



Annual Benchmark Report 2026

Senior Living Sales &
Marketing Benchmarks

Introducing Above the Line

Curating what better looks like in senior care

Senior living is entering a defining decade. Demand is rising. Expectations are higher. Teams are being asked to do more with tighter margins, leaner staffing, and greater complexity.

Above the Line is an industry-led thought leadership platform designed to define what better looks like – and help operators move toward it.

Progress in senior living requires two things working together: **Clear measurement and shared learning. Understanding what's working.** Seeing where performance is improving. Learning what separates good from great.

Above the Line brings transparency to the realities shaping senior living today – through:

Industry ambition in care and performance

Stories of operational progress

Practical insights teams can apply immediately

Benchmarks that reveal where momentum is building

The goal is simple:

Better outcomes for residents, families, and the teams who serve them.

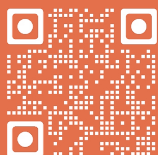
This Annual Benchmark Report is one contribution to that effort.

On the following page, we introduce the connected ecosystem Aline has built to support growth, engagement, and performance across the senior living journey.

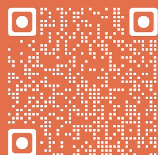
Join the conversation

Follow Above the Line on social media @AboveTheLineStories for new voices, perspectives, and benchmarks year-round.

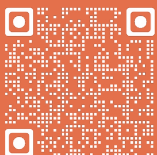
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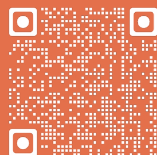
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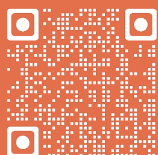
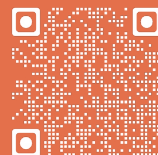
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Add Your Voice to Above the Line

Scan the QR code to schedule an Above the Line recording session with our friendly marketing team.

The ALINE Ecosystem

Built to connect

In senior living, outcomes depend on thousands of small handoffs: An inquiry returned quickly. A family updated with clarity. A care team aligned. A bill that matches expectations. A leader who sees what's happening before it becomes a problem.

Disconnected systems create friction in every one of those moments.

Aline connects the systems – and the people – behind them.

Connected products that work together across CRM, Care, Billing, Payments, and Intelligence.

Connected data that ties operational, clinical, and financial insight into one source of truth.

Connected people through workflows that strengthen relationships across the entire journey.

Connected mission to elevate aging by aligning the industry around measurable improvement.

Growth &

Engagement:

Convert demand into move-ins with a system of recommendation that guides outreach, prioritizes effort, automates follow-up, and surfaces the prospects most ready to talk.



Financials:

Run the business with connected leasing, billing, payments, and accounting workflows that improve accuracy, visibility, and control.

Resident Living:

Deliver better daily experiences through connected clinical and dining workflows that support care teams, residents, and families.

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Letter From the Authors

Each year, the Aline Benchmark Report offers a detailed view into the performance of senior living sales and marketing – where momentum is building, where challenges remain, and how benchmarks are shifting across communities, regions, and care types.

Drawing from the industry's largest and most comprehensive dataset, this year's report delivers a data-backed view of activity levels, conversion patterns, and engagement trends across the senior living landscape, enriched by industry perspectives. These benchmarks give you a clear foundation for comparison, helping you evaluate performance, recognize progress, and plan strategically for the year ahead.

By examining how sales and marketing teams allocate time, manage follow-up, and engage with prospects, the findings aim to reveal the patterns and behaviors shaping growth across the industry, especially as teams are asked to do more with leaner staffs and fewer available hours.

In an environment where every inquiry represents both a family and an opportunity, timely connection and consistent follow-up remain essential. As new technology, tools, channels, and expectations continue to reshape how teams engage with prospects, understanding performance through reliable benchmarks has never been more valuable.

Thank you for continuing to use these insights as a foundation for learning and growth. We hope this year's report provides clarity, context, and confidence as you plan for 2026 and beyond.



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Growth Officer

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Chief Customer
Officer

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Data Sample for Benchmark Report

Date Range

Inquiries, sales activity, conversion ratios, and average activities data is from full years 2024 and 2025. Move-in metrics and lengths of sale are from residents who moved into the community in 2025, and the metrics consider their associated activities from previous years. Some data traces to initial inquiries as far back as 2004.

Communities were only included if they had complete data for 2024 and 2025. Skilled nursing, home care, home health, unclassified care levels, and other care combinations not listed below were excluded from the sample.

We aggregated data for senior living locations from our CRM systems. The CRM’s master categories map to each organization’s customized properties. This allows us to standardize benchmark metrics across thousands of senior care locations.

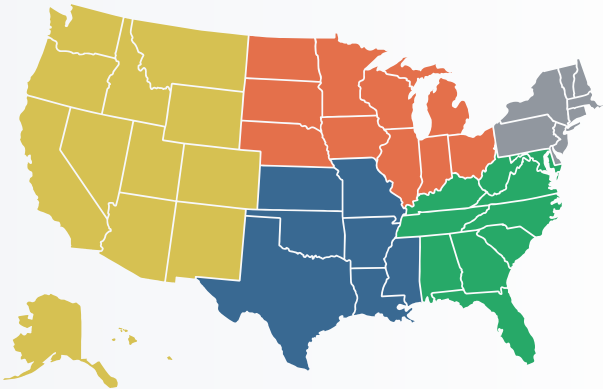
We scaled the benchmarks of sales activities included in this report to 100 units. This enables consistent comparisons between care types and helps you compare these benchmarks to your communities.

Community Type Descriptions		
Type	Description	%
IL	Independent living rental communities	19.5%
AL	Assisted living rental communities	55.4%
MC	Memory care communities	17.2%
Life Plan Residential	Entrance fee (CCRC) residential communities	7.9%

Region Breakdown	
Northeast	14%
Southeast	23%
North Central	29%
South Central	17%
West	18%

Regions

- WestAZ, CA, CO, NM, NV, MT, ID, WA, OR, WY, HI, AK, UT
- North CentralND, SD, NE, IA, MN, WI, MI, IL, IN, OH
- South CentralTX, OK, KS, LA, MS, MO, AR
- NortheastMA, VT, NH, DE, NJ, PA, NY, CT, ME, RI
- SoutheastFL, AL, WV, VA, TN, KY, MD, NC, SC, GA



How to Use The Data

Only sales activities that are denoted “per 100 units” require unit count conversion.

Here’s how to convert these benchmarks for comparison to your property.



Step 1: Calculate the ratio between your community and the benchmark by dividing your units by 100.



Step 2: Multiply the benchmark by this ratio.

Data Calculation Example

For assisted living, the average was 10.9 initial tours completed monthly per 100 units.

If your assisted living community has 125 units:

- **Ratio:** 125 units / 100 units = 1.25.
- **Apply this to the sales activities:** (1.25 * 10.9 initial tours) = 13.6 initial tours.



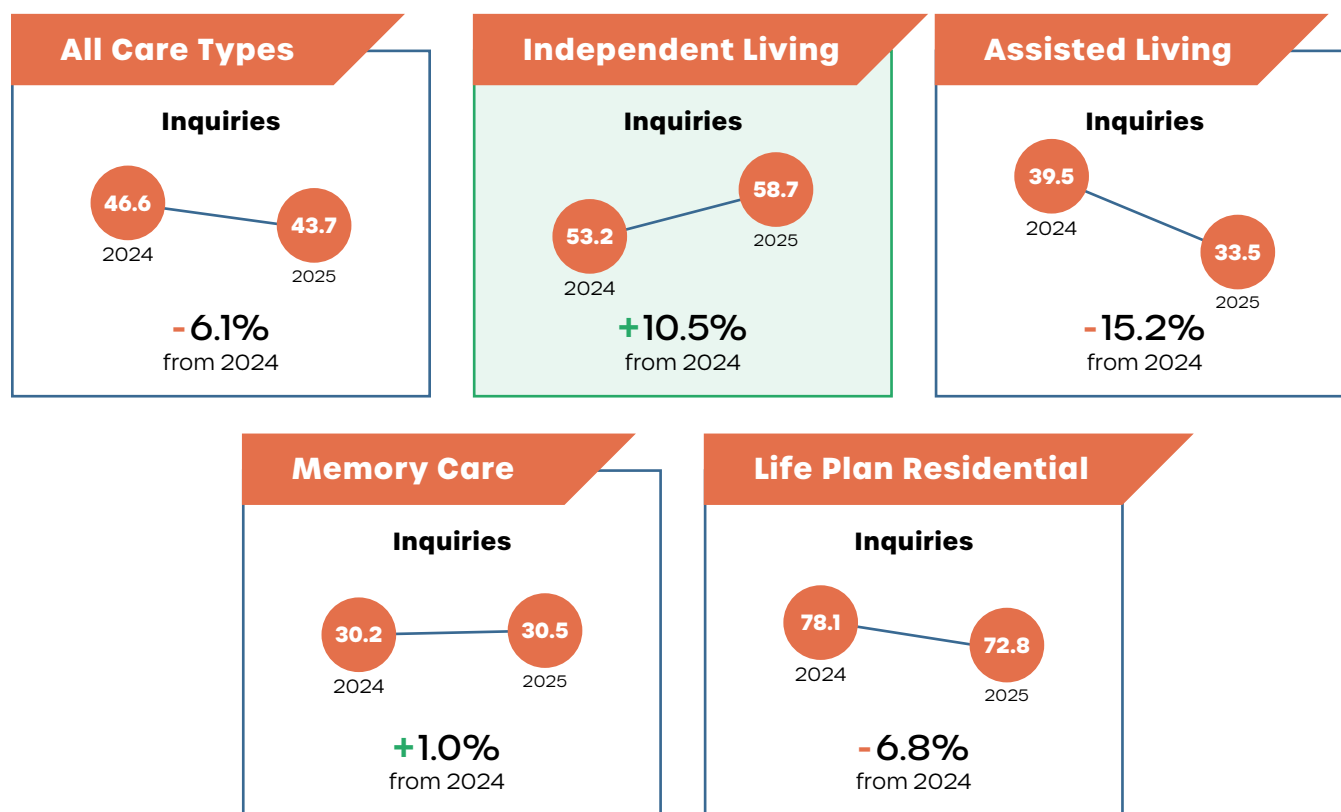
Now the 16 initial tours are adjusted to your community, allowing you to compare your initial tours to this average.

Independent Living Stands Out With Double-Digit Growth in Inquiry Volume & Move-In Conversions

Inquiries

Overall, senior living performance in 2025 reflected a market that's slightly leaner at the top of the funnel, though the impact varied significantly by care type. Average monthly inquiries declined modestly year over year, reinforcing what many operators are feeling: Demand is concentrated among fewer, slightly more purposeful shoppers. For assisted living, demand was down 15%, marking the biggest drop among all care types.

Here's how the data changed year over year:



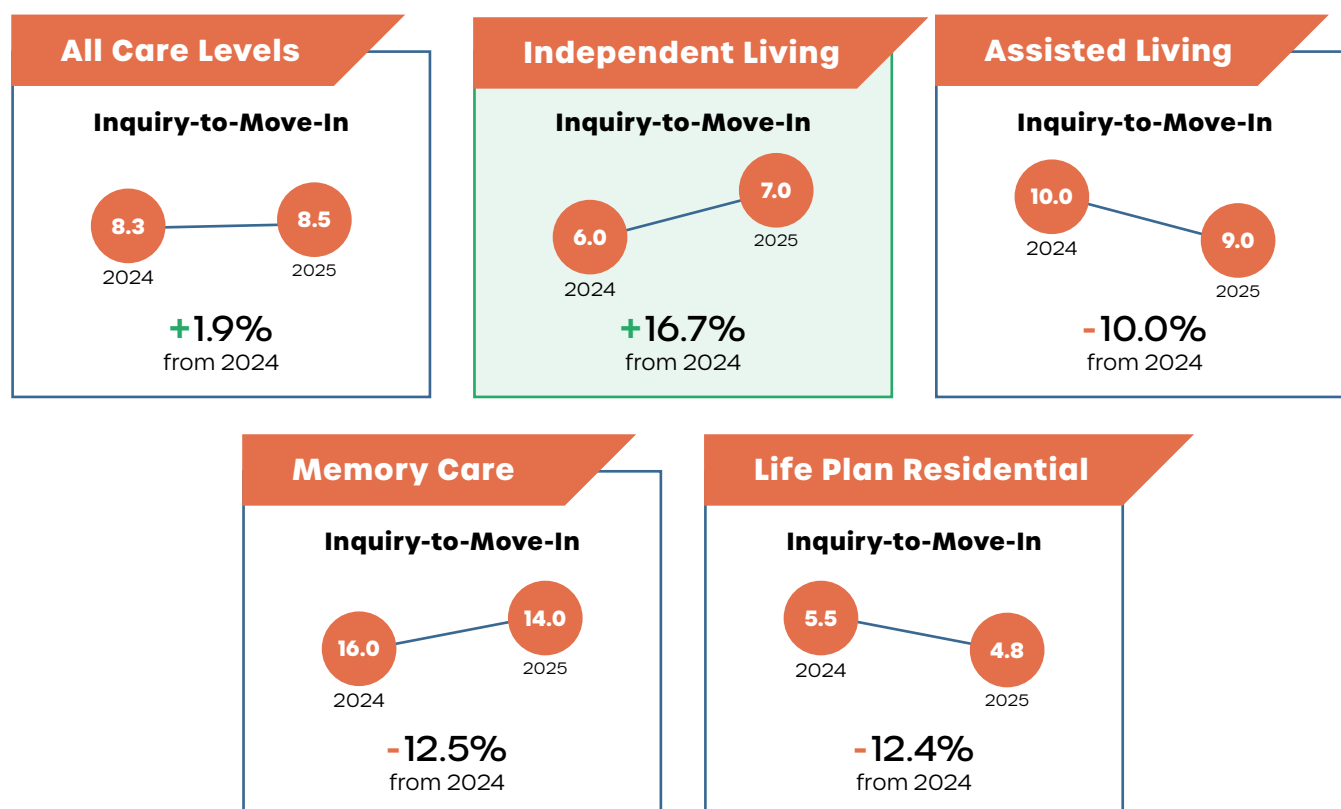
Conversions

Independent living was the clear outlier in 2025 conversion performance. While all other care types saw double-digit declines in inquiry-to-move-in conversion rates compared with 2024, independent living improved by 17% year over year.

The broader story is pressure on move-in conversions. While independent living improved, the rest of the funnel tightened across care types, reinforcing the need to prioritize inquiry quality and the signals that indicate real intent.

The takeaway is clear. Independent living demand was both higher and more actionable, reinforcing the importance of prioritizing quality signals over raw inquiry volume.

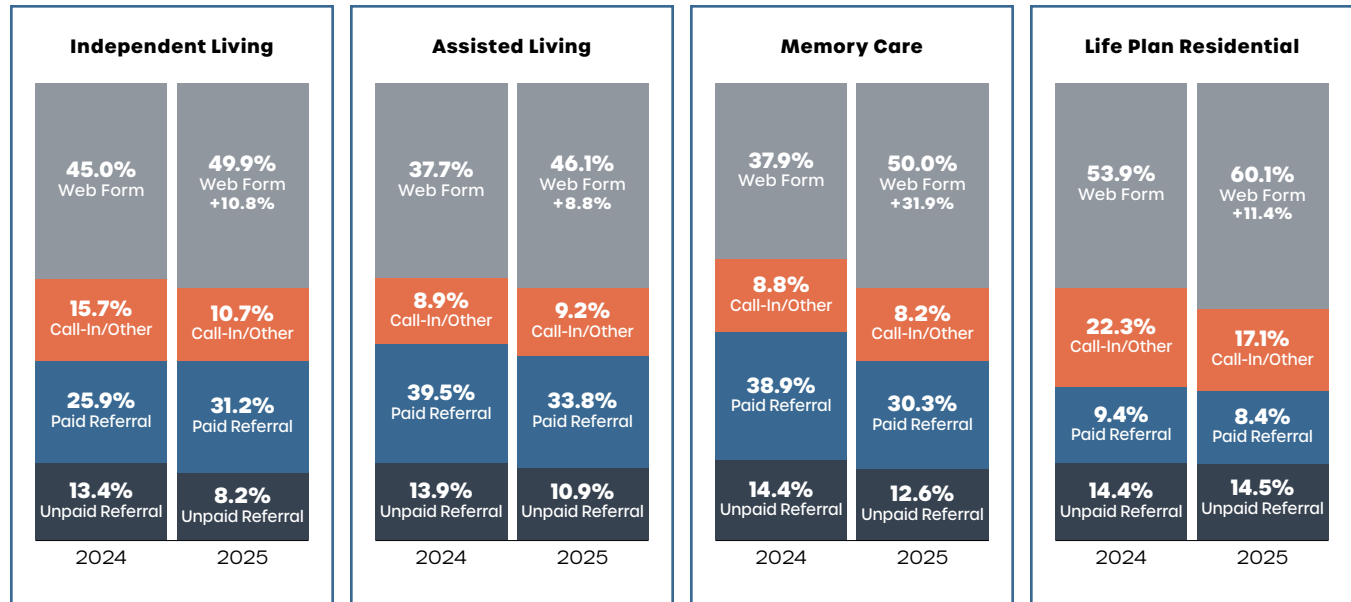
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Gauging AI's Impact on the Prospect Journey

Web form share grew across care types in 2025



A Generational Shift in Discovery

For decades, senior living discovery followed a predictable pattern. Search rankings determined visibility. A small group of aggregator sites and directories dominated results, shaping where families began – and often ended – their research.

In 2025, that model began to change. Despite some concern that AI-driven search would reduce website engagement, the opposite occurred. Web form submissions increased across all four care types. From a volume perspective, early data suggests a positive relationship between AI-driven discovery and conversion activity on community websites.

Why This Is Happening

The most plausible explanation is that AI is redistributing attention toward senior living websites rather than replacing them.

Instead of presenting users with a list of links, AI increasingly acts as an interpretive layer. It synthesizes information, frames options, and directs older adults and families toward relevant communities at moments of heightened intent.

In practice, AI is influencing discovery in two primary ways:

1. Within search results

In Google search, AI Overviews – and in some cases AI Mode – are reshaping how options are surfaced and contextualized before a user ever clicks.

These AI-generated summaries rarely appear for simple location-based searches, such as “senior living near me.” They appear more frequently when queries signal complexity, urgency, or tradeoffs related to health, safety, care needs, or affordability.

As a result, search behavior itself is evolving. Families are increasingly using more specific, situational queries, such as:

- “Best assisted living for mild dementia near me”
- “What should I ask on a tour?”
- “Memory care vs assisted living cost differences”
- “How fast can we move in after a fall?”

In these moments, AI does not simply rank results – it frames the decision space. And when users do click through, those visits often reflect higher intent and deeper engagement.

2. Through voice and mobile assistants

AI is also entering the journey through conversational interfaces already embedded in daily life: smartphones, voice assistants, and chat-based tools.

Families are no longer just searching. They are asking.

