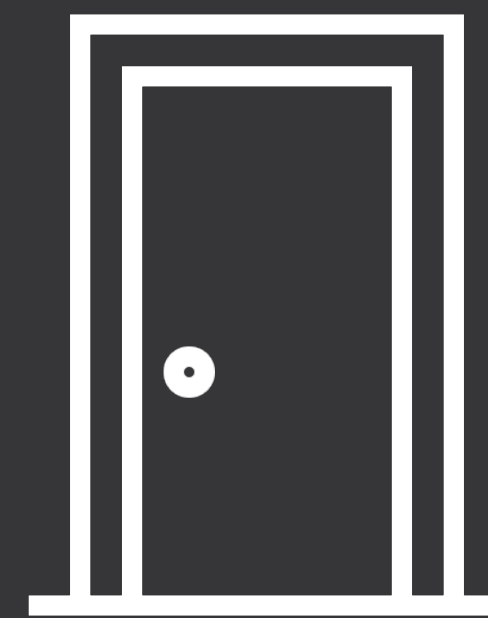


ALIS 500

THE OCCUPANCY REPORT

MAY 2025



What is ALIS 500?

- ALIS 500 is a **benchmark dataset** of 500 Assisted Living communities, carefully curated to represent various geographies, markets, community sizes, and portfolio sizes across the US.
- Reports generated based on ALIS 500 data offer insights about care practices, resident outcomes, and operational benchmarks in Assisted Living.
- Decision makers can use ALIS 500 Reports to stay up-to-date on important KPIs in Assisted Living and track national industry trends.

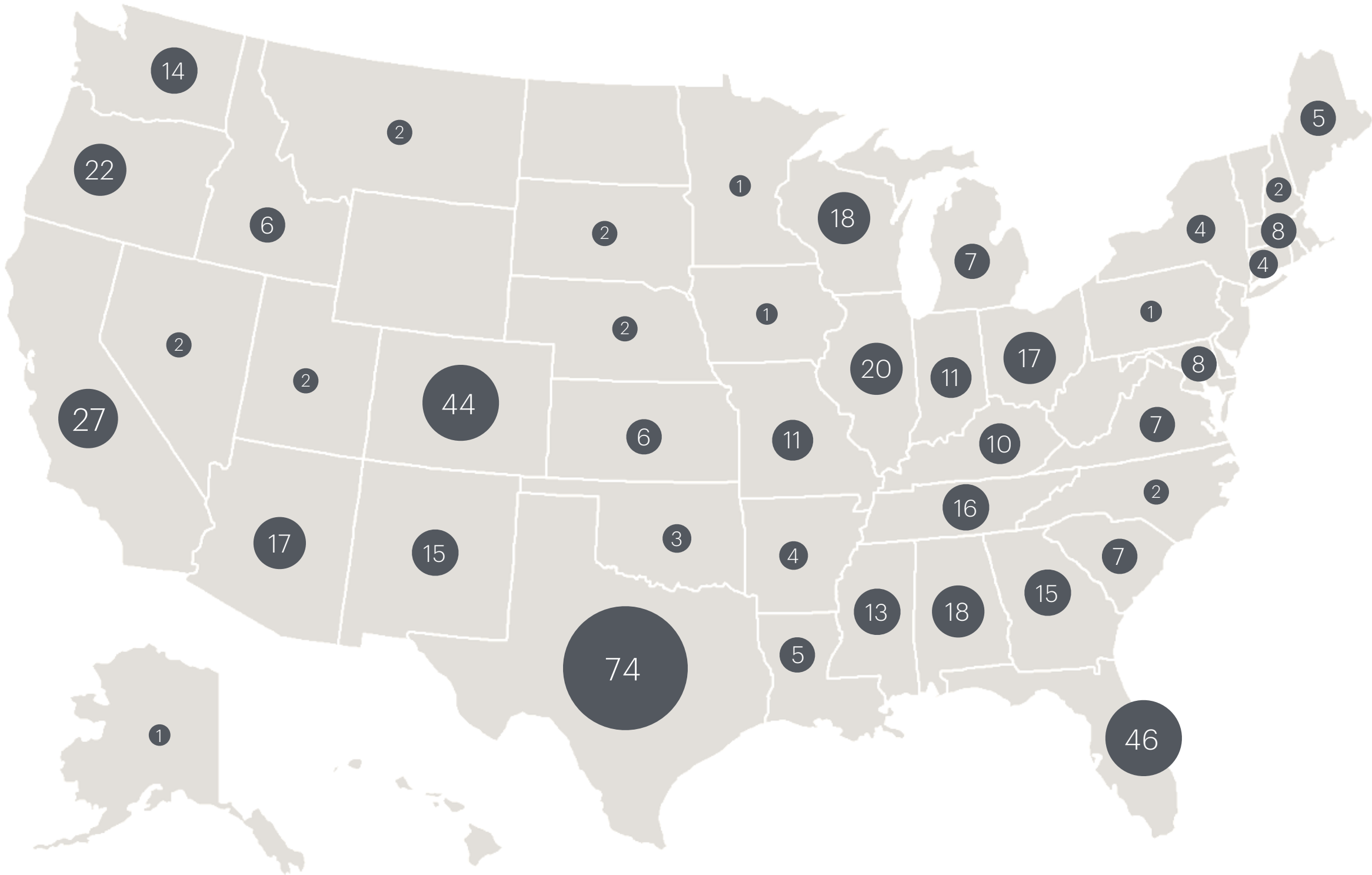
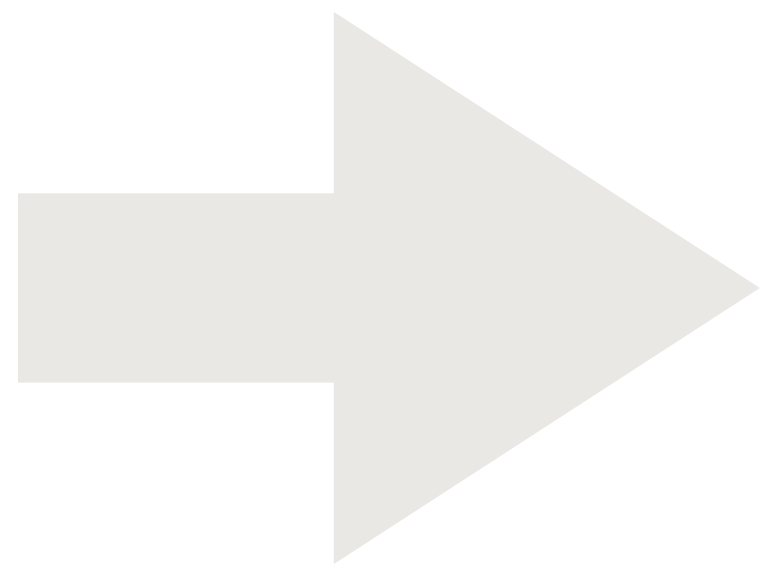


