2025 State & Market Benchmark

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.**

Now, in our fourth year of delivering industry-leading insights to senior care, we're responding to what you asked for:

More insight. Easier access. Clearer guidance.

Our State & Market Benchmark Report marks the launch of Senior Care Insights, a data subscription for senior living sales & marketing leaders.

Inside, you'll find Industry reports, virtual events, and insights tailored to your business:

- Top performer analysis and strategy.
- Perspectives from industry leaders and essential conversations on strategy.
- Intelligence for operators, consultants, and capital partners across their specific use cases.

Be part of what's next. Send your ideas, needs, and perspectives to insights@welcomehomesoftware.com.

Data Made Easy. Made for You.

InsightsWHS.com

Table of Contents

02 | About WelcomeHome & Senior Care Insights

04 | Best Practices for Using This Report

06 | Geographic & Care Type Benchmarks

07 | Geographic & Care Type Occupancy

08 | Performance by Region

10 | Midwest

13 | Northeast

16 | South

19 | West

21 | State & Market Rankings

22 | U.S. Occupancy by State

23 | U.S. Occupancy by Market

24 | State Deep Dive

25 | How to Use This Section

27 | State Profiles

69 | Methodology

71 | Thank You

Best Practices for Using This Report

Use this data to benchmark your performance, set realistic goals, and identify growth opportunities.

Sales & Marketing Leaders

Use this report to:	Pages to highlight:	Take action:
• Compare your portfolio against industry benchmarks to identify wins and gaps. • Prepare for investor meetings with credible, data-backed insights. • Set performance-based KPIs with leadership and regional teams. • Apply demographic and state-level analysis to your strategy.	• Regional & Care Type Occupancy Over Time: • Regional & Care Type Sales Funnel and Conversions: 10, 13, 16, 19 • State Performance Comparison Tables: 11, 14, 17, 20	• Train teams on strategies tailored to your community's specific market realities. • Set sales goals that reflect local market benchmarks. • Report portfolio performance against market competition.

Regional Leaders

Use this report to:	Pages to highlight:	Take action:
• Set community goals using data-driven benchmarks by region and care type. • Understand your competitive landscape with state and market metrics. • Track training impact against specific benchmarks.	• State Performance Comparison Tables: 11, 14, 17, 20. • State Sales Performance & Demographic Deep Dives: 25-68. • Market Occupancy Rankings: 23.	• Prioritize training based on opportunities highlighted by market benchmarks. • Set and track goals aligned with your community's context.

Best Practices for Using This Report

Sales Directors & Community

Use this report to:	Pages to highlight:	Take action:
• Set ambitious, achievable goals that outpace your peers. • Understand market dynamics and adapt your sales strategy.	• State Sales Performance & Demographic Deep Dives: 23. • Market Occupancy Rankings: 23.	• Identify where you outperform and underperform market benchmarks. • Focus daily sales efforts on high-opportunity areas • Align tactics with local market realities.

Investors

Use this report to:	Pages to highlight:	Take action:
• Compare care type performance across regions to guide investments. • Benchmark portfolio communities against state market data. • Build understanding of demographic and sales trends by market.	• Regional & Care Type Sales Funnel and Conversions: 10, 13, 16, 19. • State Occupancy Rankings: 22. • Market Occupancy Rankings: 23. • State Performance Comparison Tables: 11, 14, 17, 20. • State Sales Performance & Demographic Deep Dives: 25-68.	• Identify high-opportunity markets through state comparisons. • Leverage occupancy rankings and demographics to find competitive versus underserved regions.



