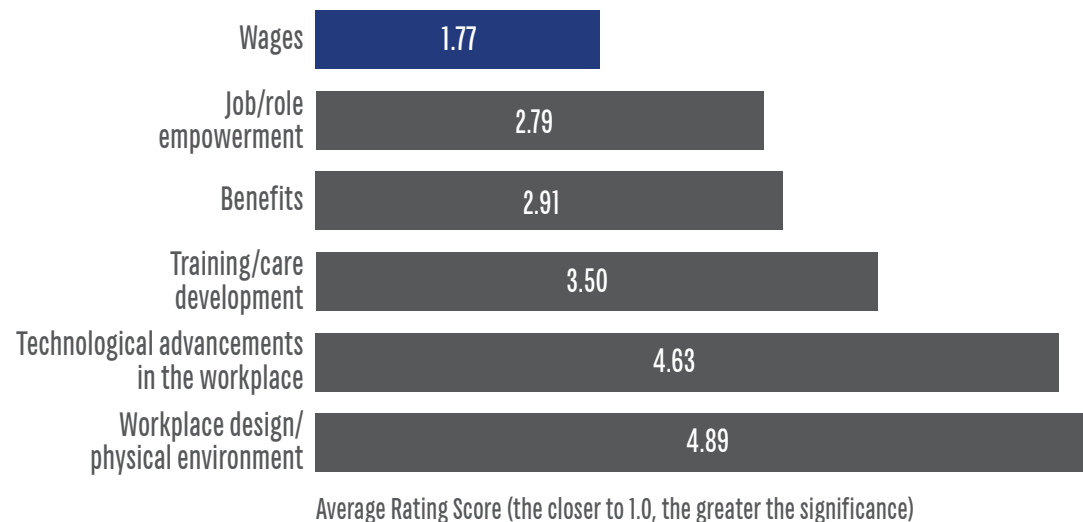
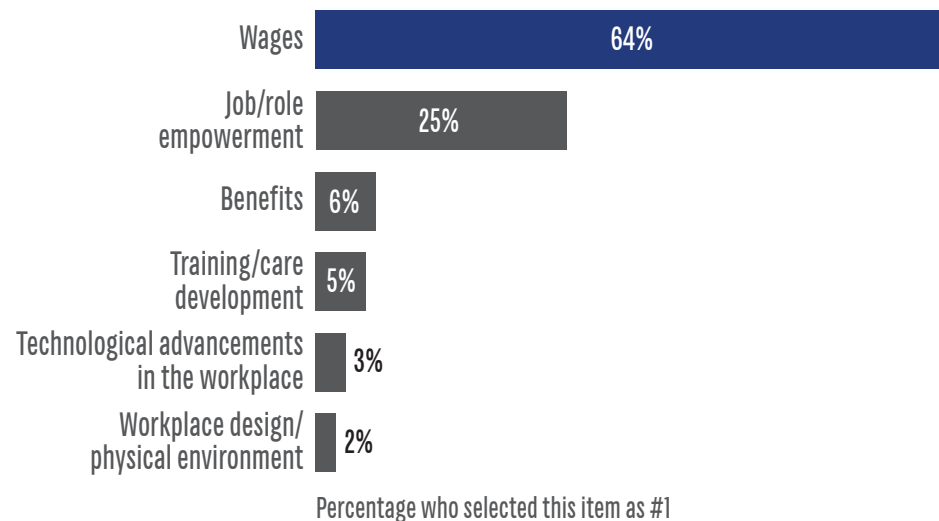


Recruitment & Retention

15) Rank the significance of the following issues related to recruitment and retention of staff in the senior living industry.

