



SENIOR LIVING SALES & MARKETING

FACT OR **FICTION?**

Powered by



In senior living sales and marketing, one size fits...one. Smart providers know they must vary their messaging and tactics to meet each prospect where they are. These flashcards, based on real data from active prospects, help you separate fact from fiction, refine your approach, and optimize your sales and marketing efforts.



Scan the QR code
to access the digital
version of these
flashcards or visit:
roobrik.com/fact-or-fiction

FACT OR FICTION?



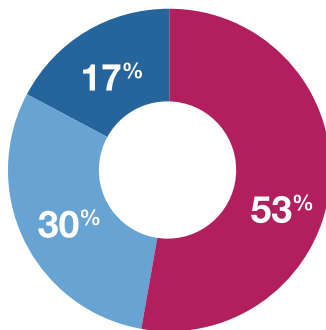
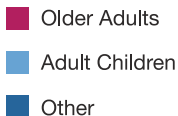
Websites and marketing campaigns should focus primarily on older adults because they make the final decision.

FICTION X

BASED ON ROOBRIK DATA

Adult children play a crucial role in decision-making. In fact, 30% of online researchers exploring senior living are adult children (this number can be 50% or higher for assisted living and memory care communities). Targeting them, alongside older adults, is key to a well-rounded marketing strategy.

WHO IS RESEARCHING SENIOR LIVING?



Source: "Is it the right time for senior living?" Roobrik survey from 1/1/23 to 8/31/24.

“Trying to make messaging on our landing pages, emails, and ads fit for both adult children and older adults is tempting for efficiency, but runs the risk of resonating with neither group. We tailor marketing to the unique concerns of these two key segments and try to minimize one-size-fits-all messaging.”

Paul Barlow
VP of Sales and Marketing,
Transforming Age

DID YOU KNOW?

The “Is it the right time for memory care?” Roobrik survey reveals that adult children make up 63% of the memory care audience, highlighting their key role in decision-making.

FACT OR FICTION?



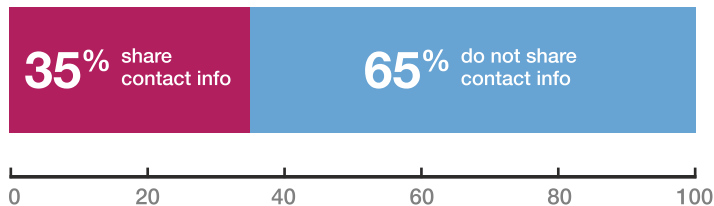
Older adults who say they are just “window shopping” are not ready to share their contact information with a community.

FICTION X

BASED ON ROOBRIK DATA

More than one-third of older adults who describe themselves as “just curious about their options” end up sharing their contact information with a senior living community. This suggests that many are further along in their decision-making journey than they may initially indicate.

SALES OPT-IN RATE FOR OLDER ADULTS WHO ARE “JUST CURIOUS”



Source: “Is it the right time for senior living?” Roobrik survey from 1/1/23 to 8/31/24.

“People don’t know what they don’t know — that’s why they’re coming to you. You are the expert. You have the ability to create urgency when you know in your gut and in your heart that senior living is the right decision for them. Be proud that you have the opportunity to sell this person on what makes your community the best option.”

Bri Stewart

Senior VP of Sales and Brand,
Asbury Communities

“We sometimes hear this audience referred to as ‘tire kickers,’ and that couldn’t be further from the truth.”

Nate O’Keefe

Founder and CEO, Roobrik

DID YOU KNOW?

Older adults who report they are “just curious about options” are open to a change 62% of the time, showing that curiosity often masks a readiness to take the next step.

FACT OR FICTION?



Prospects explore whether they can afford senior living at all stages of their research journey.

FACT



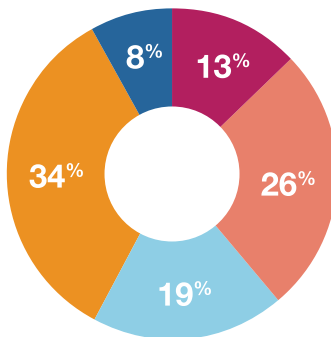
BASED ON ROOBRIK DATA

When asked about their timeline, 34% of people researching senior living affordability say they're just getting started, but nearly 26% are actively planning a move within the next few months, and 13% need to decide immediately.

For most prospects, the question of affordability never really goes away. Many begin their cost research early, while others are further along in their decision-making process.

TIMELINES OF AFFORDABILITY RESEARCHERS

- Needing to make a decision immediately
- Trying to make a decision in the next few months
- Thinking about making a move within the next year or two
- Just getting started, and not sure about timing
- I'm not sure or something else



We believe it's marketing's responsibility to provide resources on the financial piece. That's why we always post our pricing and explain options like Medicaid, Medicare, long-term care insurance, and VA benefits. We repurpose this content into presentations that our sales teams use to educate prospects on how to pay for senior living. A lot of prospects like doing that research on their own so they're as knowledgeable as they can be when they speak to the sales team.