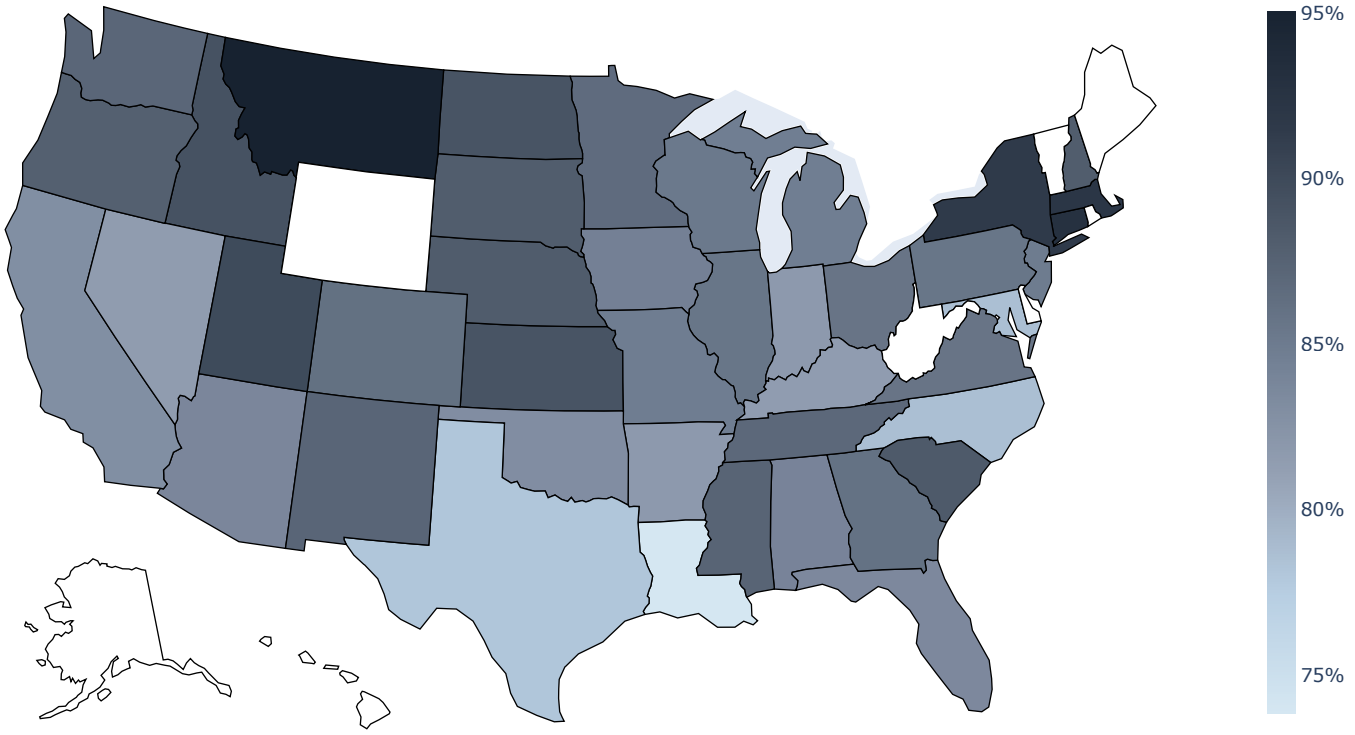
For teams looking for more, our Enterprise subscription to Senior Care Insights unlocks expanded access to downloadable industry and market data to integrate into your tools and dashboards.

