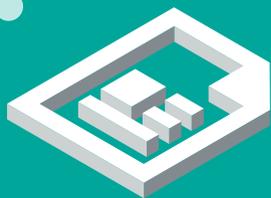


Understanding the Senior Care Landscape

A Metia Report



metia



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Executive summary



There's no denying that the senior population is expanding. According to the [Census Bureau](#), the number of U.S. residents over age 65 will increase to 98.2 million by 2060. Given that 68 percent of these senior citizens will need assistance with daily living activities, a substantial portion could end up in assisted living or memory care facilities.

Sales and marketing executives in the Senior Living industry are facing new trends and challenges that they haven't encountered before. Lead generation is one of the top challenges. Other considerations are that the conversations have broadened, the influencers extend further than you may realize, and emotional-based triggers and associations are becoming key motivators.

With so much changing in the senior care landscape, Metia explored these conversations by life stage to understand how consumer associations and perceptions of senior care living evolve over time. More importantly, how can those foundational perceptions and memories can be leveraged for emotionally resonant and effective strategic content marketing plans?

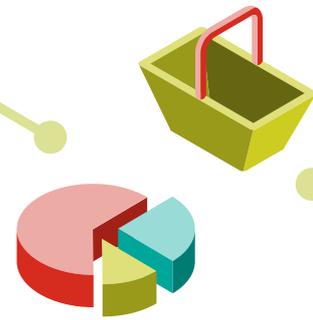
The research uncovered positive and negative inherent beliefs, emotion-based needs, and

consumer perceptions that are developed throughout life—and that ultimately drive decisions about senior care for their family members and for themselves. Marketers need to not only promote positive perceptions, but also speak to the negative experiences and barriers that are discussed, especially by audiences in earlier life stages.

Many fears and apprehensions are established earlier in life, as individuals first consider the reality of Senior Living. These concerns are later felt to be largely unfounded or at least less serious. In fact, seniors who are either living in these communities or considering living there are often the most positive audience.

These insights can help marketers to stay ahead of market trends affecting seniors' housing and care investment strategies.

Adding a “C” to B2B



The senior care industry — which includes Senior Living, transitional care, long-term care, and home care — is a \$249 billion industry that is growing by 6 percent a year. Not surprisingly, businesses and marketers are investing to capture their share of this growth marketplace.

However, there is a tendency for marketers to focus just on B2B relationships, targeting influencers involved in the decision such as doctors, specialists, and home care staff. Because of this target audience, the content created often emphasizes the logistics and technical benefits of care, ignoring the possibility for emotional engagement. Marketing content and related resources are less often focused on the patients and the personal influencers in their lives. When it does, the focus is often on positive aspects of Senior Living versus directly, and thoroughly addressing the engrained beliefs and concerns held by a large section of the audience.

Watching a loved one age can be emotionally difficult for family members (some of those “personal” influencers) in each stage of life. It can add stress to an already difficult process and may ultimately cause resentment, anger, regret, or sadness that they sometimes describe as staying with them for life. These experiences and challenges affect the message you need to send to these influencers about Senior Living communities at each life stage. It is crucial to target not only the patient, or even the adult child helping a parent with care, but also young adults and children who start to interact with senior care and living at an early age.



Applying the science: Virtual ethnography

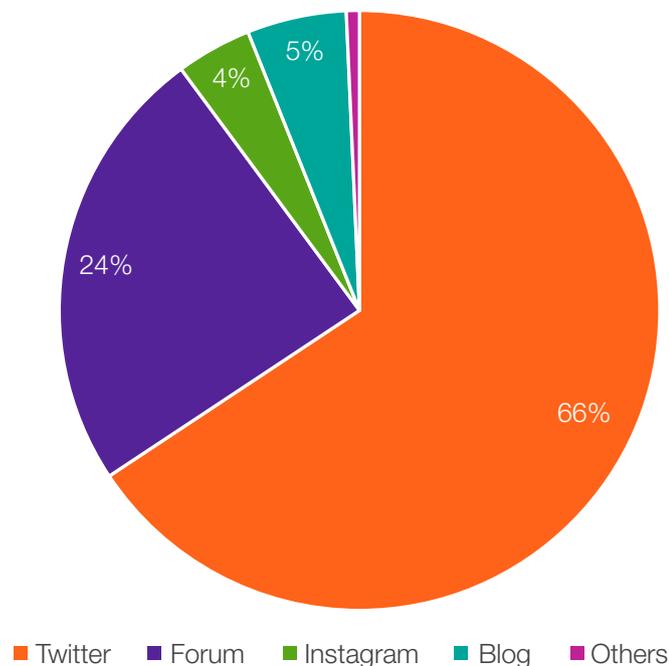
Within the scope of these studies the Insights and Analytics team at Metia looked at linguistic and visual data gathered through various digital channels, including forums and online communities, personal and corporate blogs, news commentary, and review sites.

Virtual ethnography methodology takes the traditional anthropological study of ethnography (watching people in their “native habitat”) and takes it to the social media and digital space.