Examples include:

- “What are the best assisted living communities near me for someone who needs light weekly care?”
- “My mom needs assisted living in New England with easy first-floor access and some weekly support.”

In these interactions, AI does not return a traditional list of links. It returns synthesized answers, shortlists, and recommendations that often route families directly to community websites.

In effect, AI is becoming the first interpreter of the senior living decision.

Bottom Line

What Changed



AI increasingly controls how options are framed.



More research begins earlier and with more context.



More discovery is happening outside of online search results.

What Stayed the Same



Demand still begins with search.



Websites still convert interest into action.



Digital presence still drives growth.

I What This Means for Marketers



Meet Craig Simons

Craig Simons is senior director of marketing at Aline and a seasoned demand generation leader with deep roots in senior living. From leading digital marketing at Benchmark Senior Living to shaping buyer enablement and conversion optimization at Allego and Roobrik, he's built his career around optimizing the prospect journey as a growth strategy. Simons Says is his commentary on the data shaping senior living.



1. Optimize your digital presence for AI

For now, AI appears to be feeding websites, not replacing them – often showing up as branded search, direct traffic, and call-ins.

Senior living websites remain the primary first-party source AI uses to understand what you offer and how you differ. Those signals are reinforced by third-party sources, like directories, reviews, and social platforms.

That dynamic won't stay static. Some discovery experiences will increasingly happen inside AI interfaces without an immediate click-out, a shift marketers should monitor closely.



2. Don't rely on traditional playbooks

AI is changing too fast for fixed strategies. Teams that test, learn, and adjust in real time are better positioned to respond as answer-driven search, attribution, and measurement continue to shift.

Prioritize signal over habit. Move on what's working today and adjust as tools and workflows evolve.



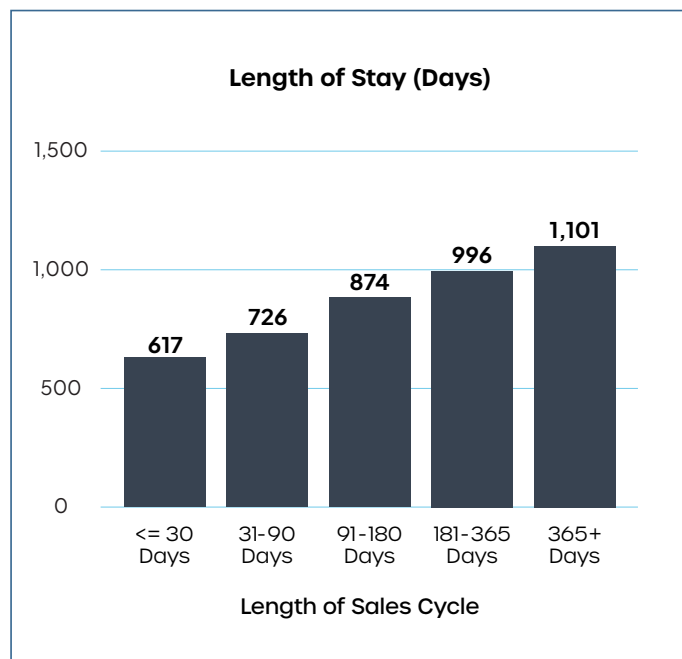
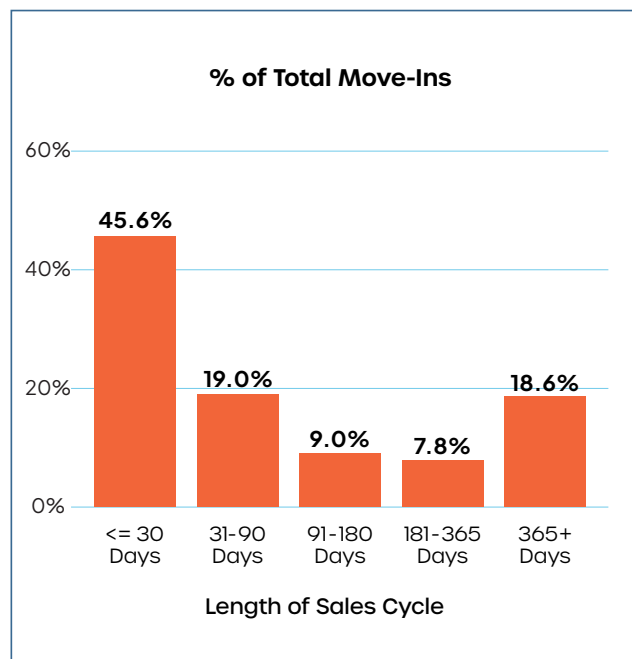
3. Expect more curiosity research

AI is making discovery faster and more accessible. That efficiency may pull research earlier in the journey while extending the time it takes to commit. For active adult and independent living, this could translate into more curiosity tours and softer tour-to-move-in conversion rates over time.

Sales Cycle & Length of Stay

Senior living move-ins are heavily concentrated in short decision windows. Almost half of all move-ins occur within 30 days, reinforcing how often decisions are made once need becomes clear. Still, a meaningful share of move-ins come from longer consideration cycles with just over one-quarter take more than six months. Together, this reflects a market defined by urgency at the point of need alongside a steady backdrop of longer-term planning.

Balance quick move-ins with longer sales cycles for a manageable length of stay.



Correction Notice (Updated: March 23, 2026): We identified and corrected an error in previously reported data. This version reflects updated, validated metrics as part of our commitment to accuracy and transparency.

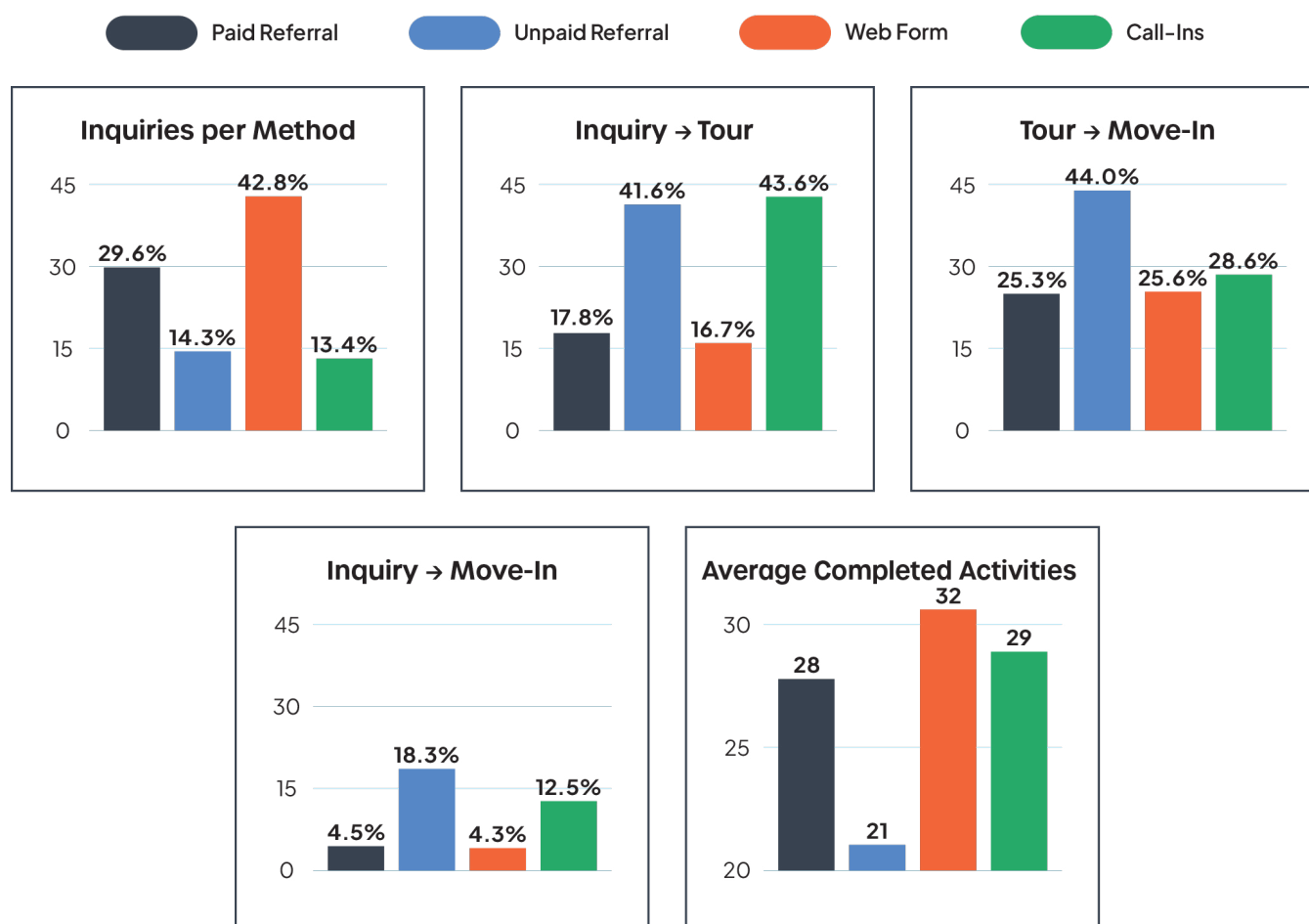
“That older lead feels harder ... we don’t feel as confident about it. So it’s the first one to get deprioritized.”



– Sanela Graziose,
Chief Marketing Officer,
Atria Management Company

Key Metrics by Methods of Inquiry

Conversion performance varies sharply by inquiry method. Call-ins and unpaid referrals convert strongest at every stage, but they represent a smaller share of total inquiries. Web forms and paid referrals drive most inbound volume; however, they deliver the lowest inquiry-to-move-in conversion and require more completed activities. Unpaid referrals are especially efficient, achieving the highest overall conversion with fewer steps.



Paid referral: Inquiries generated through third-party referral partners or listing services that charge a fee for leads or move-ins.

Unpaid referral: Inquiries driven by nonpaid sources, such as hospitals, professionals, resident referrals, or word of mouth.

Call-in: Inquiries initiated by prospects or family members who contact the community directly by phone.

Web form: Inquiries submitted through online forms on a community's website, chat, or other owned digital properties.

Understanding the Modern Senior Living Decision

How perceptions, readiness, and family dynamics shape the research journey

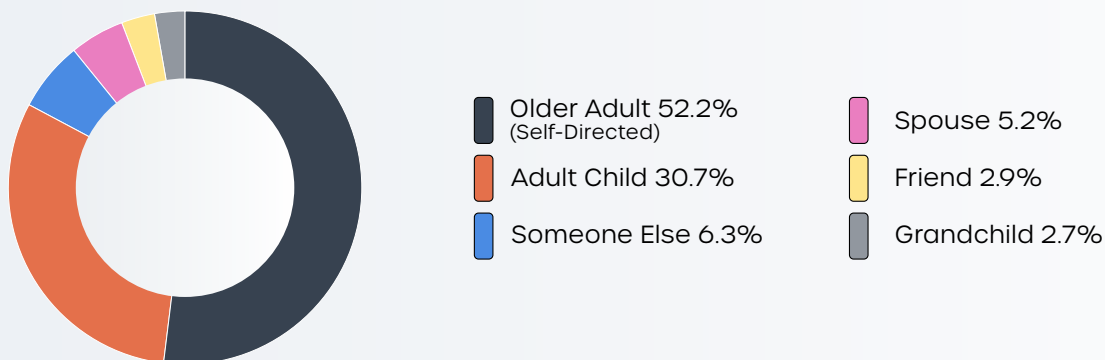
Senior living decisions rarely begin with a single question or decision-maker. These decisions unfold over time, influenced by uncertainty, family dynamics, and the search for clarity around lifestyle, care, and cost. Understanding how people enter this journey and what shapes their thinking is essential to effective engagement.

Drawn from more than 95,000 surveys completed by people actively researching senior living in 2025, this section reflects insights captured through Aline Discovery Surveys, formerly Roobrik Surveys. The data surfaces perspectives, concerns, and priorities early in the research process and provides visibility into how individuals and families think about senior living before formally engaging with a community.

Who Is Researching Senior Living?

Older adults initiated more than half of senior living research in 2025, continuing the shift toward self-directed exploration. Adult children remained deeply involved. Even when research begins independently, decisions are rarely made alone. The involvement of spouses, friends, and extended family underscores the broader social context that shapes aging decisions.

Together, these dynamics point to a shared reality for operators: Effective engagement must speak to both the older adult and their trusted circle – often simultaneously – aligning emotional readiness, practical concerns, and expectations across the decision group.

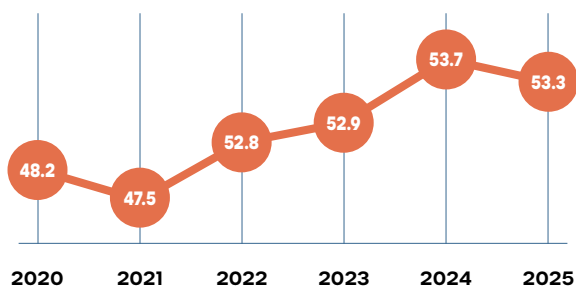


3 Trends to Watch

Since 2020, senior living research has shifted meaningfully. Self-directed research now represents most activity while adult children remain influential but play a slightly smaller role. At the same time, research is starting earlier, signaling longer planning horizons.

Trend 1: Rising & Stable Share of Self-Directed Research

Share of "Selected Person = Myself" (%)

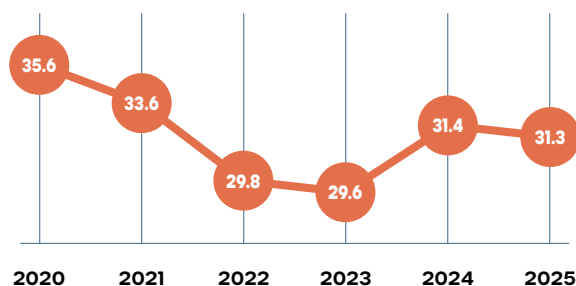


What's Changing

Starting in 2022, self-directed research stabilizes above 53%. The shift has largely settled into a new steady baseline driven by individuals initiating their own research.

Trend 2: Gradual Decline in Adult-Child Share

Share of "Selected Person = Adult Child" (%)

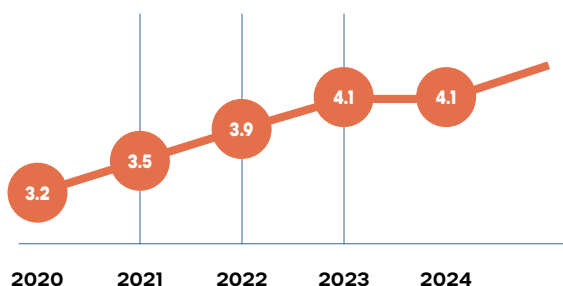


What's Changing

Adult children still represent a major share, but their relative contribution has gradually declined 4-5 percentage points from 2020 levels.

Trend 3: Research Is Starting Earlier in the Age Distribution

Under 55 Share of Age Distribution (%)



What's Changing

Senior living research is moving earlier in the life cycle with a 34% increase in age distribution since 2020. This suggests longer consideration windows and more future-oriented exploration, representing earlier-stage, lower-intent entry.

Decision Momentum Across the Journey

Key factors for influencing progress

Across all survey participants urgency often triggers the start of the senior living journey, but clarity and confidence move it forward. Rather than progress being driven by crisis alone, many respondents advance when they understand daily life, feel secure in their choice, and trust the timing.

What Helps People Move Forward

Across both older adults and adult children, progress depends less on urgency and more on clarity and confidence.

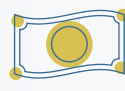
55.1%
Clearer
Picture of
Daily Life



50.9%
Confident
it's the Right
Choice



48.2%
Confidence
in Financial
Situation



45.9%
Confidence
in Timing
for Change



12.1%
Family
Alignment



"For most families, confidence does not come from floor plans or amenity lists. It comes from being able to picture daily life.

What does a Tuesday afternoon look like? Who am I having coffee with? How does this place actually feel?

That is why showing community life is not a "nice to have" for marketers. It is essential. Social media, resident ambassador programs, residents participating in tours, and events that intentionally mix current residents with prospects all help make the experience real.

The same is true online. Real photography on community websites and social channels builds trust in a way stock images never will. When people can see themselves in the community, the decision moves from abstract to personal. And that clarity is often what gives families the confidence to take the next step."



Simons Says

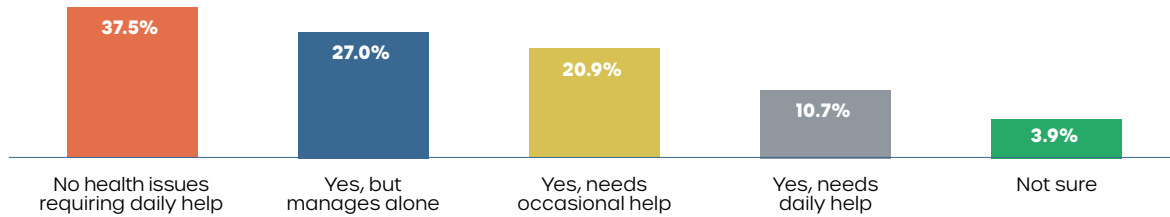
Health Needs Are Present Even Without Crisis

Most individuals researching senior living report some level of health consideration even if they're still managing independently.

Planning Starts Early

Health considerations often appear before daily assistance is required. Many prospects plan ahead rather than wait for a crisis, making clear, scalable care models more relevant to their decision process.

Current Health Needs of Individuals Researching Senior Living



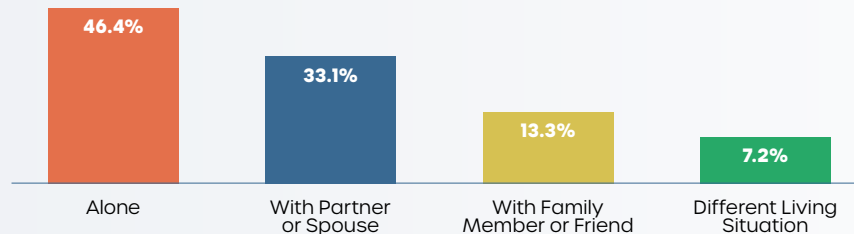
How the Living Situation Influences Research

Living arrangements provide important context for how people approach senior living decisions and why readiness may emerge earlier than families anticipate.

What This Means for Engagement

Nearly half of those researching live alone or only with a spouse. Rather than responding to immediate care needs, many are planning for connection and long-term stability. Messaging that emphasizes independence and community aligns more closely with prospect motivations.