Figure 1. Geographical distribution of ALIS 500 communities

Questions Answered In This Report



Who are the occupants?

- 🦋 What is the average **age** of residents in long-term care communities?
- 🦋 What is the **female-to-male ratio** in these communities?
- 🦋 What percentage of residents require **memory care** services?

How long do they stay?

- 🦋 What is the average and median **Length of Stay (LOS)**?
- 🦋 What is an **LOS Tree**?
- 🦋 What percentage of residents **move out within 90 days** of moving in?
- 🦋 What does the data say about **occupancy** rates at LT care communities?

Why do they move out?

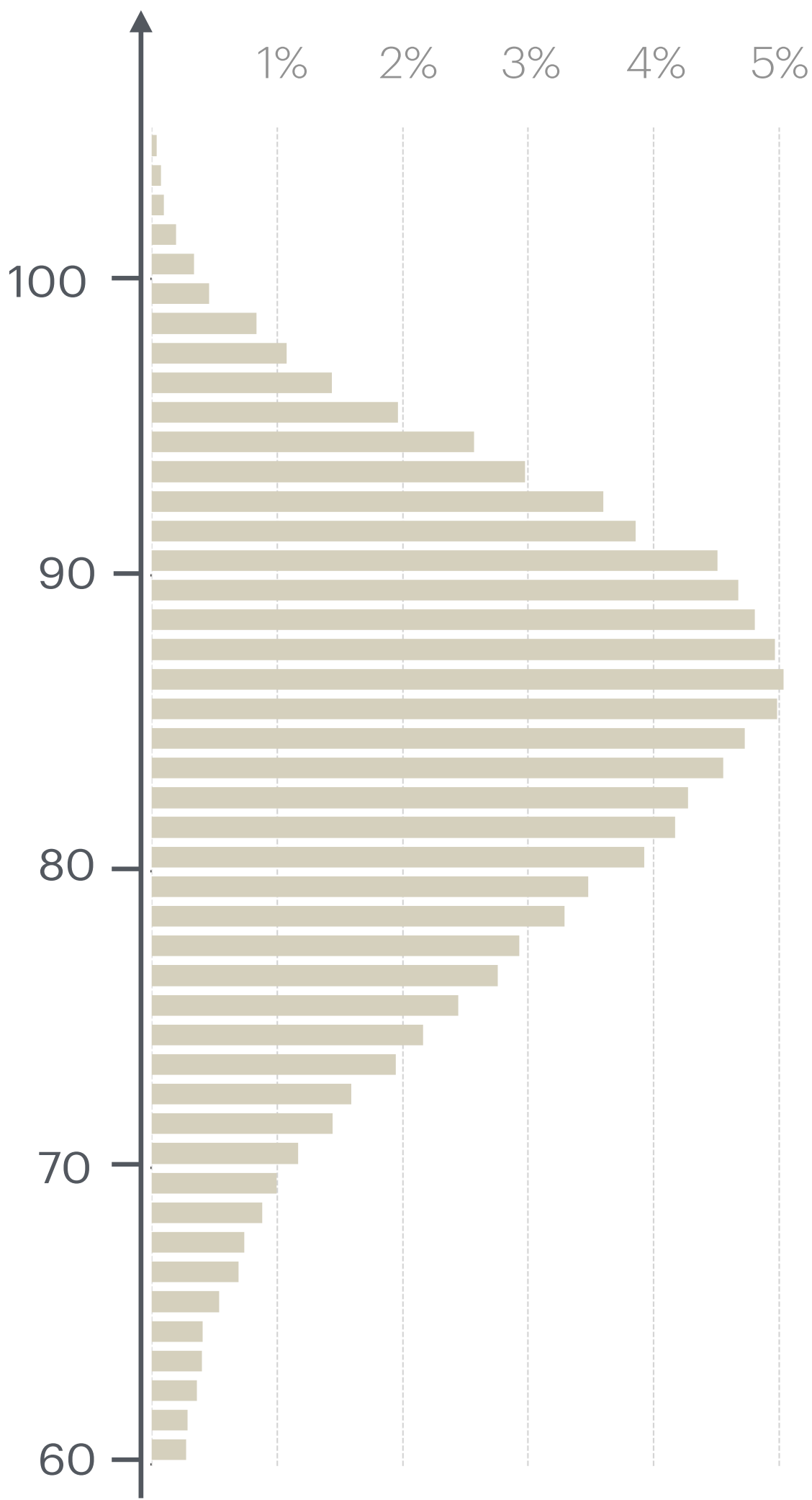
- 🦋 What are the main **move-out reasons**?

