

# ADULT DAY SERVICES

MARKET SNAPSHOT REPORT 2019

# ADULT DAY SERVICES

## SECTOR SIZE



4,600

ADULT DAY CENTERS  
NATIONWIDE



286,300

NUMBER OF PARTICIPANTS  
ON ANY GIVEN DAY



\$18,720

ANNUAL  
AVERAGE COST

## RELATIVE TO OTHER LTSS SECTORS, ADULT DAY SERVICES ARE...

**#5** **Fifth**  
in terms of  
service providers

ASSISTED LIVING  
NURSING HOME  
HOME HEALTH  
SENIOR CENTER  
**ADULT DAY**  
HOSPICE  
LIFE PLAN COMMUNITY  
PACE

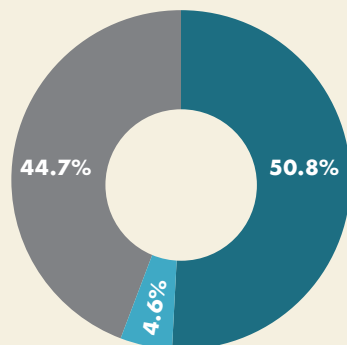
**#7** **Seventh**  
in terms of  
people served

SENIOR CENTER  
HOME HEALTH  
NURSING HOME  
HOSPICE  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
**ADULT DAY**  
PACE

**#6** **Sixth** in terms  
of revenue

NURSING HOME  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
HOME HEALTH  
HOSPICE  
**ADULT DAY**  
SENIOR CENTER  
PACE

## SECTOR COMPOSITION



- Nonprofit (2,335 adult day centers)
- For-profit (2,055 adult day centers)
- Public (210 adult day centers)

## A TYPICAL ADULT DAY SERVICES CENTER

- > Capacity at the centers surveyed range from a minimum of **2** to a maximum of **400**; the average capacity is **47**.
- > The average adult participant to staff ratio is **1:6**, with a maximum of **1:20**.
- > Average annual budget of **\$543,500**.

# ADULT DAY SERVICES

## FAST FACTS

- **4 in 10** adult day services centers are affiliated with multi-site providers.
- The majority (**68%**) of centers surveyed are not physically connected to or on the same grounds as a nursing home, assisted living community, or hospital. **Eleven percent** are connected to a nursing home, **9%** are connected to an assisted living community, and **8%** are connected to both a nursing home and assisted living community.
- The average age of the adult day center care recipient is **72**, and **two-thirds** of all adult day center care recipients are women.
- More than ever, adult day services participants have higher levels of chronic conditions and disease, such as hypertension (**46%**), physical disability (**42%**), cardiovascular disease (**34%**), diabetes (**31%**), mental illness (**25%**), and developmental disability (**20%**).
- **80%** offer nursing services, **60%** provide case management, and **50%** have social workers on staff.
- **6 in 10** have been in operation at least 10 years — including **69%** of nonprofit.

## SECTOR TRENDS



The adult day services sector has been **growing** consistently.

- > 3,400 centers in 2002 vs. 4,800 today.
- > 160,000 people served in 2002 vs. 286,000 today.

**5.5%/yr**



Desire to **age in place** is fueling increased use of adult day services.



**Nearly half** of all participants are living with some **level of dementia**.



Adult day services providers believe the concept is often **misunderstood**.



Providers' feel a major challenge today is attracting clients willing to pay **market rates**.

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# ASSISTED LIVING

MARKET SNAPSHOT REPORT 2019

# ASSISTED LIVING\*

\*defined here as licensed assisted living

## SECTOR SIZE



28,900

ASSISTED LIVING  
CENTERS NATIONWIDE



811,500

CURRENT  
RESIDENTS



\$48,000

ANNUAL  
AVERAGE COST

## RELATIVE TO OTHER LTSS SECTORS, ASSISTED LIVING IS...

#1

**Single largest**  
in terms of  
service providers

#5

**Fifth**  
in terms of  
people served

#3

**Third largest**  
in terms of  
revenue

### ASSISTED LIVING

NURSING HOME  
HOME HEALTH  
SENIOR CENTER  
HOSPICE  
ADULT DAY  
LIFE PLAN COMMUNITY  
PACE

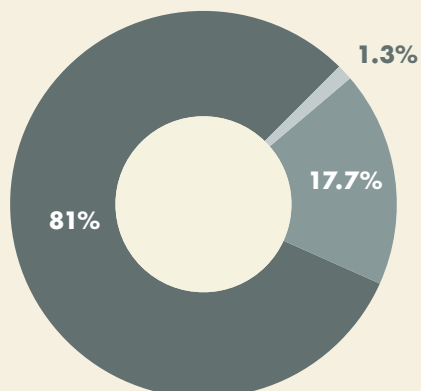
### SENIOR CENTER

HOME HEALTH  
HOSPICE  
NURSING HOME  
**ASSISTED LIVING**  
LIFE PLAN COMMUNITY  
ADULT DAY  
PACE

### NURSING HOME

HOME HEALTH  
**ASSISTED LIVING**  
LIFE PLAN COMMUNITY  
HOSPICE  
SENIOR CENTER  
ADULT DAY  
PACE

## SECTOR COMPOSITION



- For-profit (23,409 assisted living centers)
- Nonprofit (5,115 assisted living centers)
- Government owned (376)

## A TYPICAL ASSISTED LIVING CENTER

- > HHS released a study that found that **one-quarter of assisted living communities** had a ratio of one personal care aid for each 23 or more residents.
- > Is staffed by **20 employees**.
- > Costs each resident **\$4,000 per month**, or **\$48,000 per year** for a private, one-bedroom unit.