Current Living Situation of Researchers

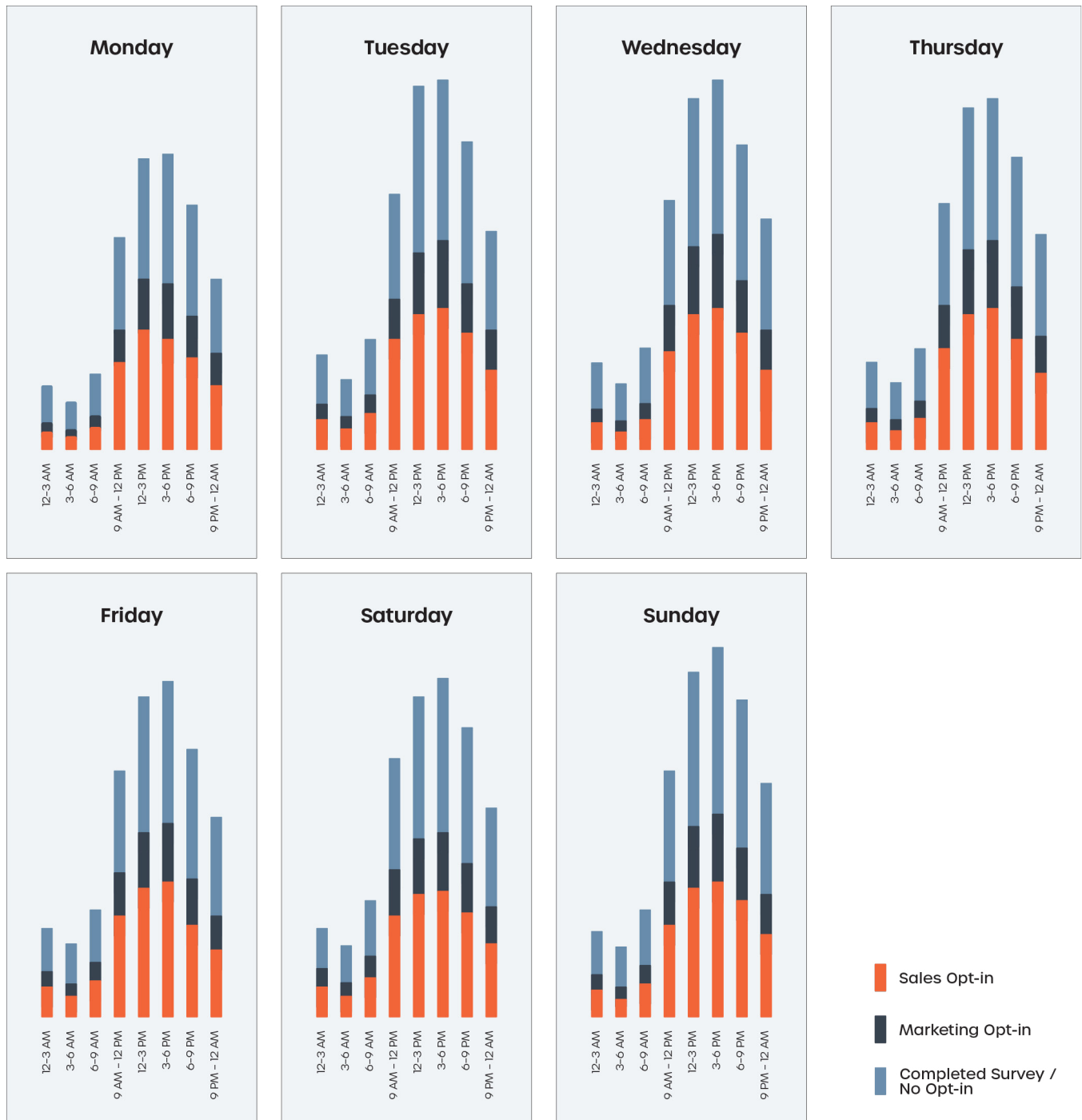




When Prospects Are Researching

Engagement consistently peaks between 12–6 p.m. with the 3–6 p.m. window emerging as the strongest performer across nearly every day of the week. Early-morning hours remain quiet while weekends mirror weekday behavior rather than dropping off.

For operators, this highlights the importance of aligning staffing, response coverage, and outreach around core daytime and afternoon windows – including weekends – when prospects are most active and receptive.



One Journey, Different Perceptions

How older adults and adult children experience the senior living research journey differently

For most families, the transition to senior living is not a single journey. Older adults and adult children often arrive with different motivations, concerns, and perceptions of need.

Older adults tend to approach the decision through the lens of identity and independence. Questions about lifestyle, purpose, and what the next chapter could look like often guide their thinking, and decisions are made at a more reflective pace. They focus less on immediate risk and more on preserving autonomy while planning for the future.

Adult children, meanwhile, are frequently driven by responsibility and urgency. Safety, cognitive change, and daily functioning take center stage as they evaluate options, often under time pressure. Their perspective is shaped by concern for their parent's well-being.

As these differing viewpoints intersect throughout the sales journey, they create moments of alignment, tension, and misunderstanding. Aline Discover's data explores where these perspectives diverge and what those gaps reveal about readiness, care perception, and opportunity for connection.



Motivation Gap

Adult children are primarily motivated by immediate safety concerns, while older adults are more often driven by future planning and curiosity, revealing a fundamental difference in why each enters the journey.



Independence Gap

Older adults largely view themselves as independent and capable. However, adult children are far more likely to see limitations and risk, especially around driving and home maintenance.



Cognitive Awareness Gap

Adult children recognize cognitive decline earlier and more frequently than older adults self-report, which creates a gap that can delay shared understanding and planning.



Readiness Gap

Older adults are far more open to discussing senior living than adult children assume, presenting an opportunity for earlier, more productive conversations.

Reasons for Change: Safety vs. Curiosity



The Fundamental Misalignment

Adult children are driven by immediate safety fears.
Older adults are driven by future planning and curiosity.



Adult Children: Safety First

Motivated by urgent concerns, prioritizing immediate risk reduction.



1. Safety concerns because of health or memory



2. Worried about loneliness/isolation



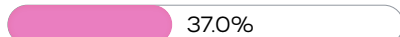
3. Concerned about care needs



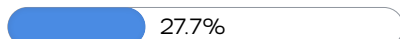
4. Worried about a recent change



5. Feeling overwhelmed



6. Curious about options



7. Time to consider downsizing



Older Adults: Future Focused

Motivated by long-term planning and exploration of possibilities.



1. Concerned about care needs



2. Curious about options



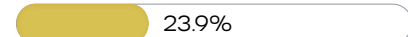
3. Time to consider downsizing



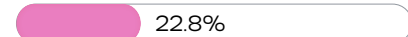
4. Worried about loneliness/isolation



5. Worried about a recent change



6. Feeling overwhelmed



7. Safety concerns because of health or memory



*Respondents could select multiple reasons, so percentages represent the share of respondents who cited each factor and do not total 100%.

The Independence Gap: Driving Safely

Older adults and adult children often assess driving independence through very different lenses

Older Adults' Perspective

Independence is the default assumption.



Nearly 4 in 5 older adults view themselves as still driving or mostly independent.



Driving is seen as a symbol of autonomy, not risk.



Only 24% acknowledge having stopped driving or struggling with mobility.

Adult Children's Perspective

Safety and limitations are top of mind.



61% say their parent no longer drives or has difficulty getting around.

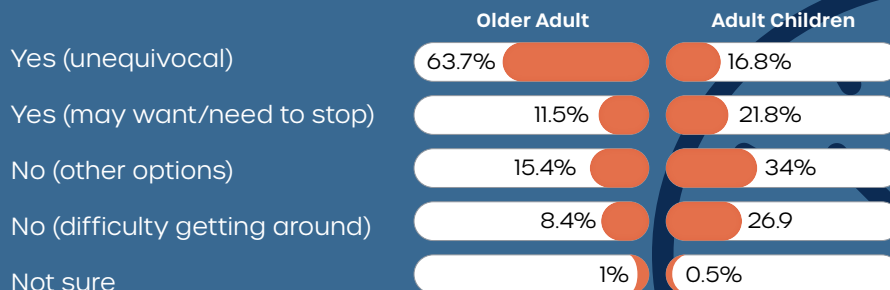


Driving is evaluated through a safety and risk lens.



Independence is often viewed as declining or fragile.

Compared Data: Driving Status Reported



Conclusion

The earliest doubts about driving mostly come from adult children – rather than older adults – creating a perception gap operators must navigate carefully.

"Driving represents far more than transportation for older adults. It is independence, identity, and control. Time and again, we see health and safety concerns set aside in order to keep the keys.

I saw this firsthand with my grandfather, who considered himself a capable driver long past the point where I worried he might be a danger to himself and to others. That tension between how older adults see themselves and how adult children see risk is one of the most emotionally charged dynamics families face.

It is not about stubbornness. It is about autonomy. Until that need for independence is acknowledged, conversations about change, whether driving, care, or senior living, are very difficult to move forward in a productive way."



Simons Says

The Home Maintenance Gap: Perceived Ability

Older adults are far more likely to describe themselves as able to manage independently

Older Adults' Perspective

23% say they can no longer manage on their own.



Most believe they manage well independently or only need occasional help.



Household challenges are often viewed as manageable, not limiting.



Less likely to frame maintenance needs as a trigger for change.

Adult Children's Perspective

45% believe their parent can no longer manage independently.



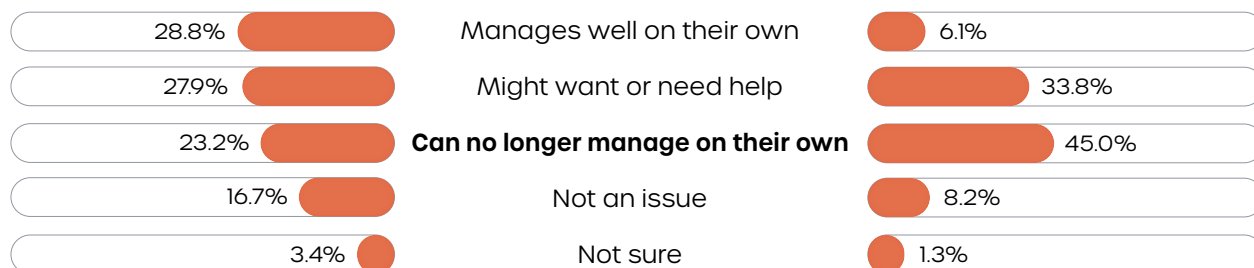
Nearly 2X as likely to perceive declining independence.



Greater concern about safety, upkeep, and long-term sustainability.



More likely to see home maintenance as an early warning sign.



Key Insight

Home and yard maintenance often surface as early indicators of changing independence recognized by adult children before older adults view them as limiting.

"One note on interpreting this data is that adult children often enter the journey at a higher level of concern, which helps explain the wide discrepancy in how these two groups respond. They are more likely to be motivated by preventative or protective reasoning, while older adults tend to engage while still feeling personally capable."



Simons Says

The Cognitive Awareness Gap: Memory & Thinking

Older adults far less likely to report cognitive decline

Older Adults' Perspective

Adult Children's Perspective

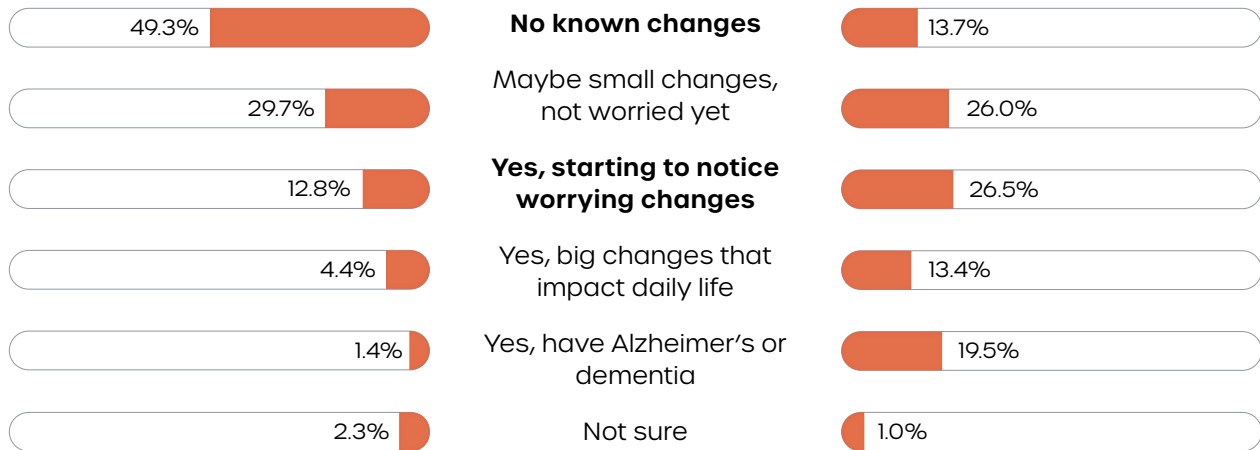
The Perception Discrepancy

45%
report no known changes



Significant Reporting Gap

14%
report no changes

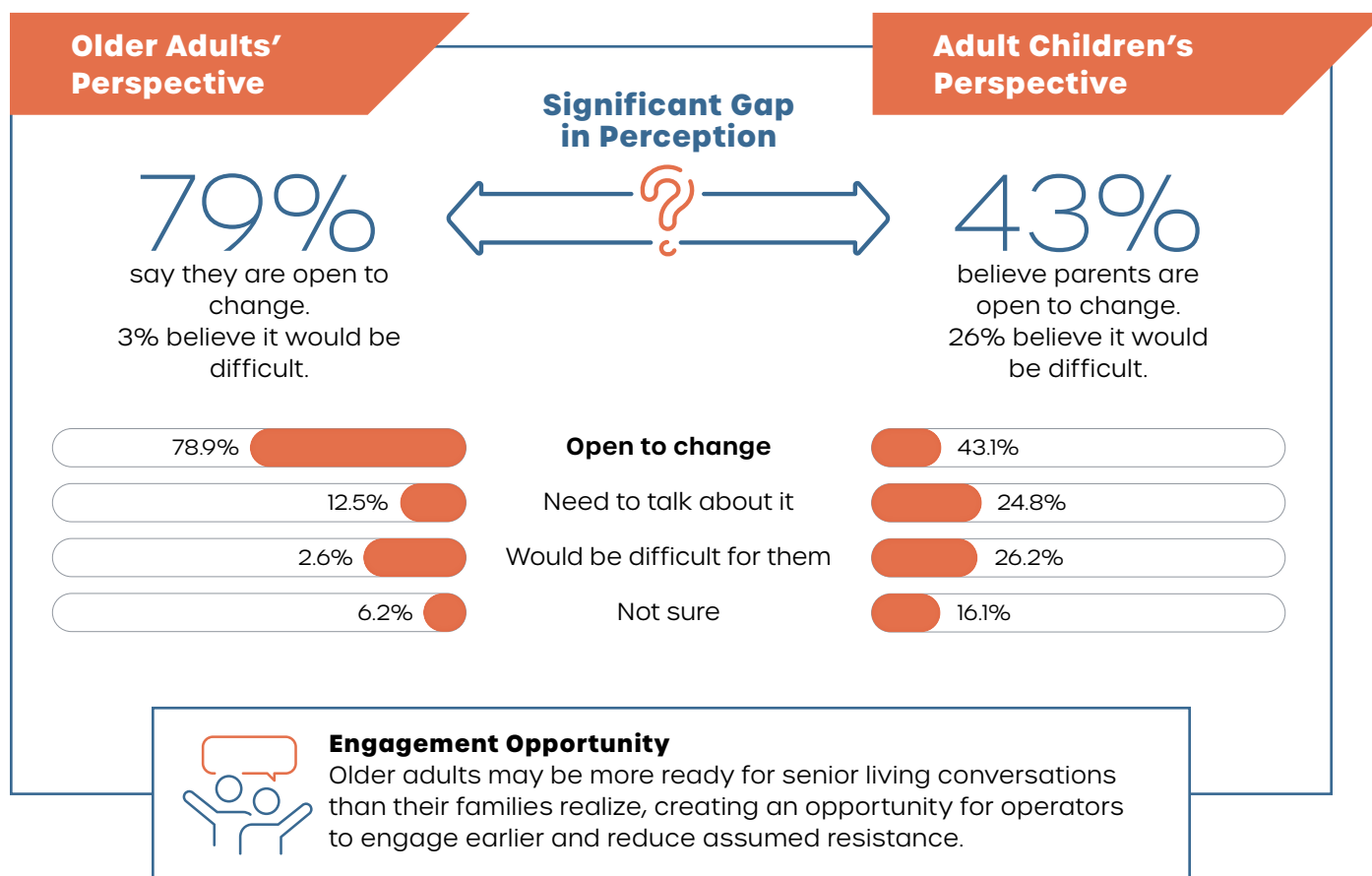


Operator Insight

Cognitive concerns are often recognized by families well before older adults self-identify changes, making early, family-inclusive conversations critical to informed planning.

The Perceived Readiness Gap

Older adults far more open to change than assumed



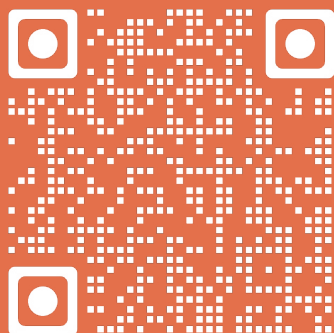
"This one is eye opening and highlights the critical role sales and marketing play. Older adults researching are more open than most people think. Build trust by helping and convert that openness to readiness."



Add Your Voice to Above the Line

Have a perspective to share? We're always interested in learning how people across senior care are working to raise the standard of aging. If you'd like to contribute your experience, insights, or lessons learned, we invite you to connect with us through **Above the Line**.

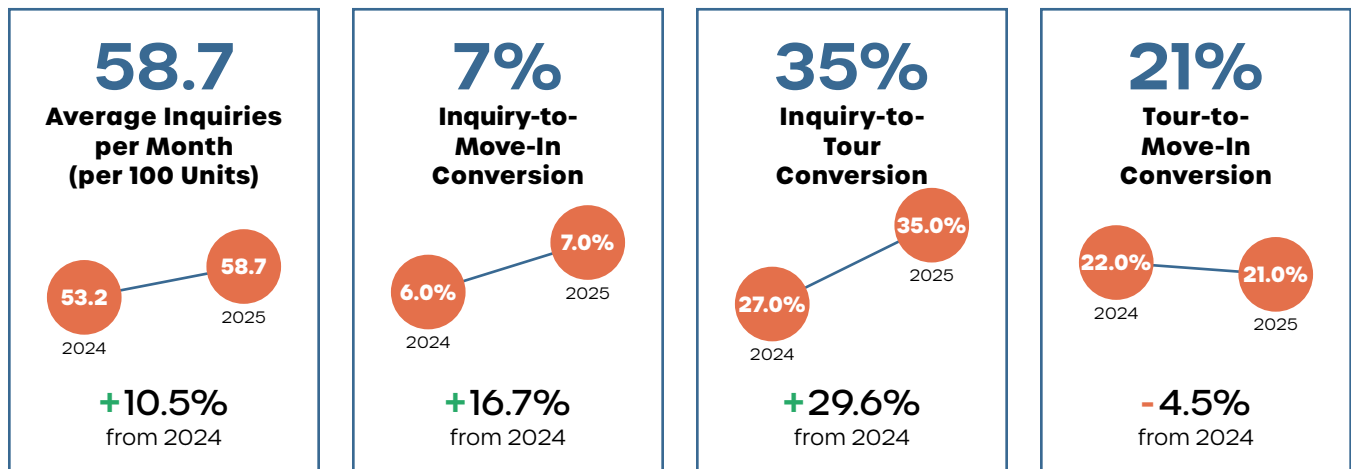
Learn more and schedule your brief, conversational interview [here](#).



