2026 Senior Living Growth Insights

What's shaping occupancy, systems, and growth decisions in 2026

Prepared by

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Prepared for

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UNCOMMON CREATIVITY

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Executive Summary

By the end of 2025, demand for senior living had largely returned—but many organizations still struggled to translate interest into move-ins.

Occupancy improved across much of the industry, yet growth remained uneven. Staffing constraints limited admissions capacity. Follow-up slowed under higher inquiry volume. Marketing teams generated demand that admissions teams couldn't consistently act on. Leadership teams were left managing growth with fragmented systems and limited visibility into what was actually working.

The organizations that made progress in 2025 didn't grow by marketing harder. They grew by tightening systems—reducing friction between marketing, admissions, and operations, improving speed-to-lead, and creating clearer accountability across the entire move-in journey.

This report examines the structural constraints that continued to limit growth, the most common breakdowns across marketing and admissions, and the system-level shifts high-performing senior living organizations made to convert demand more reliably.

Looking ahead to 2026, the opportunity isn't about generating more leads. It's about removing the friction that slows decisions, breaks follow-up, and obscures performance—and replacing disconnected tactics with integrated growth systems designed to support both teams and families at critical moments.

Key Data Shaping Senior Living Growth

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By the end of 2025, senior living demand had improved—but conversion remained inconsistent. Across the industry, the biggest gaps weren't awareness or interest. They showed up later in the journey: slow response times, manual follow-up, disconnected systems, and limited visibility into what actually influences a move-in decision.

89%
Average senior housing occupancy by the end of 2025

25%
Only 1 in 4 operators report having the right data to make confident decisions

53%
No response within 2 hours after a web inquiry

40%
Of inquiries received no response at all

"Demand isn't the problem. The gap is everything that happens after someone raises their hand."

What 2025 revealed about senior living growth

In 2025, demand for senior living largely returned—but execution didn't always keep pace.

Occupancy improved across much of the industry, yet growth remained uneven. As inquiry volume increased, many organizations struggled to consistently convert interest into move-ins. The issue wasn't effort or awareness—it was structure.

Response times lagged. Follow-up broke down under volume. Marketing generated leads that admissions teams couldn't always act on quickly or confidently. Leadership teams were left without clear visibility into what was actually driving decisions.

What 2025 made clear is that growth is no longer constrained at the top of the funnel. It breaks down between interest, follow-up, and action.

What Improved

Occupancy trends stabilized and began to recover across many markets. More organizations invested in digital marketing, refreshed their websites, and increased lead generation efforts—bringing more prospects into the funnel than in prior years.

What Didn't Scale

The systems supporting admissions didn't evolve at the same pace. Manual follow-up, disconnected tools, and unclear handoffs created friction just as volume increased—making it difficult to turn interest into timely, confident action.

Where Growth Breaks Down in Senior Living

The same breakdowns surfaced again and again: slow response times, inconsistent follow-up, disconnected systems, and limited visibility into what actually influenced a move-in. Marketing teams generated leads. Admissions teams worked hard to keep up. Leadership teams struggled to see where the process was breaking down—or why.

These issues didn't come from a lack of effort. They came from systems that weren't designed to handle modern buyer behavior, higher inquiry volume, or the handoffs required between marketing, admissions, and operations.

What We See Most Often

- Inquiry response slows as volume increases
- Follow-up depends on manual effort instead of workflows
- Websites fail to guide families to the right next step
- CRM data isn't trusted or consistently used

53%

No response within 2 hours after a web inquiry

25%

Only 1 in 4 operators report having the right data to make confident decisions

What High-Performing Senior Living Operators Did Differently

The operators that made real progress in 2025 didn't rely on a single tactic or campaign. They made a series of practical, system-level decisions that removed friction across the entire growth journey — from first inquiry through move-in. These weren't bold reinventions. They were disciplined improvements that made it easier for teams to respond, follow up, and see what was working.

Unified Systems

They reduced tool sprawl by aligning CRM, website, and admissions workflows, so teams weren't working in disconnected platforms.

Speed to Lead

They treated responsiveness as a growth lever, not an operational detail — ensuring inquiries were acknowledged quickly and consistently.

Simplified Family Journey

They clarified navigation, messaging, and next steps on their websites so families could find the right care level and take action without friction.

Standardized Admissions

They replaced ad-hoc follow-up with clear handoffs, defined workflows, and shared expectations between marketing and admissions.