The team collected almost a quarter of a million social conversations about aging or senior care issues. By identifying what influencers are saying about these issues, Metia researchers identified what positive and negative aging-related experiences look and feel like across the lifespan.

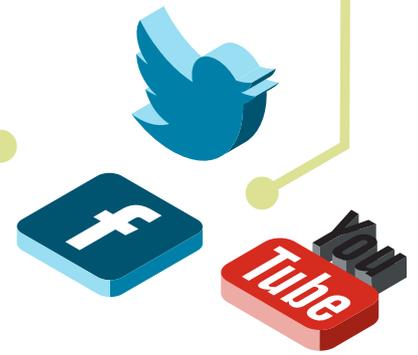
Where are conversations happening?

(Based on 224,451 conversations)



The research revealed four key life stages and the influencers who positively or negatively influenced the decision making for senior care: children, teenagers & young adults, adult children, and current residents.

Why focus on consumer influencers across the lifespan?



Adult children are often viewed as the only caregivers for elderly relatives. However, grandchildren, beginning during childhood and continuing into the teenage and young adult years, also fill caregiver roles and have opinions about their relatives' care. The experience these individuals have at touch points throughout life impact their willingness to place their grandparents, their parents, or themselves in a Senior Living facility.



Children and young adults accounted for nearly 25 percent of online conversations about senior care and living, but they are often an under-targeted audience.

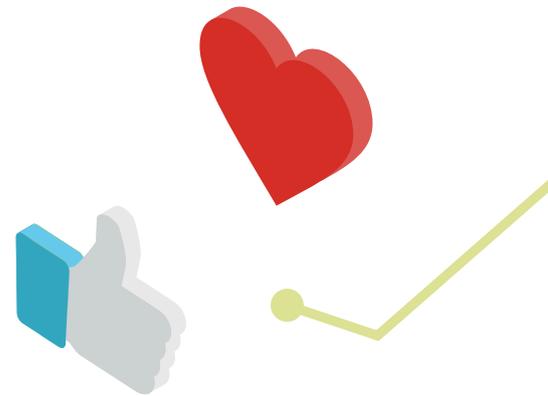
Although financial and medical needs can necessitate an eventual move to a Senior Living facility, what if the entire family had a positive view of senior care facilities from the start? Could such support prompt more seniors to enter independent living, life plan communities, or assisted living facilities earlier?

The role of experiences and emotions in senior care decisions

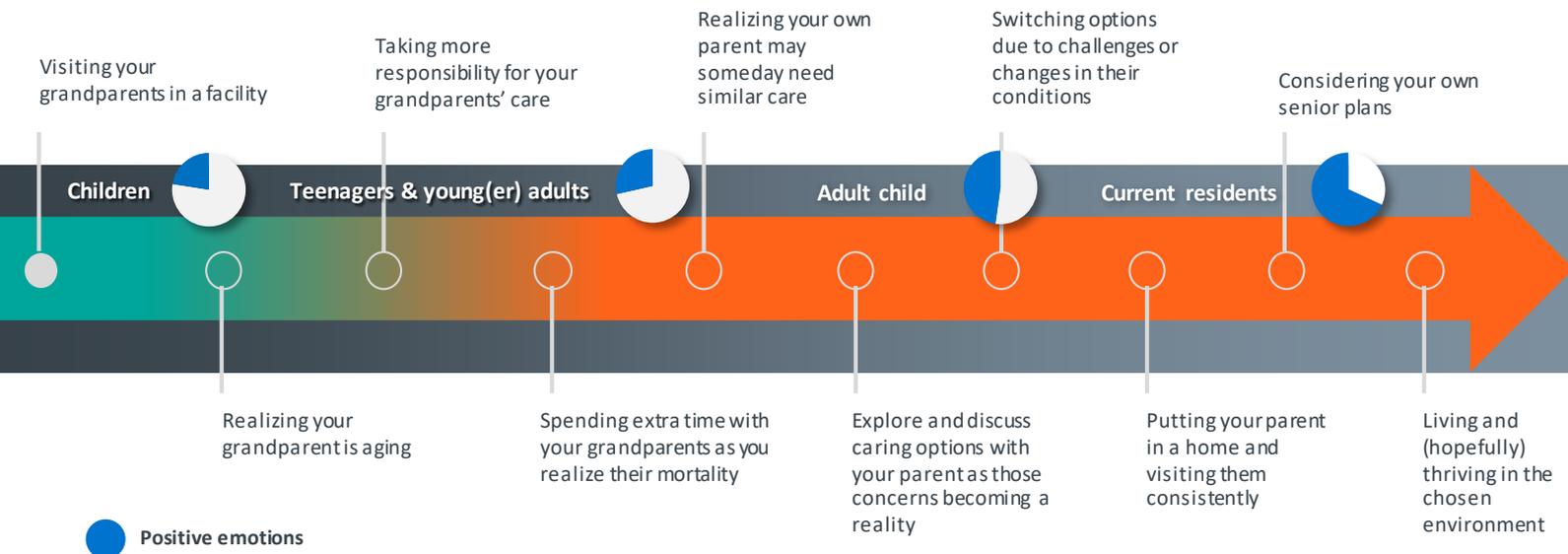
Watching a loved one age can be emotionally difficult for family members in each stage of life. For instance, young grandchildren can be pained by seeing their grandparents age; teenage/young adult grandchild and adult children can feel stressed by their caregiving responsibilities; and older people can be emotionally affected when a spouse experiences age-related decline. However, positive emotions and perceptions of elderly relations also occur across the lifespan.

