

# 2025 Year in Review



**WelcomeHome**  
Senior Care Insights



# ABOUT US

WelcomeHome empowers senior living operators with CRM solutions that are simple, powerful, and built to make every day easier.

We began with three core beliefs:

- ✓ Serving seniors is one of the most difficult (and important) jobs that exists.
- ✓ Existing tools weren't solving the challenges operators face.
- ✓ Software can be sophisticated *and* simple.

But beliefs alone don't build a great CRM. Listening does. And we've never stopped. Thanks to your feedback and insights, we continue to evolve.

## What we accomplished in 2025:

- ✓ **Product enhancements, including our AI Snapshot feature**, which surfaces prospect insights, so you can walk into every conversation prepared.
- ✓ Grew our industry reporting to more than **3,000 readers** and welcomed **2,000+ participants** into our data-driven live events and conversations.
- ✓ Launched **Senior Care Insights, a first-of-its-kind data subscription** dedicated to sales and marketing insights for operators. Check out [InsightsWHS.com](https://InsightsWHS.com).

## What's next:

While we're proud of what we've built, we're even more excited about the year ahead, shaped by everything we've learned from you.

## Data Made Easy. Made for You.



# Letter From the CEO

Four years ago, we published our first Senior Living Year in Review. It was a natural extension of WelcomeHome's founding mission to provide senior living operators with exceptional sales and marketing technology and support.

What began as a single annual report evolved into a much larger commitment to being the industry's most trusted source for data.

This year's report reflects that evolution. The data is more comprehensive, the analysis more actionable, and the recommendations more informed by the conversations we had with leaders like you in 2025.

**Senior Care Insights** is our newest and most ambitious data offering, built to:

- ✓ **Deepen and broaden the data available to you.**
- ✓ **Turn data into decisions with ready-to-implement insights.**
- ✓ **Strengthen connection across the senior care industry.**
- ✓ **Guide operators, consultants, and capital partners across their specific use cases.**

Our commitment remains the same: **data made easy, and made for you.** If you'd like to discuss strategies for improving performance in the year ahead, we're here to help.

John Lariccia  
WelcomeHome CEO



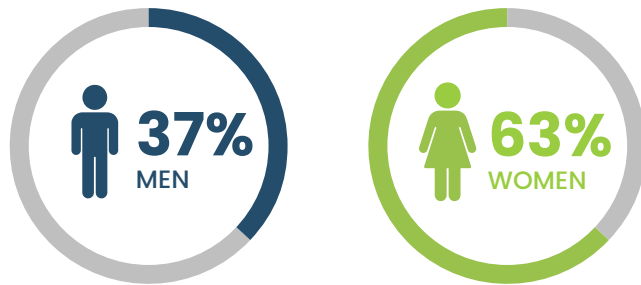
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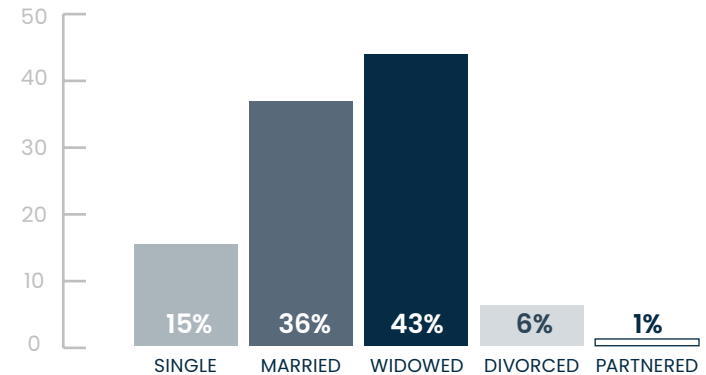
# 2025 Senior Living Prospect



## Gender Breakdown:

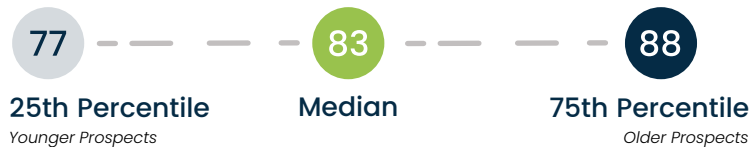


## Relationship Status Percentages:



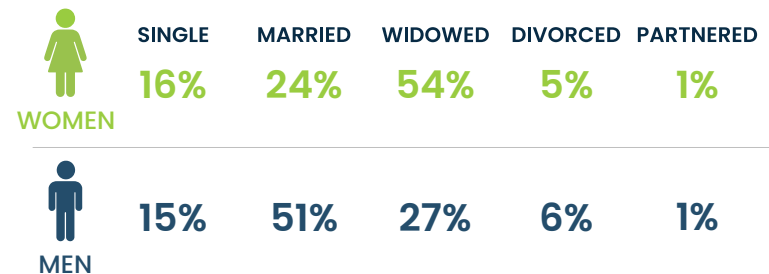
## Age at Inquiry:

**82** is the average age of inquiry



## Relationship Status Percentages, by Gender:

Just over half of men who inquire about senior living are married (51%). In contrast, fewer than 25% of women who inquire are married (24%), with the majority being widowed (54%).