Data-Driven Decisions

They focused less on vanity metrics and more on visibility — understanding where leads dropped off and what actually influenced move-ins.

Scaled Success Across Locations

Instead of reinventing growth at every community, they identified repeatable plays and applied them consistently across their portfolio.

From Isolated Fixes to a Connected Growth System

Most senior living growth challenges don't live in one place.

They show up **between** teams—where marketing generates interest, websites fail to guide next steps, admissions teams struggle to keep up, and leadership lacks a clear view of what's actually driving move-ins.

In 2025, high-performing organizations stopped chasing isolated fixes. Instead of swapping tools or launching one-off campaigns, they focused on building a **connected growth system**—one that aligned brand, digital experience, admissions workflows, and reporting around a single outcome: converting demand into occupancy.

When systems work together, response improves, handoffs become clearer, and teams gain the visibility they need to prioritize what actually moves the needle.

Plays Teams Are Doubling Down On

Senior living organizations that made progress in 2025 didn't rely on a single campaign, platform, or quick fix. They focused on a small number of system-level plays—each designed to remove a specific point of friction in the growth journey.

These plays don't all solve the same problem. Some are built for moments when census is under pressure. Others reduce drop-off when demand exists but decisions stall. Others prepare organizations for high-stakes growth moments where execution matters most.

Together, they form a connected growth system—helping teams respond faster, follow up more consistently, and understand what's actually influencing move-ins.

The pages that follow preview the plays we're seeing work most often—organized by when they're needed and the problem they're designed to solve.

Immediate Occupancy Pressure	Plays designed to stabilize census quickly when occupancy is soft and leadership needs results now.
Conversion & Decision Friction	Plays that reduce hesitation, confusion, and emotional resistance after initial interest—but before move-in.
Referral & Demand Quality Plays	Plays that improve lead quality, strengthen referral channels, and reduce over-reliance on paid demand.
Strategic Growth Moments	Plays required during high-impact moments where timing, trust, and execution shape long-term outcomes.

Immediate Occupancy Pressure Plays

When census softens, everything speeds up.

Leads matter more.

Follow-up matters more.

The plays in this section are built for moments when results can't wait—when leadership needs movement, not theories.

These are the first levers high-performing teams pull to stabilize occupancy, regain momentum, and stop revenue from leaking before it ever reaches admissions.

Low Census Rapid Recovery

Goal

Stabilize occupancy quickly in underperforming communities by converting existing and near-term demand into tours and move-ins—without creating long-term system debt.

When to Use It

Run this play when:

- Census drops below target at the community or portfolio level
- Month-over-month move-ins are trending down
- Leadership needs visible progress within 30–90 days
- Marketing volume exists, but admissions can't convert it fast enough

What High-Performing Teams Do Differently

Instead of "doing more," they tighten execution around four things:

- **Concentrated demand capture:** Campaigns are narrowed to care level, geography, and urgency signals.
- **Single-path conversion:** Landing pages and ads drive one primary action: schedule a tour now. No secondary CTAs.
- **Immediate response ownership:** Every inquiry triggers a same-minute call or text from a real person.
- **Short feedback loops**: Performance is reviewed daily— what's booking, what's stalling, and where things are breaking.

Tactics That Actually Matter

This play typically includes:

- **Paid search and retargeting** built around care-level intent
- **One-to-one landing pages** tied to a specific community and outcome
- **Call + SMS response** within minutes of inquiry
- **Clear urgency framing** (availability, timing, next steps—not discounts)
- **Rapid iteration** based on tour conversion, not clicks

If a tactic doesn't shorten the path to a tour, it doesn't belong.

Prior Lead Reactivation

Goal	Generate low-cost tours and move-ins by reactivating past inquiries whose timing, needs, or circumstances have changed.

When to Use It

Run this play when:

- You have a large database of inactive, long-term, or "not now" leads
- Paid media costs are rising or budget flexibility is limited
- Census pressure exists without strong net-new demand growth
- Sales teams hear "we already talked to them" more than once

What High-Performing Teams Do Differently

Instead of blasting old leads, they focus on:

- **Intent-based segmentation:** Leads are grouped by care level, timeframe, and last meaningful interaction.
- **Context-first messaging:** Outreach starts with what's changed (availability, care options, staffing), not generic.
- **Human re-entry points:** Priority segments receive personal outreach from counselors—not just automation.
- **Clear next steps:** Every message drives one action: schedule a tour or have a short conversation.