To obtain a solid understanding of the emotions influencing senior care/living decisions, we also

used semiotic and linguistic analysis to identify aging-related conversations representative of four different life stages. The journey map below highlights some of the key aging-related experiences that these influencers may face throughout their life. Connecting to these emotional triggers and concerns directly is a vital component of the marketing efforts of senior care and housing provider organizations.



The journey through life stages



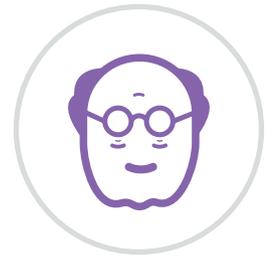
As could be expected, digital conversations about experiences from the middle two life stages were the most prevalent in our study.



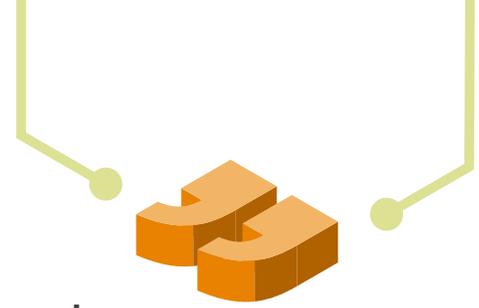
The majority (70 percent) of aging and senior care conversations we found in our study were from adult children, who are currently taking care of their elderly parents or whose parents are currently living in senior communities/facilities.



Teenagers' and young adults' conversations—often about their own experiences of taking care of elderly relatives or their perceptions of aging and senior care—accounted for 20 percent of the discussions included in our study.



Substantially fewer conversations about current residents' experiences (8 percent) or children's experiences (2 percent) were found in our research. The lower conversation volumes for these age groups are likely affected in part by the lower prevalence of social media use in general among these two groups.



Where to identify and listen to influencers?

From our experience, reviewing a mix of channels and sources helps you understand your target audience and eliminates guesswork or preconceptions about what is important to your target consumers. There are various new tracking, social listening, and monitoring tools available to plan and prepare your marketing campaigns.

For this study, we utilized data from our partner Brandwatch, a social listening platform that gathers millions of online conversations and provides the tools to analyze them to make insightful, data-driven business decisions.

Notably, different digital channels were used to describe aging-related experiences in different life stages. Forums were the most popular digital channel for discussions representing the younger two life stages, whereas Twitter was the predominant channel for the older two life stages.

Forum conversations about aging-related experiences from one's childhood, teenage, or

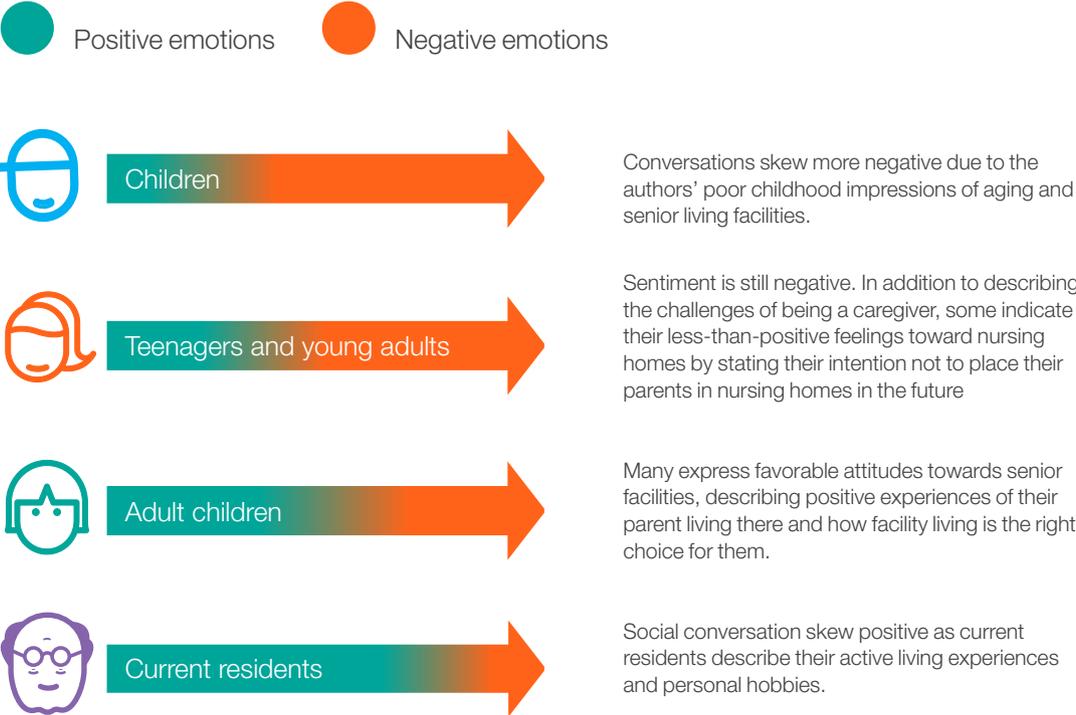
young adult years often came up in the context of discussions about childhood memories, family issues, or current personal life challenges.

