



# REPORT: 2017 A Place for Mom Senior Living Preferences Survey

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## Introduction

By 2030, nearly 20 million Americans will be age 80 or older. Most of them will need long-term care. Yet with smaller families than previous generations, they cannot rely as heavily on family caregivers. Many who do not qualify for government-funded long-term care programs will turn to assisted living communities. Meanwhile, many older adults who are still independent but wish to downsize or live among their peers will look to active senior living communities. Senior living providers, developers, city planners, and policymakers need to know more about the characteristics of senior living communities and neighborhoods where private-pay senior living consumers prefer to live.

### Types of Private-Pay Senior Living

Respondents contacted A Place for Mom about three types of senior living:

- **Independent living** for independent seniors. Includes meals and light housekeeping
- **Assisted living** for seniors who need daily assistance with personal care
- **Senior apartments** for independent 55+ adults, with no meals or housekeeping included

To better understand senior living consumer preferences, A Place for Mom — the nation's largest senior living referral service — surveyed senior living consumers who contacted the company during a three-month period in early 2017 about three major types of senior living community. This report summarizes the results of the survey in the context of generational settlement patterns, city planning, and development priorities.

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Executive Summary

Consumers' Top Priorities

- **For most independent and assisted living consumers, the quality of the provider takes top priority.** 61% of independent living and 68% of assisted living consumers rank community quality above affordability and neighborhood.
- **Most senior apartments consumers rank affordability as their top priority.** 50% of them rank affordability above community quality and neighborhood.
- **Neighborhood was ranked top priority least often, but that doesn't mean it isn't important.** 11% of senior apartments consumers, 6% of independent living consumers, and 2% of assisted living consumers gave neighborhood first rank.

Neighborhood Preferences

- **Most consumers rate low crime, hospital proximity, and family proximity as very important or mandatory.** Across senior housing categories, about 75% of consumers strongly prefer low crime, and about 50% to 60% strongly prefer proximity to hospitals and family, respectively. Over 90% of consumers across categories prefer low crime and hospital proximity to any degree.
- **Many consumers, even those looking for assisted living, rate a walkable neighborhood as very important or mandatory.** 53% of senior apartments, 38% of independent living, and 26% of assisted living consumers strongly prefer walkable neighborhoods.
- **Public transit is paramount to surprisingly many consumers** - 30% of senior apartments consumers, 23% independent living, 17% assisted living.

- **Younger senior living consumers are more likely to prefer walkable neighborhoods.** Over half of senior living consumers age 70 or under find walkability very important or mandatory compared to 32% of those over 70.
- **There isn't much evidence that walkability preferences depend on consumers' budget or urban vs. rural preference.** To the extent evidence exists, it looks like the most and least affluent consumers, as well as those with more urban living preferences, want walkability slightly more.

#### Senior Living Community Preferences

- **Almost all consumers prefer comfort over elegance.** 92% of senior apartments consumers, 95% of independent living consumers and 92% of assisted living consumers show this preference.
- **Most consumers prefer a quiet and serene community to one bustling with activity.** 72% of senior apartments consumers, 64% for independent living and 64% for assisted living prefer quiet and serenity.
- **Most consumers (between 80 and 85%) rate cleanliness and friendliness of staff as very important or mandatory.**
- **Most assisted living consumers (70%) and independent living consumers (60%) want a community to support their future care needs.**

#### Lessons for Consumers, Providers, Developers, and Planners

- **Plan for multi-generational development in dense centers of the suburbs.** Many boomers and millennials want to live in the same walkable areas. Without good planning, lack of supply could exacerbate land and rent price growth.
- **Remember what matters most to consumers.** Many senior living consumers prefer walkable neighborhoods, but top priority remains the quality of senior living buildings and services.

### Consumers' Top Priorities

We asked consumers to rank senior living community quality, affordability, and neighborhood from most to least important to their decision. We looked at the share who considered each factor as their top priority.

