WelcomeHome
Senior Care Insights

2026
Voice of the Industry

InsightsWHS.com

Table of Contents

Table of Contents

GET MORE FROM THE VOI REPORT

Upload this report to your favorite AI tool to summarize findings, compare trends, generate executive-ready takeaways, and answer questions specific to your organization. Download our ***AI for Insights: Prompt Guide*** to get started. You'll find it in the Resources tab!

About SCI

Senior Care Insights (SCI) is WelcomeHome's market intelligence platform, built from real CRM activity across more than 2,000 senior living communities. Now in its fourth year, SCI transforms millions of day-to-day sales interactions into benchmarking, research, and actionable insights for senior living operators.

The foundation of SCI is the Quarterly Benchmark Report, published four times each year. Every report includes a consistent set of core performance metrics like occupancy, sales funnel performance, conversion rates, sales cycle, lead sources, and sales activities. Each benchmark report also offers a Data Drop, which is featured analysis that explores a timely industry topic in greater depth.

Beyond the quarterly benchmarks, SCI publishes additional research throughout the year, including the Year in Review (Q1), State and Market Benchmark (Q1), Top Performers Report (Q2), Voice of the Industry (Q3), and Voice of the Senior (Q4).

At the beginning of each month, SCI also releases downloadable Excel datasets in our platform, giving subscribers direct access to aggregated performance data for their own analysis and reporting.

Whether you're benchmarking your performance against the industry, identifying opportunities for improvement, or validating strategic decisions with data, SCI is designed to help you make more informed decisions with confidence.

Ready to explore the latest senior living benchmarks and research? Sign up for a free SCI account at InsightsWHS.com.

Have questions or feedback? We'd love to hear from you at insights@welcomehomesoftware.com.

About the Voice of the Industry

The Voice of the Industry (VOI) is the inaugural edition of Senior Care Insights' large-scale study of senior living sales and marketing. This report connects what leaders say they're doing with what the data shows is actually working. VOI captured responses from 600+ sales and marketing leaders across Sales Directors, Executive Directors, Regional Directors, and executive leadership, representing perspectives from frontline execution, portfolio oversight, and strategic decision-making. By pairing those responses with CRM performance data from participating organizations, this report uncovers patterns between leadership strategy and operational outcomes that traditional industry research cannot reveal on its own.

How to use this report

VOI is not intended to tell every organization what to do. Use the findings alongside your own goals, market conditions, staffing model, and performance data to determine what makes sense for your organization.

Some sections serve as comparison tools, helping you understand how peers approach similar challenges. Others function more like practical playbooks, offering ideas for your team.

- Bring findings into executive meetings, coaching sessions, and one-on-ones
- Compare your team's priorities with those of similar organizations
- Explore areas where leadership priorities and frontline execution may not be fully aligned
- Use the findings to identify opportunities for coaching, process improvement, and strategic planning
- Return to VOI when evaluating a new challenge or organizational change

In many cases, VOI will raise as many valuable questions as it answers. That is intentional. Its purpose is to help leaders ask better questions, have more informed discussions, and make decisions grounded in real operational patterns, not to prescribe a one-size-fits-all solution.

Why this report is different

Most industry reports fall into one of two categories:

- Industry perspectives (qualitative) capture what leaders are thinking, prioritizing, and experiencing through surveys, interviews, and open-ended feedback.
- Performance benchmarks (quantitative) measure operational results through metrics like occupancy, conversion rates, sales activity, and response times.

VOI brings both perspectives together to explore the relationship between leadership decisions and operational performance in a way neither approach can achieve alone.

The two questions this report answers

1. **What are senior living organizations doing today?** How are sales and marketing leaders responding to today's challenges? How are they structuring teams, investing in technology, allocating time, coaching performance, and prioritizing their efforts?
2. **How do those decisions and actions relate to performance?** Which reported behaviors are associated with stronger outcomes? Where do high-performing communities differ, and what patterns emerge when leadership perspective meets performance data?

How survey data and CRM data work together

Because participating organizations use WelcomeHome CRM, we can see not just what leaders report, but how those strategies perform in practice.

- **Survey data** reveals what leaders are doing, observing, and prioritizing: the strategies, beliefs, and challenges shaping decision-making across the industry.
- **CRM data** measures the outcomes of those decisions through occupancy, conversion rates, sales cycle length, response times, and other operational metrics.