Industry Benchmarks

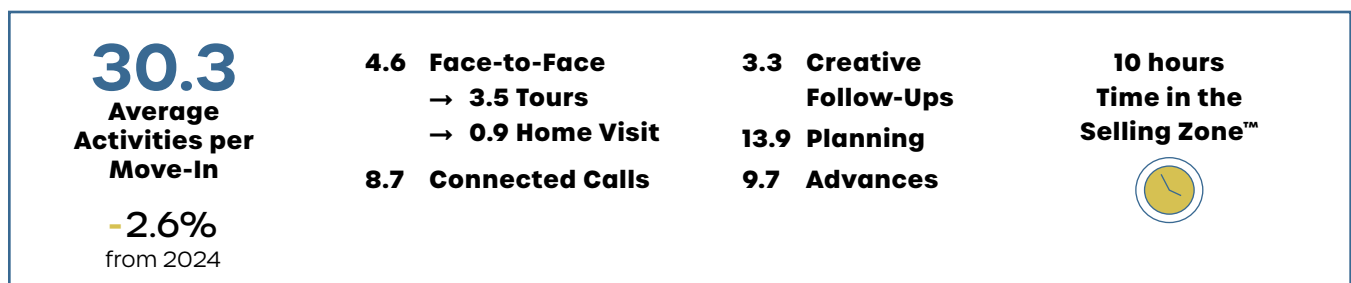
Independent living

Independent living performance in 2025 reflects steady demand paired with improving efficiency across the sales journey. Increased inquiry volume and stronger inquiry-to-move-in conversion (measure of inquiry quality) point to better alignment between incoming prospects and eventual residents, even as later-stage conversion shows modest softening.



To support each move-in, sales teams balance high-touch interactions with a significant amount of planning and coordination, resulting in a consistent level of engagement per move-in and a clearly defined time investment.

- Early conversations and face-to-face interactions continue to anchor the sales process.
- Planning and coordination represent a meaningful share of the work behind each move-in.
- Total selling time reflects disciplined execution rather than excess activity.



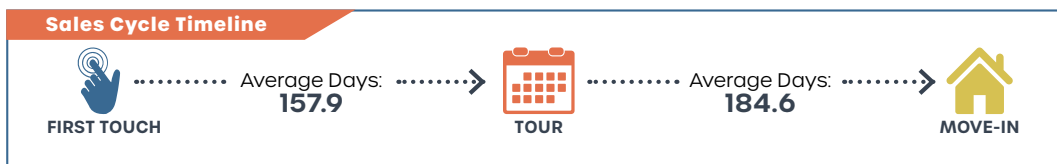
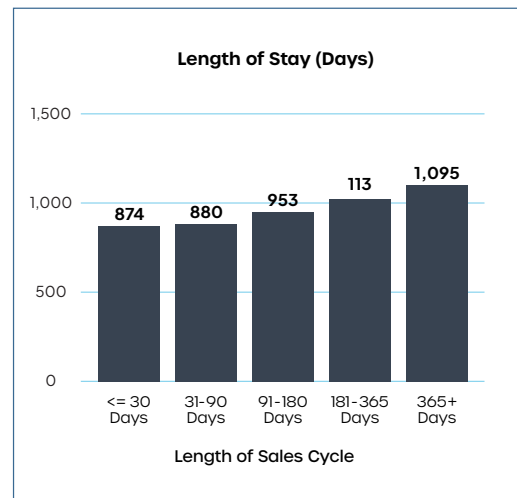
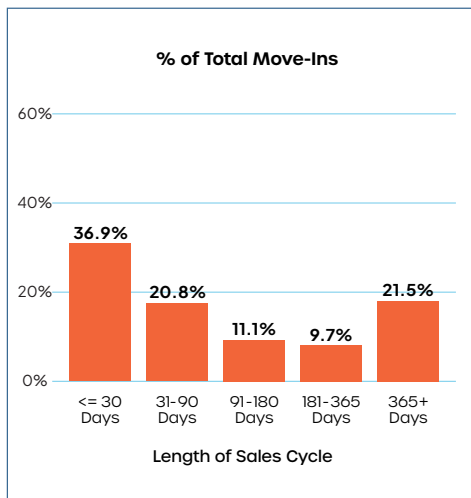
"Independent Living is increasingly serving as the industry's front door. As discovery evolves, including the growing influence of AI-shaped search, more older adults are moving from curiosity to a tour. This trend may signal a growing desire not just for convenience, but for connection. In a culture where isolation is common, senior living provides one of the few environments intentionally designed for community, engagement, and belonging."



Sales Cycle

Independent living

Independent living sales cycles reflect a mix of urgency and extended consideration. Just over one-third of all move-ins occur within 30 days, reinforcing how often decisions are made quickly once timing and need align. However, a notable 21% of move-ins take more than one year to convert. This shows the importance of sustaining engagement across varying timelines and creates context for why relationship continuity, not just speed, matters.



Correction Notice (Updated: March 23, 2026): We identified and corrected an error in previously reported data. This version reflects updated, validated metrics as part of our commitment to accuracy and transparency.

Longer-Lasting Residents Come From Relationship-Driven Sales

“Regardless of the length of the sales process, if the team continues multiple touch points and communication even after the move-in, you’re going to have that length of stay. Families stay longer when they feel connected and bonded with the team caring for mom.”



– Coryanne Graham, Vice
President of Marketing & Brand,
Oxford Senior Living

“My hope is that as technology, CRM, and AI tools improve, we can give our sales directors more resources to be able to keep those longer nurture relationships top of mind.”

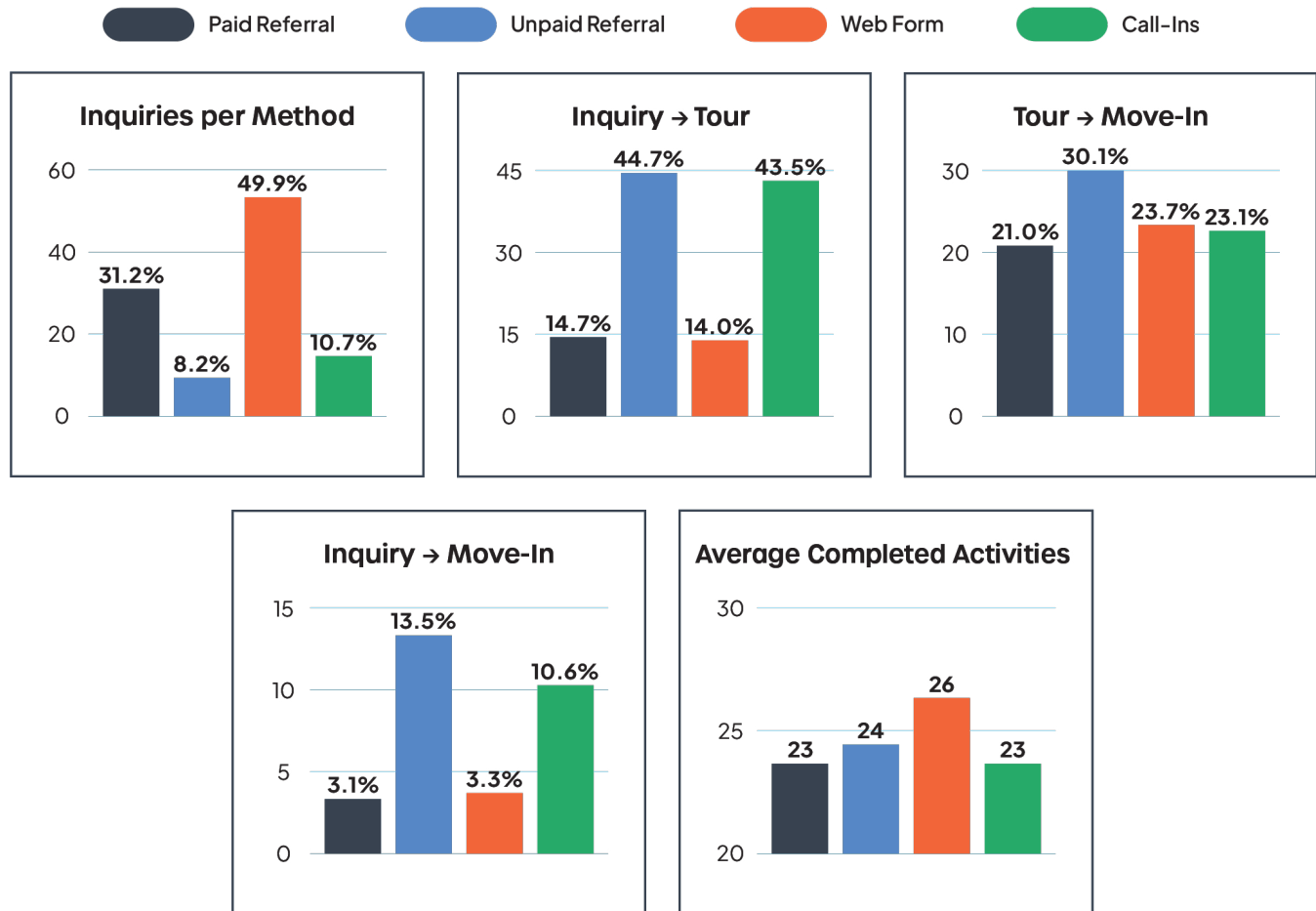


– Sanela Graziose, Chief Marketing
Officer, Atria Management Company

Key Metrics by Method of Inquiry

Independent living

Independent living conversion varies sharply by inquiry method. Call-ins and unpaid referrals deliver the strongest performance across the funnel. Meanwhile, web forms and paid referrals generate most inquiry volume but convert at far lower rates and require more effort to progress.



AI Is Changing the Path to Inquiry – Not Replacing It

“People expected AI to reduce website traffic, but that’s not what we’re seeing. AI isn’t replacing our website. Prospects use those tools to gather information, and then they still come to our site to dig deeper before they send a web form.”

– Susan Brewer, Managing Director of Independent Living Sales, Lifespace Communities



*Method of Inquiry definitions on page 13

Conversion by Response Time

Independent living

How quickly teams respond shapes the trajectory of the sales process. Shorter response times correlate with stronger inquiry-to-tour conversion, signaling that early engagement helps move families forward. Beyond the initial touch, outcomes reflect the cumulative impact of continued communication with move-ins influenced by how consistently prospects are supported over time.

Response Time	Average Completed Activities	Inquiry ▼ Tour	Tour ▼ Move-In	Inquiry ▼ Move-In
0-15 minutes	27	27.1%	18.9%	5.1%
16-30 minutes	25	20.3%	21.2%	4.3%
31-45 minutes	26	16.3%	17.1%	2.8%
46-60 minutes	23	15.4%	23.7%	3.6%
1-24 hours	29	16.2%	21.4%	3.5%
Total	26	20.7%	20.9%	4.3%

The First Connection Creates Momentum

“When families first reach out, that initial connection sets the tone. Early engagement creates momentum, and continued communication is what carries it through to move-in.”

– Coryanne Graham, Oxford Senior Living



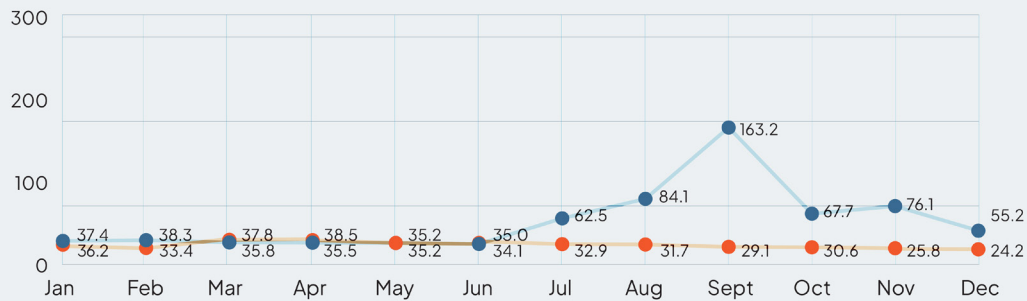
Monthly Conversion Metrics

Independent living

Monthly conversion metrics in 2025 remained steady with inquiries and initial tours tracking closely to prior-year levels and showing only modest seasonal variation. Move-ins followed a consistent cadence as well.

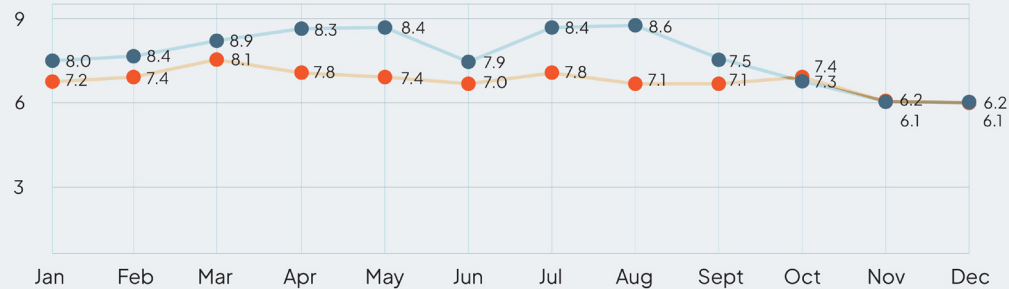
Independent Living: Inquiries (per 100 units)

2024 2025



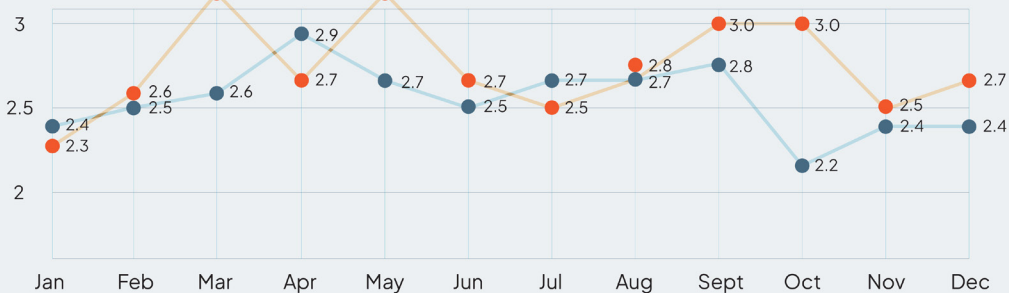
Independent Living: Initial Tours (per 100 units)

2024 2025



Independent Living: Move-Ins (per 100 units)

2024 2025

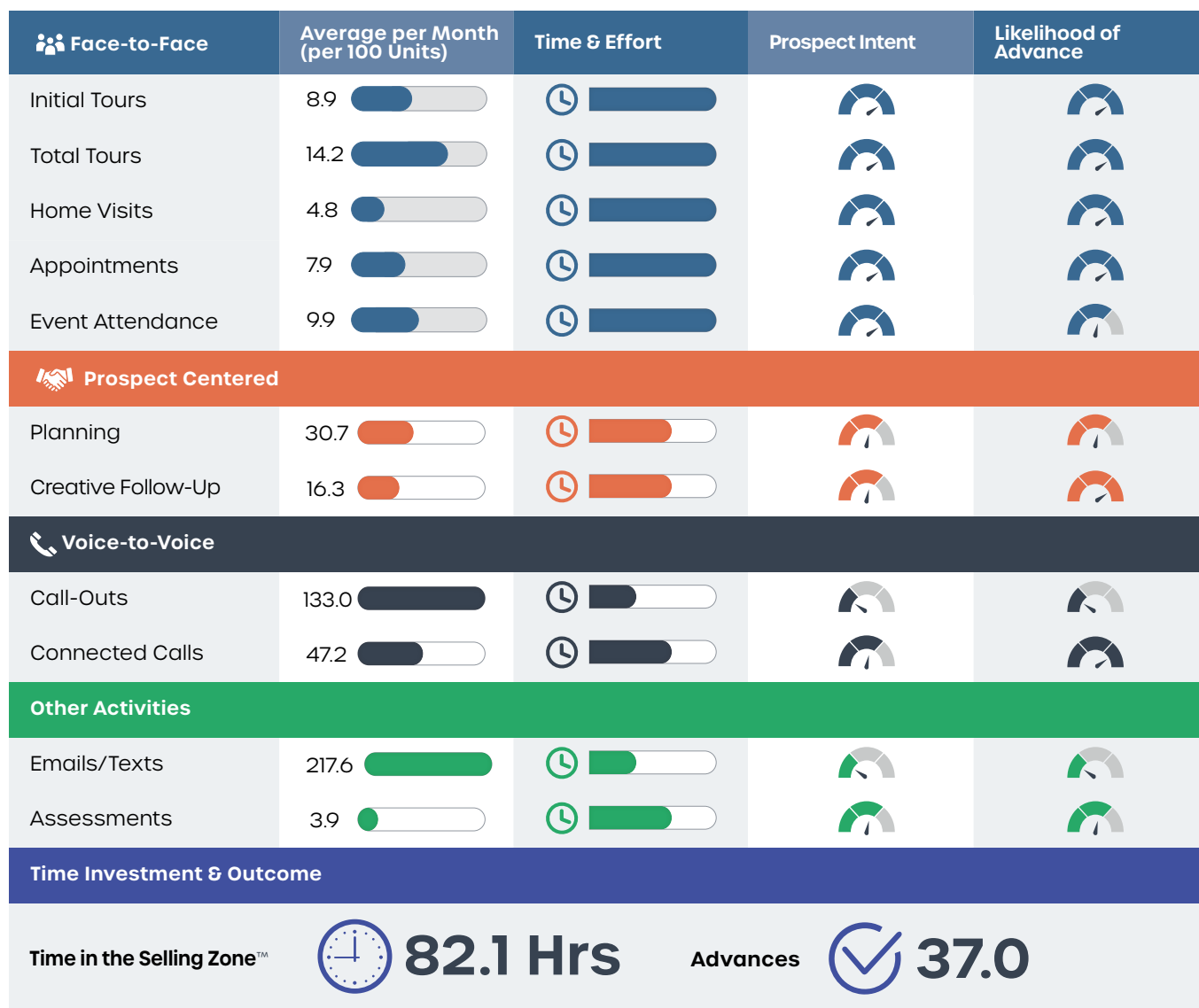


Average Monthly Sales Activity

Independent living

Average monthly sales activity reflects a highly engaged, multi-channel approach. Most effort is concentrated in ongoing communication, particularly email, text, and call activity, supported by a steady cadence of tours, appointments, and events that create face-to-face connection.

Prospect-centered work, including planning and creative follow-up, represents a significant share of activity, alongside meaningful time invested in advancing prospects through the process. Overall, the data shows sales teams balancing volume, personalization, and time commitment to sustain momentum across the journey.