Adult children used Twitter (for 69 percent of their conversations) to talk about topics such as their own perceptions on senior care and wellness and their parents' experiences at senior facilities/communities. Current residents also used Twitter (for 66 percent of their conversations) as a platform to engage in conversations about topics such as their own experiences and concerns (e.g., financial concerns, healthcare and Medicare concerns, social activities, and recounting the day).

Although not as popular as Twitter, forums were also used by adult children (in 20 percent of their conversations) to interact with others, for example, to seek advice and support for difficulties and challenges related to the senior care they were providing their relatives.

Positive emotions/enablers vs. negative emotions/challenge

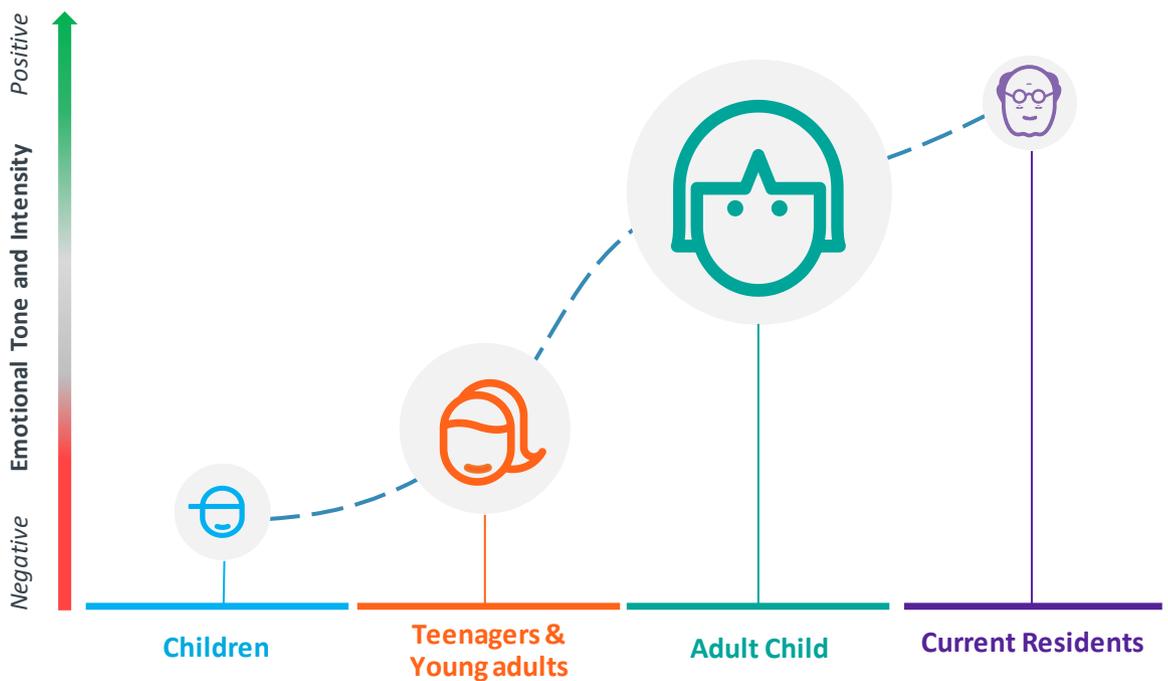
Conversations about senior care and wellness grow more positive as audiences move further along their life journey.



The Influencers

We've divided senior care conversations by key life stages into categories: children, teenagers and young adults, adult children, and current residents. These influencers can be barriers or enablers in the decision-making process. By viewing these perspectives, we can understand the opportunities to make an impact.

