



# Trends in Assisted Living

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# Facts about Assisted Living

# Assisted Living is Regulated

- Assisted living is regulated in all 50 states, and communities are licensed or certified.
- While every state may not use the term “assisted living”, all of the state regulations are similar in philosophy and comprehensive in promoting resident safety and quality of care.
- State oversight of assisted living provides the opportunity for each state to address the variety of needs and preferences of their elderly citizens.

# Assisted Living Residents

ALF Data from ALFA, ASHA, AAHSA, NCAL & NIC *2006 Overview of Assisted Living*

Average Age	85.3
Average age at move-in	83
Female	75.7%
Male	24.3%
Median Income	\$15,686
Median Assets (including home)	\$250K
Average length of stay	27.2 months
61% within 10 miles of their previous residence	

# Prior Residence

ALF Data from ALFA, ASHA, AAHSA, NCAL & NIC *2006 Overview of Assisted Living*

Private home or apartment	60%
Retirement/Independent living community	12%
Family residence	10%
Different AL community or group home	9%
Nursing home	8%
Other	1%

# ADL Dependence

ALF Data from ALFA, ASHA, AAHSA, NCAL & NIC *2006 Overview of Assisted Living*

ADL	AL
Bathing	68%
Dressing	47%
Toileting	34%
Transfer	25%
Eating	22%
86% of AL residents need help with meds. (average of 8.7 medications)	

# Residents Moving Out

ALF Data from ALFA, ASHA, AAHSA, NCAL & NIC *2006 Overview of Assisted Living*

Nursing home (health reasons)	34%
Death	30%
Home	7%
Another AL residence	7%
Nursing home (financial reasons)	5%
Relative's home	4%
Hospital (other than short term)	4%
Independent living	3%
Other	7%

# Primary Payment Source for AL

ALF Data from ALFA, ASHA, AAHSA, NCAL & NIC *2006 Overview of Assisted Living*

Self	52.4%
Family	33.8%
Insurance	3.4%
Medicaid	8.2%
SSI	1.6%
VA	0.7%





# Pop Quiz

# Pop Quiz

- Q. Is *assisted living* a home or an institution?
- Q. Is *assisted living* a residential alternative to a nursing home or an intermediary step between independent living and a nursing home?
- Q. Is resident safety more important than resident rights? Should a resident in assisted living with a history of falls be discharged to another level of care?
- Q. Should assisted living residents who are noncompliant with medications or diet be discharged to another level of care?

# Pop Quiz

- Q. Is assisted living caring for a population that is too frail and should be living a nursing home?
- Q. Should assisted living residents on hospice be discharged to another level of care?
- Q. Should assisted living residents who are “two-person transfers” be discharged to another level of care?

# Pop Quiz

- Q. Who should decide if someone is appropriate to move in to assisted living?
- A. Residents
  - B. Families
  - C. Providers
  - D. Physicians
  - E. State Regulators

# Pop Quiz

Q. Who should decide if someone must move out of assisted living?

- A. Residents
- B. Families
- C. Providers
- D. Physicians
- E. State Regulators

# National Assisted Living Industry Perspective

## *Informed Choice:*

Residents should be allowed to move in and remain in assisted living as long as the resident, family, provider, and physician all agree that the resident's needs can be met in the assisted living community.

# Informed Choice

- Assisted living is not an intermediary step.
- Assisted living is a residential alternative to nursing home care.
- Decision making on who should move in or out of an assisted living community should be made by the resident, family, physician and provider, not the state regulator.
- Quality of life is as important as quality of care (i.e. falls)
- Negotiated risk agreements should be in place for residents who chose to be non-compliant.
- Hospice and “two-person transfer” residents should all be allowed to remain in assisted living as they are allowed to remain in other home settings.

# Future Trends in Assisted Living

“There is a race between bureaucracy and personal choice”

–Newt Gingrich

- Assisted living industry supports meaningful state regulation of assisted living that supports provider and consumer choice
- Ageism often leads to overly prescriptive regulations that lead to inappropriate institutionalization and a denial of human rights.
- The best assisted living has yet to be invented.



# Future Trends in Assisted Living

- Assisted living is the fastest growing long term care option in the country
- Assisted living serves one million residents in over 36,000 licensed communities across the country.
- Median occupancy for assisted living communities open as least 12 months is 94.7%
- Resident satisfaction scores of 91%

# How Do Consumers Choose?

There are Two Consumers doing the shopping

1. The 45 – 65 yr. old woman looking for mom/mother in law
  - She is a Baby boomer
  - Not ready to move in but thinking about what she will want when
  - She is 80
  - Speaks her mind, ask tough questions, demanding
  - She has done her research
2. 80 year old woman, widowed, needs assistance with bathing, dressing, medications
  - Age 32 in 1960- different values than previous generation
  - More knowledge/comfort with technology
  - Will participate in decision making

# Overview of Assisted Living Marketing Process

- Director of Marketing/ Director of Community Relations
- Sales background, human services experience, Comfortable talking about health care needs, death
- Trustworthy image to take care of mom
- Process begins with a phone call, from adult daughter, requesting information
- Visit to “tour” the community is arranged
- Marketing staff listen/ ask questions
- Tour is tailored to resident needs not just physical surroundings

# Overview of AL Marketing Process

- Staff must determine if the community can meet the customers needs
- Realistic expectations, don't over promise
- Sales team needs to work with operations team
- Executive Director critical to sale
- More calls/ visits
- Close the deal
- Mom moves in
- Extensive process of generating / tracking leads, hot, warm, cold
- Log conversations and visits, status of each lead
- Competitive market surveys and analysis
- Intelligence on why sale was not made

# What is today's customer looking for?

- Consumer today is more informed- more knowledgeable about assisted living
- More web based research – community websites, state inspections
- They want more than a pretty face- want to know about care services, management team, staffing levels
- Less important are appearance, activities, price, location
- Physically looking for bigger units, more closets, kitchens, more homelike
- Biggest competition is the home
- Need driven for the most part – urgent time frame
- Value proposition – what do you offer that no one else offers

# What is today's customer looking for?

- Plasma flat screen TVs- Baby Boomer value
- Sell Peace of mind/passion for caring
- Emotional decision
- Different from selling tooth paste or a hotel room – this is relationship building

# Informed Choice

- You've seen one assisted living community, you've seen one assisted living community
- Consumers are different
- Providers are different
- Important to disclose everything to help consumers find the right fit



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