Average Monthly Conversions by Market

Independent living

Market performance data highlights clear differences between volume and intent. Urban markets continue to generate higher inquiry and tour activity, even as those volumes softened slightly year over year. Rural markets, by contrast, saw modest growth in inquiries and tours while maintaining stable move-in performance, pointing to stronger intent among prospects once they engage.

Average Inquiries per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	37.7	33.8	-10.5%
Rural	17.8	19.8	11.4%

Average Tours per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	8.0	7.5	-6.1%
Rural	4.2	4.4	4.5%

Average Move-Ins per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	2.6	2.8	8.6%
Rural	2.4	2.4	0.8%

Average Move-Ins per Month (per 100 Units)			
Region	2024	2025	Variance
North Central	3.0	3.2	7.4%
Northeast	2.0	1.7	-13.7%
South Central	2.5	2.9	14.7%
Southeast	2.1	2.0	-6.5%
West	2.5	2.7	9.2%
Average	2.4	2.5	3.4%

Aging in Place Is Pressuring Urban Demand

"In more urban markets, families have more options to age in place. Home health, personal care, and therapy services have expanded significantly, which allows people to delay longer, and that's showing up in inquiry and move-in volume."

- Valerie Niebrand, Managing Director of Sales, LifeSpace Communities



Conversion Metrics by Market Source

Independent living

Market source conversion shows stable performance among trusted, relationship-driven channels with professional referrals maintaining the strongest results. By contrast, competitor and resident referrals softened while signage gained ground, pointing to a broader mix of influence shaping decisions.

Market source distribution in 2025 reflects a continued shift toward digital discovery and self directed research. Website and online directory sources make up a growing share of inquiries while organic and paid web channels remain steady contributors. At the same time, traditional outbound tactics, such as direct mail, declined sharply, signaling a broader move away from push-based outreach toward channels where prospects initiate engagement on their own.

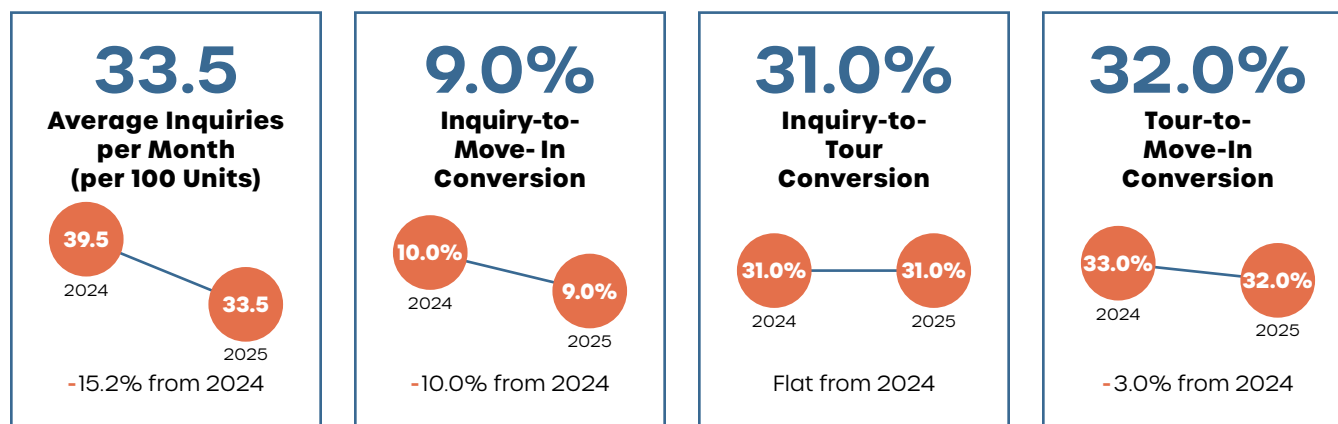
Market Source	Share of Total Inquiries		Inquiry-to-Move-In %"	
	2024 (INQUIRIES)	2025 (INQUIRIES)	2024 (CONVERSIONS)	2025 (CONVERSIONS)
Digital Demand (Owned + Paid)				
Website - Organic	8.0%	9.2%	3.4%	2.9%
Website - Paid	6.6%	6.1%	1.4%	1.0%
Internet Advertising	2.1%	2.0%	3.9%	3.8%
Online Directory*	17.1%	18.4%	2.5%	2.2%
Agency (Local)*	6.3%	7.4%	5.9%	5.7%
Email	0.1%	0.1%	3.6%	5.8%
Relationship & Referral-Driven				
Family / Friends Referral	3.0%	3.6%	13.4%	12.2%
Professional Referral	1.6%	2.3%	20.5%	22.0%
Resident Referral	1.1%	1.2%	22.4%	18.1%
Staff Referral	0.6%	0.8%	17.0%	17.1%
Community & Local Presence				
Community Knowledge	3.4%	4.5%	12.3%	12.3%
Events	0.9%	0.7%	4.2%	4.3%
Signage	2.7%	2.1%	12.0%	14.9%
Direct Mail	11.5%	2.5%	0.6%	14.9%
Print Advertising	0.5%	0.4%	6.5%	14.9%
Media	0.2%	0.4%	7.0%	5.8%
Other				
Other	14.0%	9.9%	8.5%	8.0%

*Agency refers to primarily local paid referral agencies. Online directory includes lead aggregators and large online paid referral sources.

Industry Benchmarks

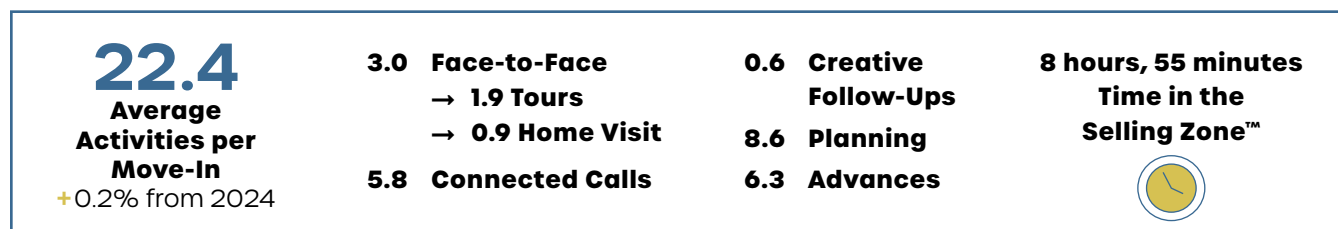
Assisted living

Assisted living performance in 2025 reflects a shift toward more selective demand. Average monthly inquiries declined meaningfully, placing greater emphasis on how effectively teams convert engaged prospects. Inquiry-to-tour performance was flat year over year, while tour-to-move-in conversion softened by 3%.



The effort required to support each move-in ticked up slightly from 2024. Sales teams rely on a defined mix of face-to-face interaction, connected calls, and planning activity, resulting in a consistent activity profile and a clearly bounded time investment per move-in. The data points to teams adapting their approach to maintain quality and momentum even as volume fluctuates.

- Early conversations and tours continue to anchor the assisted living sales process.
- Planning and advancement activities help move qualified prospects through the funnel.
- The total selling time reflects disciplined execution.



When Conversion Gets Harder, Teams Get Smarter

“When inquiry volume shifts, the focus has to be on maintaining quality. Pre-qualifying earlier and tightening targeting has helped us keep conversions steady even with fewer leads coming in.”

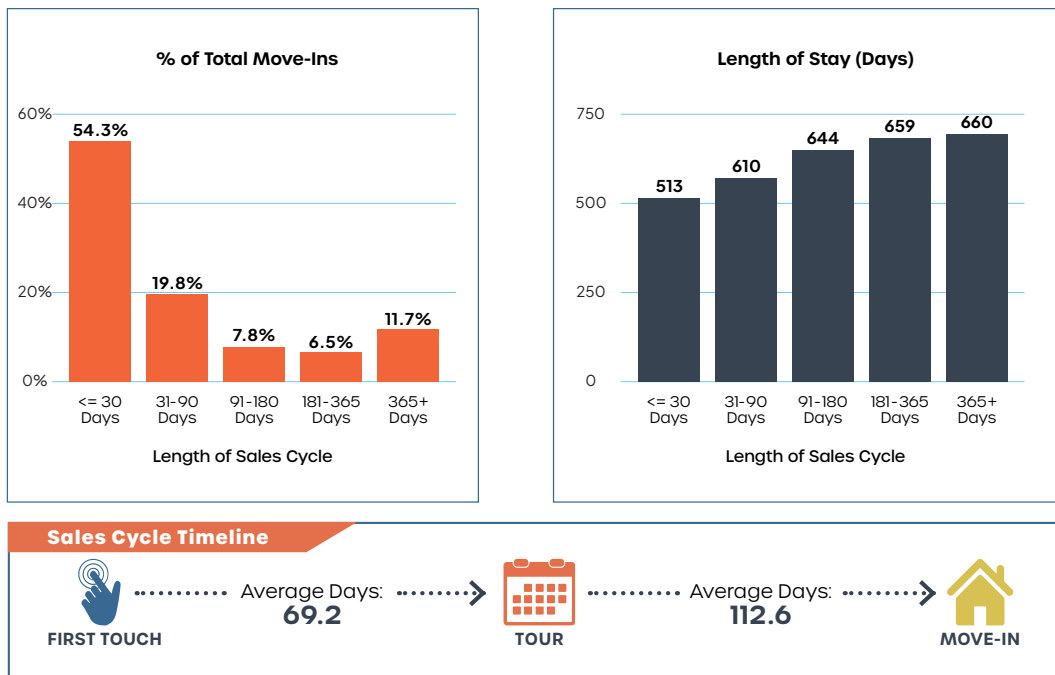
– Tracy Polacheck, Vice President of Sales, Leisure Care



Sales Cycle

Assisted living

Assisted living sales cycles are heavily weighted toward shorter timelines with more than half of move-ins occurring within 30 days. Beyond those fast decisions, a meaningful share of move-ins follow extended paths, including roughly 12% that stretch beyond a year, reflecting the layered financial, familial, and care considerations unique to assisted living. The distribution points to a market where urgency drives most outcomes, while a long tail of slower decisions rewards sustained engagement.



Correction Notice (Updated: March 23, 2026): We identified and corrected an error in previously reported data. This version reflects updated, validated metrics as part of our commitment to accuracy and transparency.

Quick Decisions Still Require Thoughtful Fit

“When a nurse joins the marketer in the assessment, it builds trust from the start. In the communities that do this well, occupancy is higher and the length of stay is longer because that connection with families is already there.”



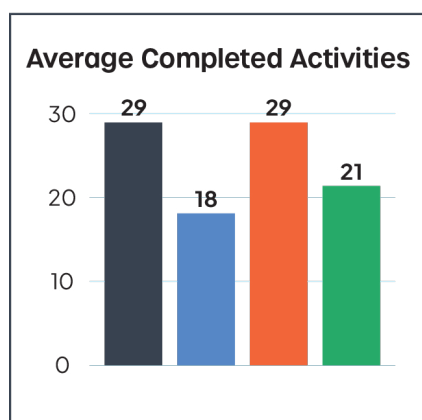
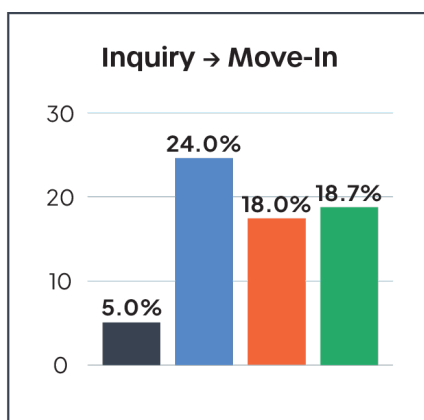
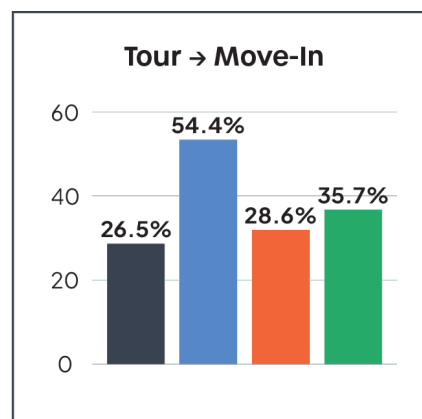
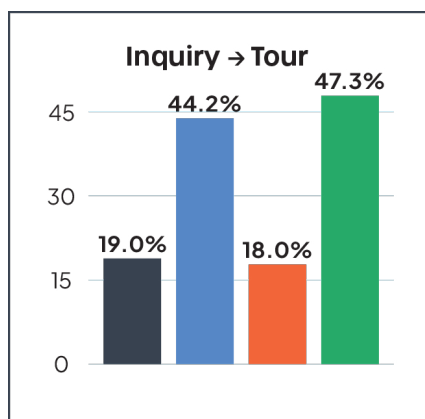
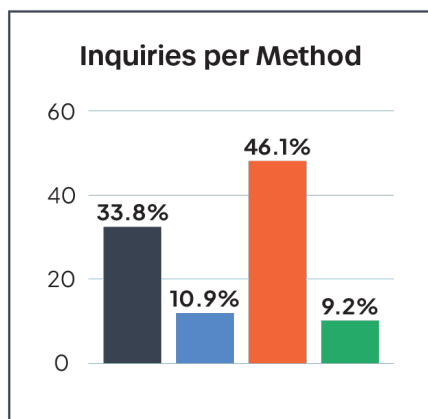
–Carol Noonan, RN, Regional
Director of Quality & Education,
Spring Arbor

Key Metrics by Method of Inquiry

Assisted living

Method of inquiry plays a significant role in assisted living conversion outcomes. Call-ins and unpaid referrals deliver the strongest performance across the funnel, converting at higher rates and requiring fewer completed activities to reach move-in. Web forms and paid referrals account for most inquiry volume but convert less efficiently and demand greater sales effort.

Paid Referral
Unpaid Referral
Web Form
Call-Ins



Match the Sales Effort to the Signal

“We spend a lot of time educating our sales teams on what different inquiry sources actually signal. Some require deeper relationship-building, but others convert with fewer touches. When our team understands that difference, it helps them more effectively focus their time.”

– Julie Davila, MPH, Manager of Sales Enablement, Discovery Senior Living



*Method of Inquiry definitions on page 13

Conversion by Response Time

Assisted living

Response time continues to shape assisted living conversion but not in a purely linear way. Faster responses are associated with stronger inquiry-to-tour performance, helping open the door to engagement. Move-in outcomes, however, reflect the importance of sustained communication, with conversion influenced by how effectively teams stay connected and support families over time.

Response Time	Average Completed Activities	Inquiry ▼ Tour	Tour ▼ Move-In	Inquiry ▼ Move-In
0-15 minutes	25	28.8%	26.9%	7.8%
16-30 minutes	27	27.8%	24.1%	6.7%
31-45 minutes	27	23.6%	27.4%	6.5%
46-60 minutes	26	23.9%	27.9%	6.7%
1-24 hours	27	20.9%	26.9%	5.6%
Total	25.5	25.3%	28.5%	7.2%

Speed Opens the Door, Engagement Closes the Sale

“People are doing much more homework before they reach out – reading reviews, touring multiple communities, and taking their time. That means early connection still matters, but what really drives conversion is staying engaged and helping families build confidence as they work toward the right decision.”

– Holly Warner, Regional Director of Sales & Analytics, Masonicare

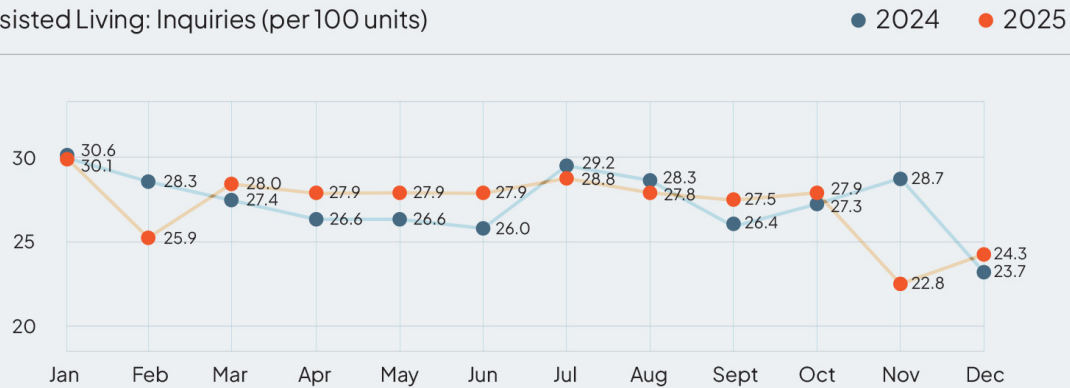


Monthly Conversion Metrics

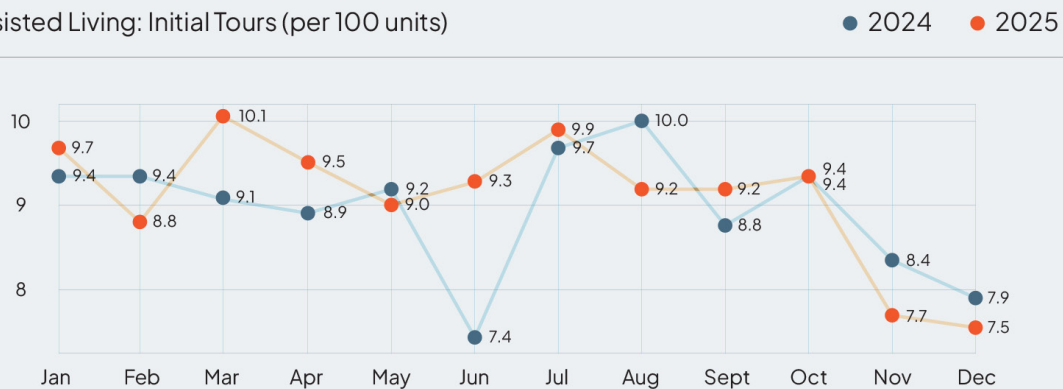
Assisted living

Monthly activity held steady throughout 2025 with inquiries and initial tours tracking consistently across the year and showing minimal seasonal swing. Move-ins followed a predictable cadence as well, reflecting stable conversion patterns month over month rather than sharp peaks or drop-offs.