#### Affordability, community quality, or neighborhood: Which is the top priority for senior living consumers?

Share of consumers for whom a topic is their top priority.  
Lines show 95 percent uncertainty intervals.  
Affordability is top priority more often for Senior Apartments consumers.  
Community quality is top priority most often, except for Senior Apartments.  
Neighborhood is a little less important to Assisted Living consumers.



Source: 2017 A Place for Mom Senior Living Preferences Survey

### Neighborhood Preferences

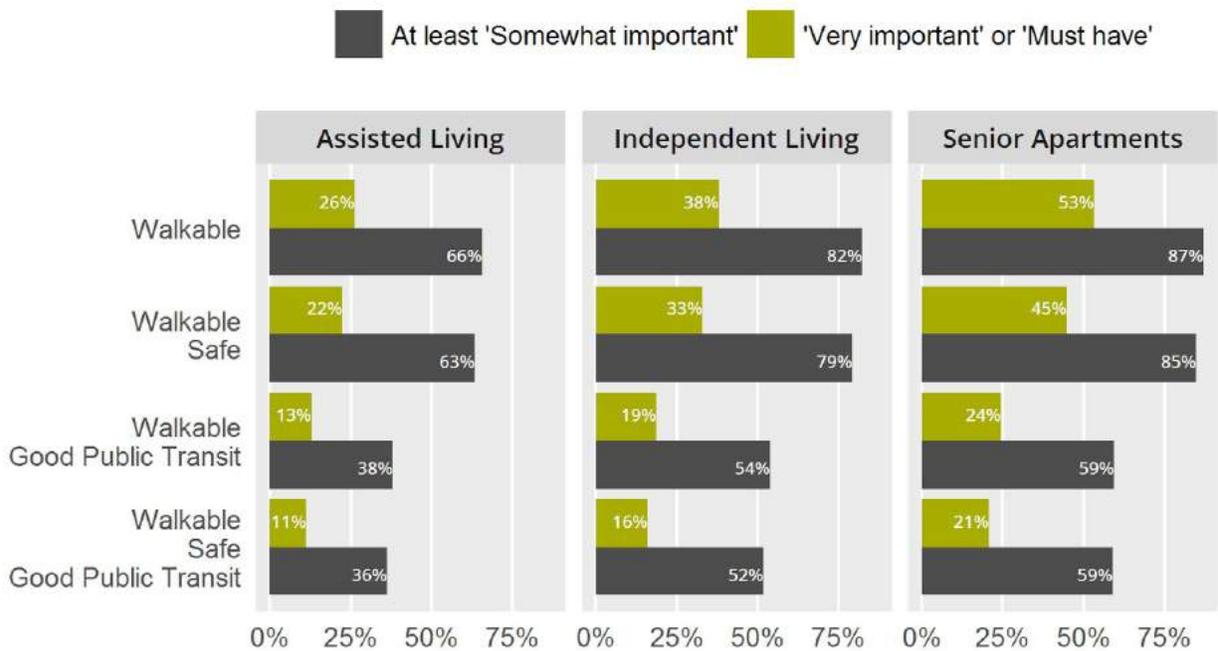
We asked consumers to rate each of the following neighborhood amenities on a scale from “Not important to me” to “Must have” (presented in random order):

- Access to public transportation (nearby stops, etc.)
- Friendly and safe for bicyclists
- Within walking distance of parks and other outdoor recreation
- Within walking distance of retail shopping, restaurants, entertainment, etc.
- Within walking distance of grocery stores
- Within walking distance of cultural activities (e.g., museums, theatre)
- Low crime rate
- Close to children, grandchildren, or other family members
- Close to hospital and other health care services

These traits were strongly inspired by the Transit Score, Bike Score, and Walk Score from Walk Score<sup>1</sup>, a Redfin company. We looked at the share of consumers who considered each of these separate neighborhood characteristics as either “Very important” or “Must have” (strong preference). We also looked at the share of consumers who considered at least one walkability characteristic “Very important” or “Must have,” as well as those who had a strong preference for combinations of walkability, safety, and good public transit options. We also looked at how the share showing a strong preference for walkability varied by consumers’ stated senior living budget, preferred community type, urban vs. rural preference, and age.