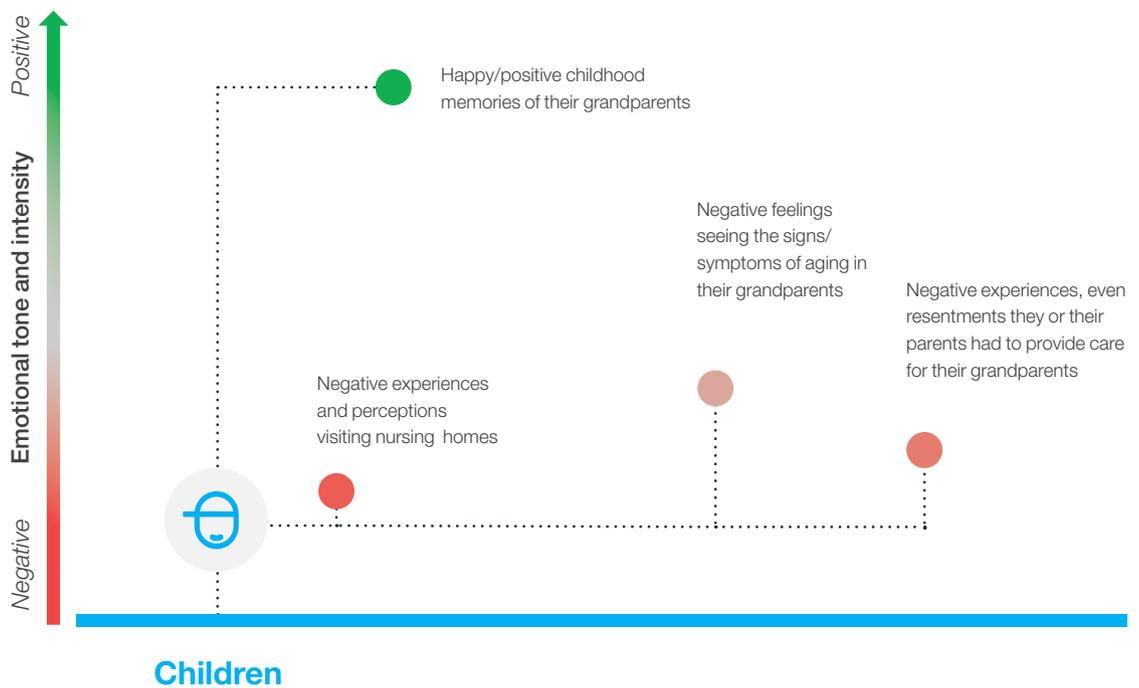
Life stages at a glance



Children



Perspective and sentiment: Despite some positive conversations describing their childhood memories of their elderly relatives, conversations skew more negative due to the authors' poor childhood impressions of aging and Senior Living facilities. These negative experiences which are often shared retrospectively when they are adults, can fundamentally impact how they view senior care and living for the rest of their lives.



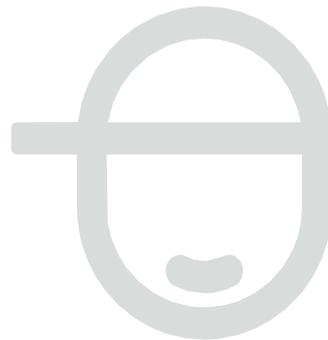
Children

Key insights and audience nuances:

- **Seeing the aging process first-hand can drive emotional responses:** Some audiences share the negative feelings that they experienced (fear, confusion, and apprehension) when they saw the signs of aging in a loved one or other elderly person, especially in cases of limited mobility and deteriorating cognitive ability.
- **There are negative emotions and memories associated with grandparents getting care in a facility and in the child's own home:** These conversations range from the smell or aura of "death" that a handful of children associate with memories of assisted living to resentment and lost time with family members due to live-in grandparents. At this age, children are confused. They don't see what the "right" option is. No option looks ideal.
- **Mentions of the facilities, aging, and care needs leaned negative, but there was also positive content about quality time spent, memories made, and life lessons learned.**

Opportunity:

Help to make the senior care living experience less intimidating for children, through early socialization and early positive inter-generational experiences. Consider fieldtrips, weekly reading sessions, playdates, and cooking classes where young family members can join their loved one—or even consider pursuing these activities with local school groups.