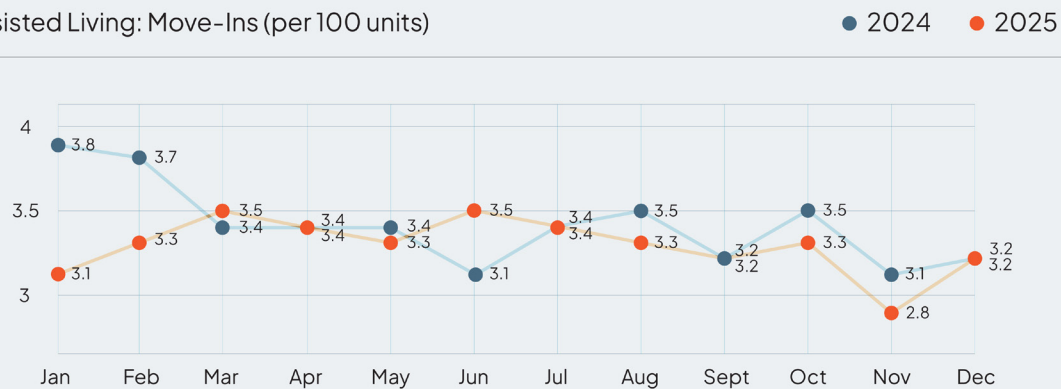
Assisted Living: Inquiries (per 100 units)



Assisted Living: Initial Tours (per 100 units)



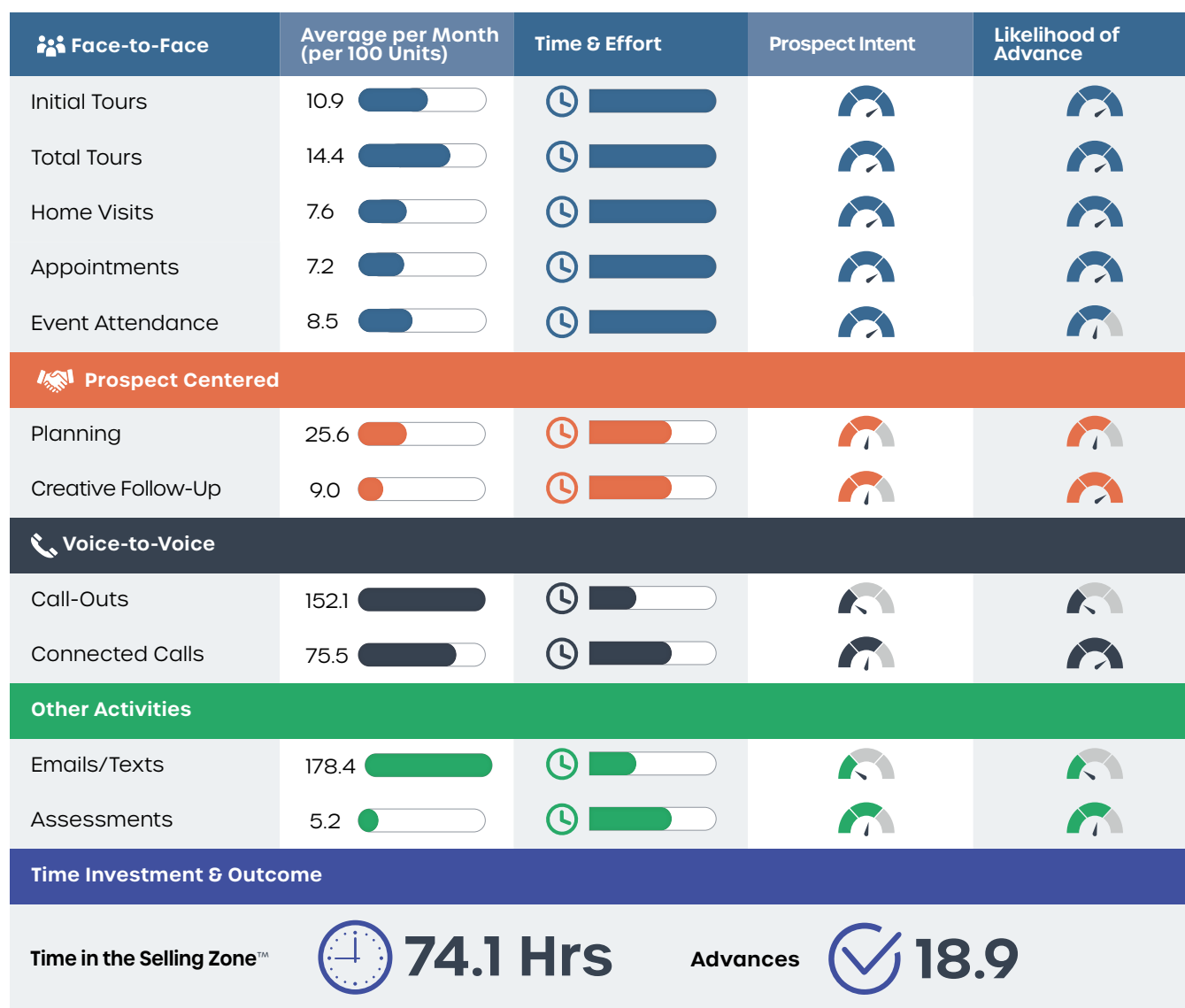
Assisted Living: Move-Ins (per 100 units)



Average Monthly Sales Activity

Assisted living

Sales activity in assisted living reflects a high-touch, communication-driven approach. Ongoing outreach, particularly email, text, and call activity, accounts for the largest share of effort, supported by a steady cadence of tours, home visits, and appointments that sustain in-person connection. Prospect-centered work and advancement activity contribute to forward momentum while overall time investment remains focused, highlighting disciplined engagement rather than excess activity.



Average Monthly Conversions by Market

Assisted living

Market performance in assisted living varies meaningfully by geography. Urban communities maintained steady inquiry and tour activity with move-ins holding relatively stable while rural markets experienced a notable decline in inquiry volume. The data points to local market dynamics rather than broad demand shifts playing a larger role in shaping assisted living performance.

Average Inquiries per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	43.8	45.0	2.6%
Rural	35.5	26.2	-26.3%

Average Tours per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	11.2	11.4	1.8%
Rural	7.9	8.0	1.3%

Average Move-Ins per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	4.4	4.3	-1.1%
Rural	4.8	4.8	0%

Average Move-Ins per Month (per 100 Units)			
Region	2024	2025	Variance
North Central	4.5	4.6	0.7%
Northeast	4.1	3.6	-12.9%
South Central	4.6	4.6	1.5%
Southeast	4.8	4.6	-3.8%
West	3.8	4.1	7.1%
Average	4.4	4.3	-1.6%

Urban Brings Volume, Rural Brings Intent

“What we see is a difference in volume versus intent. Our urban communities tend to see higher inquiry volume while our rural communities see fewer inquiries, but by the time someone in a rural market raises their hand, they’ve already decided this is where they want to go. Those leads convert at a much higher rate.”

– Coryanne Graham, Oxford Senior Living



Conversion Metrics by Market Source

Assisted living

Inquiry-to-move-in conversion is strongest among relationship-driven sources, led by staff and resident referrals, which continue to improve year over year. Other sources show more modest performance with signage, community knowledge, and agency channels delivering steady but lower conversion by comparison.

Market source distribution in assisted living reflects a continued shift toward digital discovery with website, organic web, and paid web channels accounting for a growing share of inquiries. Online directories remain a major contributor, though their share declined year over year, suggesting some movement away from third-party aggregation toward owned and search-driven channels. Traditional and referral-based sources continue to play a smaller but steady role in overall volume, reinforcing a market where digital entry points dominate awareness while other channels support downstream engagement.

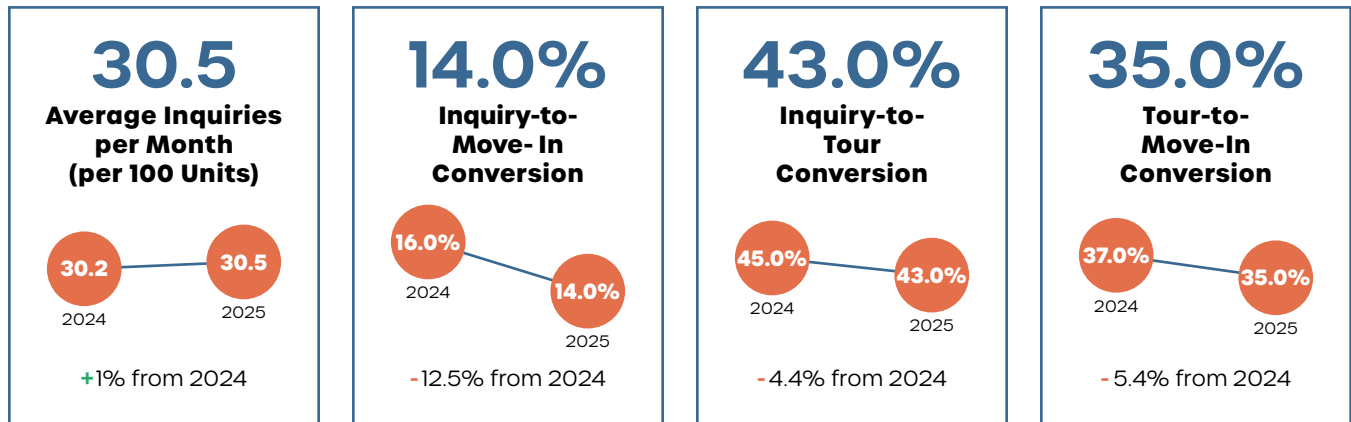
Market Source	Share of Total Inquiries		Inquiry-to-Move-In %"	
	2024 (INQUIRIES)	2025 (INQUIRIES)	2024 (CONVERSIONS)	2025 (CONVERSIONS)
Digital Demand (Owned + Paid)				
Website – Organic	8.9%	10.9%	4.9%	4.9%
Website – Paid	5.9%	8.8%	1.5%	1.2%
Internet Advertising	1.7%	1.6%	6.5%	4.6%
Online Directory*	27.1%	21.1%	3.2%	3.2%
Agency (Local)*	6.8%	6.5%	10.6%	10.6%
Email	0.0%	0.0%	13.0%	6.7%
Relationship & Referral-Driven				
Family / Friends Referral	2.7%	2.7%	26.4%	24.5%
Professional Referral	4.3%	4.1%	24.9%	25.6%
Resident Referral	0.4%	0.5%	30.3%	31.9%
Staff Referral	1.8%	2.0%	32.4%	34.4%
Community & Local Presence				
Community Knowledge	4.5%	3.8%	18.7%	18.9%
Events	0.5%	0.4%	6.3%	5.8%
Signage	1.7%	1.4%	19.4%	19.1%
Direct Mail	0.3%	1.2%	9.4%	5.4%
Print Advertising	0.2%	0.2%	10.0%	11.3%
Media	0.2%	0.3%	11.8%	8.1%
Other				
Other	7.2%	7.6%	11.3%	17.0%

*Agency refers to primarily local paid referral agencies. Online directory includes lead aggregators and large online paid referral sources.

Industry Benchmarks

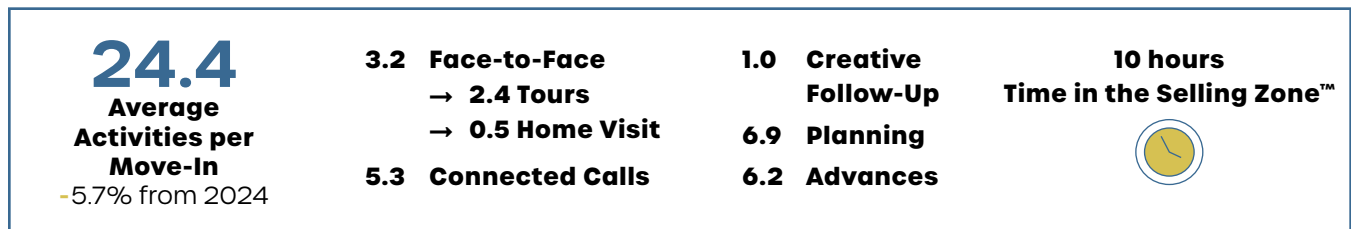
Memory care

Memory care demand in 2025 remained steady, but conversion outcomes reflect the unique urgency and emotional weight of these decisions. Inquiry volume held relatively flat, and movement through the funnel slowed modestly with fewer inquiries converting to tours and move-ins. This suggests families arrive with an immediate need, yet require careful guidance as they evaluate next steps.



Rather than adding activity, sales teams focused on precision. Effort is concentrated on timely, high-impact interactions with teams prioritizing face-to-face engagement, connected calls, and planning without extending the process unnecessarily. This approach results in a streamlined activity profile and a clearly defined time commitment per move-in.

- Initial engagement plays an outsized role in shaping the memory care journey.
- Planning and advancement help families move forward with confidence.
- Selling time remains focused, reflecting intentional support rather than added steps.



Meeting Families at the Right Moment

“Memory care decisions are driven by need, not volume. Families often arrive already overwhelmed, so what matters most is meeting them at the right moment with the right conversations, not adding more steps to the process.”

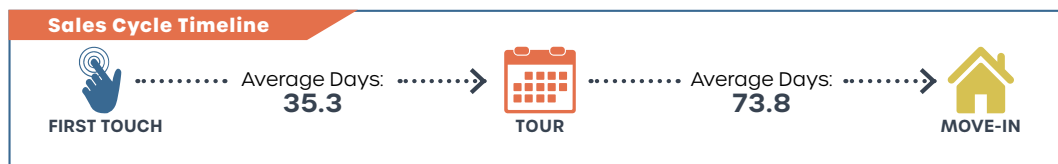
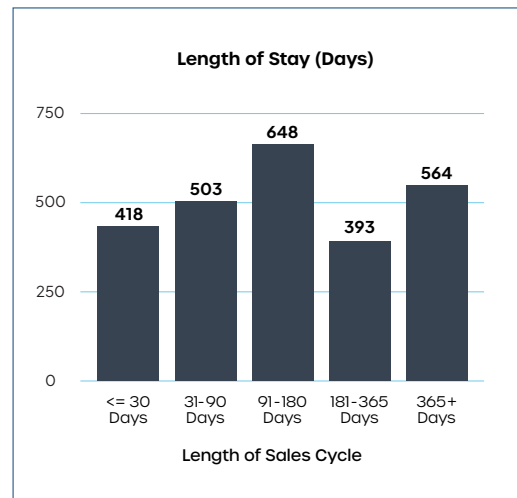
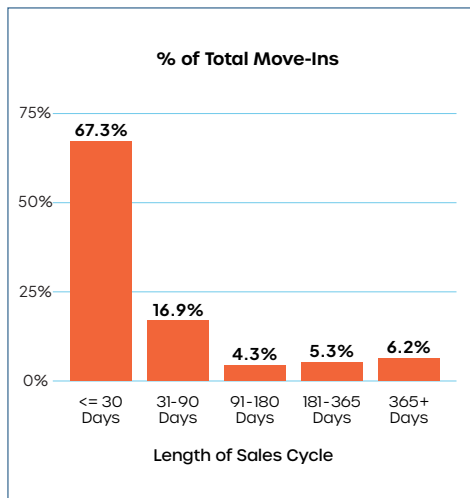
– Holly Warner, Masonicare



Sales Cycle

Memory care

Memory care sales cycles skew heavily toward rapid decisions with just over two-thirds of move-ins occurring within 30 days. Decision timelines fragment across longer timeframes with no single bucket commanding significant share. The distribution reflects a market driven overwhelmingly by immediacy, where crisis or acute need compresses the decision window, and extended evaluation is the exception rather than the rule.



Correction Notice (Updated: March 23, 2026): We identified and corrected an error in previously reported data. This version reflects updated, validated metrics as part of our commitment to accuracy and transparency.

The Hidden Cost of Moving Too Fast

“Shorter sales cycles can feel efficient, but they don’t always lead to longer stays. Paying attention to fit upfront helps avoid early move-outs and creates more sustainable results over time.”

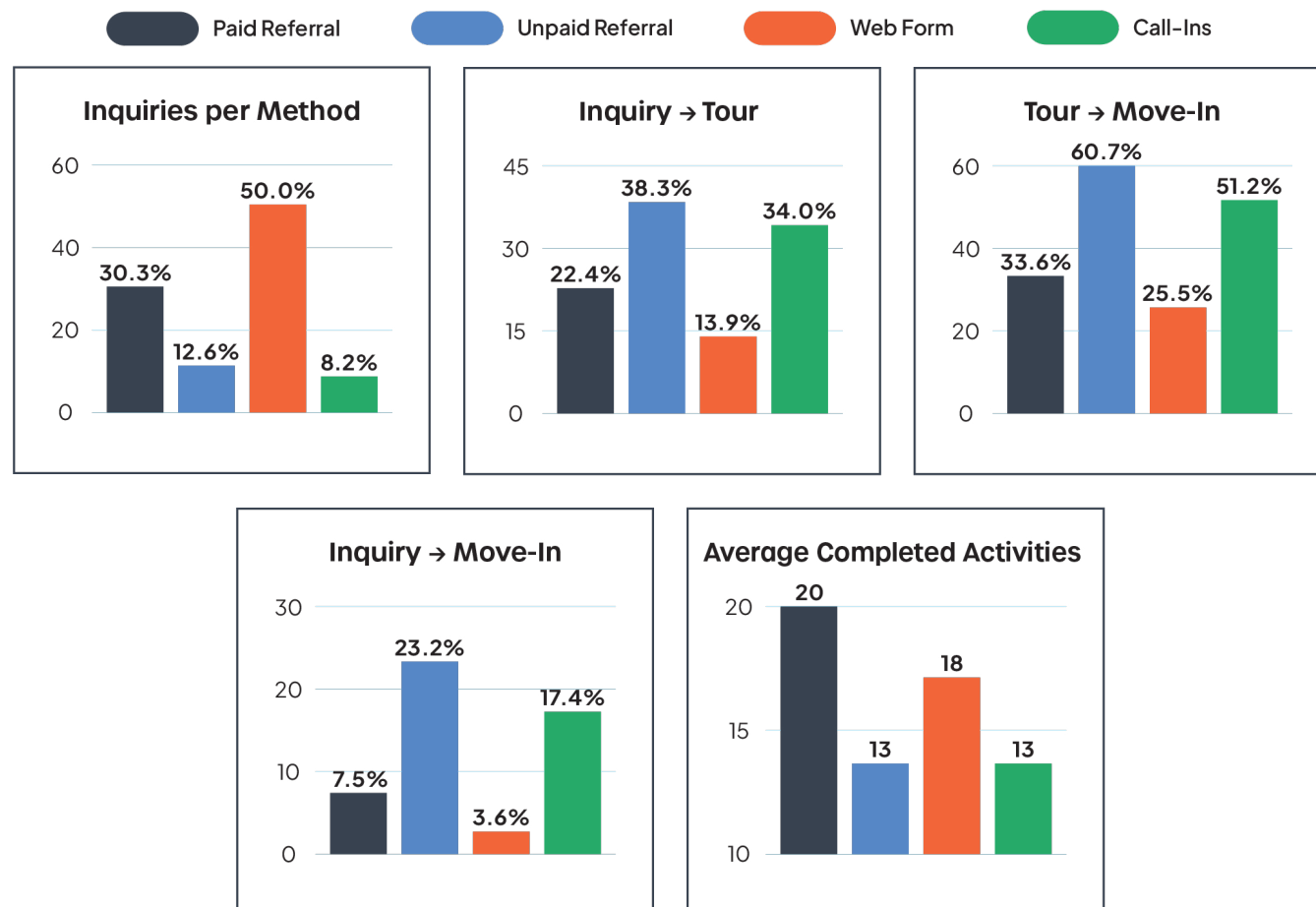
– Tracy Polacheck, Leisure Care



Key Metrics by Method of Inquiry

Memory care

In memory care, the method of inquiry signals both intent and the level of guidance families need. Unpaid referrals and call-ins deliver the strongest conversion across the funnel, reaching move-in with fewer completed activities. Web forms and paid referrals generate the majority of inquiries but convert at significantly lower rates and require more education and follow-up. The data highlights how differences at the point of entry shape conversations, effort, and outcomes throughout the sales cycle.