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Geographic & Care Type

Geographic & Care Type

End of Year Occupancy

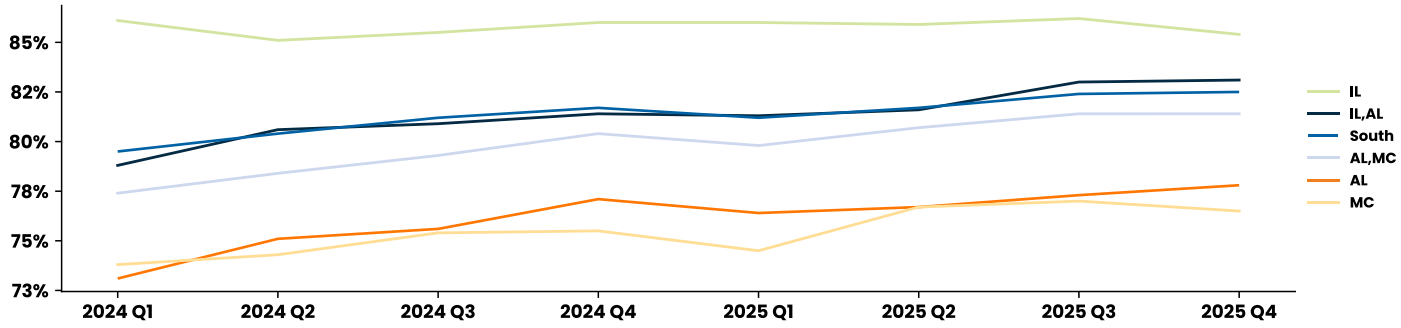


Region	All Care Types	IL	IL,AL	AL	AL,MC	MC
Midwest	85.4%	86.3%	82.8%	84.3%	84.3%	83.4%
Northeast	88.6%	91.2%	92.1%	83.5%	88.1%	92.6%
South	82.7%	85.7%	83.0%	77.7%	81.4%	76.3%
West	85.7%	85.5%	87.1%	85.2%	85.0%	83.2%

Note: The state map and region by care type table represents year end occupancy (Dec. 2025). States in white represent states with too small a sample size to include (<6 communities from multiple independent operators)

Performance by Region
South

South Occupancy Over Time



South Sales Performance

Care Type	Avg. Occupancy	New Inquiries	Connections	Initial Tours	Retours	Move-Ins	Move-Outs
South Avg.	**82.0%**	**40**	**30**	**10**	**3.1**	**3.3**	**3.0**
IL	85.9%	43	40	9.3	3.6	2.4	2.3
IL,AL	82.3%	30	14	8.7	3.1	2.5	2.4
AL	77.0%	33	25	7.2	1.9	3.1	2.9
AL,MC	80.8%	46	32	12	2.7	4.2	3.6
MC	76.2%	36	29	10	2.1	4.6	4.1