Based on the average ratings as well as the frequency of which issue was selected as the #1 most significant, 2017 survey respondents felt that wages have the greatest significance for recruitment and retention of staff in the senior living industry. Interestingly, the second most significant is job/role empowerment. Workplace design/physical environment was considered the least significant issue. [Answered: 139]

64%
believe wages are
the most significant
issue to recruitment
and retention

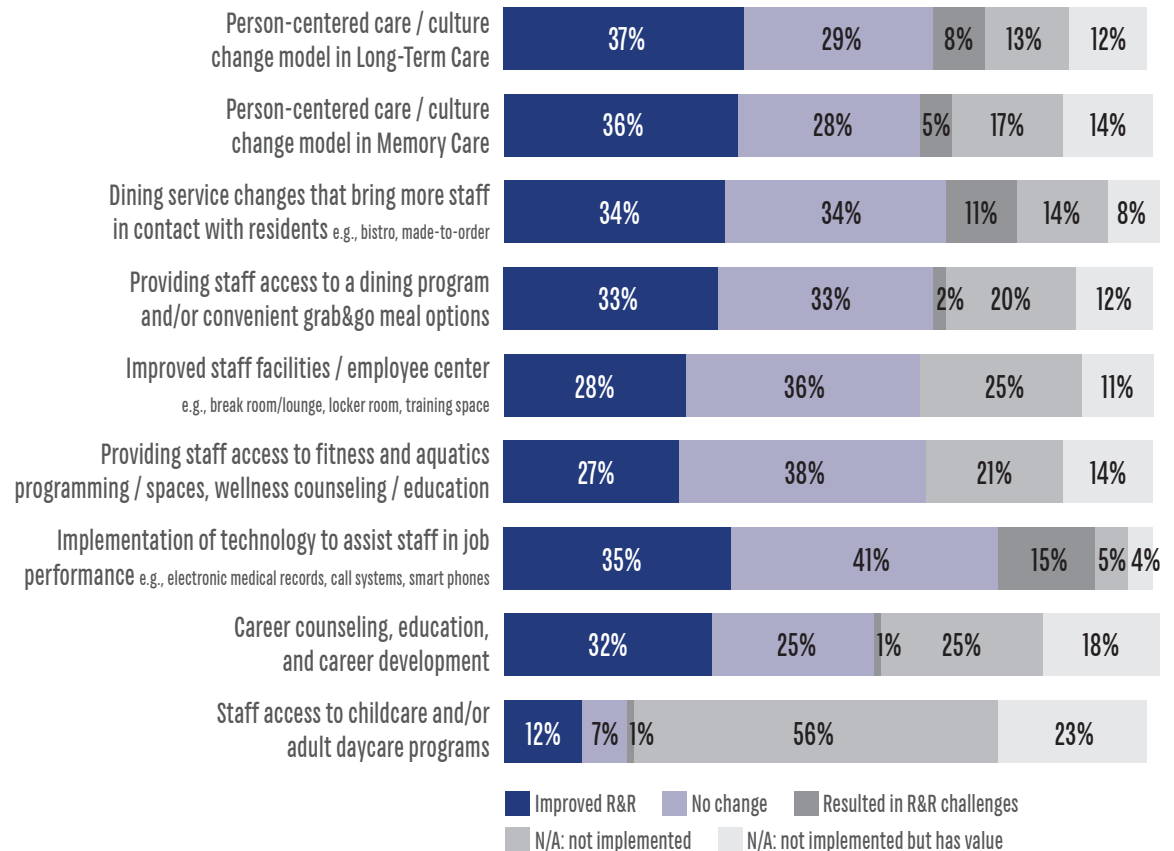


16) If you have implemented programmatic, operational, and/or physical changes in the recent past, have they impacted recruitment and retention (“R&R”) of staff?

Of all the programmatic, operational, and/or physical changes that were asked about in the 2017 survey, respondents (who were providers) indicated that there are many techniques that have the potential to create a positive impact on recruitment and retention (R&R). One-third or more respondents indicated that they improved R&R after implementing: a person-centered care/culture change model in Long-Term Care and in Memory Care; technology to assist staff in their job performance; dining service changes that bring more staff in contact with residents; and career counseling, education, and career development.