# What Does This Mean for Senior Living?

## 01

As **Baby Boomers continue to drive demand for senior living**, it becomes critical to use the **right tools to identify strong leads** for your community.

- ✓ With lead volume projected to rise, prospect-to-community fit becomes more important to avoid overwhelming sales teams, and maximizing ROI.

## 02

Beyond prospects reaching out to your community, **understanding your market** and the demographics in it is crucial for effective marketing and outreach.

- ✓ Trends differ among regional markets, and understanding how yours stack up against the industry at-large informs how to effectively invest your resources.

WelcomeHome is here to help with...

- ✓ AI enhancements that synthesize your prospect information to help you close faster and more often.
- ✓ New reports like the State & Market Benchmark from Senior Care Insights – delivering granular data to help refine your strategy.

### ***Key Takeaway:***

As occupancy continues to climb, our focus shifts from strategy to support **occupancy growth**, to strategy to support **improved net operating income (NOI)**. Now, prospect-community fit, measuring ROI in sales, and maximizing resident satisfaction and LOS are critical.



# All Industry SUMMARY



**WelcomeHome**  
Senior Care Insights

# Year at a Glance

WelcomeHome's Industry Benchmarking is based on thousands of communities in primary, secondary and tertiary markets across all 50 states. For more detailed data, including state-level benchmarks, please connect with our WelcomeHome Customer Insights team: [insights@welcomehomesoftware.com](mailto:insights@welcomehomesoftware.com).



Industry occupancy added over 2 pts, ending at 85% in 2025. Gains were driven primarily by the bottom 10% and in Memory Care communities.



Communities are prioritizing early connection and improved speed to lead. Creating quality touchpoints early in the sales cycle is paying dividends in the front half of the sales funnel.



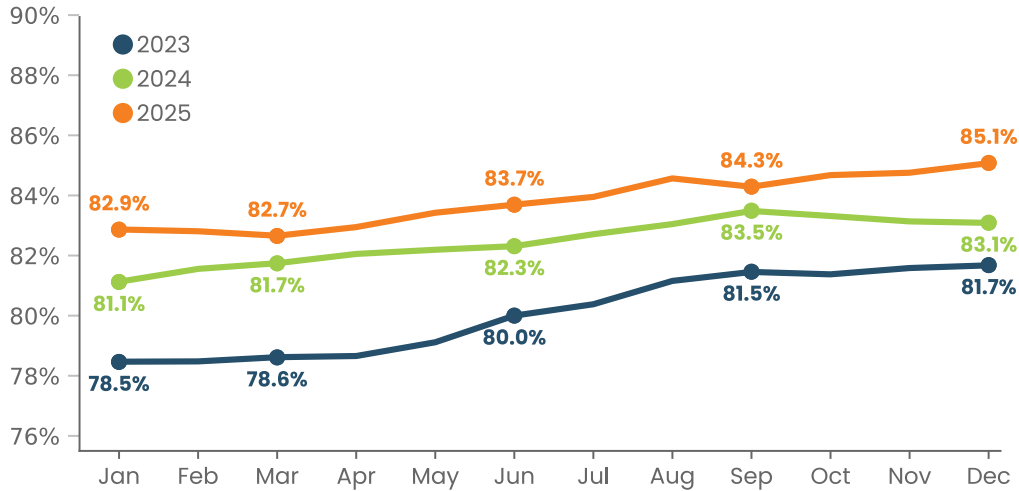
Operators are continuing to experiment with digital and online lead generation. Aggregator usage continues to decline as the focus shifts towards higher-converting online lead sources.



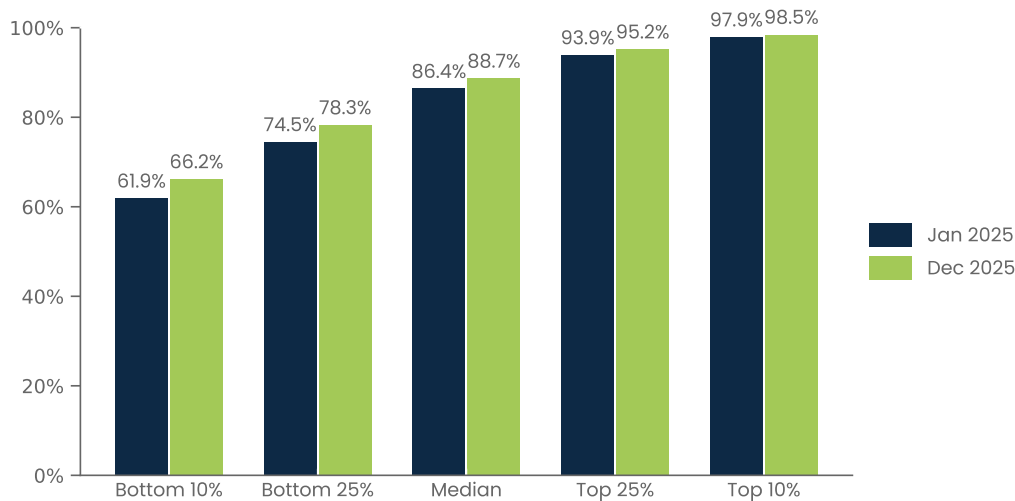
Tour growth outpaces new lead growth, signaling that communities are focusing on improving conversion, vs. relying on lead volume to drive occupancy growth.