Together, this pairing identifies meaningful patterns: how team structure correlates with performance, whether technology investments show measurable ROI, and how time allocation differs between high-growth and struggling communities.

What this report provides

The Voice of the Industry is designed to provide a comprehensive view of senior living sales and marketing across every level of the organization.

Because Executive Leaders, Regional Directors, Executive Directors, and Sales Directors each play a different role in driving occupancy and performance, the survey was intentionally tailored to capture the unique responsibilities, priorities, and challenges of each audience. Rather than asking every participant the same questions, the study follows the progression of sales leadership, from industry trends and executive priorities to regional coaching, frontline sales execution, and the operational outcomes that connect them.

Throughout the report you'll discover:

- How senior living organizations are responding to today's sales and marketing challenges.
- How priorities differ across executive, regional, and community leadership.
- Which leadership behaviors, coaching practices, and sales strategies are associated with stronger performance.
- Where alignment, or disconnects, exist between executive strategy and frontline execution.

TAKE YOUR ANALYSIS FURTHER WITH AI

Senior Care Insights reports contain hundreds of data points and actionable insights. Upload a report to your preferred AI tool to explore the findings through the lens of your organization's goals, metrics, and priorities. Generate executive summaries, identify trends, compare performance, and answer the questions that matter most to your team. Download our ***AI for Insights: Prompt Guide*** to get started. You'll find it in the Resources tab at InsightsWHS.com.

VOI Executive Summary & Key Themes

Senior living leaders are optimistic about the future, but they're leading through one of the most complex operating environments the industry has faced. Drawing on responses from 600+ sales and marketing leaders, this report traces the connections between leadership priorities, team execution, and sales performance. Together, these findings provide a snapshot of where the industry stands today and where the greatest opportunities for the future appear to lie.

External pressures and change shape the environment, but execution shapes performance.

Economic conditions, competitive pressure, and shifting buyer behavior are felt across the industry, and organizational change is widespread (80% saw portfolio shifts this year). Yet similar conditions produce different outcomes. The difference isn't the environment, but whether an organization has a well-defined process that starts at the top and is carried through in everyday sales practices.

Organizational continuity creates a stronger foundation for execution.

Leadership tenure correlates directly with occupancy. Teams with 6+ years of experience on average achieve a median occupancy, versus94.3% versus 82.9% for new teams (< 1 year). Organizational knowledge matters more than industry experience. Communities benefit when knowledge, processes, and collaboration are built intentionally and strong enough to withstand staffing changes.

Leadership priorities don't always translate into coaching priorities.

Leadership sets priorities and tracks metrics, and regionals are meant to coach around both those priorities and team-specific context, like where sales teams feel least confident. That connection isn't always consistent: Closing receives substantial coaching attention, yet confidence remains at 65%. Referral outreach, where confidence is lowest at 27%, receives comparatively little coaching.

More effort doesn't guarantee better results, intentional strategy does.

Communities that work hardest aren't always the ones converting best. Some personalize tours at high rates without the strong discovery and relationship-building that makes personalization as effective. Others invest heavily in referral outreach but see comparable results to those spending less time and effort. Strategy, not volume alone, drives outcomes.

The gap between priorities and practice shapes performance.

Leaders across the industry share similar priorities, metrics, and technology investments. Where performance can diverge is in translating those priorities into day-to-day practice, whether between what's measured and what's coached, coaching and team capability, or design and a process that holds together consistently. Finding your gaps and consistently working to close them is key.

600+	**150+**	**3,400+**	**92%**
Sales & Marketing Leaders Surveyed	Senior Living Operators Represented	Senior Living Communities	Optimistic About the Future of Senior Living

Who Participated in VOI 2026

Responses from senior living professionals across 150+ operators managing roughly 3,400+ communities in the U.S. and Canada, spanning executive leadership, regional directors, Executive Directors, and frontline sales.