Resident demographics

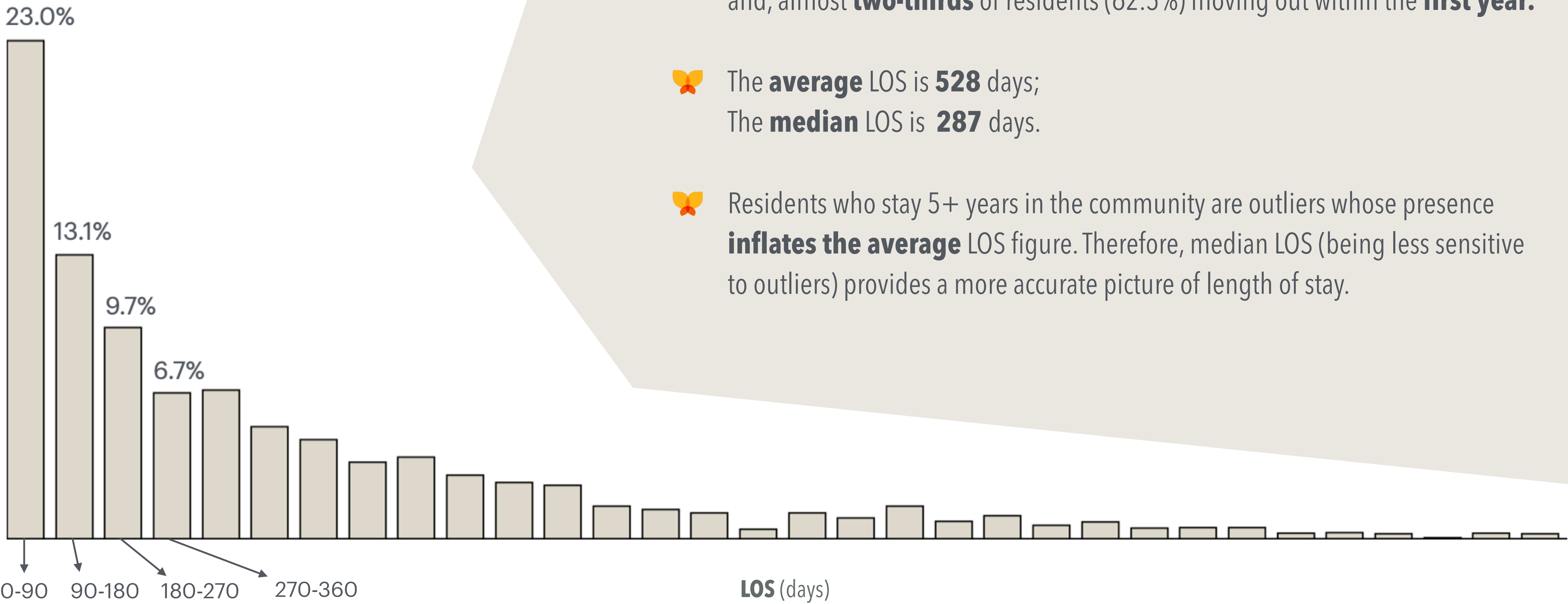
- 🦋 The average age of residents in senior living communities is **83.4** years.
- 🦋 **24%** of residents are 90 years of age or older at the time of admission;
46% are between 80 and 90 years old;
23% are between 70 and 80 years old;
7% are 70 years old or younger.
- 🦋 **34%** of residents have dementia, Alzheimer's, or other conditions that require them to use memory care (MC) services.
- 🦋 Some estimates place the **female-to-male ratio** in Assisted Living as high as 7:1*
Our data indicates a significantly lower **2:1** ratio, likely providing a more accurate demographic picture — considering the extensive and representative nature of the ALIS 500 dataset.