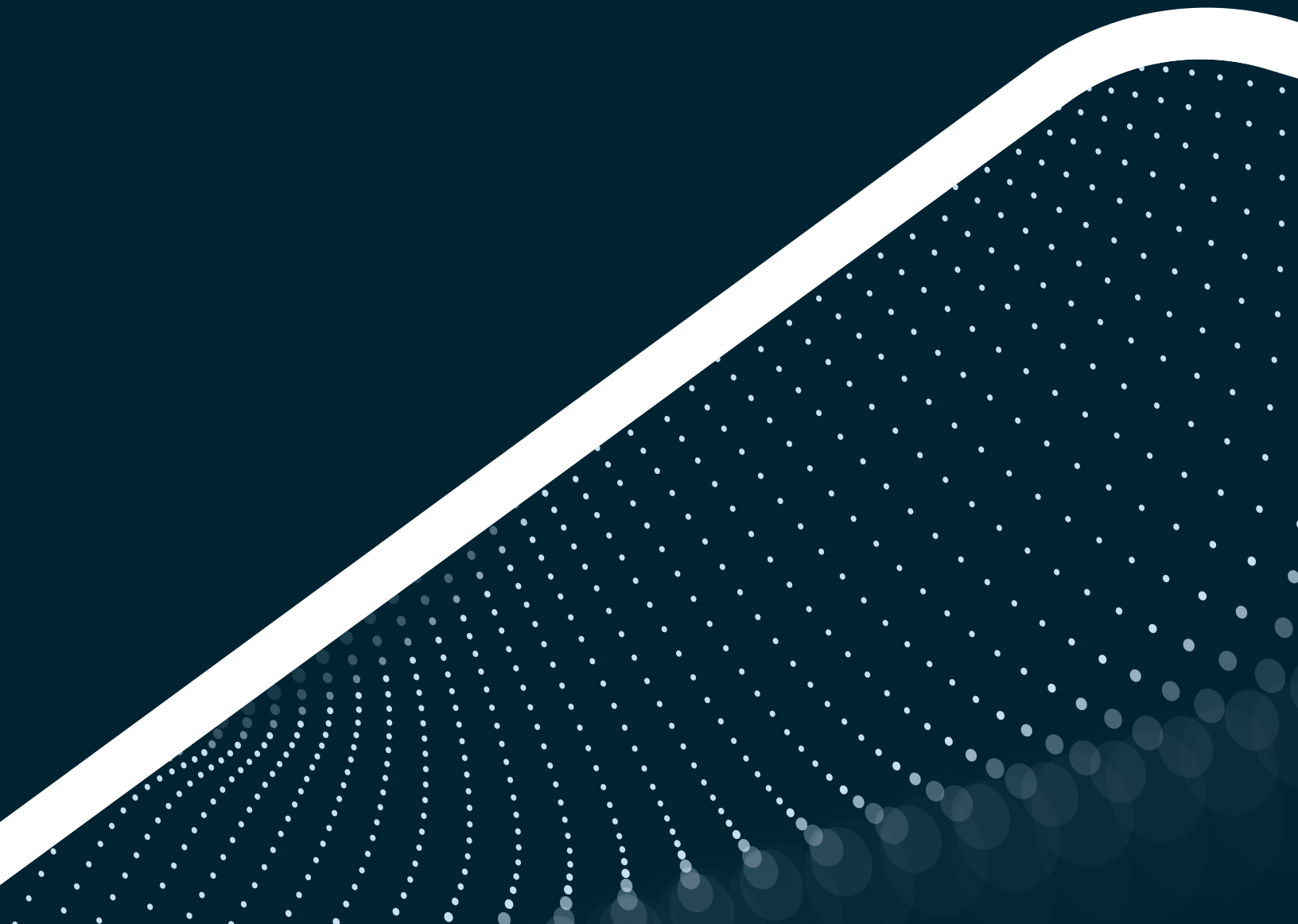
South Conversions

Care Type	Avg. Occupancy	New Inquiries	Inq > Connection	Connection > Tour	Inq > Tour	Tour > Move-in	Inq > Move-In
South Avg.	**82.0%**	**40**	**74.7%**	**33.8%**	**25.2%**	**33.0%**	**8.3%**
IL	85.9%	43	91.6%	23.6%	21.6%	25.9%	5.6%
IL,AL	82.3%	30	47.1%	61.4%	28.9%	28.3%	8.2%
AL	77.0%	33	76.8%	28.9%	22.2%	43.3%	9.6%
AL,MC	80.8%	46	70.2%	35.8%	25.1%	36.2%	9.1%
MC	76.2%	36	82.3%	35.8%	29.2%	44.8%	13.1%

Note: Metrics are scaled to reflect a 100 unit community. They reflect the monthly average over 2025.