Tactics That Actually Matter

This play typically includes:

- **Segmented email + SMS** reactivation campaigns tied to care level and urgency
- **"What's changed?" messaging** that reflects real updates
- **Counselor-led outreach** on the highest-intent segments
- **Simple reactivation CTAs** or landing pages tied to specific communities
- **Suppression rules and sensitivity checks** to avoid inappropriate outreach

If it doesn't restart a real conversation, it's just noise.

High Tour Volume, Low Move-In

Goal

Increase tour-to-move-in conversion by addressing the real barriers that surface after the tour—not before it.

When to Use It

Run this play when:

- Tour volume is healthy, but move-ins lag behind
- Sales teams hear "not ready yet," "we're going to wait," or "we're comparing options"
- Marketing is doing its job, but outcomes stall post-tour
- Time from tour to decision keeps stretching longer

What High-Performing Teams Do Differently

Instead of pushing harder at the top of the funnel, they:

- **Treat the tour as the midpoint, not the finish line:** The real work starts after the visit.
- **Address objections explicitly:** Follow-up is built around cost, timing, readiness, and guilt—not generic nurturing.
- **Create momentum windows:** Clear next steps are set before families leave the building.
- **Blend automation with ownership:** Systems support follow-up, but counselors stay visibly involved.

Tactics That Actually Matter

This play typically includes:

- **Automated post-tour email + SMS** sequences triggered immediately
- **Objection-based messaging** tied to what families actually hesitate on
- **Counselor or director-led outreach** within days—not weeks—of the tour
- **Time-bound next steps** (second visit, care consult, short-stay)
- **Social proof** woven into follow-up, not buried on the website

If nothing changes after the tour, the decision won't either.

Conversion & Decision Friction Plays

Demand alone doesn't drive move-ins.

Confusion slows decisions.

Unanswered questions create hesitation.

Emotional misalignment stalls progress.

The plays in this section focus on removing the friction that shows up after interest—but before commitment—so families feel confident, supported, and ready to move forward.

Care Level Clarity

Goal	Increase tour conversion and move-ins by helping families identify the right level of care—earlier in the decision journey.

When to Use It

Run this play when:

- Families frequently say "we're not sure what level we need"
- Inquiry volume is high, but tour scheduling is inconsistent
- Tours are booked for the wrong care level and don't convert
- Sales teams spend time re-educating families on basic differences

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What High-Performing Teams Do Differently

Instead of letting confusion linger, they:

- **Lead with needs, not labels:** Conversations focus on daily support, safety, and progression—not IL vs AL vs MC definitions.
- **Create clarity before the tour:** Families arrive informed, aligned, and emotionally prepared.
- **Reduce decision anxiety:** Content normalizes uncertainty and guides families step by step.
- **Align marketing and admissions:** Messaging, intake, and follow-up reinforce the same care recommendation.

Tactics That Actually Matter

This play typically includes:

- **Clear, plain-language care-level comparison** content (IL vs AL vs MC)
- **Guided intake questions** that surface needs and readiness
- **Simple self-assessment tools** to support—not replace— sales conversations
- **Care-level–specific landing pages** and CTAs
- **Follow-up and nurturing** aligned to the recommended care level

When families understand the right fit, tours feel purposeful— and decisions move faster.

Caregiver Trust Building & Alignment

Goal	Build trust and alignment with caregivers so decisions move forward without emotional gridlock.

When to Use It

Run this play when:

- Adult children are the primary decision-makers
- Decisions stall despite strong interest or completed tours
- Caregivers express guilt, overwhelm, or fear of "making the wrong call"
- Family disagreement slows or derails next steps

What High-Performing Teams Do Differently

Instead of pushing for commitment, they:

- **Support before selling:** Conversations focus on reassurance, understanding, and validation first.
- **Name the emotions:** Guilt, burnout, and fear are addressed directly—not avoided.
- **Bring the whole family along:** Messaging and follow-up include multiple stakeholders, not just one contact.
- **Reframe the decision:** Moving in is positioned as support and relief—not loss or failure.

Tactics That Actually Matter

This play typically includes:

- **Caregiver-specific educational content** (when to know it's time, what changes to expect)
- **Messaging that validates emotions**—not just features, amenities, or pricing
- **Family-inclusive follow-up** and communication workflows
- **Clear "what happens next"** guidance to reduce uncertainty
- **Testimonials and stories** from other caregivers who've been there

When caregivers feel supported, aligned, and understood, decisions happen faster—and with less regret.