*<https://www.asccare.com/assisted-living-statistics-a-deeper-dive-into-the-demographics/>

Figure 2. Histogram distribution of age at admission (in years) of ALIS 500 residents



Length of Stay (LOS)



The 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.

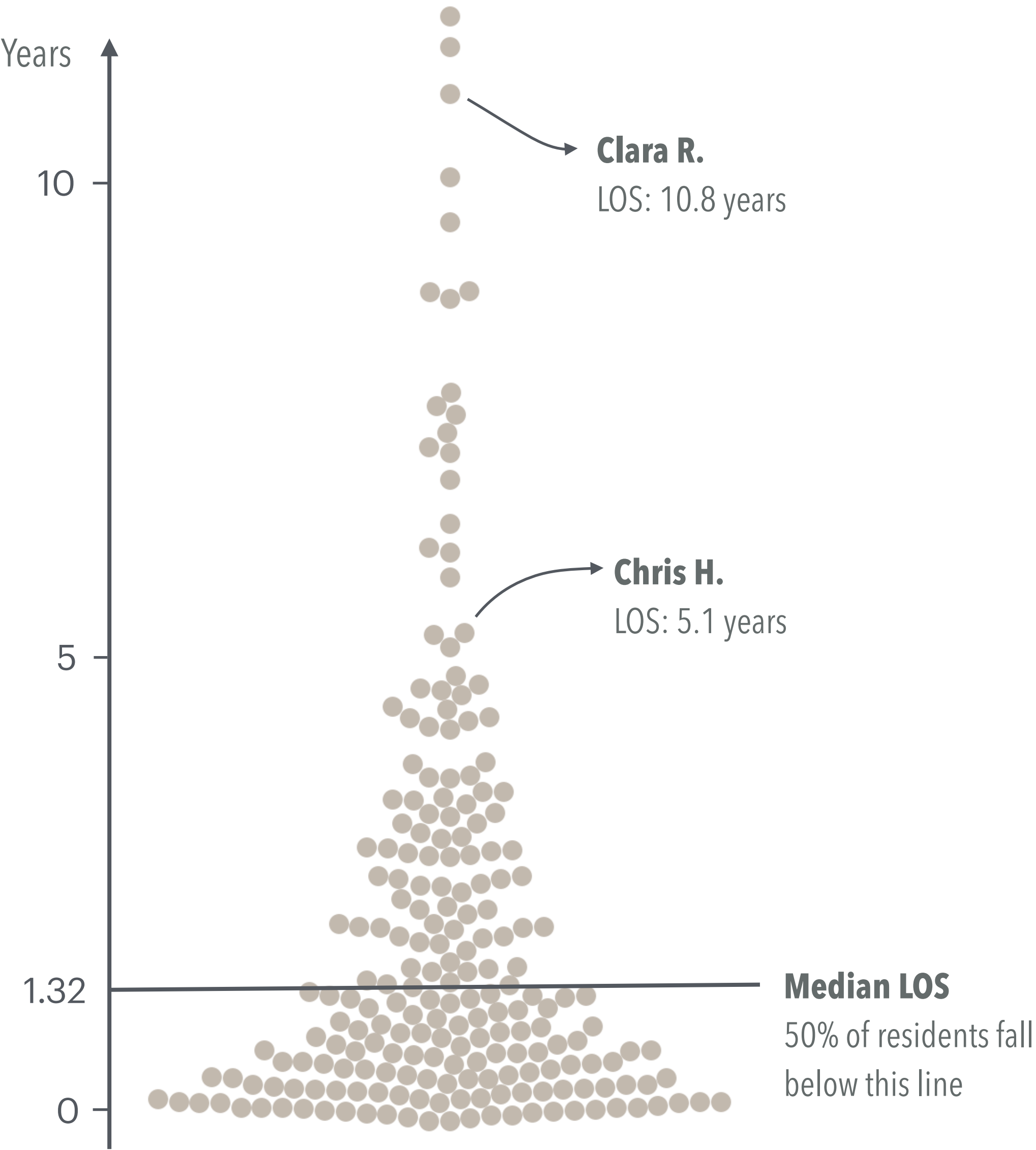


Figure 4. The LOS tree of one of ALIS 500 communities.