The First Step Shapes the Path

“Prospects reach out to advisors with varying levels of understanding of senior housing. Those who have researched options, especially through our website, enter the conversation differently. Recognizing what someone already knows and meeting them where they are at creates a more thoughtful, supportive experience.”

– Melissa Dupont, Presbyterian Homes & Services



*Method of Inquiry definitions on page 13

Conversion by Response Time

Memory care

Response time in memory care influences early momentum, but conversion outcomes depend on more than speed alone. Strong inquiry-to-tour performance appears across multiple response windows, while move-ins are ultimately driven by what happens after initial contact. The data suggests that timely outreach helps start the conversation, but sustained follow-up and clear guidance in the first day play a larger role in moving families toward decision.

Response Time	Average Completed Activities	Inquiry ▼ Tour	Tour ▼ Move-In	Inquiry ▼ Move-In
0-15 minutes	23	24.9%	28.4%	7.1%
16-30 minutes	20	27.5%	31.8%	8.7%
31-45 minutes	25	27.7%	28.1%	7.8%
46-60 minutes	23	19.6%	30.0%	5.9%
1-24 hours	19	15.7%	32.7%	5.1%
Total	21	23.6%	32%	7.5%

Responsiveness and Follow-Up Builds Trust

“What matters most is ensuring prospects and families don’t feel forgotten after their initial contact with our communities. A timely response opens the door to trust while consistent, sincere follow-up provides helpful next steps and guides the journey forward with clarity, care, and compassion.”

– Melissa Dupont, Presbyterian Homes & Services



Monthly Conversion Metrics

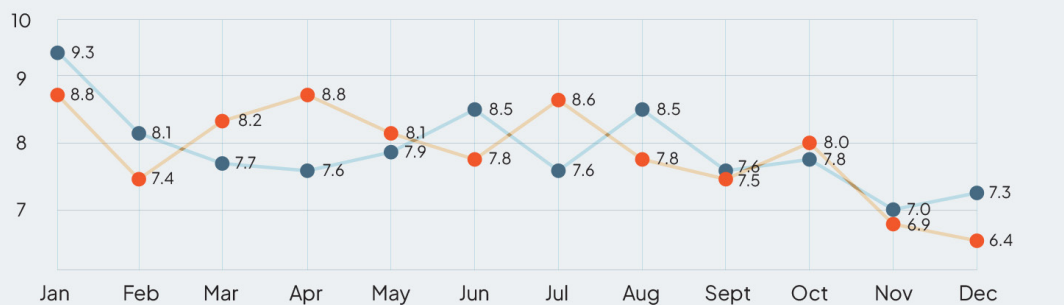
Memory care

Monthly activity in memory care remained steady throughout 2025 with inquiries and tours showing modest variation but no pronounced seasonal swings. Move-ins tracked consistently for a stable conversion rhythm across the year.

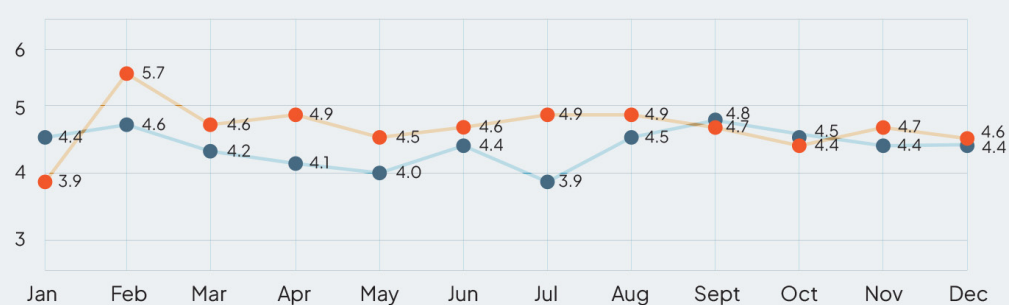
Memory Care: Inquiries (per 100 units)



Memory Care: Initial Tours (per 100 units)



Memory Care: Move-Ins (per 100 units)

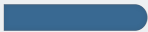
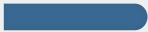
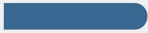


Average Monthly Sales Activity

Memory care

Sales activity in memory care reflects a highly engaged, relationship-driven process. Face-to-face interactions, especially tours, appointments, and home visits, remain central in creating multiple opportunities for families to experience the community and ask care-specific questions. These in-person moments are supported by a steady cadence of events and assessments, doubling down on the importance of observation and reassurance in memory care decision-making.

Behind those interactions sits a significant amount of prospect-centered and follow-up work. Planning represents one of the largest areas of effort, alongside consistent call activity and digital communication that help families navigate next steps. The overall time investment per community is substantial, underscoring the depth of engagement required to support families thoughtfully, build trust, and move decisions forward with confidence.

 Face-to-Face	Average per Month (per 100 Units)	Time & Effort	Prospect Intent	Likelihood of Advance
Initial Tours	12.6 	 		
Total Tours	14.5 	 		
Home Visits	6.5 	 		
Appointments	11.5 	 		
Event Attendance	6.8 	 		
 Prospect Centered				
Planning	55.0 	 		
Creative Follow-Up	12.4 	 		
 Voice-to-Voice				
Call-Outs	95.3 	 		
Connected Calls	41.5 	 		
Other Activities				
Emails/Texts	133.3 	 		
Assessments	8.0 	 		
Time Investment & Outcome				
Time in the Selling Zone™		 71.6 Hrs	Advances	 42.1

Average Monthly Conversions by Market

Memory care

Memory care performance varies meaningfully by market as urban communities see modest growth in inquiries and move-ins while rural markets experience softer inquiry volume but stable outcomes.

Average Inquiries per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	39.8	40.7	2.4%
Rural	29.8	28.2	-5.4%

Average Tours per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	12.6	12.7	0.2%
Rural	11.5	11.4	-1.0%

Average Move-Ins per Month (per 100 Units)			
Market	2024	2025	Variance
Urban	6.9	7.8	13.1%
Rural	9.6	9.8	1.5%

Average Move-Ins per Month (per 100 Units)			
Region	2024	2025	Variance
North Central	5.5	5.2	-5.8%
Northeast	5.9	4.4	-24.9%
South Central	5.3	5.2	-0.9%
Southeast	7.8	7.4	-4.8%
West	10.0	11.1	11.7%
Average	6.9	6.7	-3.0%

Market Dynamics Shape Performance

“One of the biggest mistakes teams make is treating all markets the same. Demand behaves differently depending on location, competition, and access to care, and performance improves when teams adjust to those realities instead of forcing a single playbook.”

– Julie Davila, MPH, Discovery Senior Living



Conversion Metrics by Market Source

Memory care

With an increase year over year, resident referrals posted the highest inquiry-to-move-in conversion rate. Most other sources, however, recorded lower conversion rates than the prior year.

Online directories and professional referrals declined as a share of inquiries while paid web activity increased significantly, pointing to a heavier reliance on digital acquisition to drive awareness. Organic website performance remained stable, continuing to serve as a consistent entry point for research. Smaller gains in direct mail, events, and staff referrals suggest a modest broadening of the source mix, even as the overall distribution reflects families engaging through fewer, more intentional channels.

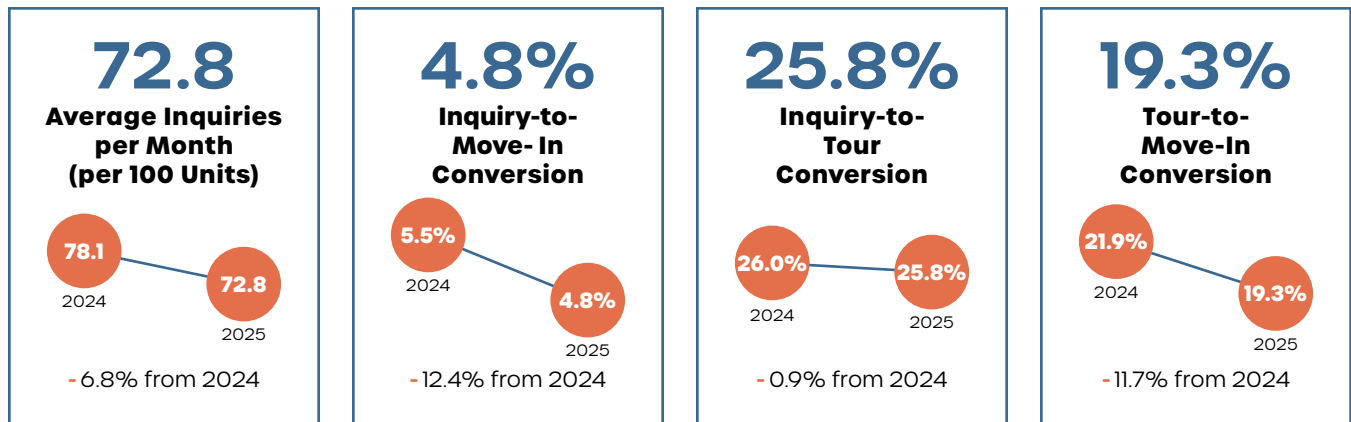
Market Source	Share of Total Inquiries		Inquiry-to-Move-In %"	
	2024 (INQUIRIES)	2025 (INQUIRIES)	2024 (CONVERSIONS)	2025 (CONVERSIONS)
Digital Demand (Owned + Paid)				
Website – Organic	6.3%	6.2%	6.8%	3.1%
Website – Paid	4.9%	12.5%	2.0%	0.9%
Internet Advertising	2.8%	2.5%	12.6%	10.1%
Online Directory*	24.8%	16.0%	5.1%	5.0%
Agency (Local)*	9.2%	8.7%	12.5%	12.9%
Email	0.1%	0.0%	7.7%	0.0%
Relationship & Referral-Driven				
Family / Friends Referral	2.8%	2.3%	32.0%	26.9%
Professional Referral	10.3%	8.0%	25.6%	27.8%
Resident Referral	0.3%	0.2%	28.6%	42.9%
Staff Referral	1.2%	1.6%	22.7%	18.3%
Community & Local Presence				
Community Knowledge	4.7%	3.4%	25.6%	21.7%
Events	0.2%	1.0%	24.2%	6.1%
Signage	1.3%	1.1%	19.7%	22.2%
Direct Mail	0.1%	1.0%	4.8%	3.5%
Print Advertising	0.2%	0.4%	21.1%	12.7%
Media	0.0%	0.2%	0.0%	6.3%
Other				
Other	10.4%	15.0%	8.1%	12.9%

*Agency refers to primarily local paid referral agencies. Online directory includes lead aggregators and large online paid referral sources.

Industry Benchmarks

Life plan residential

Life plan residential performance reflects a more deliberate decision environment. Average monthly inquiries declined year over year, and conversion slightly dropped across the funnel as fewer inquiries progressed to tours and move-ins. These shifts point to prospects approaching these communities with greater caution, given the financial and lifestyle commitment involved.



What stands out most is the depth of engagement required once prospects enter the journey. Supporting each move-in involves a high volume of planning, coordination, and direct communication, resulting in the highest time investment per move-in among care levels. Rather than a volume-driven process, the data shows teams guiding fewer prospects through longer, more consultative conversations before decisions are made.

- Planning accounts for a significant share of activity, reflecting the complexity of life plan decisions.
- Tours, face-to-face interactions, and connected calls remain essential touchpoints throughout the process.
- Total selling time is substantial, underscoring the extended consideration required before prospects are ready to move forward.



A Higher Bar to Move Forward

“People are being more deliberate about CCRCs. It’s a bigger financial and lifestyle decision, so while fewer prospects are starting the process, those who do engage require more conversation, more touchpoints, and more time before they’re ready to move forward.”

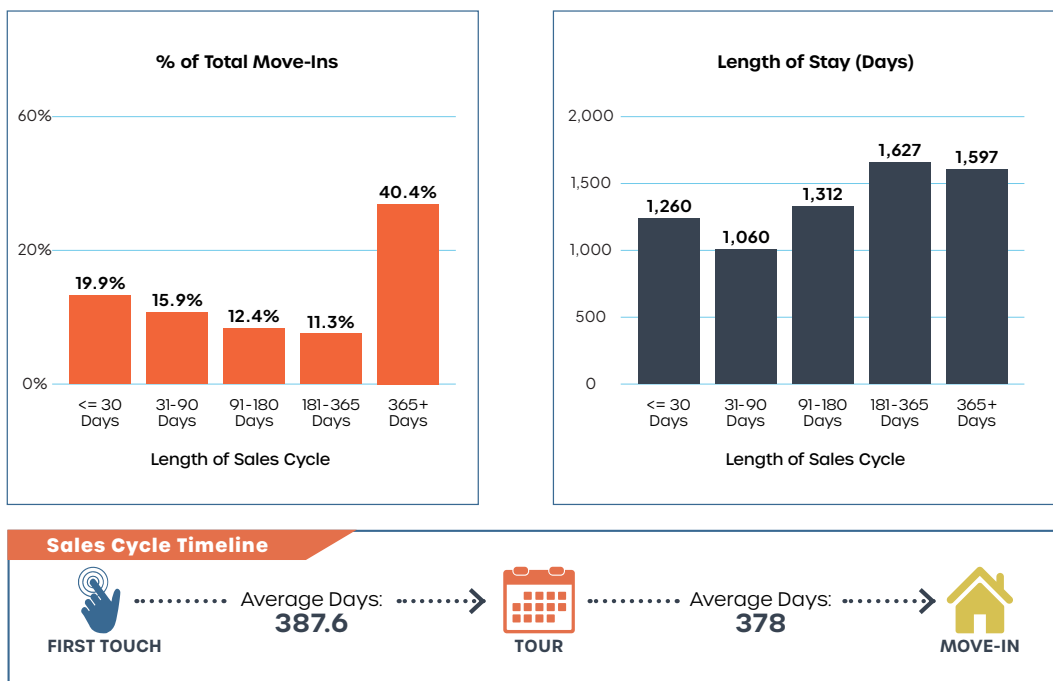
– Susan Brewer, LifeSpace Communities



Sales Cycle

Life plan residential

Sales cycles in life plan residential communities extend well beyond short decision windows. While nearly 20% of move-ins occur within 30 days, a substantial share take many months, with nearly 4 in 10 taking more than a year to convert. The distribution reflects the time required to evaluate financial, lifestyle, and long-term care considerations, creating space for deeper relationships and more deliberate decision-making before families move forward.



Correction Notice (Updated: March 23, 2026): We identified and corrected an error in previously reported data. This version reflects updated, validated metrics as part of our commitment to accuracy and transparency.

The Right Fit Drives Long-Term Outcomes

“When families have time to build a relationship with the team, they come in more confident and more committed. That fit upfront makes a difference in how long they stay.”

– Coryanne Graham, Oxford Senior Living



“When someone goes quiet or lost, we think, ‘Oh, they’re just not interested.’ Going cold or quiet for a week or month or longer does not necessarily mean they’re not interested. It just means they need more nurturing.”

– Debbie Howard, CEO, Senior Living Smart



Key Metrics by Method of Inquiry

Life plan residential

Inquiry method plays a clear role in how prospects move through the life plan residential funnel. Call-ins and unpaid referrals convert more effectively from inquiry-to-tour and move-in, signaling higher readiness at first contact. Web forms generate the majority of inquiries, but require more completed activities and convert at lower rates overall. The data highlights meaningful differences in intent at the top of the funnel, shaping both the pace and depth of engagement that follows.



Signals at the Top of the Funnel

“Prospects often do a lot of research before they reach out. Some are ready for a conversation while others are still gathering information, and that difference shows up in how they enter the funnel.”

– Susan Brewer, LifeSpace Communities



*Method of Inquiry definitions on page 13

Conversion by Response Time

Life plan residential

Response timing in life plan residential communities shapes early engagement, but conversion reflects a longer arc of decision-making. Faster responses are associated with stronger inquiry-to-tour performance, helping initiate conversation, while inquiry-to-move-in outcomes depend on sustained interaction over time. Consistently high activity levels indicate the sustained effort required to support complex financial and lifestyle decisions.

Response Time	Average Completed Activities	Inquiry ▼ Tour	Tour ▼ Move-In	Inquiry ▼ Move-In
0-15 minutes	46	36.5%	17.3%	6.3%
16-30 minutes	50	32.3%	17.0%	5.5%
31-45 minutes	51	27.4%	17.5%	4.8%
46-60 minutes	52	26.0%	15.0%	3.9%
1-24 hours	57	21.3%	16.8%	3.6%
Total	51.7	29.1%	17.3%	5.1%

Balancing Early Connection and Sustained Engagement

“That first connection is still important, but with CCRCs, it’s really about starting the right conversations early and then staying engaged as people work through a much bigger decision.”

– Sarah Choukalas, Manager Sales Operations, LifeSpace Communities

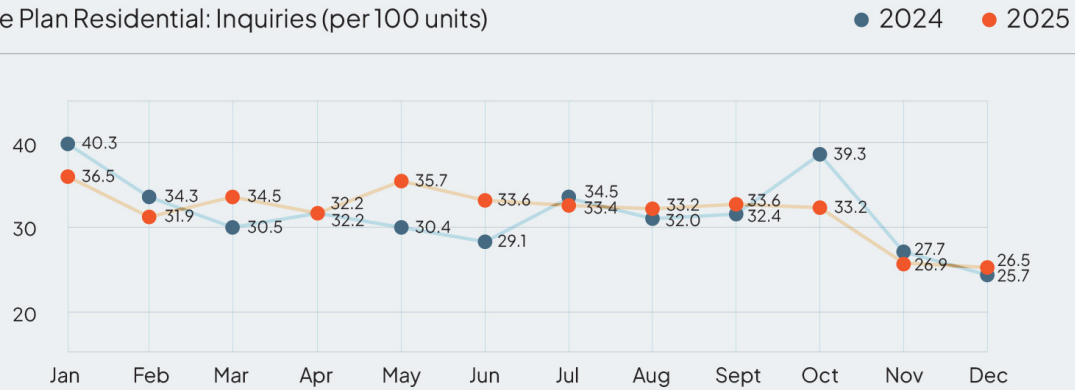


Monthly Conversion Metrics

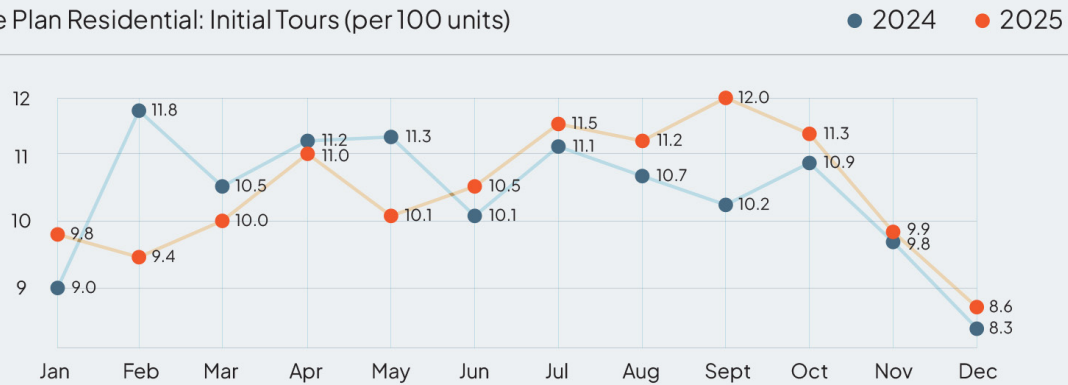
Life plan residential

Monthly activity remained steady in 2025 with average activities and initial tours showing consistent pacing across the year. Move-ins followed a similar rhythm, showing stable progression rather than pronounced seasonal shifts.