### Walkable, safe, good public transit, or all three?

Share of consumers who find a group of neighborhood characteristics important. All figures are broken out by level of importance.



<sup>1</sup> <https://www.redfin.com/how-walk-score-works>

### What kind of neighborhood do senior living consumers want to call home?

Share of consumers who say characteristic is 'Very important' or 'Must have.'  
 Three most important characteristics highlighted in red.  
 Lines show 95 percent uncertainty intervals.



Source: 2017 A Place for Mom Senior Living Preferences Survey

### How do finances impact walkability preferences?

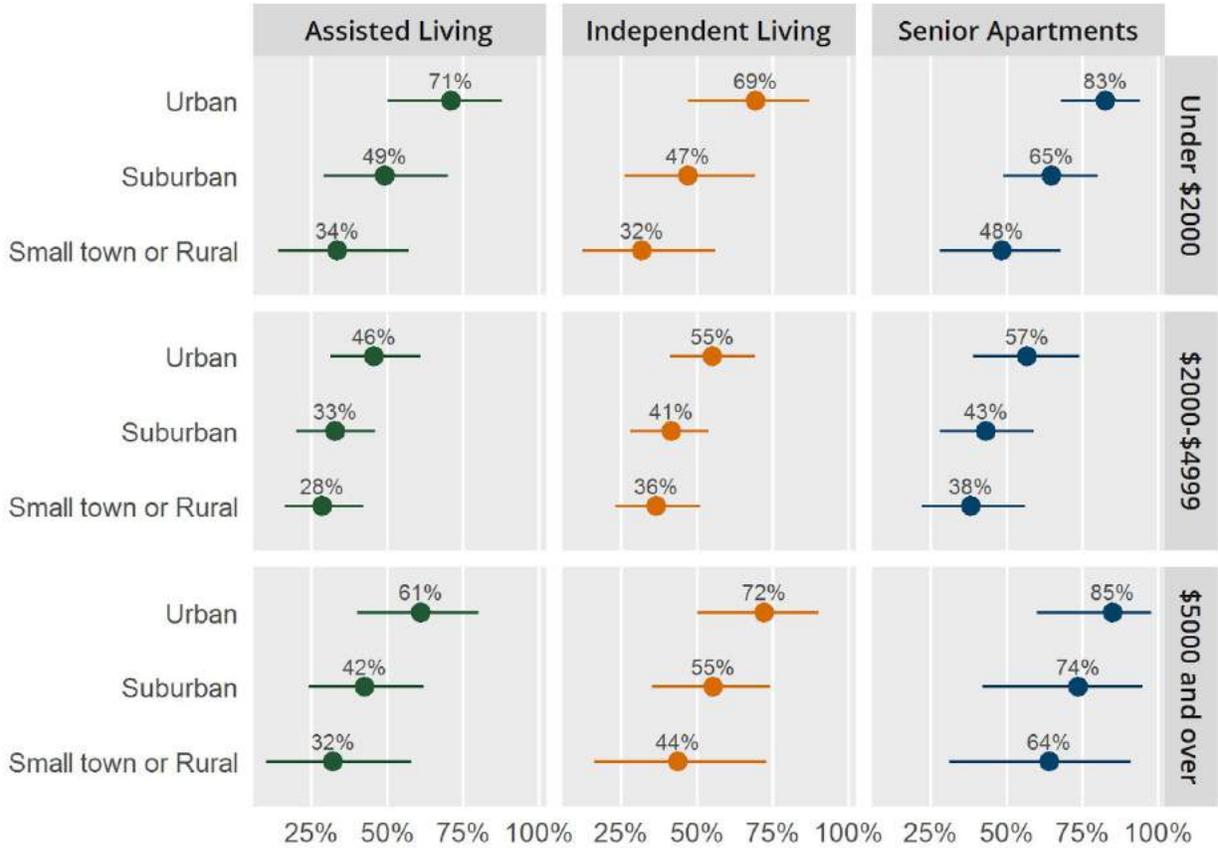
Share of consumers who find walkability 'Very important' or 'Must have' broken out by whether consumer is looking for themselves or someone else, and by self-reported monthly senior living budget. Walkability may be more important to the most and least affluent consumers. Consumers looking for themselves may also prefer walkability more, likely because they are on average 6 to 9 years younger, but maybe also because family members underestimate older relatives' preferences. Lines represent 95 percent uncertainty intervals.