The Continuum of Care

Goal	Position the organization as a long-term care partner so families feel confident choosing now—even as needs change later.
When to Use It	Run this play when: • Multiple care levels are offered (IL, AL, MC, etc.) • Families hesitate because worried about "choosing wrong" • Decisions stall due to uncertainty about future needs • Residents or leads drop off during care-level transitions • Retention across portfolio is as important as new move-ins
What High-Performing Teams Do Differently	Instead of selling a single care level, they: • **Sell the journey, not the unit:** Senior living is framed as a progression, not a permanent bet. • **Normalize change:** Conversations proactively address how needs evolve—and how the organization adapts. • **Reduce future anxiety early:** Families understand what happens after move-in, not just before it. • **Keep families inside the system:** Transitions are positioned as continuity, not disruption.
Tactics That Actually Matter	This play typically includes: • **Clear care-journey messaging** across the website and sales materials • **Content explaining when and why** care needs change • **Intake and follow-up questions** that assess both current and future readiness • **Nurture tracks aligned to care progression**—not just entry-level decisions • **Internal routing and handoff workflows** between care levels or communities *When families believe you can support what's next, they're more willing to say yes today.*

Referral & Demand Quality Plays

Not all leads are created equal.

Some convert quickly.

Others drain time, budget, and attention.

The difference is system design.

The plays in this section help teams improve lead quality, reduce over-reliance on paid media, and build demand engines that compound over time instead of resetting every month.

Referral Flywheel

Goal	Increase high-quality tours and move-ins by turning positive experiences into a consistent, trackable referral engine.
When to Use It	Run this play when: • Paid media is driving volume but at rising cost • Residents and families are satisfied, but referrals inconsistent • Teams rely on "word of mouth" without a system behind it • Leadership wants higher-intent demand w/ better close rates • Long-term cost per move-in needs to come down
What High-Performing Teams Do Differently	Instead of waiting for referrals, they: • **Engineer referral moments:** Requests are triggered at the right time, not left to chance. • **Make referrals easy to give:** Clear asks, simple forms, and visible next steps. • **Separate promoters from everyone else:** Outreach is focused on people most likely to refer. • **Treat referrals like a channel:** They're tracked, measured, and optimized like paid or organic leads.
Tactics That Actually Matter	This play typically includes: • **NPS or satisfaction surveys** to identify promoters • **Automated referral requests** tied to key moments (post-move-in, post-tour, milestone events) • **Simple referral landing pages** with clear attribution • **Testimonial and review capture** built into the same workflows • **Partner referral outreach** (physicians, rehab, social workers) with defined follow-up • **Recognition or incentive programs** where compliant *If referrals aren't visible in reporting, they're not a system—they're luck.*

Professional Referral Engine

Goal	Increase high-intent tours and move-ins by making your communities a trusted, reliable referral destination for healthcare and social service professionals.

When to Use It

Run this play when:

- Referrals depend on too heavily personal relationships
- Discharge planners, case managers, or physicians influence placement decisions
- Referral volume is inconsistent or declining
- New leadership, services, or communities need external credibility
- Speed and trust matter more than marketing persuasion

What High-Performing Teams Do Differently

Instead of "networking," they:

- **Create a professional-grade referral path:** Clear, compliant, and easy to use—every time.
- **Remove uncertainty for referrers:** Care criteria, availability, and next steps are always clear.
- **Close the loop:** Referrers know what happened after they send someone.
- **Show up as a care partner:** Education and responsiveness replace promotional outreach.

Tactics That Actually Matter

This play typically includes:

- **Dedicated referral forms** and intake paths for professionals
- **Clear care-level criteria** and real-time availability guidance
- **Same-day follow-up** on professional referrals
- **Closed-loop updates** back to the referrer
- **Educational touchpoints** for case managers and clinicians
- **Non-promotional outreach** focused on support and clarity

If a professional can't confidently refer someone in under two minutes, the system is broken.

Strategic Growth Moment Plays

Some moments change the trajectory of growth.

Handled well, they accelerate everything.

Handled poorly, they magnify existing problems.

The plays in this section aren't always running—but when they're needed, they matter most. These are high-impact moments that require clarity, coordination, and precision.

Reputation Recovery

Goal	Restore trust, credibility, and lead conversion by reshaping how the community is perceived—online and in real conversations.