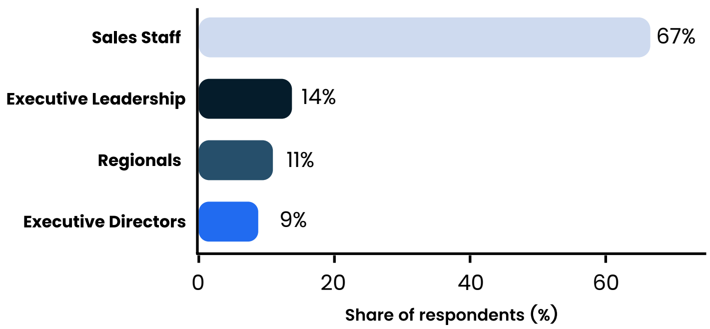
600+ RESPONDENTS

150+ OPERATORS

3,400+ COMMUNITIES

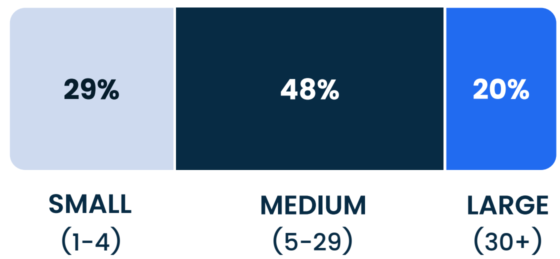
ABOUT THE PEOPLE

Executive Directors were included only when primarily responsible for sales at their community. Sales Staff includes Sales Directors, Sales Specialists, Sales Counselors, and other related positions.



ABOUT THE OPERATORS

Operator size by # of communities reflects all 150+ operators represented in the sample.

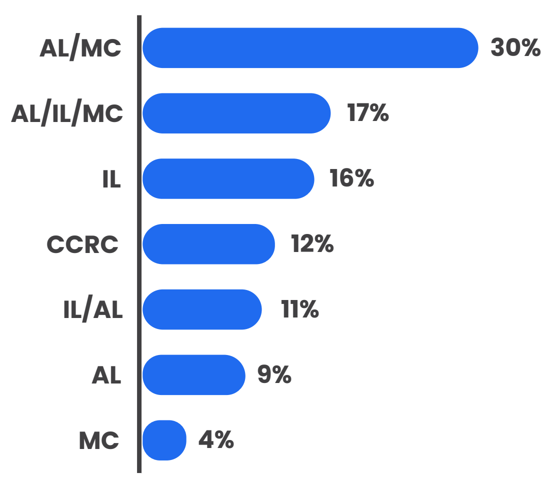


3% of operators with unknown size

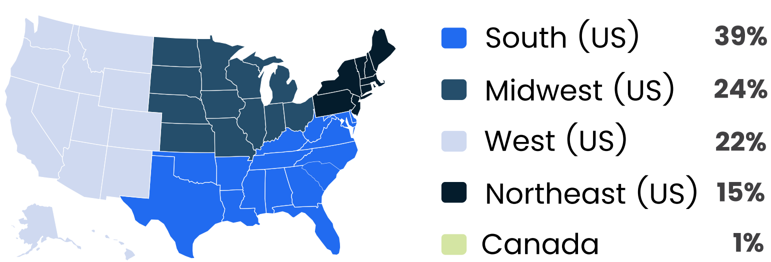
ABOUT THE COMMUNITIES

Community characteristics reflect the 350+ communities represented by sales staff or executive directors.

CARE TYPES



REGIONAL SPREAD



MEDIAN OCCUPANCY

AVERAGE OCCUPANCY

Industry Sentiment

Optimism about the industry's future is widespread, but not evenly distributed.

92% of respondents feel positive, driven by aging boomers, rising demand, and shifting perceptions of senior living. But it holds unevenly: executive and regional teams sit highest (95%/94%), while sales staff and EDs closest to prospects come in lower (91%/89%). They see the long-term opportunity, but they're also managing families who can't afford the community and residents arriving with more needs than the setting was designed for.