Source: 2017 A Place for Mom Senior Living Preferences Survey

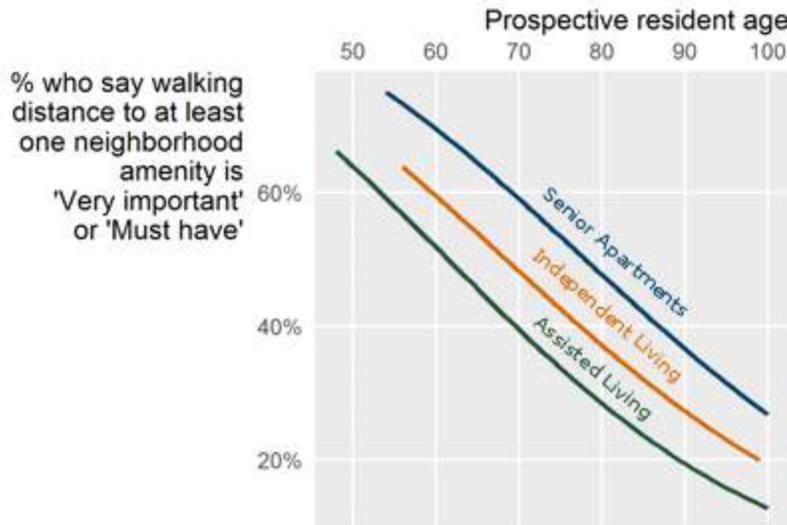
### Is walkability only for city slickers? Nope.

Share of consumers who find walkability 'Very important' or 'Must have' broken out by urban/rural preference, and by self-reported monthly senior living budget.



Source: 2017 A Place for Mom Senior Living Preferences Survey

Younger senior living consumers are more likely to show a strong preference for walkability.



### Senior Living Community Preferences

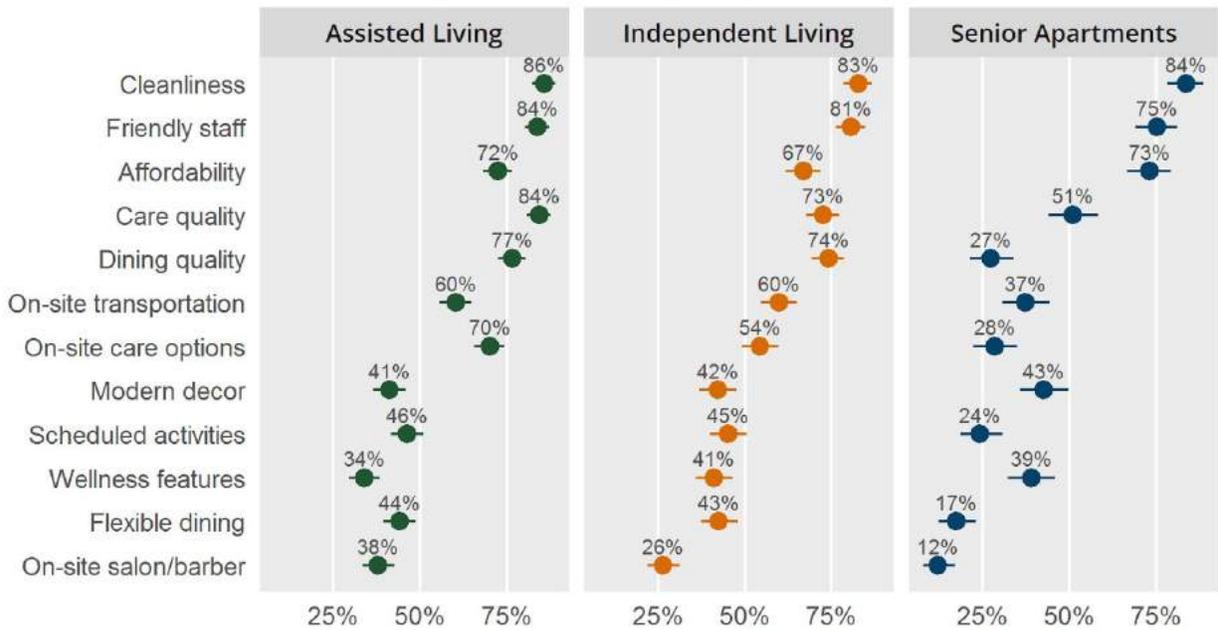
We asked consumers to rate each of the following senior living community characteristics (presented in random order):