Over one-quarter of the provider-respondents indicated that they had improved R&R after improving the staff facilities/employee center and by providing staff access to fitness and aquatics programming/spaces, and wellness counseling/education. Providing staff with access to childcare and/or adult daycare programs were said to result in fewer improvements to R&R—though it should be noted that over half of the respondents had not yet implemented this benefit. In addition, many who had not yet provided staff access to childcare and/or adult daycare programs felt that it had value.

The flip side of this positive impact is that a similar percentage saw no change from having implemented these same concepts. A smaller group of respondents saw recruitment and retention challenges from implementing technology, person-centered care models, and dining service changes. [Answered: 128]



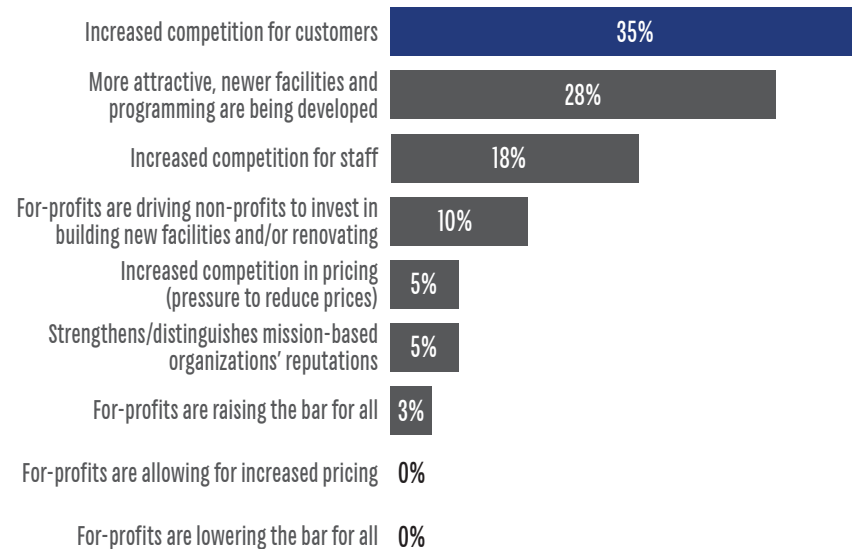
Growth of For-Profit Competition

17) The industry has seen a significant growth in the past five years of for-profit companies developing senior living products. What are the most significant issues facing the not-for-profit industry related to this trend?

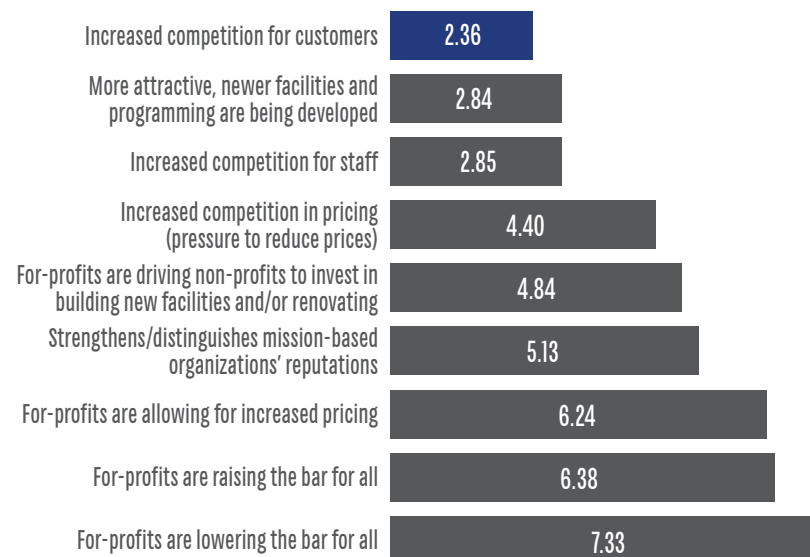
In general, the issues facing non-profits as a result of the growth of for-profits were not seen as highly significant. However, based on the average ratings as well as the frequency of which issue was selected as the #1 most significant, 2017 survey respondents felt that increased competition for customers is the most significant issue, followed by the fact that more attractive, newer facilities and programming are being developed. Very few consider for-profits as lowering the bar for all.