# ASSISTED LIVING\*

\*defined here as licensed assisted living

## FAST FACTS

- **2% (1 million)** in assisted living centers.
- **90%** of referrals to assisted living come from hospitals.
- The average resident is **87 years-old**.
- Typical resident needs assistance with at least 2 activities of daily living (ADL). **35%** need assistance with 0 ADLs, **24%** for 1 ADL, **14%** for 2 ADLs, **10%** for 3 ADLs, and **17%** for 4-5 ADLs.
- **42%** of residents live with Alzheimer's Disease or dementia.
- Larger centers have 80 units and have 74 residents, operating at **88.88%** occupancy.

## SECTOR TRENDS



Assisted living is expected to **grow rapidly** in terms of revenue generation.

6.5%/yr



This sector has been **growing** in total centers, but not at the same pace as other sectors.

2.4%/yr



The sector is getting **"squeezed"** as independent living models add assisted living, and as more people delay transition to assisted living.



Centers are adding more **profitable** services — namely rehabilitation and memory care — to offset less profitable services.



Staff **turnover** rate is high due to low wages and lack of training.



Assisted living centers are experimenting with **new models** in order to survive and thrive.

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# HOME HEALTH CARE

## MARKET SNAPSHOT REPORT 2019

# HOME HEALTH CARE\*

\* defined here as Medicare certified home health

## SECTOR SIZE



# 12,200

NUMBER OF HOME HEALTH AGENCIES



# 4.5M

NUMBER OF PATIENTS WHO RECEIVED AND ENDED CARE



# \$48,048

ANNUAL AVERAGE COST FOR HOMEMAKER

## RELATIVE TO OTHER LTSS SECTORS, HOME HEALTH CARE IS...

### #3

**Third largest**  
in terms of  
service providers

ASSISTED LIVING  
NURSING HOME  
**HOME HEALTH**  
SENIOR CENTER  
ADULT DAY  
HOSPICE  
LIFE PLAN COMMUNITY  
PACE

### #2

**Second largest**  
in terms of  
people served

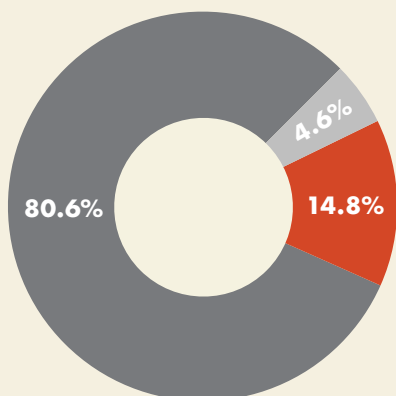
SENIOR CENTER  
**HOME HEALTH**  
NURSING HOME  
HOSPICE  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
ADULT DAY  
PACE

### #4

**Fourth largest**  
in terms of  
revenue

NURSING HOME  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
**HOME HEALTH**  
HOSPICE  
ADULT DAY  
SENIOR CENTER  
PACE

## SECTOR COMPOSITION



- For-profit (9,833)
- Nonprofit (1,806)
- Government owned (561)

## A TYPICAL HOME HEALTH AGENCY

- > In terms of persons served annually, a home health agency served an average of **401 patients** who were then discharged from the agency in 2015.
- > About **44.8%** of home health agencies discharged 100 patients or fewer annually, while **25.8%** discharged 101 to 300, and **29.4%** discharged more than 300.
- > Provides **18.8 visits** per episode with an average payment per visit of **\$163.86**.

# HOME HEALTH CARE\*

\* defined here as Medicare certified home health

## FAST FACTS

- Through 2026, the projected growth of jobs in health care settings is at **18%**. But the demand for home health and personal care aides will far outpace the sector's growth, with an increase of **41%** to more than 4 million jobs.
- The projected numeric change in employment from 2016 to 2026: **1,208,800**.
- **2.8%** of total Medicare spending was for home health care (**\$92.4 billion**).
- **53% of Medicare** certified home health visits required skilled nursing, **16%** required home health aide services, **33%** required therapy, and **1%** required social work services.
- The rate of home health care use for women aged 65 and over was **55%** higher than the rate for men.
- More than **80%** of home health care patients aged 65 years and over had a primary caregiver outside of the home health care agency.