- Quality of care services
- Quality of dining services
- Community offers transportation to shopping, entertainment, medical facilities, etc.
- Friendliness of staff
- Cleanliness of building
- Scheduled activities
- Wellness features of community (fitness rooms, trainers, fitness classes, etc.)
- Availability of on-site options for future care/medical services
- Flexible dining hours
- Low price / affordability
- On-site salon / barber
- Modern look and feel

We looked at the share of consumers who considered each characteristic “Very important” or “Must have.”

### Which senior living community characteristics do consumers find 'Very important' or 'Must have'?

Share of consumers who say characteristic is 'Very important' or 'Must have.' Friendliness of staff and building cleanliness are strongly preferred across community types. Lines show 95 percent uncertainty intervals.



Source: 2017 A Place for Mom Senior Living Preferences Survey

### Lessons for Consumers, Providers, Developers, and Planners

This report shows the widespread preference for walkable communities among senior living consumers, including those who live in suburbs. Even greater preference for walkable neighborhoods is widely reported for millennials, according to the National Association of Realtors and Portland State University<sup>2</sup>. The shared preferences of many boomers and millennials will lead them to converge on limited land supply in suburban centers, even as suburbs remain the fastest growing areas of the country according to

<sup>2</sup> National Association of Realtors and Portland State University 2015 Community and Transportation Survey.

<https://www.nar.realtor/reports/nar-2015-community-preference-survey>

Indeed.com Chief Economist Jed Kolko<sup>3</sup>. Cities should plan for multi-use, multi-generational communities in suburban centers to serve these growing needs.

At the same time, planners should remember the top priorities of senior living consumers: the quality of senior living buildings and services. Although a large plurality of older adults strongly prefer walkable neighborhoods with good public transit, the majority do not factor walkability into their decisions. The top priority remains the quality of senior housing buildings and services.

## Methods

The 2017 Senior Living Preferences Survey was administered via an emailed SurveyMonkey survey link sent to 19,983 consumers who had contacted A Place for Mom in search of private-pay senior housing care and been referred to at least one of our partner communities within a period of three months prior to the beginning of the survey on 8 March 2017. To include only consumers looking for senior apartments, independent living, or assisted living communities, the sampling frame excluded consumers who had reported memory diagnosis or combative/wandering issues, as well as consumers who indicated they were looking for a skilled nursing facility. Consumers were also excluded who had not been referred to any partner communities offering at least one of the senior living types of interest. The final survey script is attached.

The survey was conducted from March 8th to March 16th, with a reminder email sent March 14th. With 1,246 respondents, the response rate was 6.2 percent. Yet many respondents did not sufficiently complete questions about their senior living preferences to be included in the study, leaving 948 respondents for a final response rate of 4.7 percent.

Three methods were used to estimate the share of respondents who show a given preference.

- For estimates that do not break the share out by family senior living budget or other predictors, the share was estimated with independent Dirichlet-multinomial models with flat priors.