[Answered: 135]

35%
believe increased competition for customers is the most significant issue facing not-for-profits



Percentage who selected this item as #1

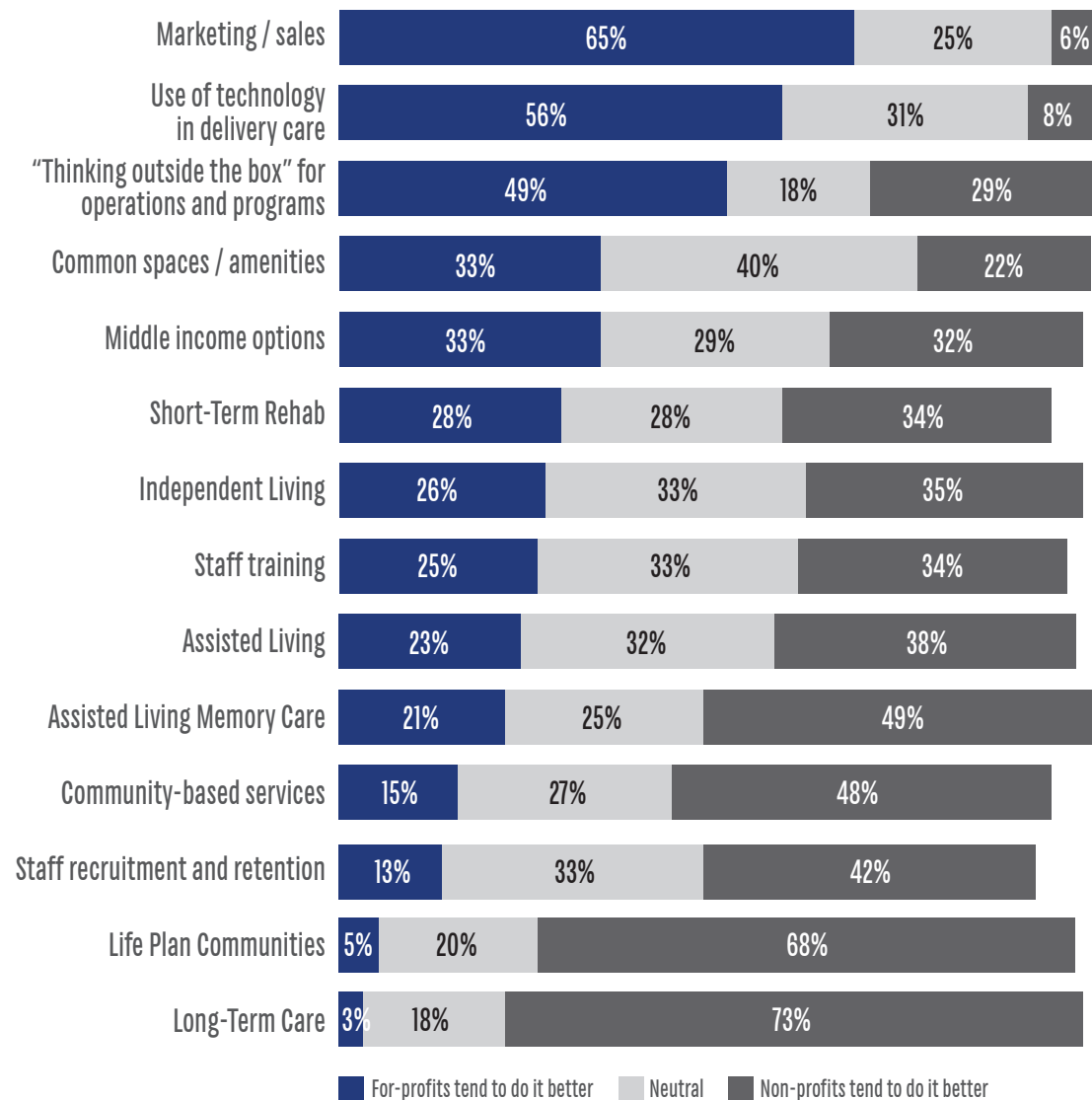


Average Rating Score (the closer to 1.0, the greater the significance)

18) How do for-profit providers compare to non-profit providers?