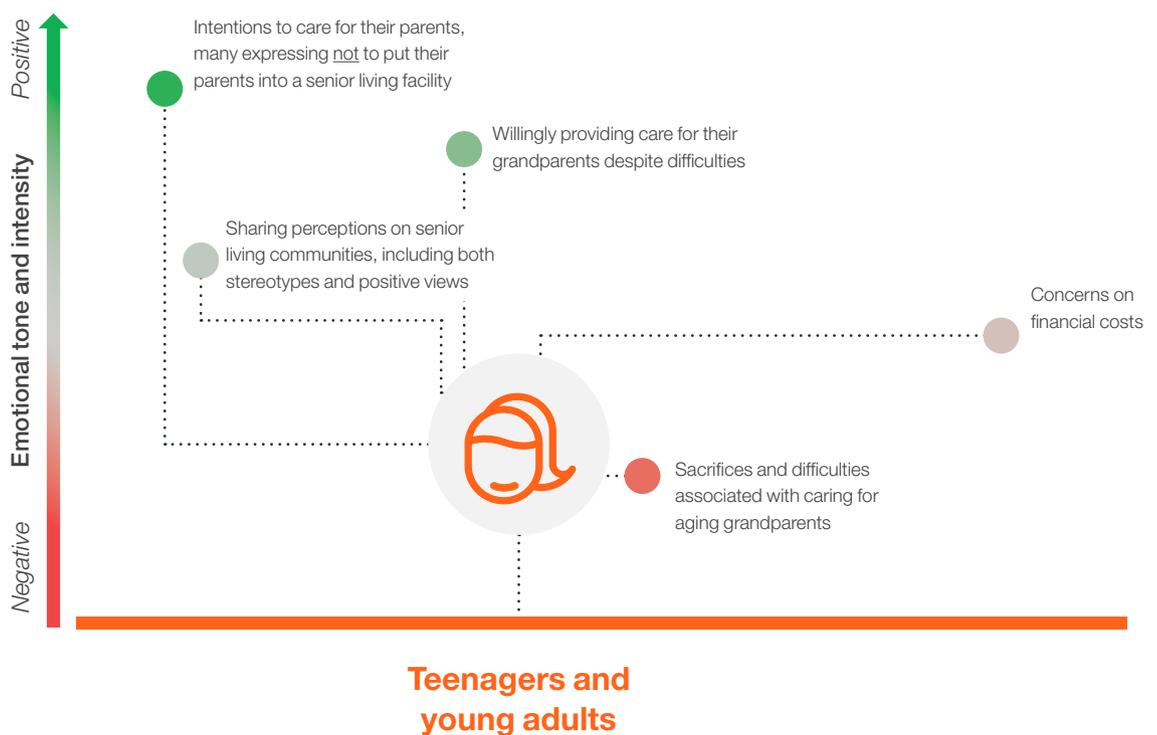


Teenagers and young adults



Perspective and sentiment: The emotional challenges associated with senior care and living are still the most prominent theme in this life stage. Despite these challenges, there was emerging content about the role, duty, and honor of caring for their grandparents and, eventually, their own parents (i.e., it's hard, but worth it and necessary).

Also, as they get older, audiences tend to recognize and appreciate the good moments and the life lessons even more, partially because they recognize that those moments are increasingly fleeting. At the same time, there are more adult conversations about “missing out” on life and life events start to emerge.



Teenagers and young adults

Key insights and audience nuances:

- **Young adults recognize the social value and community of assisted living:** Some have favorable views about Senior Living communities while talking about their elderly relatives' positive living experiences—accommodations, socialization, companionship, activities, food options, and more. These seem to be more focused on more transitional 55+ communities, with some posts even noting that they and their grandparent are both going through a similar transitional (and hopefully social) period.
- **Nonetheless, they are often reluctant to consider assisted living:** This hesitation is associated with their perspective that they have an honor and duty to care for their grandparents and their parents themselves.
- **Some negative stereotypes live on, feeding into the “not in my family” mentality:** These include some sharing and commentary about high profile cases of abuse and neglect, as well as broader concerns about loneliness.
- **Despite a somewhat anti-facility sentiment, home care for aging grandparents sometimes causes early resentment:** Some posts describe the sacrifices they had to make in order to care for their grandparents (e.g., time lost with parents, life events missed, having to grow up “too fast”)—particularly in situations where they felt their own parents weren't doing enough and they had to help or step in.
- **They begin to see the reality of aging and death, from physical effects to financial burdens:** Posts start to mention the reality of elderly care, especially the impact on family finances. Some posts also note their fleeting time with their loved ones, which drives some of the urgency to care for them and honor them.

Opportunity:

Focus on the idea of paying back or honoring parents and grandparents by giving them MORE than they can get at home, such as socialization opportunities and chances for new experiences and hobbies. Emphasize that a facility is not a replacement for family and family care; it takes care and challenges out of the equation, so everyone can focus on living.



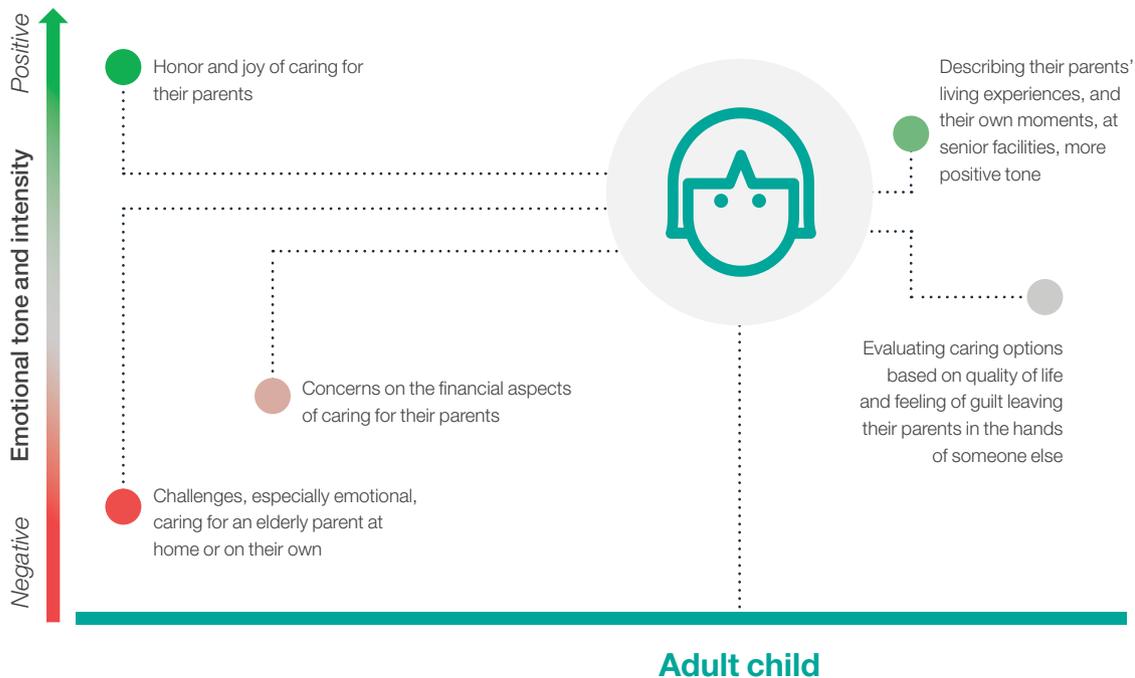
Adult children



Perspective and sentiment: This life stage was most involved in the actual providing of care, especially conversations from adult children who are currently caring for their parent in their home or their parents' home.