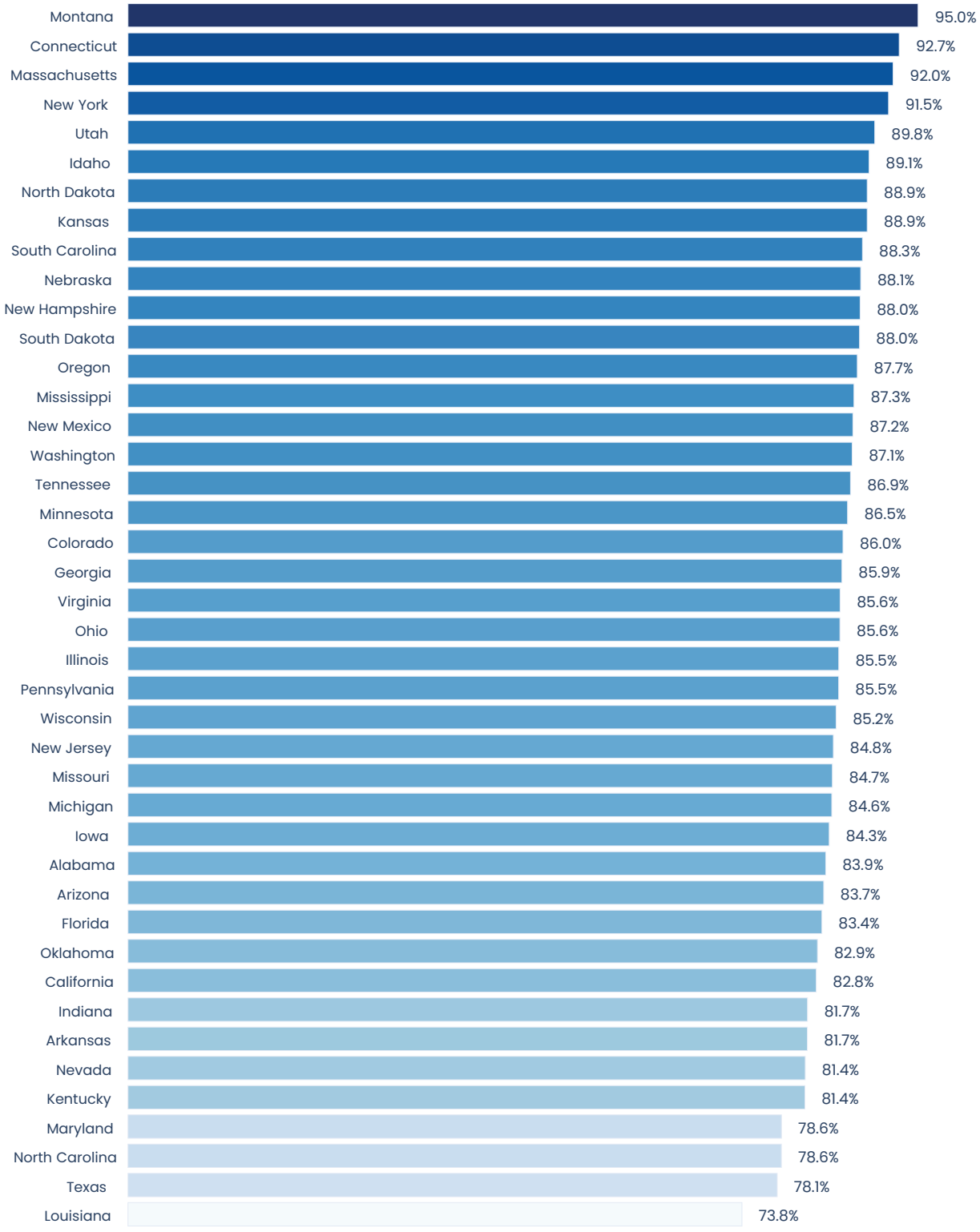
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State & Market Rankings