2017 survey respondents said that non-profit providers surpass for-profits in the following areas: Long-Term Care (+70% difference); Life Plan Communities (formerly known as CCRCs) (+63% difference); community-based services (+33% difference); staff recruitment and retention (+29% difference); Assisted Living Memory Care (+28% difference); Assisted Living (+15% difference); Independent Living (+9% difference); staff training (+9% difference); and Short-Term Rehab (+6% difference).

Whereas they reported for-profit providers surpassing non-profits on the following: marketing/sales (+59% difference); use of technology in delivering care (+48% difference); “thinking outside the box” for operations and programs (+20% difference); and common spaces/amenities (+11% difference). Respondents also rated non-profit and for-profit providers about the same on middle income options. [Answered: 136]

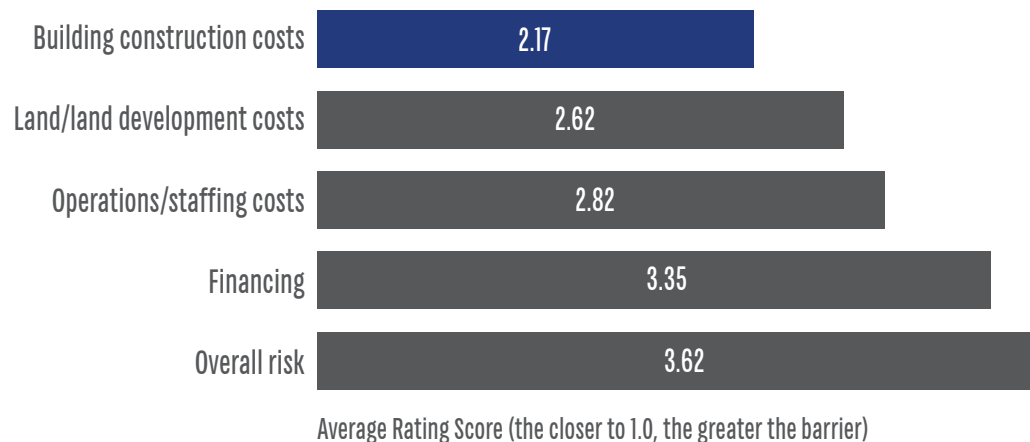
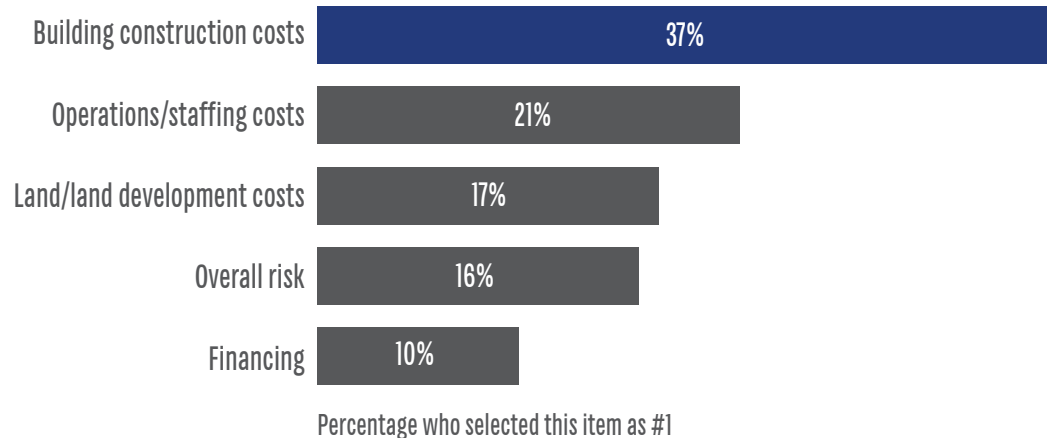


Addressing Middle Income Needs

19) What are the biggest barriers to providing/developing products (settings and services) to the vast middle income market?