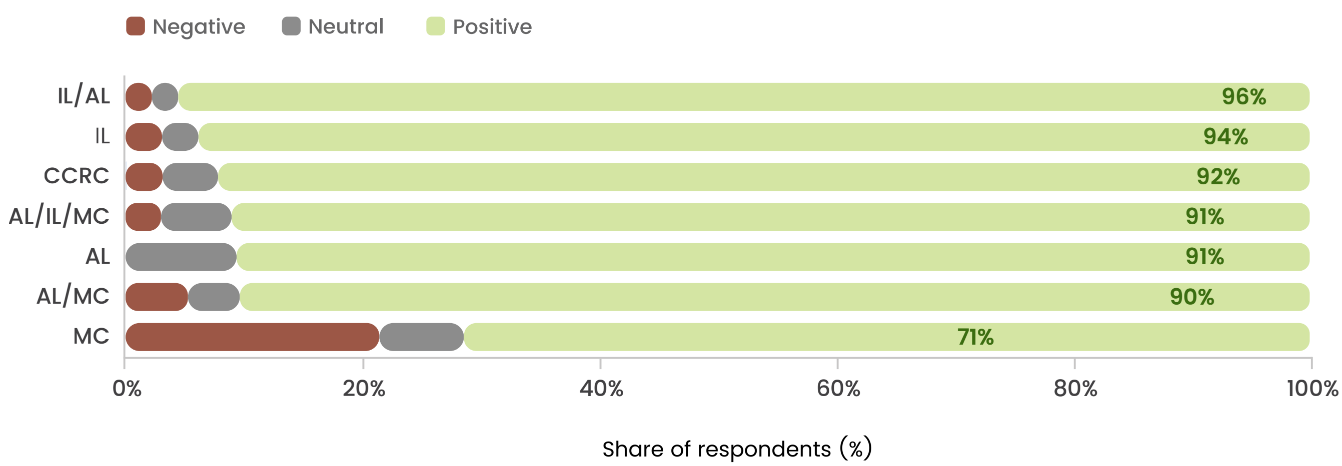
SENTIMENT BY ROLE

ROLE	POSITIVE	NEUTRAL	NEGATIVE
Executive Leadership	95%	3%	2%
Regionals	94%	2%	4%
Sales Staff	91%	4%	4%
Executive Directors	89%	7%	5%
All Roles	92%	4%	4%

Care type tells a sharper story. Among IL/AL communities, 96% of respondents are optimistic. Among memory care–only communities, it drops to 71%. The operational weight of MC, higher acuity, workforce intensity, access barriers, shows up in how teams see the road ahead.

SENTIMENT BY CARE TYPE

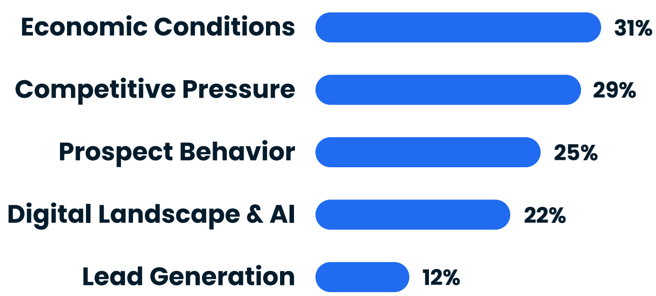
Includes sales staff and executive directors only



Factors Shaping Sales and Marketing Strategy

EXTERNAL CHALLENGES

In their own words, executive leadership cited economic conditions, competitive pressure, and prospect behavior as the external factors most often shaping sales and marketing strategy today. Prospects are waiting longer, arriving at higher acuity, reducing length of stay. How prospects search for and make decisions on communities has changed as well.



Share of respondents mentioning theme (%)

> *Economic conditions limit the size of our organization; construction costs are high, and capital for new construction is difficult to find. We have more active adult/independent living options to compete with, and we are seeing our residents have a higher acuity than previously.*
>
> *- C-suite executive with responsibility for sales and marketing*

INTERNAL CHALLENGES

Internally, workforce and staffing were mentioned by 37% of executive leaders, a two-part story of finding the right people and keeping them. That instability has direct downstream impact. Process inconsistency at 33% is partly a staffing symptom. **Turnover on teams makes it more difficult to set and maintain consistent processes.**

Share of respondents mentioning theme (%)