Jodie Roberts
Director of Marketing,
Senior Services of America

Source: Roobrik Afford survey 3/20/24 - 9/11/24.

FACT OR FICTION?



Prospects who may be less financially qualified are more likely to reach out to your sales team.

FACT



BASED ON ROOBRIK DATA

Prospects who may not be financially qualified are slightly more likely to request outreach, highlighting the importance of early identification. By collecting financial readiness data early, sales teams can direct less qualified prospects to educational resources like online tools or guides, helping some to opt out before engaging with sales. This allows the sales team to focus their time on more qualified leads.

SALES OPT-IN RATES BY PROBABLE FINANCIAL QUALIFICATION LEVEL

30% Very likely qualified

27% Likely qualified

32% Uncertain



The biggest challenge that our sales team is encountering is that they feel like they have to burn and churn through these leads and they end up spending too much time in financial discovery.”

Nick Jasmon

VP of Business Development,
American Healthcare Management



The data illustrates one of the greatest challenges facing senior living sales teams today – spending too much time on financially unqualified prospects. This underscores the importance of pre-sales discovery and lead prioritization.”

Craig Simons

Head of Marketing, Roobrik

FACT OR FICTION?



Prospects with the highest need for care are the most open to senior living.

FICTION X

BASED ON ROOBRIK DATA

Our data shows that older adults with lower care needs are significantly more open to moving to senior living. In contrast, openness drops significantly for those with higher care needs. Addressing this reluctance and providing reassurance is critical, especially when speaking with family members who may feel a greater sense of urgency.

OPENNESS TO MOVING TO SENIOR LIVING BY CARE NEEDS LEVEL



Source: "Is it the right time for senior living?" survey from 1/1/23 to 8/31/24.

“The sense of urgency often increases for family members as care needs grow, but for the prospective resident, the less control they have over their day-to-day and the more control they lose as they need more care, the more likely they are to dig their heels in and say they want to stay home.”

Michelle Curnow
VP of Sales,
Asbury Communities

DID YOU KNOW?

When asked about openness to making a move to senior living, older adults self-report being open to change 68% of the time, while adult children report their parent being open just 39% of the time.

FACT OR FICTION?



Safety concerns are a key motivator for both adult children and older adults when considering senior living.



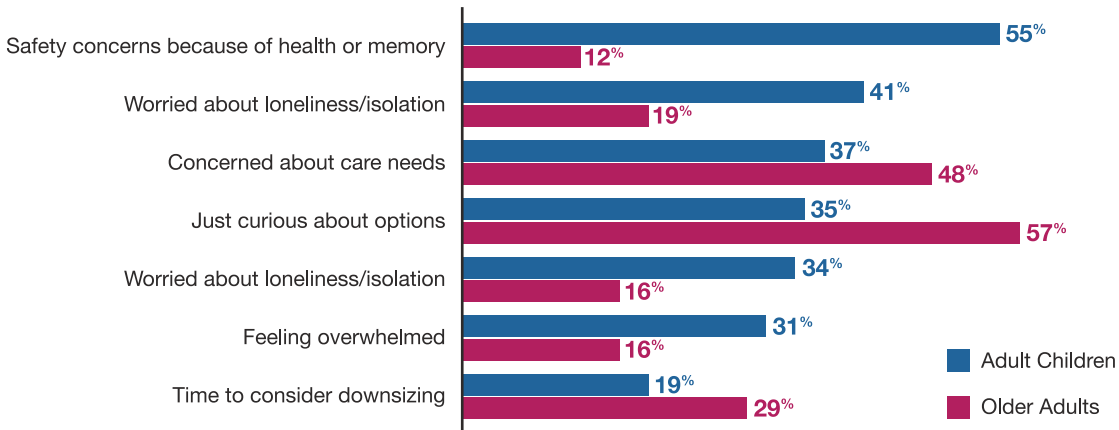
FICTION X

BASED ON ROOBRIK DATA

While 55% of adult children are driven by safety concerns, older adults are primarily focused on maintaining their independence, with only 12% motivated by safety.

This highlights the importance of distinct messaging for each group.

MOTIVATIONS FOR SEEKING SENIOR LIVING



Source: "Is it the right time for senior living?" survey from 1/1/23 to 8/31/24.

FACT OR FICTION?



Among older adults with high acuity, the Activity of Daily Living (ADL) they most frequently report needing assistance with is bathing.