🦋 If we plot LOS trees for each of the 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.

Tall & narrow trees:
Residents tend to stay longer

Short & wide trees:
Many residents move out early

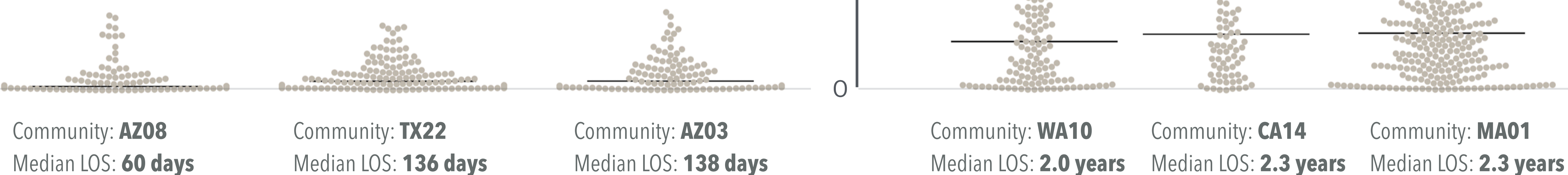


Figure 5. Three low-performing (left) and three high-performing (right) ALIS 500 communities.

The relationship between LOS and occupancy

🦋 Length of Stay (LOS) and occupancy are not correlated, meaning that knowing one doesn't reliably predict the other. Therefore, both metrics are crucial for a complete understanding of a community's financial well-being.

🦋 Depending on occupancy and LOS numbers, Assisted Living communities fall into one of four quadrants:

😊 **Top-right** quadrant: the best of both worlds!

😐 **Top-left** quadrant: strong resident retention but challenges in attracting new residents.

😐 **Bottom-right** quadrant: consistent resident turnover but successful at quickly filling vacancies.

😞 **Bottom-left** quadrant: facing difficulties in both attracting and retaining residents.

