

# What Drives **Consumer Choice** in Senior Living?

Results from the 2016 Post-Acute Care Collaborative Senior Survey

# What Do Consumers Want in Senior Living?

## Consumer Involvement in Decision Making Is Changing. Are Outreach Efforts?

Increased information access has made the large cohort approaching retirement more active and discerning than consumers of the past. While senior living has long relied on consumer outreach to drive occupancy, providers will need to map outreach efforts to consumers' preferences to continue to grow their businesses. To provide a better sense of what drives patient and family choice, we asked potential consumers for their preferences in our 2016 Post-Acute and Senior Care Survey.

## The 2016 Post-Acute and Senior Care Survey

We conducted a national consumer survey to assess what consumers are looking for in four post-acute and senior care scenarios: hip rehabilitation, senior living, stroke rehabilitation, and dementia care. To capture consumers' decision-making processes about senior living, we asked them to rank 27 potential attributes by relative importance.

### The Scenario: Choosing a Senior Living Community

- You have decided to move to a senior living community (apartments for people aged 55+)
- You will live there for the remainder of your life
- You plan to make a decision within the next year

### Senior Living Scenario Survey Respondents



## Consumer Priorities Are Straightforward



### Cost Is Always a Major Concern

Regardless of demographic background—income, net worth, age—consumers unsurprisingly prioritize cost over other factors when considering a permanent move to senior living.

### Cost Attribute Ranking Across Net Worth Groups

Net Worth	<\$50K	\$50K–\$100K	\$100K–\$250K	\$250K–\$500K	\$500K–\$1M	\$1M+
Attribute Rank	1	1	1	3	2	4

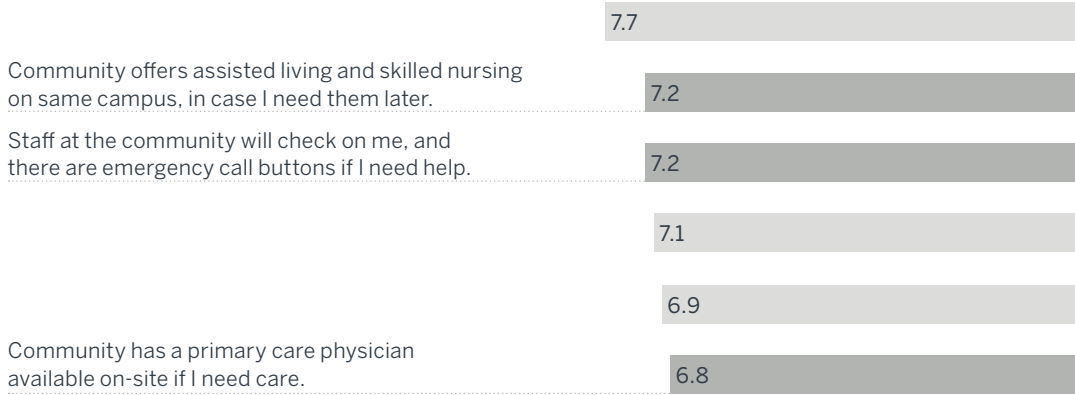
Even respondents with a net worth over \$500K rank cost as second of 27 attributes.



## Consumers Choose Senior Living for the Clinical Care

Immediate and convenient access to medical care is the driving force behind most consumers' decision to shift from home to a facility. After cost, clinical capability attributes rank highest across consumer groups.

### Health Care Ranked Highly



Regardless of demographic background, all respondent groups ranked a clinical care attribute within the top 2.

**Interpreting Results**  
Higher scores are better, and all scores add up to 100

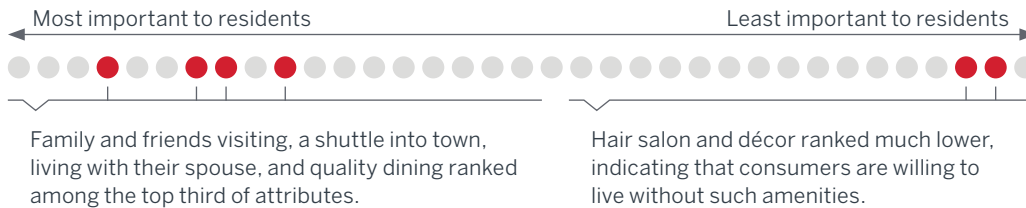


## Consumers Want Normalcy, Over Amenities

Senior living, unlike most long-term or post-acute care admissions, is elective, leading consumers to consider their long-term goals, and prioritize home-like environments that facilitate independence.

### Quality of Life Means Community, Not Amenities

Top Ranked Quality of Life Attributes and Amenities



## Next Moves

**1**  
Consumers increasingly demand transparency, so convey your competitive pricing through straightforward and accessible channels such as your website.

**2**  
With seniors showing heightened medical complexity and greater demand for low-acuity environments, evaluate on-campus primary care programs and partnerships with home health.

**3**  
Consumers value settings that promote their independence. Show that you are an enhanced version of home—a place where residents can enjoy community and family without the associated stressors of aging at home.



To learn more about becoming a health-focused senior living provider of choice, view our infographic at [advisory.com/pacc/seniorliving](https://www.advisory.com/pacc/seniorliving).

# The 2016 Post-Acute and Senior Care Survey Results

## Senior Living Full Data

1. The yearly cost to live in this community is lower than the average costs for other communities.	7.7
2. Community offers assisted living and skilled nursing on same campus, in case I need them later.	7.2
3. Staff at the community will check on me, and there are emergency call buttons if I need help.	7.2
4. Family and friends can visit at any time.	7.1
5. The yearly cost to live in this community is average compared to other facilities.	6.9
6. Community has a primary care physician available on-site if I need care.	6.8
7. Community offers a shuttle to go shopping and to places in town.	5.6
8. If my spouse and I need different levels of care, we can still live together at this community.	4.6
9. Physical and occupational therapists will come on-site to provide care, if needed.	4.6
10. Community offers an excellent dining plan.	3.9
11. Community is close to my relatives' homes.	3.8
12. I have friends who live at the community.	3.7
13. My doctor recommended the community.	3.3
14. Community has regular social events.	3.3
15. Community is close to my current home.	3.1
16. Community has positive online reviews.	3.0
17. Community has regular religious services of my preferred religion.	2.4
18. Community has on-site exercise classes.	2.4
19. Community allows pets to visit.	2.3
20. My son or daughter thinks this is the right community for me.	2.1
21. Community offers resources for planning for end-of-life needs.	1.9
22. Community is affiliated with my religious group.	1.8
23. Community has a mental health counselor on staff and available for support as needed.	1.7
24. Community is independently owned and operated.	1.6
25. Community is part of a large chain of senior living providers.	1.0
26. Community has newly appointed décor.	0.6
27. Community has an on-site salon.	0.5



### Interpreting the Data

- Importance scores for the set of attributes sum to 100.
- Importance scores represent the relative value of each attribute, so an attribute with a score of 8 is valued twice as much as one with a score of 4.