In general, the barriers to providing/developing products (settings and services) to the vast middle income market were not seen as very great. However, based on the average ratings as well as the frequency of which issue was selected as the #1 biggest barrier, 2017 survey respondents felt that building construction costs are the biggest barrier, followed (logically) by land/land development costs. Overall risk was considered to be the smallest barrier. [Answered: 134]

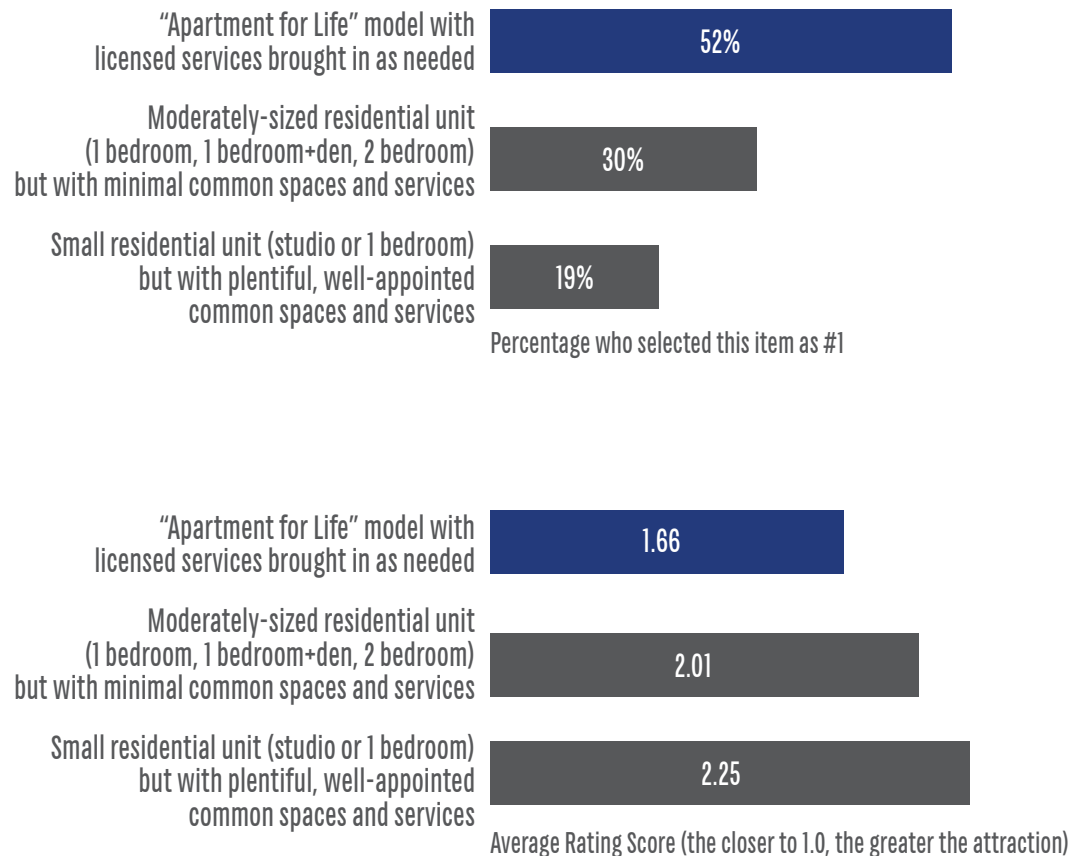
37%
believe building construction costs are the biggest barrier to providing for middle income



20) Which of the following Independent Living residential models do you think might be the most attractive to the middle income senior (age 80+) consumer?