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<sup>3</sup> “Seattle Climbs but Austin Sprawls: The Myth of the Return to Cities.” Jed Kolko. *New York Times*.  
<https://www.nytimes.com/2017/05/22/upshot/seattle-climbs-but-austin-sprawls-the-myth-of-the-return-to-cities.html>

- For estimates that do break the share out by all predictors other than age, the share was estimated using Bayesian logistic regression with weakly informative priors following the suggestions of Gelman et al.<sup>4</sup> The figures for the chart that shows walkability preferences by family budget were produced from a regression model with categorical predictors for where the consumer was inquiring for care for themselves, the family's stated senior living budget, the type of senior living, and the interaction of budget and senior living type. The figures for the chart that shows walkability preferences by family budget and urban/rural preference were produced from a regression that includes the same predictors as before, but also a categorical predictor for urban/rural preference, as well an interaction between family budget and urban/rural preference.
- The chart showing walkability preference by prospective resident age was generated from three separate generalized additive logistic regression models, one for each care type, with prospective resident age as a single predictor.

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<sup>4</sup> A Weakly Informative Default Prior Distribution for Logistic and Other Regression Models. Andrew Gelman, Aleks Jakulin, Maria Grazia Pittau, and Yu-Sung Su.  
<https://arxiv.org/pdf/0901.4011.pdf>

## Quick Survey: What matters most in your search for senior living?

Welcome

**Recently, you contacted A Place for Mom looking for senior living options.**

**We want to ask you about what is important to you when you're weighing your senior living options.**

**Your participation will help us create the best experience possible for families searching for senior living. Your responses are entirely confidential.**

**Remember, your Senior Living Advisor is always there to help. If you need to speak with them and forgot their contact info, please call: 1-877-687-4616**

## Quick Survey: What matters most in your search for senior living?

### Questions about the type of senior living you were looking for

Think about the senior living option you are currently looking for.

Do you want in-house dining services to be included in your senior living option?

Yes

No

Are you looking for an **assisted living** community?

Assisted living is for those who need daily assistance with medication management, mobility, or other activities of daily living.

Yes

No

What best describes the area where you would like to move into senior living?

Urban

Suburban

Small town

Rural

## Quick Survey: What matters most in your search for senior living?

### Your ideal neighborhood for senior living

Think about the senior living option you are looking for right now.

Now think about the type of neighborhood you want your senior living community to be in.

Rate the importance of each neighborhood feature below:

	Not important to me	Somewhat important	Very important	Must have
Access to public transportation (nearby bus stops, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friendly and safe for bicyclists	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Within walking distance of parks and other outdoor recreation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Within walking distance of retail shopping, restaurants, entertainment, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Within walking distance of grocery stores	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Within walking distance of cultural activities (e.g., museums, theater)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low crime rate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Close to children, grandchildren, or other family members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Close to hospital and other healthcare services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Quick Survey: What matters most in your search for senior living?

### Your ideal senior living community

Think about the senior living option you are looking for right now.

Now think about the kind of senior living community you want to live in.

Rate the importance of the senior living community features below:

	Not important to me	Somewhat important	Very important	Must have
Quality of care services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of dining services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community offers transportation to shopping, entertainment, medical facilities, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Friendliness of staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cleanliness of building	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scheduled activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wellness features of community (fitness rooms, trainers, fitness classes, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of on-site options for future care/medical needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flexible dining hours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Low price / affordability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
On-site salon / barber	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Modern look and feel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Think about the look and feel of your ideal senior living community.

For each item below, pick your preference.

Classic **OR** Modern?

Classic

Modern

Comfortable **OR** Elegant?

Comfortable

Elegant

Quiet and serene **OR** Bustling with activity?

Quiet and serene

Bustling with activity

Rank the following in order of their importance to you, with 1 being the most important, and 3 being the least important.

The quality of the senior living community

The neighborhood surrounding the senior living community

The low price of the senior living community

## Quick Survey: What matters most in your search for senior living?

### A little bit about you

What is your age (that is, the age of the person responding to this survey)?

- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 or older

Which race/ethnicity best describes the prospective resident? (Please choose only one.)

- American Indian or Alaskan Native
- Asian / Pacific Islander
- Black or African American
- Hispanic
- White / Caucasian
- Decline to state
- Multiple ethnicity / Other (please specify)

What best describes the area where the prospective resident currently lives?

- Urban
- Suburban
- Small town
- Rural

**Quick Survey: What matters most in your search for senior living?**

Thank you

**Thank you for your participation. The survey is complete.**