Many adult children describe their love for their parents, their desire to have quality time with them, and, similar to young adults, the honor associated with caring for them. Despite these positive feelings, there is considerable conversation about caregiver burnout, with emotionally harrowing descriptions of caregivers not being able to care for their own basic needs (e.g., not sleeping, eating, socializing, enjoying life.)

Many of these posts recognize and even recommend the benefits of finding a mutually beneficial living situation so that they can focus on quality of time vs. quantity.



Adult children

Key insights and audience nuances:

- **They want MORE for their parents, things they can't provide:** These include chances for socialization, “getting out,” and living life, as well as specialized care.
- **They also want more for themselves:** Caregiver burnout (for them and their family) is a real concern. Finding a healthy balance between caring for their parents, themselves, and their own growing family is often a key challenge.
- **Finding the humor in caregiving and the relationships between caregiver and elder:** Some children describe little moments or memories they have from caring for their loved one. They emphasize getting as many of these moments as possible. These stories often recognize the difficulties associated with care, but again, there is a sense of it being “worth it.”
- **Concerns with fairness of responsibilities cause familial tension:** Some expressed frustration over the inability or unwillingness of other siblings to assist with their parent’s care.
- **Financial concerns also become more prominent:** Adult children talk about the financial burden associated with both in-home care and Senior Living facilities. Much of the fear and apprehension seems to be driven by the “unknowns” around the costs and what is covered.

Opportunity:

Despite a desire to honor and spend time with their parents, adult children are more receptive to Senior Living facilities, which may be able to deliver a stronger quality of life for the whole family.



Current residents



Perspective and sentiment: Current residents' discussions are normally positive. They focus on the opportunities presented by this stage of life and by residing in Senior Living communities.



Current residents

Key insights and audience nuances:

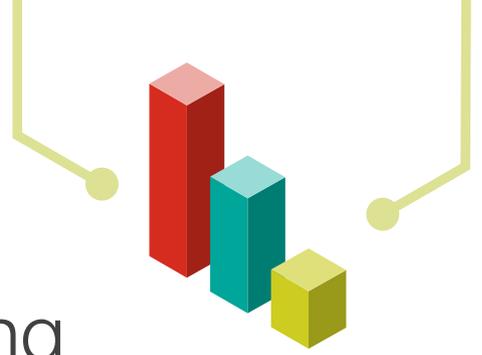
- **Independent, active living communities for people who are 55 or older are seen as a strong, balanced choice between living alone and having additional (low-intensity) care available if needed.** The independence balanced with community, care, and curated experiences makes the community a favorable retirement option and something to look forward to as opposed to something “scary.”
- **Senior Living isn’t the end; rather it’s often seen as a new beginning:** Checking off bucket lists, pursuing dreams they have had their whole lives, and not letting the “idea” of age get in the way of enjoying the rest of their lives are common themes.
- **Senior Living facilities provide ample ways to improve quality of life, including:**
 - Opportunities to socialize with other seniors and engage in activities
 - Convenience of having fewer household responsibilities
 - Emotional benefit of not feeling like they are a ‘burden’ on family or loved ones
- **Negative conversations often focus on logistics, especially around financing:** Specific conversation topics are what is or isn’t covered by health insurance and Medicare, as well as the use of retirement savings and nest eggs.

Although current residents lean the most positive, the age and health status of the adults having those conversations should be considered. Many of the conversations we heard from adults in the current resident stage are from adults who live in 55+ communities or need relatively light assistance. There comes a time when current residents begin to require more intensive care and have more age-related symptoms. At that point, these adults are unlikely to be having online conversations about their perspectives of the aging process. However, their adult children do continue to describe their own (and their parents’) journeys through this often-difficult time. (Note that this situation may account, in part, for the vastly higher volume of conversations among the adult children group compared to the current residents group).

Opportunity:

Highlight the positive experiences that seniors are having in the Senior Living community and TALK to them so they can better understand how living in that community can help them live better.





How to start thinking differently about your senior care marketing programs

Senior care involves a difficult decision-making process. Aging and death are hard to discuss, but the conversations are worth having. By considering the real challenges these audiences face throughout their life, marketers can find the right balance in creating relatable content that speaks to the true challenges and opportunities that Senior Living and Senior Living Care facilities present.

The overall message from the senior care landscape research for marketers is that brands must:

1. Widen the target audience and start early.

Perceptions, hopes, and fears are engrained in us from an early age, not only about aging but also about the options associated with assisted living and senior communities. There are many touchpoints with Senior Living facilities and communities that shape influencers' perceptions throughout their lives.