# Occupancy

## INDUSTRY OCCUPANCY OVER TIME



## INDUSTRY OCCUPANCY PERCENTILES



Note: WelcomeHome industry benchmark data does not include lease-up communities. Occupancy percentiles are based on end-of-month performance.

### 2025 YEAR IN REVIEW

## Key Takeaways

- Average occupancy for the industry has **continued to climb year-over-year** – maintaining momentum from the prior two years.
- Half of communities on WelcomeHome have an **occupancy of 89% or more**, with the **bottom 10% showing the most improvement**.
- Strategic goals for 2026 will differ for communities that are aiming to grow their occupancy vs. keeping their buildings full.

### OCCUPANCY GAINS:

**+2.2pt**

SINCE JAN '25

**+4.0pt**

SINCE JAN '24

## Best Practices

- Set community goals according to each community's specific strengths and challenges, and use with your region or care type metrics for more accurate benchmarking.
- For even closer comparisons and regional care type metrics – check out WelcomeHome's new Senior Care Insights report, State & Market Benchmark.



# Sales Activities

## SUCCESSFULLY COMPLETED ACTIVITIES FOR PROSPECTS WHO MOVED IN DURING 2025

Length of sales cycle can depend on a variety of factors such as care type, regional location, and prospect-specific factors. For more granular benchmarks on the sales cycle, see the **Care Type** sections later in the report.

### INQUIRY

### CONNECTION

### TOUR

### MOVE-IN



#### Pre-Tour Insights

Speed to Lead:

**1HR & 15MINS**

Half of connected prospects are contacted within an **hour and 15 minutes**. This is a **20 minute improvement compared to 2024**.

Time to Tour:

**4 DAYS**

**About half of prospects schedule a tour within four days of their inquiry.** Some tour as quickly as one day, while others take two weeks or longer.

#### Post-Tour Insights



**Half of prospects move-in within 25 days of their tour.**

- The fastest 25% move-in within ~10 days.
- The slowest 25% take 2+ months.
- Prospects are touring earlier than in 2024, but moving in later after the tour.
- Post tour follow-up is now table stakes, increasing likelihood and speed of move-in.

Touchpoints:



2 Calls



2 Emails



1 Text



5 Calls



3 Emails



3 Text



1 Retour



1 Follow-Up

Pre-tour: ~5 touches

Post-tour: ~13 touches

Note: This data reflects activities for prospects who moved in during 2025, and only completed and successful activities are included in the counts.

# Lead Source Analysis

## 2025 INDUSTRY LEAD SOURCE KEY PERFORMANCE INDICATORS

	% of Total Inquiries	Change from '24	% of Total Move-ins	Inquiry to Connection	Inquiry to Tour	Tour to Move-in	Inquiry to Move-in	LOSC (median)	LOS (median)
Advertising	3%	↑	2%	88%	31%	22%	7%	74	717
Aggregator	33%	↓	16%	73%	16%	25%	4%	36	334
Call/Drive-by	6%	=	14%	78%	63%	34%	22%	31	369
Local Agency	3%	↑	7%	67%	56%	39%	22%	18	236
Online	44%	↑	30%	77%	23%	26%	6%	40	336
Referral (Non-professional)	3%	=	11%	77%	73%	43%	31%	33	462
Referral (Professional)	4%	↑	12%	72%	55%	52%	29%	17	316
All Lead Sources	—	—	—	75%	28%	32%	9%	31	381

Note: Length of Sales Cycle (LOSC): Days between active inquiry and initial tour or move-in.  
 Length of Stay (LOS): Calculated as days in community, not unit or care type.  
 Other lead sources include word of mouth and other (uncategorized).

## Key Takeaways

- The share of inquiries from aggregators continues to drop from 2024 levels, with 25% of communities shifting away from their use entirely.



Check out WelcomeHome's Q3 2025 Data Drop for more information on this growing trend, and when it does, or doesn't, make sense for your communities.

- Alternative sources like online marketing and professional referral networks have grown: a sign that communities are investing a larger presence in directly managing their online and business community brand.

## Best Practices

- To help gauge lead source ROI, leverage the Move-Out Reasons Report grouped by source. Examine which sources produce higher lengths of stay (LOS) and which sources may be contributing a high proportion of move-outs.



## See the Full Story Behind the Data

This sample is just a snapshot.

With Senior Care Insights, you get the complete, across markets, states, and the entire industry, so you can benchmark performance, spot trends early, and act with confidence.

Unlock deeper visibility into:

- ✓ Occupancy and market trends
- ✓ Lead, funnel, and conversion performance
- ✓ Competitive benchmarks across thousands of communities
- ✓ Research focused specifically on sales and marketing strategy and customer

Make faster, smarter decisions backed by real data, not guesswork.

Subscribe to access the full report and ongoing insights

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