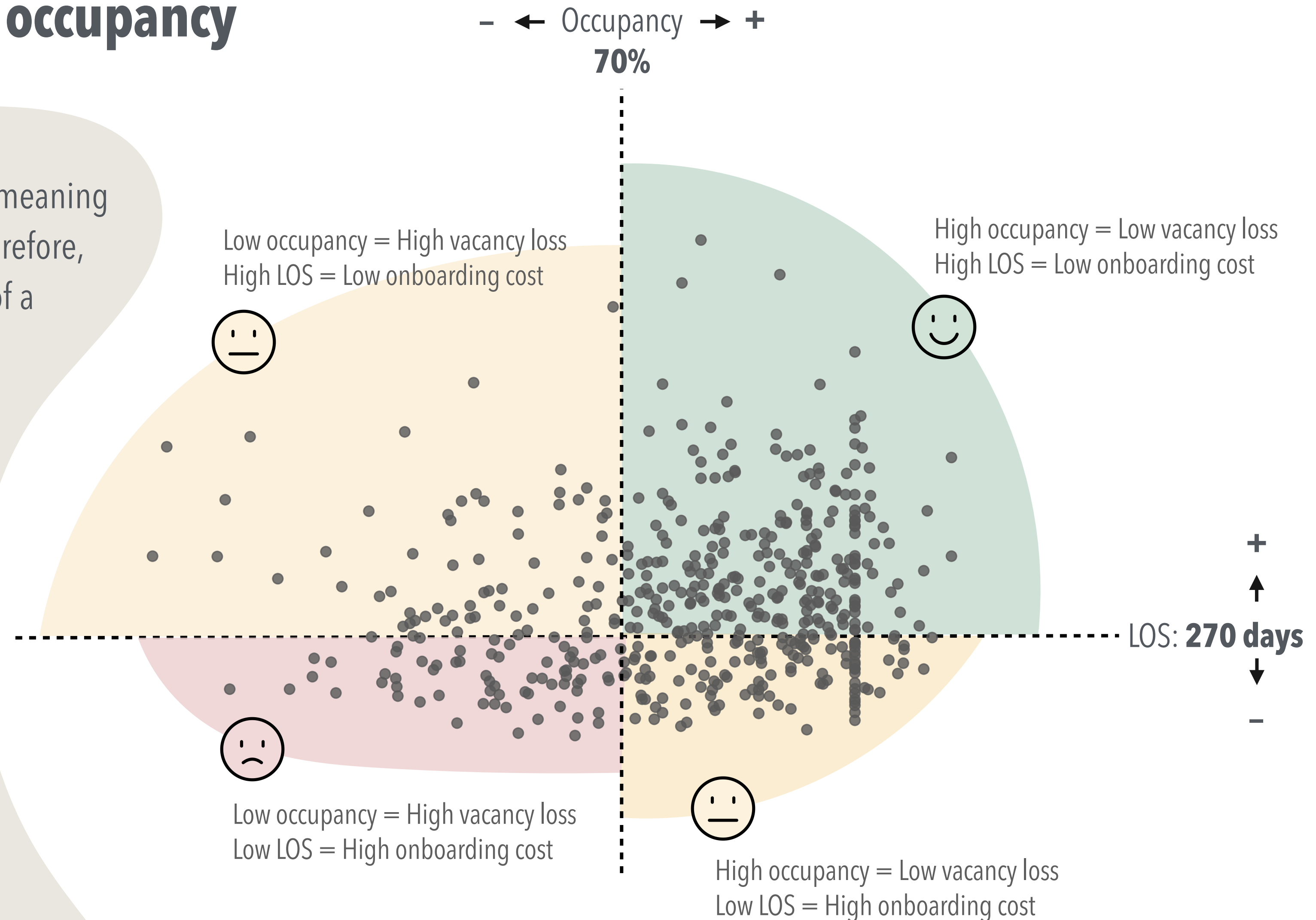


Figure 6. The scatter plot of occupancy vs. LOS; Each dot represents an ALIS 500 community.

Occupancy trends

- 🦋 The median occupancy rate of ALIS 500 communities in Q1' 2025 was **86%**
- 🦋 **40%** of communities had >90% occupancy (*excellent*); **36%** had 70% – 90% occupancy (*good*); **14%** had 50% – 70% occupancy (*moderate*); **10%** had <50% occupancy (*poor*).
- 🦋 The post-Covid recovery in occupancy rates has reached a stable point, hovering around 86% for the past 4 consecutive quarters.

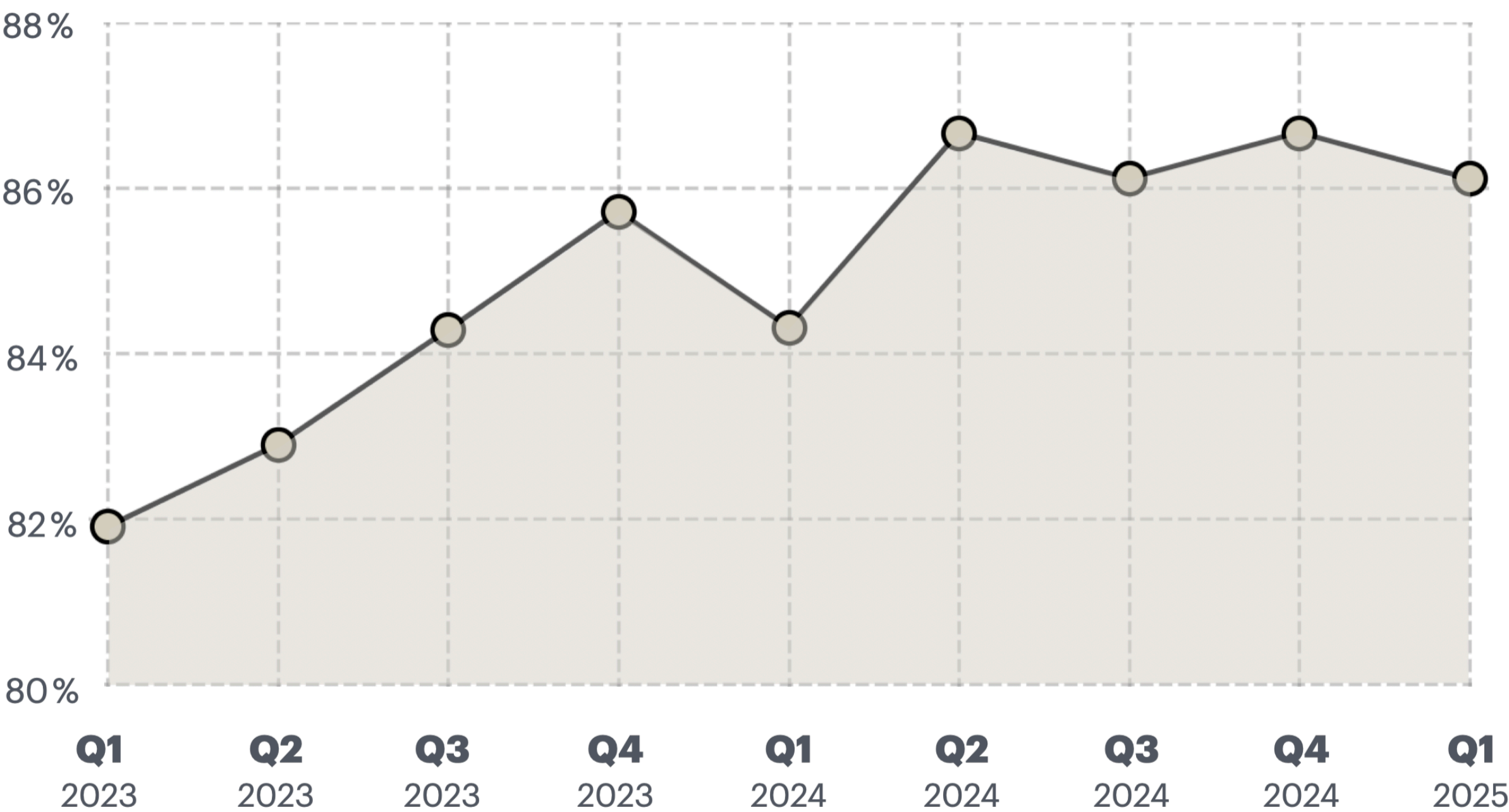


Figure 7. The median occupancy rates of ALIS 500 communities over time.