2. Focus on the importance of quality time vs. quantity.

Providing care for an elderly relative can cause family struggles and resentment across the first three life stages. Audiences crave quality time with elderly loved ones, but they often become resentful and burnt out as caregivers. Senior care facilities can allow the family to focus less on fulfilling daily needs and be more emotionally available to their loved one.

3. Show that many long-held stereotypes and fears are unfounded.

There is some fear, uncertainty, and negative stereotypes associated with aging and Senior Living communities, especially in the earlier life stages. Interestingly, the people expressing the most positive views of aging are the current residents of 55+ communities and other facilities, who speak about the positive social experiences their senior housing affords them.



4. Be transparent on the subject of finances, which are important and may ultimately drive the final decision.

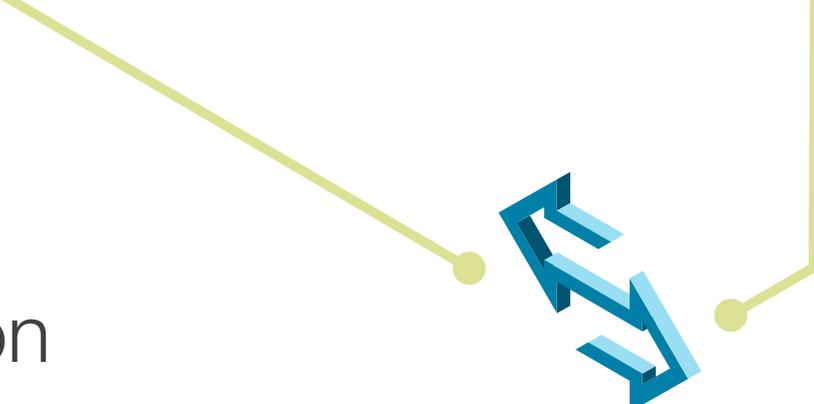
The financial side of elder care is talked about as early as the teenage/young adult stage. Fear, apprehension, and sometimes uncertainty about finances increase throughout life stages.

5. Show that you recognize the emotions involved in senior care decisions. No experience or choice is entirely positive or negative.

At each stage of life, the aging of loved ones can pose emotional and practical difficulties. Grandchildren can be upset by seeing their grandparents age and providing care to a grandparent or parent young can be stressful. But younger children enjoy time with their grandparents, as can teens/young adults and adult children in caring for their elderly relative.

6. Focus on themes around “honoring” or “paying back” parents and grandparents

Many audiences, especially young adults and adults, talk about the honor associated with being the one who cares for their elders and the importance of “paying them back.” Help these influencers understand that they can still honor their relatives, love them, and ultimately do right by them by finding the right housing situation for them—from independent living to assisted living to medical-intensive facilities.



Conclusion

Let's face it, there is no easy way to navigate through the pathway of aging. To improve the experience, companies must think about ways to strengthen the bond between the senior, their influencers, and the senior care and housing provider organizations.

Understand their passions and their interests and seek an emotional connection. **Be the brand that recognizes challenges** associated with this big decision—**and helps solve them.**

Find the balance between describing the negative and positive aspects of senior care and living. Our research found that messaging can potentially be **disingenuous** and **unrelatable** if it overemphasizes positive experiences in the facilities or fails to address the negative emotions (e.g., fears, uncertainty, confusion, resentment) and the challenges faced by the families involved.

This study should help you to develop more meaningful and authentic content that helps engage with the influencers—a multi-generational audience—and increasingly the end users. By engaging more fully and effectively, you can create a distinct advantage over the competition and drive lifetime value from the customer perspective.

If you're planning to take the next step, don't hesitate to get in touch. We have a host of case studies that illustrate each of these points and we'd love to talk you through them.

Action list



To begin to better understand your customers' wants, needs, and expectations, brands need to:

- Listen to your customers**
Look more closely at the feedback your customers and influencers leave over the phone, online, in emails, through social channels, or even on community boards and forums.
- Understand customers' conversations**
Explore the language they use and the topics that matter to them: how well does your content resonate with them?
- Use data-driven insight**
Analyze the data customers themselves are providing across every part of their journey and use data science and research techniques to provide the insights that will help you better understand your customers.

Now what?

Metia can help you research, design, and deliver experiences that better connect with your customers. We use data-driven insights to optimize your customer.

The Metia Insight and Analytics team has experienced methodologies, and tools, that will accelerate the creation or improvement of your program, and provide a framework for ongoing measurement and optimization.

Contact us to learn more.

Metia Group

Metia Group is a global digital marketing agency with offices in London, Seattle, Austin, and Singapore. We employ over 130 digital marketing professionals; each is expert in a particular area of specialization.

Our clients include big corporations and ambitious businesses. We provide them with creative campaigns that reach across geographies, scale massively, and can be deployed systematically and measured relentlessly.

If you'd like to learn more about our capabilities and discuss how we could help you reach and engage your target audiences with focused, measurable campaigns, please get in touch.

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