When to Use It

Run this play when:

- Online reviews don't reflect current operations or leadership
- Sales teams face reputation-based objections during tours
- Competitors win local search visibility due to stronger ratings
- Recent staffing, leadership, or operational changes haven't reset perception
- Organic demand is suppressed despite strong in-community experience

What High-Performing Teams Do Differently

Instead of avoiding the issue, they:

- **Address gaps directly:** Acknowledge past issues and clearly signal what's changed.
- **Create fresh proof:** Generate new reviews and stories that outweigh outdated feedback.
- **Equip admissions teams:** Objections are handled confidently, not defensively.
- **Control the narrative:** Messaging is consistent across reviews, tours, and follow-up.

Tactics That Actually Matter

This play typically includes:

- **Review audits** across Google and key local platforms
- **Timely, empathetic, and compliant response** framework
- **Automated review requests** triggered by positive moments
- **Testimonial capture** (family stories, short videos, quotes)
- **Sales enablement messaging** for reputation objections
- **Local SEO optimization** to surface recent, positive signals

If families don't trust what they see before the tour, nothing else converts.

New Community Opening

Goal

Generate early demand and qualified tours ahead of—and immediately after—opening to support strong initial occupancy.

When to Use It

Run this play when:

- A new community is launching within the next 6–12 months
- Pre-leasing or waitlist targets are required
- Brand awareness in the local market is low or nonexistent
- Leadership needs early momentum, not a "soft open" funnel

What High-Performing Teams Do Differently

Instead of waiting until doors open, they:

- **Build awareness before launch:** They start showing up early so the community isn't introduced at the last minute.
- **Capture interest with one clear next step:** A waitlist or interest form becomes the primary conversion path.
- **Warm leads while the build happens:** They nurture consistently so prospects don't go cold before move-in is possible.
- **Plan the first 90 days like a campaign:** Tours, events, and follow-up are coordinated—not ad hoc.

Tactics That Actually Matter

This play typically includes:

- **Pre-opening landing page** with waitlist or interest form
- **Local SEO + Google Business Profile** setup before launch
- **Paid search and paid social** to build early demand by geography and care level
- **Pre-opening events** (hard hat tours, info sessions, community previews)
- **Content on care options**, pricing expectations, and timelines
- **Nurture campaigns** to keep interest warm until opening

If you wait until launch to build demand, you're already behind.

Growth Doesn't Come From One Play

Across every play in this guide, one pattern shows up again and again:

Growth doesn't stall because senior living teams aren't working hard.
It stalls because effort isn't supported by systems.

High-performing organizations don't rely on isolated tactics or one-off campaigns. They align marketing, admissions, and follow-up around shared goals, clean data, and consistent execution. That's what turns pressure into progress—and activity into occupancy.

These plays are not meant to be run in isolation. They work best when they're connected, measured, and adjusted over time.

That's where Vye comes in.

Ready for the
Next Step?

Schedule a Discovery Call

Talk through your current challenges, goals, and where momentum is getting stuck. You'll leave with clarity on what to prioritize—and whether Vye is the right partner to help.

Schedule a discovery call

Take the Senior Living Growth Diagnostic

Prefer to start on your own? Our Senior Living Diagnostic Assessment highlights where growth systems are strong, where gaps exist, and which plays will have the biggest impact right now.

Take the assessment

Key Data Referenced in This Report

Senior Housing Occupancy

- 89% average senior housing occupancy by the end of 2025
- Source: National Investment Center for Seniors Housing & Care (NIC)
- NIC MAP Vision — U.S. Senior Housing Occupancy Data
    - https://www.nic.org/research/occupancy-rate-data/

Decision-Making & Data Visibility

- Only 25% of operators report having the right data to confidently guide decisions
- Source: Industry operator surveys and analytics summaries
- Referenced in: NIC research briefings and conference insights
    - https://www.nic.org/research/

Speed-to-Lead Performance

- 53% of senior living communities did not respond within two hours of a web inquiry
- Source: Senior Housing News — Mystery Shop Study
    - https://seniorhousingnews.com/2023/05/09/mystery-shopping-senior-living-lead-response-times/

Inquiry Follow-Up Gaps

- 40% of inquiries received no response at all
- Source: Senior Housing News — Mystery Shop Findings
    - https://seniorhousingnews.com/2023/05/09/mystery-shopping-senior-living-lead-response-times/