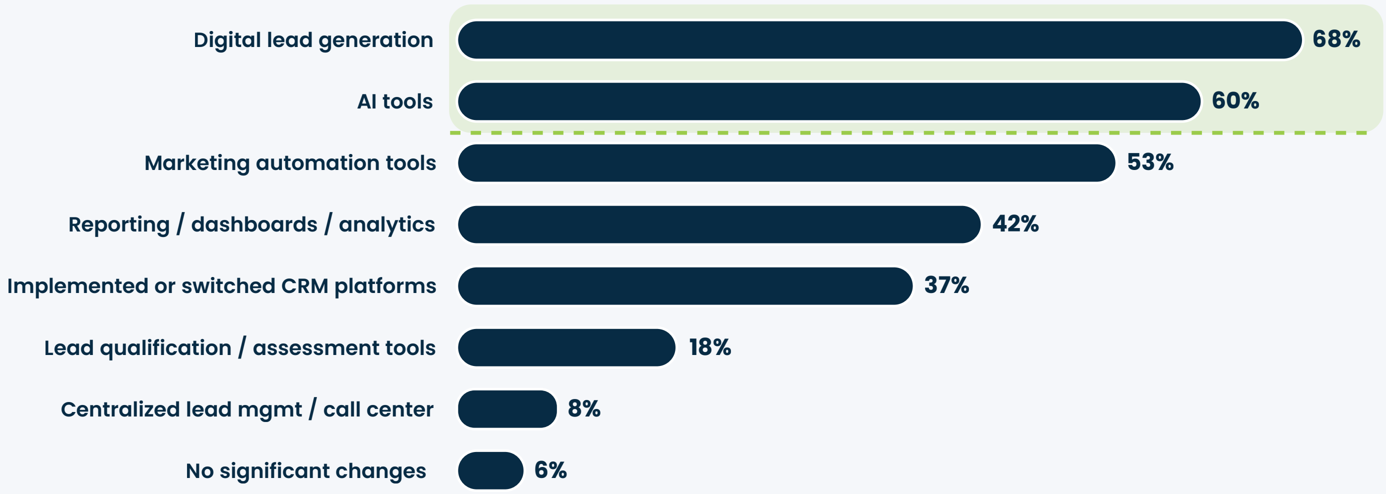
> *Our biggest challenge is process consistency and team alignment across a growing portfolio. As we continue to scale, we have more moving parts. We have to create clearer, more consistent systems and stronger alignment between sales, marketing, operations, and technology — while still allowing each community to maintain its unique local identity.*
>
> *Vice President of Marketing*

Technology showed up at 19% internally and 22% externally. Inside, the challenge is operational, keeping up with new tools, technology and scaling systems. Outside, it's reshaping how prospects find and evaluate communities before making contact.

Technology Investments

Technology investment and changes were nearly universal in the past year. Only 6% of Executive Leadership respondents reported no significant tech changes. The rest were actively building, switching, or expanding their technology strategies while also managing portfolio changes, workforce pressure, and a shifting prospect landscape.

TECH INVESTMENTS IN THE PAST YEAR



Increased investment in digital lead generation, including paid search, SEO/AEO, and digital campaigns, led investments at 68%. This reflects the findings throughout this section, where lead generation and digital strategy consistently emerge as top priorities as operators adapt to changing prospect search behaviors.

More than half expanded use of AI tools in sales and marketing at 60%, and marketing automation followed at 53%. Together, these both help operators engage prospects earlier, respond more quickly, and support a buying journey that increasingly begins online.

The investments are happening, but the results are still taking shape.

IN YOUR OWN WORDS

"Continue on our AI journey to make our sales team members roles easier, make them more productive, and increase their effectiveness through use of AI."

C-suite executive

"AI is playing a big role in how we operate as a sales and marketing department. It is impacting a variety of facets including streamlining workflows, and allowing a smaller department to do more."

Vice President of Sales and Marketing

Team Structures

Who is on the sales team matters, but so does the team structure. 49% of operators still rely on a single-person sales team per community, while 32% use multi-person coverage. The remaining 14% report structures that vary across their portfolio or use other models. Only 4% use centralized approaches like cluster selling, where one sales director covers multiple communities. The performance data tells a clear story about what these structural differences mean in practice, and where each excels and where gaps are. Community size shapes these team size choices. Single-person teams operate in communities with a median of 92 units, while multi-person teams are in communities with a median of 147 units.

SINGLE- VS. MULTI-PERSON SALES TEAMS

Single-Person	vs	Multi-Person
92	Median Units per Community	147
88.3%	Median Occupancy	92.7%
36.9	Inquiries per 100 units	25.7
30%	Inquiry → Tour Rate	45%
10.2	Tours per 100 units	10.5
34%	Tour → Move-in Rate	28%
3.2	Move-ins per 100 units	2.8
9%	Inquiry → Move-in Rate	12%
38 min	Speed to Lead (STL)	21 min

Multi-person team leads   Single-person team leads   *Unshaded rows show scale/volume context, not a better-or-worse outcome.*

Single-person teams: the back half of your funnel is working. The opportunity is in the front, converting more inquiries to tours so that closing strength compounds.

ACTION ITEM

Tracking when inbound inquiry activity is highest and scheduling tours and business development around it can support better front-of-funnel results.

Multi-person teams: watch the tour to move-in rate. Handoffs break the trust a prospect built with their first contact. Protect continuity through the back half of the funnel.