State & Market Rankings

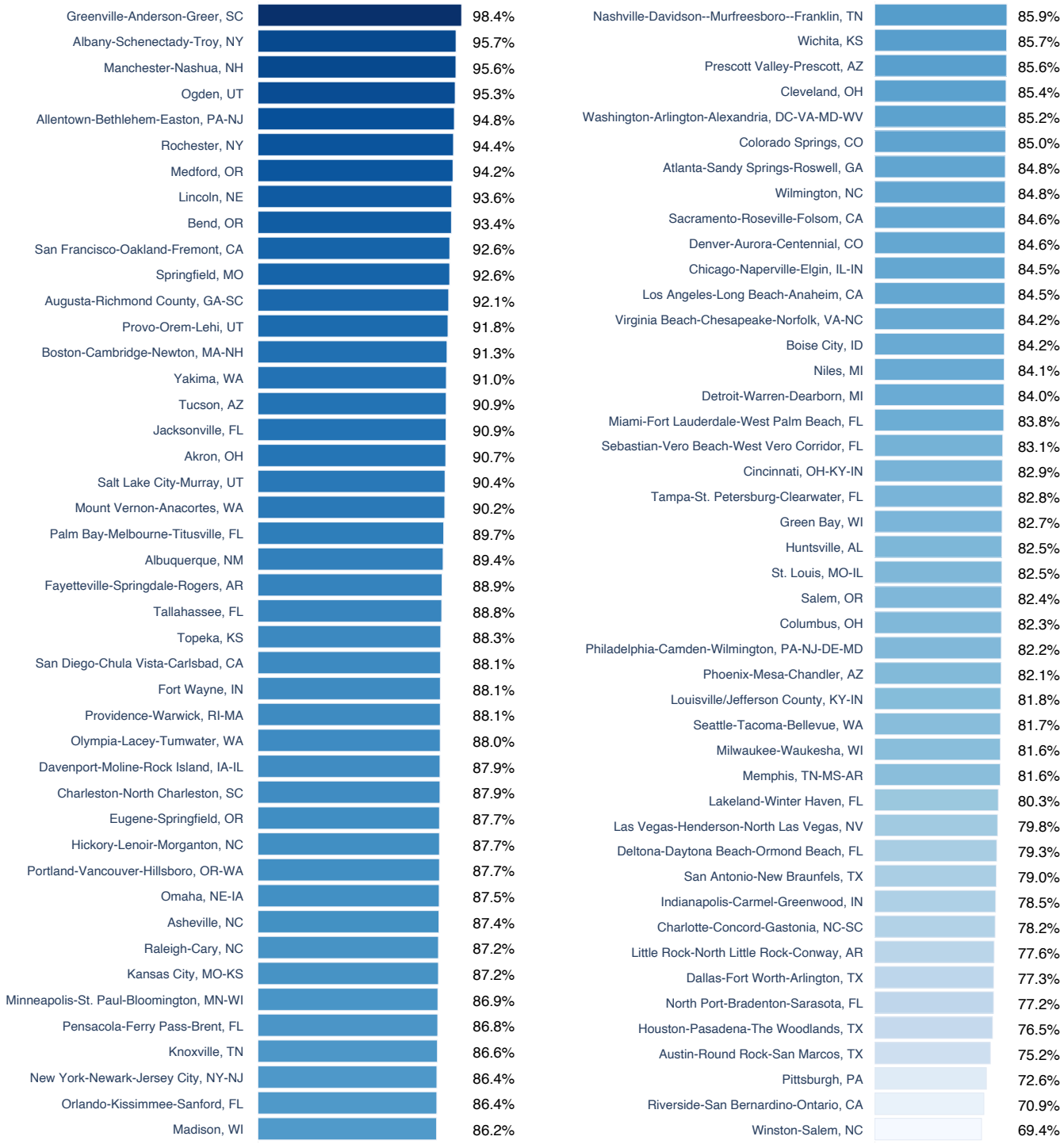
U.S. Occupancy by State



Note: Metrics represent year end occupancy (Dec. 2025); to be included states must have at least 6 communities from independent operators

State & Market Rankings

U.S. Occupancy by Market



Note: Metrics represent year end occupancy (Dec. 2025); to be included states must have at least 6 communities from independent operators

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State Deep Dive

The State Deep Dive breaks down WelcomeHome's industry-leading metrics at the state level, combined with relevant population and economic data. This section helps you build strategies tailored to your state's unique dynamics.

The following explains how to interpret the data and use it strategically.



For teams looking for more, our Enterprise subscription to Senior Care Insights unlocks expanded access to downloadable industry and market data to integrate into your tools and dashboards.

A Guide to the State Deep Dive

This page provides the framework to understand the data in the upcoming section, and more importantly, lays out suggestions for how you can use the data strategically.

Fast Facts: Fast facts provide relevant population and economic metrics (ranked amongst the states) to put a state's senior living metrics in context.

Population

Population metrics are a reference point considering the size of the senior population.

Population 65+

The share of the population who may be influencers now, and potential prospects in the next 10-20 years. A stronger share may indicate higher demand.

Population 85+

The closest representation of our target market. A stronger percentage of seniors in a state indicates a bigger opportunity for senior living communities.

Population 65+ w / Disability

An indicator of relative care needs beyond age. High rates of chronic disease and disability in a state may represent a greater need for higher care options.

Population Veteran

Veterans' benefits can support seniors in pursuing senior living. A state with a stronger share of veterans highlights an opportunity for marketing to this specific group.

Population Born in State

Cross-state mobility impacts senior living sales. States with a higher population born in-state may indicate more familial support in decision-making. Alternatively, a low share born in the state indicates there is more appetite to move closer to family

Median HH Income (Overall, Retirement & Social Security)

Household (HH) income is an indicator of ability to pay and relative affordability for senior living. This contextualizes how seniors may consider their broad budget.

Median Monthly Mortgage & Median Gross Rent

A comparison point for senior living unit pricing. These numbers contextualize whether senior living is perceived as expensive.

Unemployment Rate

The unemployment rate gives an indication of the availability of talent in operating a senior living community.