Based on the average ratings as well as the frequency of which model was selected as the #1 most attractive, 2017 survey respondents felt that the “Apartment for Life” model with licensed services brought in as needed is the most attractive Independent Living residential model for middle income senior consumers. [Answered: 135]

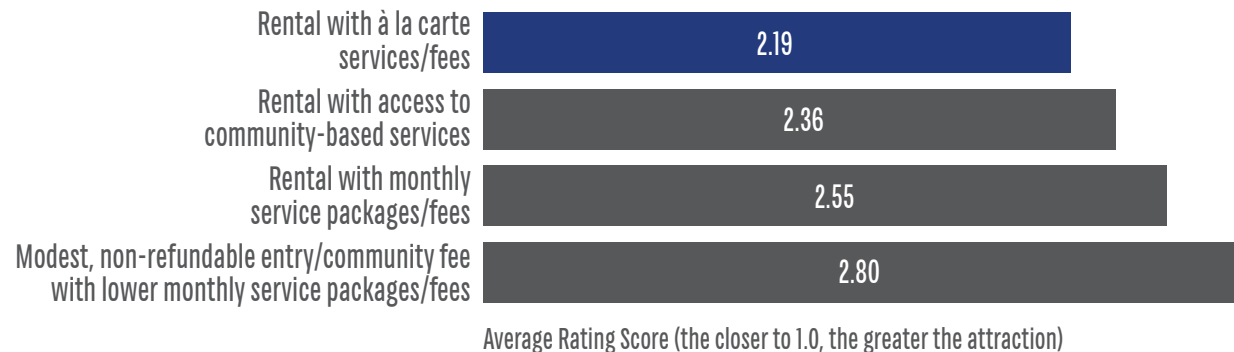
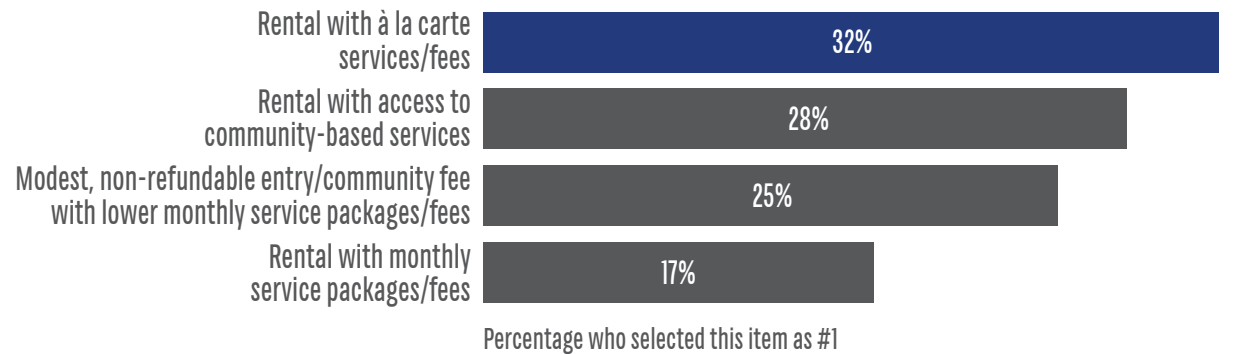
52%
said the “Apartment for Life” model is the most attractive for middle income IL



21) Which of the following financial models do you think might be the most attractive to the middle income senior (age 80+) consumer?

Overall, the ratings of attraction did not vary greatly, but based on the average ratings as well as the frequency of which model was selected as the #1 most attractive, 2017 survey respondents felt that rental with à la carte services/fees is the most attractive financial model for middle income senior consumers. This was followed closely by rental with access to community-based services. [Answered: 134]

32%
said rental with à la carte services/fees is the most attractive financial model for the middle income consumer



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