ACTION ITEM

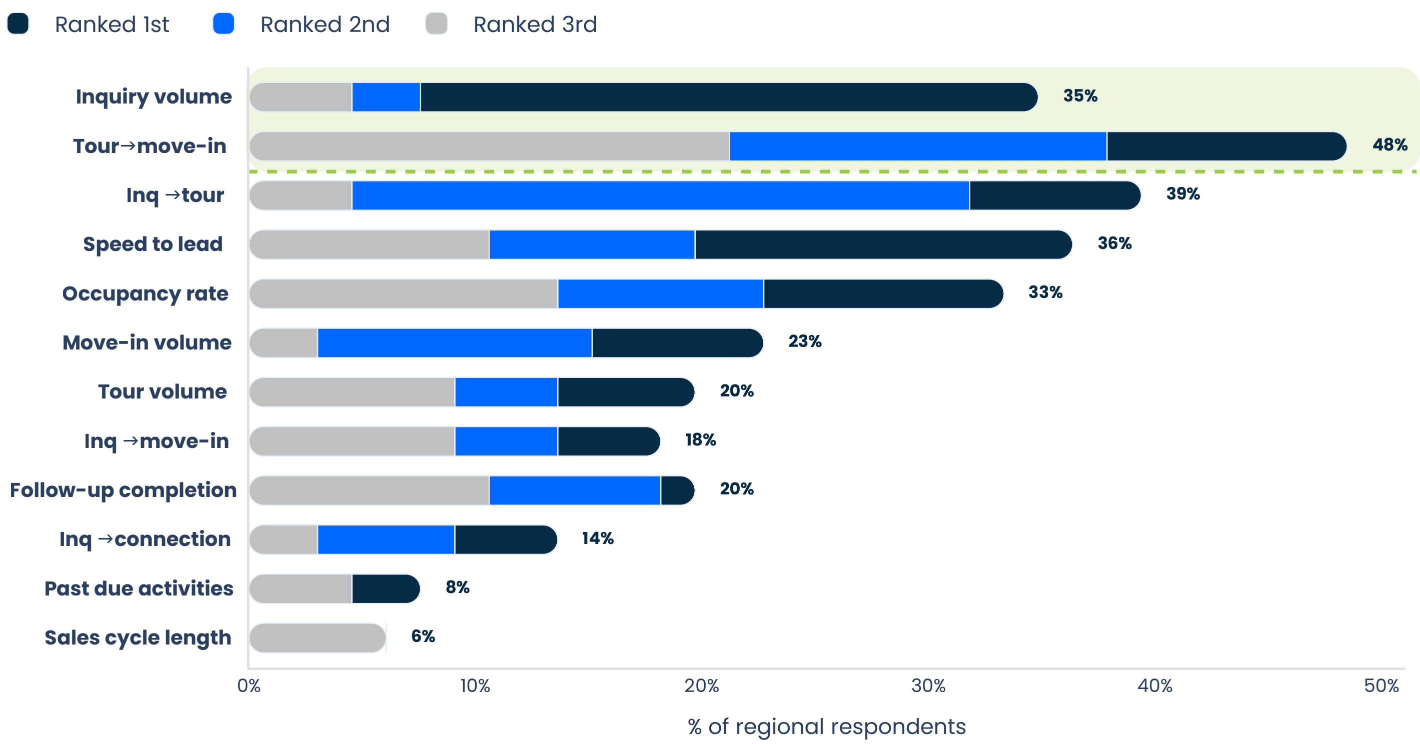
Strong prospect documentation is critical to ensure the customized and personal experience carries across multiple sales people.

Multi-person teams work a smaller lead pool more effectively: fewer inquiries, faster speed to lead, stronger inquiry to tour conversion, and higher overall inquiry to move-in rates. However, single-person teams close tours at a higher rate. Multi-person teams show a clear performance edge. However, they're not the right fit for all communities. Community size and occupancy constraints may require single-person teams. Where staffing is limited, front-of-funnel efficiency becomes an area to keep close watch on and improve.

How Regionals Evaluate Sales Performance

Executive leaders define organizational priorities. Regional leaders translate those priorities into coaching and day to day execution among their teams. Regional leaders take a more balanced view of sales performance, pairing inquiry volume with strong attention to inquiry to tour and tour to move-in while placing greater emphasis on speed to lead to uncover where traction is being lost early in the process.

Metrics Regional Leaders Prioritize



COMPARING EXECUTIVE LEADERSHIP AND REGIONAL SALES METRICS

While both groups prioritize tour to move-in, regional leaders place greater emphasis on lead volume, inquiry to tour, and speed to lead, metrics that help identify where teams need support.