Move-out reasons

- 🦋 We analyzed move-out reasons for over **30,000 residents** of ALIS 500 who moved out in recent years (2023 onwards)
- 🦋 Half of all move-outs were due to death.
- 🦋 A quarter of all move-outs were due to decline in health or behavioral issues.

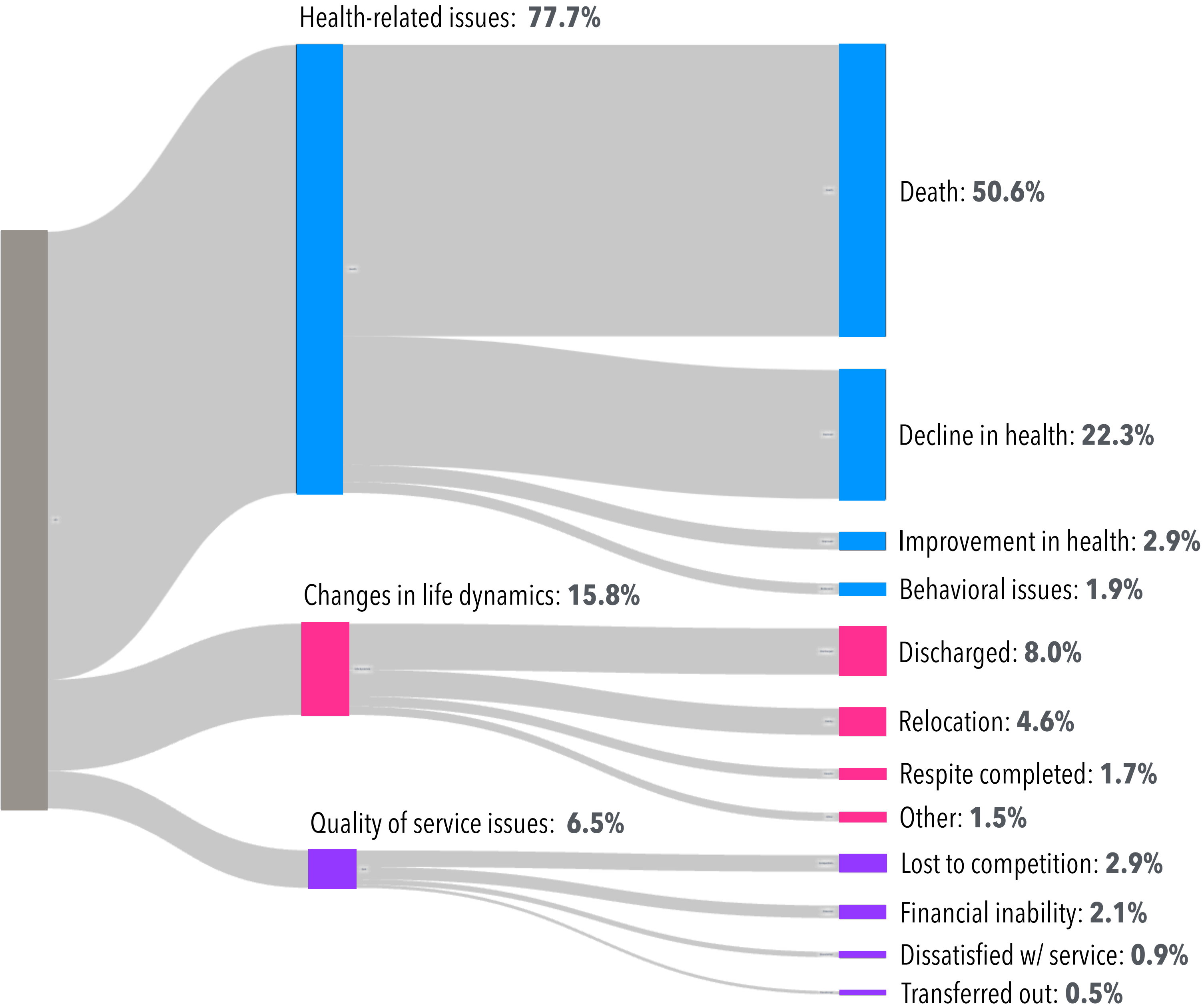


Figure 8. Move-out reasons among residents of ALIS 500 communities.