Performance & Conversion Metrics

State-level metrics provide a high-level view of performance trends across markets, helping teams understand how demand, seasonality, and conversion dynamics vary by region.

Use these insights to:

- ✔ Identify which states are outperforming or lagging at key stages of the funnel
- ✔ Compare individual community performance against relevant geographic benchmarks
- ✔ Set realistic goals, train teams, refine strategy, and allocate resources effectively

State Deep Dive

Georgia

Fast Facts (Population)

Population: 11,180,878
Population 65+: 1,766,579 (15.8%)
Population 85+: 156,532 (1.4%)
Population 65+ w/ Disability: 582,971 (33.0%)
Population Veteran: 604,059 (5.4%)
Population Born in State: 5,892,323 (52.7%)

Fast Facts (Economics)

Median HH Income: $79,991 | Rank: 23rd
Mean HH Retirement Income: $30,843 | Rank: 26th
Mean HH Social Security Income: $24,081 | Rank: 40th
Median Monthly Mortgage: $1,909 | Rank: 21st
Median Gross Rent: $1,506 | Rank: 18th
Unemployment Rate: 4.7% | Rank: 16th

Metric	2024 Avg	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025 Avg	YoY (Raw)	YoY (%)
Occupancy	82.2%	83.8%	85.2%	85.8%	85.7%	85.1%	+2.9%	+3.5%
New Inquiries	48	51	45	50	43	47	-1.0	-2.1%
Connections	-	38	35	38	32	36	-	-
Initial Tours	11	12	11	12	10	11	0.0	0.0%
Retours	3.6	4.8	4.1	4.1	3.1	4.0	+0.4	+11.1%
Move-Ins	3.3	3.2	3.3	3.3	3.1	3.3	0.0	0.0%
Move-Outs	3.1	3.3	2.8	2.8	2.7	2.9	-0.2	-6.5%
Inq > Connection	-	75.8%	76.8%	76.9%	74.7%	76.1%	-	-
Inq > Tour	23.5%	23.8%	24.0%	23.7%	23.3%	23.7%	+0.2%	+0.7%
Connection > Tour	-	31.4%	31.2%	30.8%	31.2%	31.1%	-	-
Tour > Move-In	30.0%	26.9%	30.5%	28.4%	31.4%	29.3%	-0.7%	-2.3%
Inq > Move-In	7.0%	6.4%	7.3%	6.7%	7.3%	6.9%	-0.1%	-1.7%

Note: Rank in the Economic Fast Facts section is across all 50 states; states with larger metric values receive higher ranks (closer to 1). Source: American Community Survey (ACS), U.S. Census Bureau. Metrics are scaled to reflect a 100 unit community; They reflect the monthly average over the time period. Connections tracking started in December of 2024 so they are not included in the report.

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Access Benchmarks and Insights

Get free access to core reports and insights. You can upgrade anytime to access additional datasets, state and market-level benchmarks, and top-performer analysis.

TIERS	BASIC	RESEARCH TEAM	ENTERPRISE
User Access Unlock the right tier for your team	1	1-5	Unlimited
Quarterly Benchmarks Quarterly updates on key metrics and proven strategies	✓	✓	✓
Monthly Benchmarks Newsletter Benchmarks and new insights delivered to your inbox	✓	✓	✓
Insights Webinars Access training and best practices anytime	✓	✓	✓
Year in Review The industry's annual sales and marketing report	✓	✓	✓
Top Performers Report Adopt strategies from top-performing communities	✗	✓	✓
Voice of the Industry Sales and marketing strategies and perspectives, backed by data	✗	✓	✓
Voice of the Senior Insights into how seniors view and choose care	✗	✓	✓
Industry Data Access Integrate industry data into your tools and dashboards	✗	✗	✓
Pricing	Free	$1500 / year	$6000 / year
	SIGN UP	SIGN UP	SIGN UP

Data Made Easy. Made for You.

Senior Care Insights is WelcomeHome's market intelligence platform for senior living sales and marketing leaders. Benchmarks, research reports, and virtual events, built from real activity across more than 5,000 communities.

Subscribe

Connect directly with our team bella.vranesevich@welcomehomesoftware.com

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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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