The prominence of lead volume raises an important question: Can regional leaders meaningfully influence this metric? If regional teams own their team's emphasis on outreach, referral development, or community partnerships, lead volume is an appropriate metric for regionals to be paying close attention to. If demand generation is largely beyond their scope of control, regional leaders may create greater impact by focusing on the conversion metrics they can influence most directly.

	Executive Leadership	Regionals
1	**Occupancy rate** (61%)	**Inquiry volume** (35%)
2	**Tour to move-in** (57%)	**Tour to move-in** (48%)
3	**Inquiry volume** (36%)	**Inquiry to tour** (39%)
4	**Inquiry to tour** (33%)	**Speed to lead** (36%)
5	**Speed to lead** (27%)	**Occupancy rate** (33%)

RELATIONSHIP-LED SELLING IS THE CLEAREST SEPARATOR ACROSS PERFORMANCE GROUPS

What sales teams say drives their wins. Share of respondents mentioning each theme.

	Top Performer	High Growth	Opportunity	Declining Performance
Relationship & Trust Building	47%	51%	40%	32%
Personalized Tours & Experiences	36%	40%	31%	39%
Discovery & Needs Assessment	30%	37%	24%	23%
Follow-Up & Speed to Lead	23%	37%	33%	27%

Percentages represent the share of open responses mentioning each theme; responses could mention multiple themes, so columns do not sum to 100%.

WHERE PERFORMANCE GROUPS DIVERGE

Sales strategy varies across performance groups, and the data shows which approach is driving growth.

01 Top Performer

Top Performers mention relationship building and personalization but discovery and follow-up less often. This isn't a more mature process; it's likely occupancy-driven. At such high occupancy, there are few units left to fill. You know your remaining inventory. You know who fits.

02 High Growth

High Growth communities lead across all four core behaviors mentioned by sales staff: relationship building, personalized tours, discovery, and follow-up. They report pursuing these behaviors more intensely which aligns with their recent growth.

03 Opportunity

Opportunity communities report relationship-building and follow-up at levels closer to High Growth. But they trail on discovery and personalization, suggesting the groundwork for connection is there, but it may not be translating into a tour or experience shaped around what the prospect actually needs. Strengthening discovery will make relationship building and tour personalization more effective.

04 Declining Performance

Declining Performance communities emphasize personalized tours at nearly the same rate as High Growth. But they mention relationship-building, discovery, and follow-up urgency less. Without that upfront groundwork, personalized tours may fall short of feeling truly informed and tailored to the prospect, and without trust established first, prospects may be less receptive to them.

> If you're working to grow occupancy, High Growth's approach is the playbook. Relationship-led selling, paired with discovery, personalization, and follow-up urgency is what's allowing these communities to guide prospects and families best. Top Performers' lighter touch works because they're full, not because it's the path to growth.

WelcomeHome
Senior Care Insights

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:

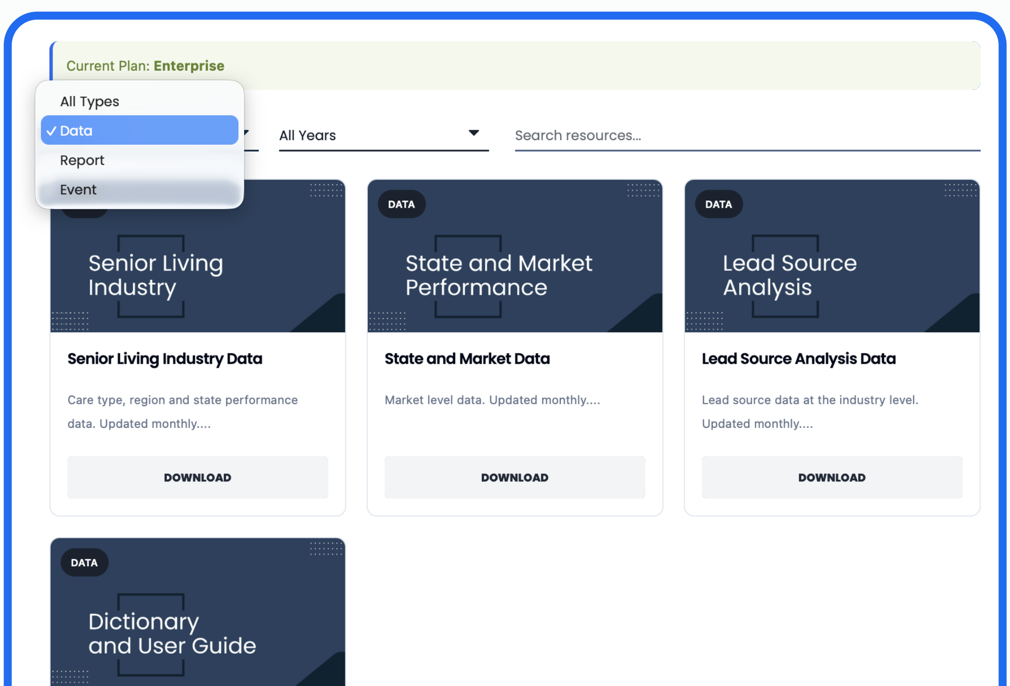
- Occupancy and market trends
- Lead, funnel, and conversion performance
- Competitive benchmarks across thousands of communities
- Research focused specifically on sales and marketing strategy and customer