Recap

Who are the occupants?

- 🦋 What is the average age of residents in long-term care communities? **83.4 years**
- 🦋 What is the female-to-male ratio in these communities? **2:1**
- 🦋 What percentage of residents require memory care services? **34%**

How long do they stay?

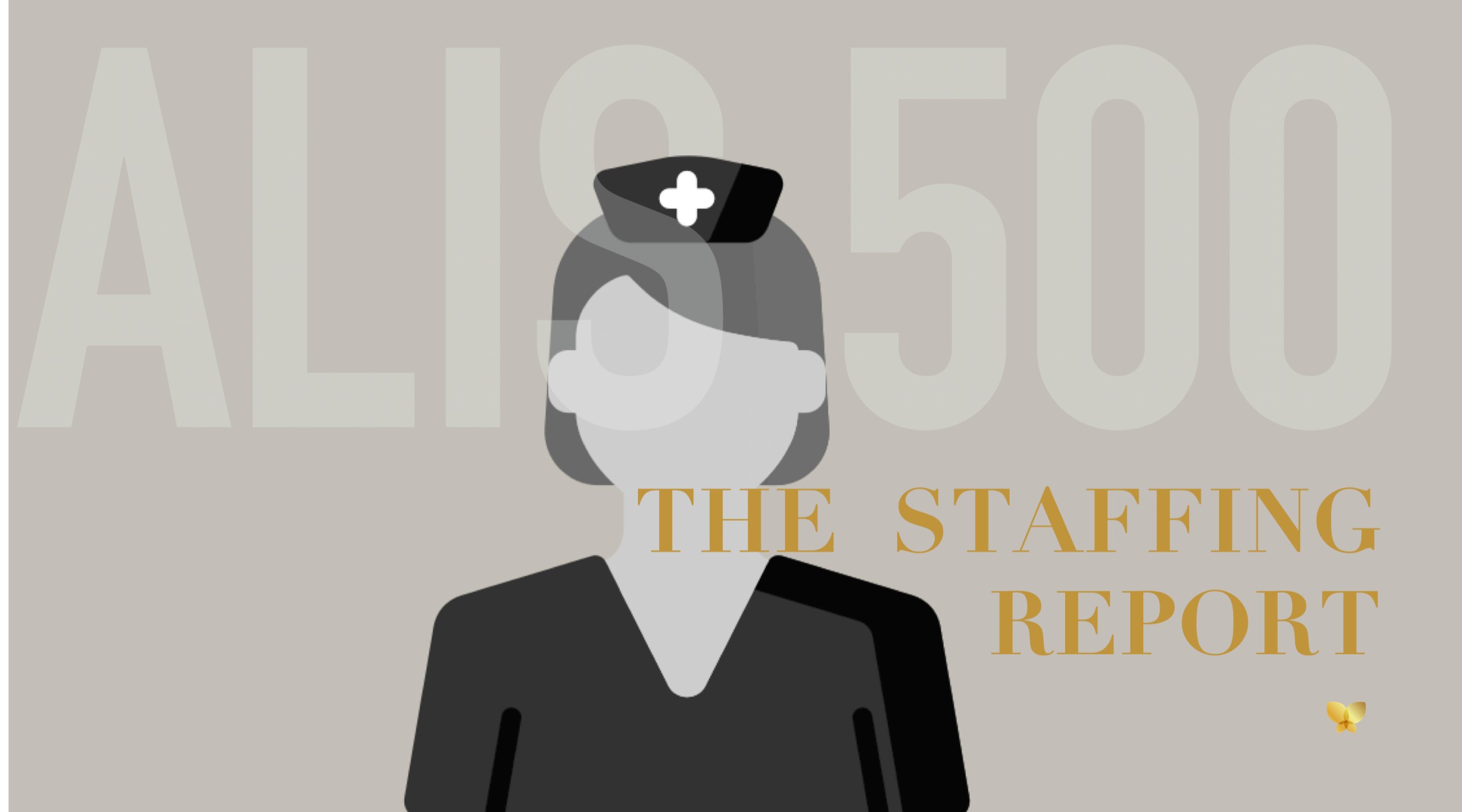
- 🦋 What is the average and median Length of Stay (LOS)? **528 and 287 days, respectively**
- 🦋 What is an LOS Tree? **A novel visual representation of LOS data**
- 🦋 What percentage of residents move out within 90 days of moving in? **Roughly a quarter of residents**
- 🦋 What does the data say about occupancy rates at LT care communities? **Recently stable around 86%**

Why do they move out?

- 🦋 What are the main move-out reasons? **Death, followed by decline in health and change in life dynamics**

More ALIS 500 Reports are in the works. ----->

Stay tuned!



Do you have questions that were not covered in this report?
Do you wish to be added to be added to our mailing list to
get notified when future reports drop?

Drop us a line at:
alis500@go-alis.com