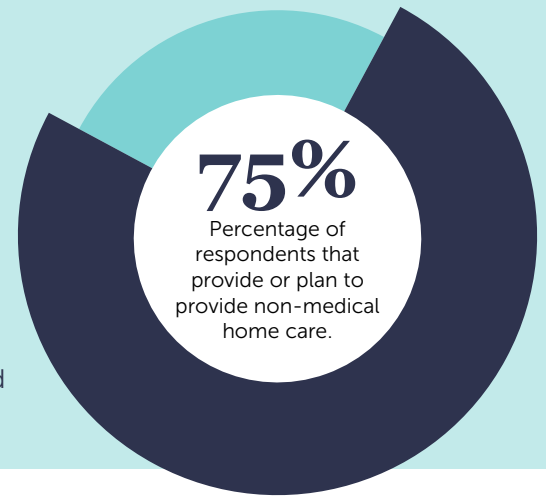




Senior Living Options

Most people's plans prioritize non-medical home care.

Preparing for baby boomers while focusing on increasing demographics and service reach, providers showed diversity in their offerings with a focus on expanding reach and altering operations. Home-based and community-based services appear to be in full force from an implementation perspective.



Offer options for middle market consumers.



Offer unbundled (i.e. à la carte) services.



Unbundling of services (i.e. à la carte) will be critical for future consumers.



Providers with partial continuums (e.g. independent living without health care) will capture the majority of future markets.



Organizations focused on serving those who stay home will become more influential in the future.



Note: Data on graphs may not total 100% due to rounding of numbers.

What services or changes will be necessary to attract future residents and enhance the resident experience?

Although worded differently, the overall comments focused on the following key focal points:

- Home care very often highlights as critical
- Use of enabling technologies
- Significant focus on individualized services
- Unbundling of services and tailoring of service options



More options for dining, more selection overall for types of meal plans, cleaning services, and other lifestyle components.

Future residents will expect 'what I want and how I want it.' This could be on campus or in their community based home. Technology will be an enabler of the experience.

Participant comments



CLA recommended action steps:

- Consider the benefits of introducing choice and options in a marketplace.
- Understand local market and internal facility needs for additional services, including market studies.
- More choice can often erode margins as volumes become less predictable, particularly when unbundling services. Understand the economics of providing choice and make sure those options are valued (e.g., high utilization) and helpful to develop good data, analysis, and models to allow for additional options.
- Identify opportunities for innovation and leadership within communities, since many service options do not require significant start-up capital.

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