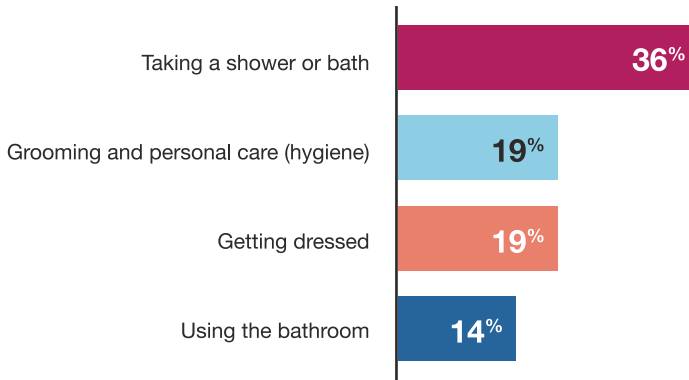
FACT



BASED ON ROOBRIK DATA

Bathing is the most commonly reported ADL that older adults need help with, often due to concerns about falling. This is a key area to explore during discovery conversations.

ADLs THAT OLDER ADULTS NEED THE MOST HELP WITH



It's the fear of falling, the fear of getting in and out of the tub, or taking a shower. In discovery, our salespeople ask questions about their bathroom setup at home. Some people may not want to admit they're afraid of falling, but they're often willing to share the challenges with their current setup that make life a little more difficult every day."

Michelle Curnow
VP of Sales,
Asbury Communities

Source: "Is it the right time for senior living?" survey from 1/1/23 to 8/31/24.

FACT OR FICTION?



Spouses and adult children have different motivations when seeking memory care for prospects with cognitive decline.

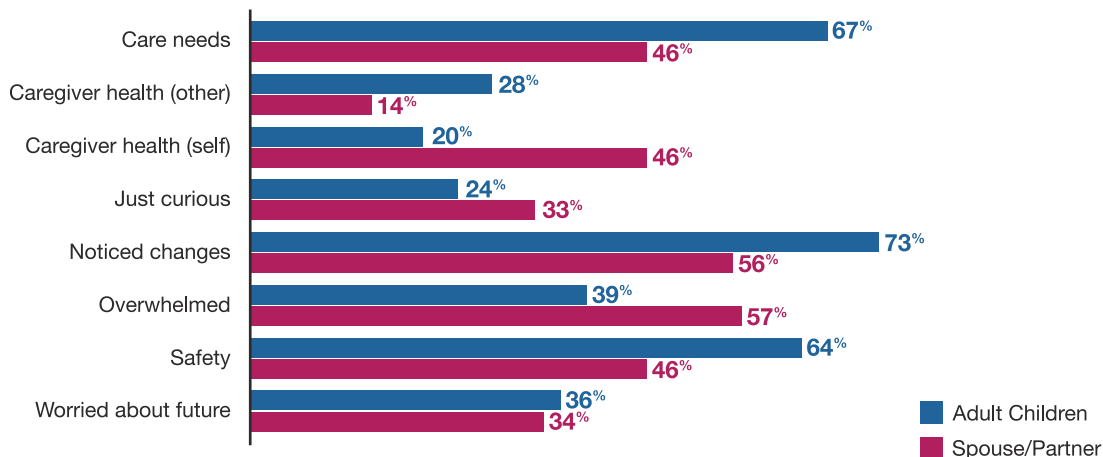
FACT



BASED ON ROOBRIK DATA

Caregivers' relationships with loved ones in cognitive decline significantly influence their motivations for seeking memory care. Adult children are generally more focused on their parent's safety and care needs. In contrast, spouses, who often feel overwhelmed by caregiving responsibilities, are more likely to express concerns about their own mental and physical well-being.

MOTIVATIONS FOR SEEKING MEMORY CARE



Source: "Is it the right time for memory care?" survey from 1/1/23 to 8/31/24.

FACT OR FICTION?



Adult children need access to their parents' financial details to know if they can afford senior living.

FICTION X

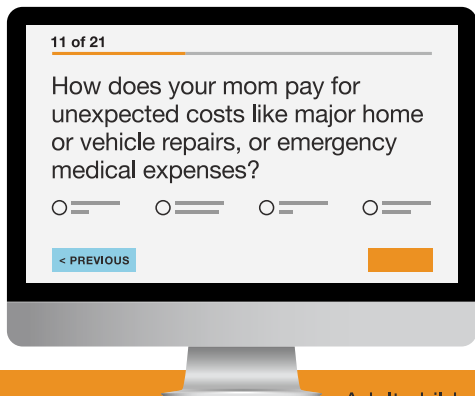
BASED ON ROOBRIK DATA

Many adult children have a strong intuitive understanding of their parents' financial situation, even without direct access to accounts or financial documents. They represent a significant portion of the audience taking the 'Can I Afford Senior Living?' Roobrik survey.

Sources: "Can I afford senior living?" Roobrik survey from 3/20/24 to 9/11/24 and the "Is it the right time for senior living?" Roobrik survey from 1/1/23 to 8/31/24.

