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THE 2009 OVERVIEW OF ASSISTED LIVING

Kudos and huzzahs to AAHSA, ASHA, ALFA, NCAL and NIC¹ on the release of *The 2009 Overview of Assisted Living!* This research project is their second collaborative publication of statistical data on the assisted living business, fashioned after a similar report issued by this group in 2006 (the "2006 Overview").

The survey-based compendium of research is based on the responses of approximately 500 assisted living communities: 37 percent were free-standing assisted living providers; 28.1 percent, a combination of assisted living and assisted living dementia care; 18.5 percent in a combination of assisted living and independent living, 6.9 in a combination of assisted living and nursing, and the remaining 9.6 percent in CCRCs. Respondents included for-profit (65.6 percent), not-for-profit (30.3 percent), and government owned (2.7 percent) providers. Though 47 states were represented in the study, nearly 60 percent of the respondents came from 10 states, with Iowa having the highest percentage of respondents (66 out of the 481).

The 2009 Overview of Assisted Living (the "2009 Overview") provides information on an array of topics, including occupancy and staffing rates, monthly service fees, employee benefits, and resident profiles, services and amenities. In many cases, comparative statistics are provided so the reader can understand how the 2009 Overview compares to the results of the 2006 Overview.

The resident profiles reflected in this study address the typical characteristics of gender and age, but also include turnover rates, length of stay, relocation statistics, hospitalization and discharge rates, residents' financial resources and payment streams for the provider. As in the 2006 Overview, the resident profiles were compiled by having each survey respondent select four 'random' residents. The selection process was then defined to ensure consistency in approach (e.g., alphabetizing a resident list, dividing the list into four parts, then selecting the last person in each group).

With nearly 50 pages of findings, it is difficult to choose from among many highlights, but several findings from the research include:

- Across all assisted living community types, there is an average of 27.7 FTEs in all departments serving AL and dementia care residents; this is less than the 2006 Overview's reported average of 33 FTEs. Among all assisted living community types, the average total staffing is 83.6 FTEs per 100 residents (compared with the 2006 Overview's reported average of 71 FTEs per 100 residents).

- The average length of stay varies by the type of community: for men, the longest average length of stay is in the CCRC (42.4 months), whereas for women, the longest average length of stay is in AL/IL (36.6 months).
- The average monthly rate across all community types is \$3,022; 45% reported tiered pricing (as opposed to one, all-inclusive rate, hourly charges, other).
- 91% of all assisted living community types provide three meals per day in basic rates.
- A significant percentage (92%) provides or arranges hospice care for their residents.
- More than two-thirds of communities allow residents to have a personal pet.
- While an increasing percentage of residents indicate self-reliance in their payments, in the 2009 Overview 76.6% of the residents say they or their families pay for their assisted living stays (down from 85%); an increasing percentage report support from long-term care insurance (6.1% vs. just over 3% in 2006) and likewise there has been a small increase in Medicaid participation.

Visit the web sites of any of the organizations responsible (noted above) for the report:

www.aahsa.org
www.alfa.org
www.seniorshousing.org
www.ncal.org
www.nic.org

Cost is \$125. Note: as of 6/19/09, the publication was not yet available on every website, but it should be available shortly on all of them.

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¹ AAHSA: American Association of Homes and Services for the Aging; ASHA: American Seniors Housing Association; ALFA: Assisted Living Federation of America; NCAL: National Center for Assisted Living; NIC: National Investment Center for the Seniors Housing and Care Industry.