Make faster, smarter decisions backed by real data, not guesswork.
Subscribe to access the full report and ongoing insights

SUBSCRIBE

Everything You Need: All in One Place

Quarterly Benchmarks | Ongoing Report Releases | Industry Data | Virtual Events



WelcomeHome
Senior Care Insights

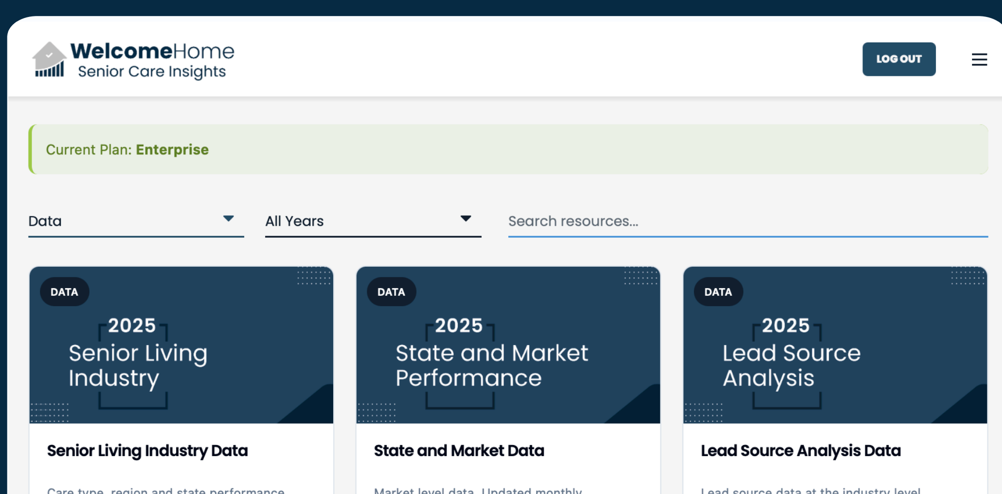
Explore Subscripton Options

Choose the plan that gives your team the access it needs:

TIERS	FREE	SINGLE	TEAM	ENTERPRISE
Number of Subscriptions Unlock the right tier for your team	1	1	1-5	Unlimited
Virtual Events Access virtual events discussing our reports	✓	✓	✓	✓
Quarterly Benchmarks Quarterly updates on key metrics and proven strategies	✓	✓	✓	✓
Year in Review The industry's annual sales and marketing report	✓	✓	✓	✓
State and Market Benchmark Detailed reports filtered by state, care type, and market	✗	✓	✓	✓
Top Performers Report (Coming Q2 2026) Adopt strategies from top-performing communities	✗	✓	✓	✓
Voice of the Industry (Coming Q3 2026) Sales and marketing strategies and perspectives, backed by data	✗	✓	✓	✓
Voice of the Senior (Coming Q4 2026) Insights into how seniors view and choose care	✗	✓	✓	✓
Report Downloads Shareable data for your entire team	✗	✗	✓	✓
Industry Data Access Integrate industry data into your tools and dashboards	✗	✗	✗	✓
Pricing	Free	$600 / year	$3000 / year	$6000 / year

WelcomeHome's all-access data subscription for senior living sales & marketing leaders. Industry reports, virtual events, and insights tailored to your business—when you need them. Visit Insightswhs.com

Subscribe



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

WelcomeHome
Senior Care Insights

InsightsWHS.com