“One of the things that I like about the Afford survey is that you could be a son or daughter and not be totally involved or an expert in your mom or dad's finances and still get through the survey.”

Matt Pavlick
Corporate Director of Sales,
Vantage Point



PERCENTAGE OF ADULT CHILDREN SURVEY TAKERS

"Is it the right time for senior living?"

30%

"Can I afford senior living?"

37%

DID YOU KNOW?

Adult children often know if their parents can handle unexpected expenses, like a home or car repair, even without financial documents. The "Can I Afford Senior Living?" survey includes questions like this, making it easier for them to provide meaningful input.

FACT OR FICTION?



Prospects use chat on senior living websites because they just need information fast.

FICTION X

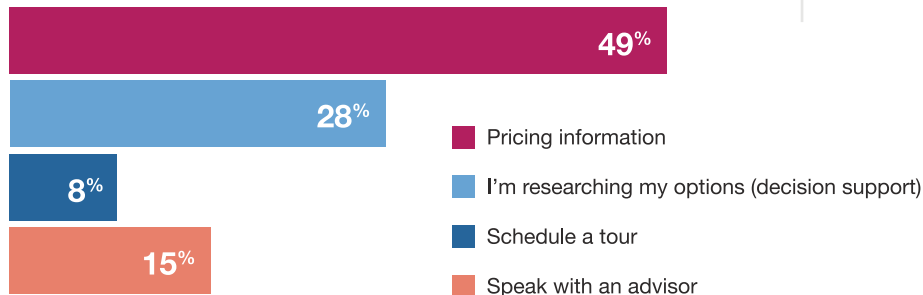
BASED ON ROOBRIK DATA

Nearly a third of chat users—28% opting for decision support right away and another 4% transitioning to a Roobrik Survey within the same session—use chat for more than just quick answers or transactions. This data suggests that chat can play a key role in guiding prospects through their decision journey.

“This is really surprising to me! When I think about my own behavior with online chat, it's usually to find something specific. But the senior living journey is unique — it's filled with enough emotion and complexity that even people who think they know what they want end up seeking guidance.”

Craig Simons
Head of Marketing, Roobrik

INITIAL CHAT INQUIRY PATH



Source: Roobrik Chat data from 4/1/2024 to 9/15/2024.

FACT OR FICTION?



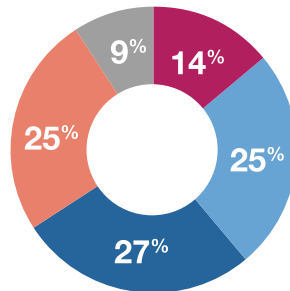
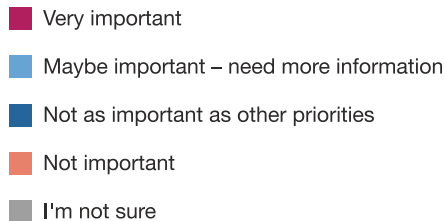
High-end amenities
are very important to
most prospects.

FICTION X

BASED ON ROOBRIK DATA

While high-end amenities (like multiple dining choices, concierge services, and a variety of fitness and entertainment options) are a factor of prospects researching senior living, more than half of survey respondents say these perks are not a top priority and other parts of the decision matter more. Messaging and sales strategies that make amenities the focus may fall flat with many prospects.

HOW IMPORTANT ARE HIGH-END AMENITIES?



Source: Roobrik Afford survey 3/20/24 - 9/11/24

“When you have someone in the discovery room with you and they’re talking about their roadblocks and their feelings and how they’re going to convince their loved one to make this decision, the pool, the culinary, the activities – all of that doesn’t matter. We need to meet them where they are.”

Erin Thompson
Executive Director,
Aspire For More

DID YOU KNOW?

The top three priorities reported by prospects were:

69% Safety and Security

56% Living Spaces / Floor Plans

52% Location

FACT OR FICTION?



Providing decision support
to prospects helps the entire
sales and marketing funnel.

FACT



BASED ON ROOBRIK DATA

Many people describe the decision to move to a senior living community as one of the hardest they've ever made, giving providers the opportunity to become trusted advisors.

Is it the **right time**
for senior living?

Can I afford it?

Just Looking Around

Engaged

Sales Opt-In

Move-In

20-40% lift in we leads by
adding Roobrik Surveys

17% shorter sales cycle
and up to 2X move-in rates



Roobrik provides me with a map to create the best experience from the first phone call. I have a picture of their hobbies and interests and who they are as a person. I can see them before I even speak with them on the phone. Knowing how to start them on their journey of research – from recommended care level to amenities aligned with their interests – makes a big difference in my first touch base.

Nicole Pretre

President and CEO,
Cedar Communities

Source: Roobrik client performance data from 2016-2024.



Powered by



roobrik™

Put Your Prospects First



roobrik.com