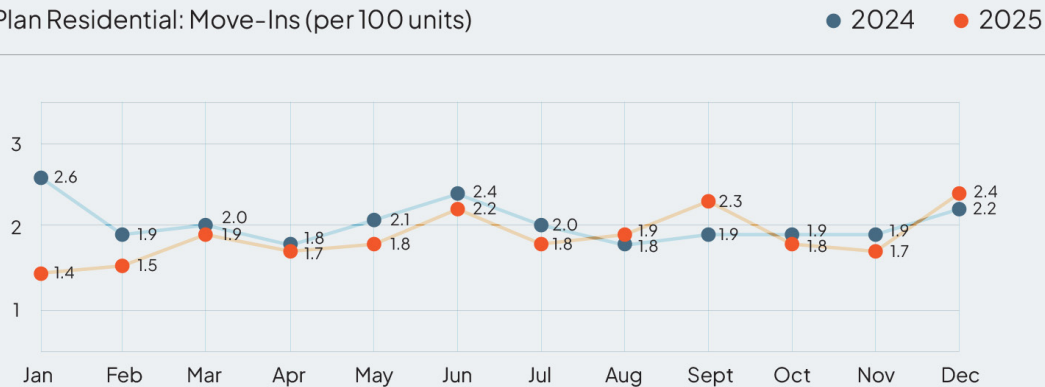
Life Plan Residential: Inquiries (per 100 units)



Life Plan Residential: Initial Tours (per 100 units)



Life Plan Residential: Move-Ins (per 100 units)



Average Monthly Sales Activity

Life plan residential

Sales activity in life plan residential communities is driven by sustained, multi-channel engagement. Digital communication and call activity account for a large share of monthly effort, supported by a steady cadence of tours, events, and appointments that create in-person connection. Initial tours and events stand out as frequent face-to-face touchpoints, which shows the importance of firsthand experience as prospects evaluate a long-term lifestyle decision.

A significant portion of effort is dedicated to prospect-centered work and time investment. Planning and creative follow-up play a meaningful role in guiding prospects through complex considerations while connected calls help maintain continuity over an extended decision cycle. The overall activity mix points to a consultative sales process that prioritizes depth of engagement, patience, and ongoing relationship-building.

Face-to-Face	Average per Month (per 100 Units)	Time & Effort	Prospect Intent	Likelihood of Advance
Initial Tours	6.1			
Total Tours	15.0			
Home Visits	1.9			
Appointments	9.6			
Event Attendance	17.6			
Prospect Centered				
Planning	21.8			
Creative Follow-Up	9.3			
Voice-to-Voice				
Call-Outs	122.4			
Connected Calls	50.5			
Other Activities				
Emails/Texts	207.2			
Assessments	1.6			
Time Investment & Outcome				
Time in the Selling Zone™ 233.8 Hrs Advances 24.3				

Average Monthly Conversions by Market

Life plan residential

Life plan residential performance softened across both urban and rural markets in 2025 with notable declines in inquiries, tours, and move-ins. Regional results showed similar pressure with variation in the degree of slowdown rather than isolated pockets of growth. This broad shift toward more cautious entry into the decision process is consistent with longer consideration and higher engagement thresholds.

Average Inquiries per Month (per 100 Units)

Market	2024	2025	Variance
Urban	28.5	25.4	-10.9%
Rural	21.9	19.7	-10.0%

Average Tours per Month (per 100 Units)

Market	2024	2025	Variance
Urban	6.6	6.2	-6.1%
Rural	4.3	4.1	-5.6%

Average Move-Ins per Month (per 100 Units)

Market	2024	2025	Variance
Urban	1.8	1.6	-8.4%
Rural	2.2	1.9	-11.5%

Average Move-Ins per Month (per 100 Units)

Region	2024	2025	Variance
North Central	1.9	1.8	-5.2%
Northeast	1.7	1.5	-16.7%
South Central	2.5	2.2	-10.4%
Southeast	1.6	1.5	-4.3%
West	1.4	1.1	-24.5%
Average	1.8	1.6	-11.7%

Fewer Inquiries Reflect More Deliberate Decision-Making

“We’ve heard a lot of hesitation around CCRCs because of economic uncertainty and concerns about return of capital. It’s a bigger financial and lifestyle decision, so people are being more deliberate before they start the process.”

– Susan Brewer, LifeSpace Communities



Conversion Metrics by Market Source

Life plan residential

Inquiry-to-move-in conversion remained strongest among resident referrals. Several other channels posted modest gains while family referrals, community knowledge, and signage sources showed slight softening.

Market Source	Share of Total Inquiries		Inquiry-to-Move-In %"	
	2024 (INQUIRIES)	2025 (INQUIRIES)	2024 (CONVERSIONS)	2025 (CONVERSIONS)
Digital Demand (Owned + Paid)				
Website - Organic	6.4%	6.4%	2.7%	2.2%
Website - Paid	1.9%	3.1%	1.5%	0.8%
Internet Advertising	4.5%	4.9%	2.7%	2.0%
Online Directory*	4.7%	4.0%	2.3%	3.1%
Agency (Local)*	2.1%	1.6%	4.6%	5.8%
Email	0.2%	0.1%	5.5%	4.3%
Relationship & Referral-Driven				
Family / Friends Referral	4.0%	3.9%	14.0%	12.8%
Professional Referral	4.2%	4.5%	11.8%	12.7%
Resident Referral	2.5%	2.5%	18.6%	17.5%
Staff Referral	1.7%	1.2%	9.9%	11.6%
Community & Local Presence				
Community Knowledge	6.4%	7.1%	12.0%	10.6%
Events	1.5%	1.0%	4.3%	8.6%
Signage	0.7%	0.5%	14.4%	14.2%
Direct Mail	9.3%	5.4%	2.9%	4.5%
Print Advertising	0.6%	0.6%	7.8%	10.9%
Media	0.3%	0.5%	8.7%	5.8%
Other				
Other	11.0%	9.9%	6.0%	7.7%

*Agency refers to primarily local paid referral agencies. Online directory includes lead aggregators and large online paid referral sources.

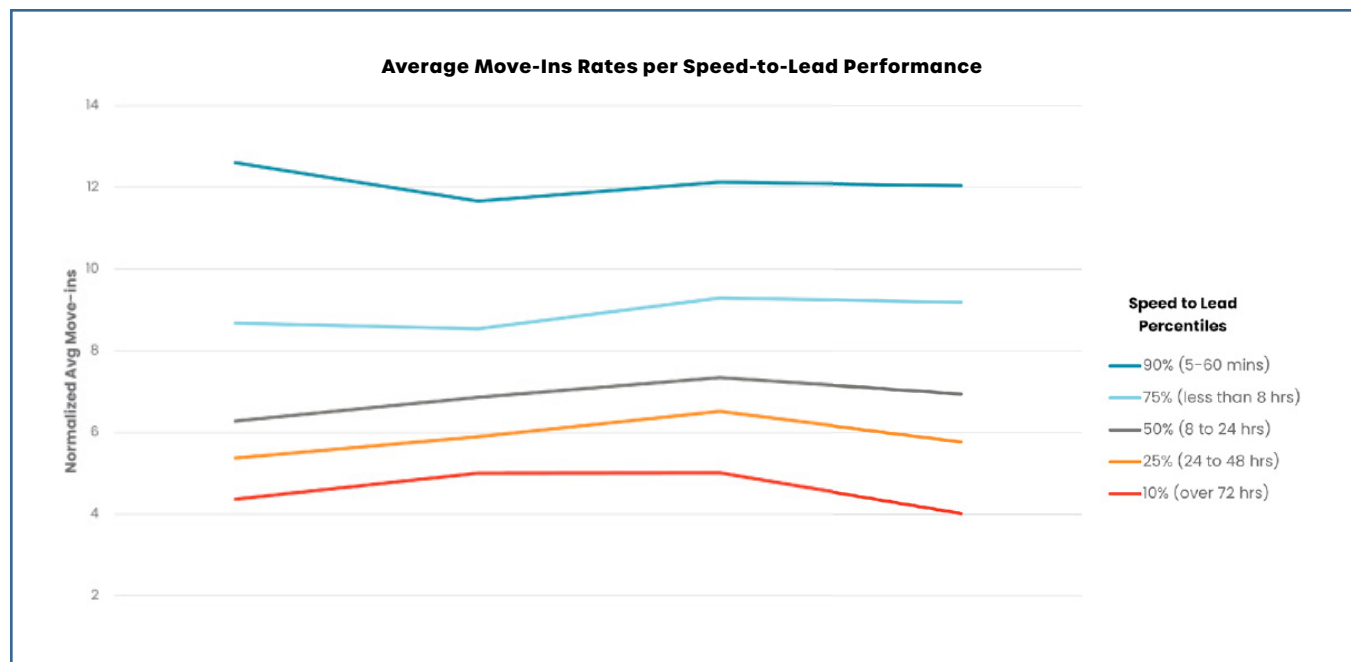
Speed-to-Lead & Move-In Performance

Faster first connections associated with higher move-in rates

Speed-to-lead captures the first moment of engagement across all inquiry sources, including calls, emails, chats, and form submissions. Without consistent notification and follow-up workflows, response times can vary widely by channel.

While speed-to-lead reflects the initial connection, performance depends on what follows. Reliable call tracking, accurate disposition, and timely subsequent touches all contribute to stronger inquiry-to-move-in outcomes.

- Faster speed-to-lead performance is associated with higher move-in rates.
- Early response supports trust-building and stronger inquiry-to-tour conversion.
- Communities that consistently engage quickly tend to see higher move-in performance.



*Speed-to-lead is defined as the time between inquiry creation and the first completed call task. Speed-to-lead values represent average quarterly performance by percentile band. Move-in rates are weighted quarterly averages, normalized to a 1-20 scale to adjust for differences in community size.

“Speed-to-lead directly impacts revenue performance. Teams that respond quickly and consistently convert more inquiries and sustain stronger move-in results. The real difference isn’t lead volume but disciplined execution after the inquiry arrives.”

– Jenny Malcolm, VP of Sales & Marketing, ActiveDemand



Introducing Length of Stay Tree by Alis



LoS Tree

- 🦋 An "LoS tree" is a novel visual representation of LoS data at the community level.
- 🦋 Each dot represents a moved-out resident, with the dot's height indicating their length of stay measured in years.
- 🦋 Plotted this way, the data naturally forms a structure resembling a pine tree with a wide base and a tapering top.
- 🦋 If we plot LoS trees for all ALIS 500 communities, the resulting collection will naturally form a forest with different types of trees.
- 🦋 As a general rule, taller trees with a narrower base are more desirable, as they represent communities where residents tend to have longer lengths of stay.

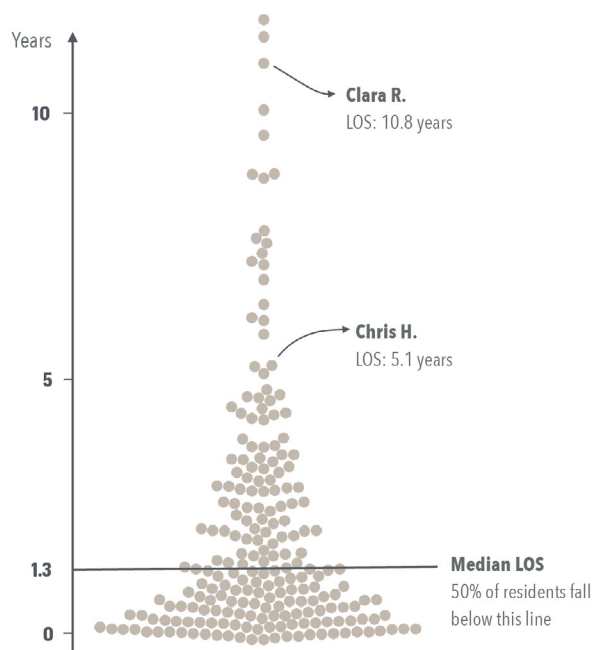


Figure 4. A prototypical LoS tree.

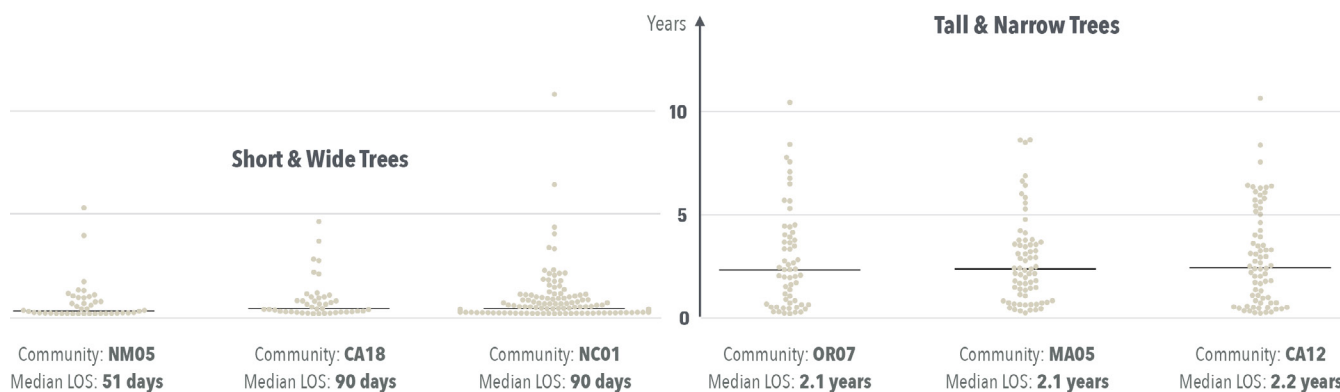


Figure 5. Three low-performing (left) and three high-performing (right) ALIS 500 communities in terms of resident LoS. Each tree represents moved-out residents from the beginning of Q1' 2024 to the end of Q4' 2025.

→ [Click here to access the ALIS500 Occupancy Report](#)

From Insight to Infrastructure

The data in this report makes one thing clear:

Performance in senior living no longer depends on effort alone. **It depends on connection.**

Connection across people.

Across systems.

Across workflows.

Across the full resident journey.

When sales operates separately from care...When billing is disconnected from move-in timing...When data lives in silos...

Revenue leaks.

Follow-up slows.

Confidence erodes.

But when people, products, and data are aligned:

Demand converts more predictably

Workflows move faster

Visibility improves across teams

Revenue loss is reduced

Time returns to care

The next decade of senior living will belong to operators who build connected infrastructure – not just add more tools.

The benchmarks in this report are not just measurements, they're the signals of where connection matters most. That is the ecosystem Aline is building.

ALINE
BUILT TO CONNECT

Growth & Engagement Products

The sales and marketing ecosystem built for the full senior care continuum.

Sales and marketing teams do not need more tools. They need the right system, one that helps them work smarter, move faster, and focus on the conversations that matter most.

Aline delivers a CRM purpose-built for senior living, designed to guide outreach, prioritize effort, and automate follow-up across the full care continuum.

Whether you operate senior living, post-acute, or both, Aline provides one unified platform without duplicate systems or siloed data.

When the right ecosystem is in place, sales teams stop chasing tasks and start building relationships.

Designed for the Way Teams Actually Work

Easy to learn.

Intuitive to use.

Flexible to configure.

**Powerful enough
to scale.**

Aline CRM A next-generation relationship platform that recommends next steps, automates follow-up, and prioritizes the prospects most ready to move forward.

Aline Smart Referral CRM A modern admissions CRM built for speed and precision – helping post-acute teams triage, qualify, and convert referrals in minutes, not hours.

Aline Discover Supports older adults and families in their decision-making process while equipping sales teams with meaningful discovery insights that inform outreach.

Aline Nurture Automated, personalized outreach that ensures every inquiry is nurtured consistently – without adding manual workload.

Aline Contact Center Centralized communication workflows that increase responsiveness, visibility, and accountability across communities.

Aline Connect Automates follow-up with AI-powered voice and text outreach, ensuring speed to lead and consistent cadence so sellers can focus on human connection.



Prospect-Centered Selling™ Built In

High-performing teams design their process around the prospect experience – not internal stages.

Prospect-Centered Selling™ is built directly into Aline CRM as optional functionality, providing a structured, customer-led framework that aligns sales activity with how families actually evaluate and decide.

Within Aline CRM, Prospect-Centered Selling™:

Aligns sales stages to real decision milestones

Encourages meaningful discovery before advancing next steps

Surfaces motivations, barriers, and key influencers

Supports consistent follow-through without unnecessary rigidity

Teams can adopt it fully or apply the elements that best fit their culture. The framework is not layered on top of the CRM. It is integrated directly into workflows, reinforcing clarity, consistency, and empathy at every stage..

The result is a sales motion that feels more natural to families and more repeatable for operators.

Turning a Prospect-First Approach into Better Operator Outcomes

Across the data, one theme is clear. Performance improves when teams reduce friction, respond quickly, and maintain the right cadence over time.

When the journey is designed around the prospect experience, operators see measurable downstream impact in higher conversion, stronger productivity, and more predictable growth.

A prospect-first system does not just enhance experience. It drives results.

Aline Contact Center:

An Extension of Your Sales Team

The Aline Contact Center operates as an extension of your sales team to ensure every inquiry stays connected to the CRM when on-site teams are unavailable. The metrics below reflect internal performance benchmarks that show how this continuity translates into consistent engagement and follow-through across the journey.

Call Responsiveness

90% of inbound calls are answered within 30 seconds, supporting timely first contact.

Overall Response Time

Average response time is under 2.5 minutes.

Early Conversion Performance

Inquiry-to-tour conversion typically ranges from 25–35%, varying by lead quality.

Coverage Model

24/7/365 coverage with AI-assisted support to reduce response gaps outside traditional business hours.

* These metrics reflect Aline Contact Center performance and are provided for context alongside industry and community benchmark data.

Senior living software for better outcomes.

It's not just about data

– it's about insights

Schedule your demo:

alineops.com/book-demo/

Email us:

info@alineops.com