## SECTOR TRENDS



There was a **slight decline** in 2014, when the number of agencies decreased from **12,613** to **12,461**.



**Workforce** is a major concern with the cost of per home health employee turnover ranging from **\$951** to **\$1,242**.



**Home health agencies** are aligning with hospital systems, physician practices and alternative payment models (ACOs, bundled payments, shared savings, and managed care companies) to reduce admissions and re-admissions.



**Health care corporations** that operate rehabilitation centers, hospitals, nursing homes, home health agencies, and hospice have purchased home health companies throughout the country increasing market share.



Since 2004, the number of beneficiaries enrolled in private plans **has more than tripled** from 5.3 million (**13%**) to 19.0 million in 2017 (**33%**).

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# HOSPICE

MARKET SNAPSHOT REPORT 2019

# HOSPICE\*

\* defined here as Medicare certified hospice

## SECTOR SIZE



4,300\*

NUMBER OF HOSPICE CARE AGENCIES.



1.4M

NUMBER OF PATIENTS



\$15.1B

TOTAL EXPENDITURES

\*4,382 Medicare certified hospices in operation over the course of 2016

## RELATIVE TO OTHER LTSS SECTORS, HOSPICE CARE IS THE...

#6

**Sixth** in terms of service providers

#4

**Fourth** in terms of people served

#5

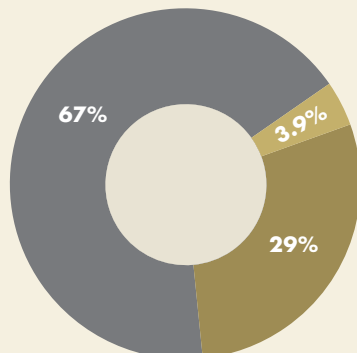
**Fifth** in terms of revenue

ASSISTED LIVING  
NURSING HOME  
HOME HEALTH  
SENIOR CENTER  
ADULT DAY  
**HOSPICE**  
LIFE PLAN COMMUNITY  
PACE

SENIOR CENTER  
HOME HEALTH  
NURSING HOME  
**HOSPICE**  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
ADULT DAY  
PACE

NURSING HOME  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
HOME HEALTH  
**HOSPICE**  
ADULT DAY  
SENIOR CENTER  
PACE

## SECTOR COMPOSITION



- For-profit
- Nonprofit
- Government owned

## A TYPICAL HOSPICE

- > Serves **353 people** per year.
- > Costs on average **\$153 per day** under Medicare.
- > Has an average profit margin between **-2.9%** and **-4.4%** for nonprofit hospices (much lower than the for-profit margins between **12%** and **16%**).

# HOSPICE\*

\* defined here as Medicare certified hospice

## FAST FACTS

- In 2016 **1.04 million** Medicare beneficiaries died while enrolled in hospice care.
- More Medicare hospice patients have a principal diagnosis of cancer than any other disease. **27.2%** have cancer and **18.7%** have cardiac or circulatory diseases.
- More than half (**58.6%**) of hospice Medicare beneficiaries are female. About **64%** of Medicare hospice patients are 80 years of age or older, with **47.5%** being over 85 years of age.
- Most days of care are provided at a private residence (**56.5%**) home, (**41.9%**) nursing facility, (**1.3%**) hospice inpatient facility, (**.5%**) acute care hospital, (**.8%**) other.
- **57%** of hospices are independent, **21%** belong to a hospital system, **17%** belong to a home health agency.

## SECTOR TRENDS



Over the course of 2016, there were **4,382** Medicare certified hospices in operation.



**Hospice ownership** is tilting toward for-profits.

- > In 2000 just 36% of hospices were for-profit, vs. 63% today.
- > In just over a decade, the number of for-profit hospices has tripled.



**Use by nursing homes** is growing rapidly.

- > In 1999 14% of nursing home residents received hospice care, vs. 33% in 2006.



Referrals from **hospitals** are also on the rise.

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# LIFE PLAN COMMUNITY (CCRC)

MARKET SNAPSHOT REPORT 2019

# LIFE PLAN COMMUNITY (CCRC)

## SECTOR SIZE



**1,954** LIFE PLAN COMMUNITIES



**745k** PEOPLE SERVED

## RELATIVE TO OTHER LTSS SECTORS, LIFE PLAN COMMUNITIES ARE...

**#7**

**Seventh**  
in terms of  
service providers

**#6**

**Sixth**  
in terms of  
people served

**#4**

**Fourth**  
in terms of  
revenue

ASSISTED LIVING  
NURSING HOME  
HOME HEALTH  
SENIOR CENTER  
HOSPICE  
ADULT DAY

**LIFE PLAN COMMUNITY**

PACE

SENIOR CENTER  
HOME HEALTH  
HOSPICE  
NURSING HOME  
ASSISTED LIVING

**LIFE PLAN COMMUNITY**

ADULT DAY

PACE

NURSING HOME  
HOME HEALTH  
ASSISTED LIVING

**LIFE PLAN COMMUNITY**

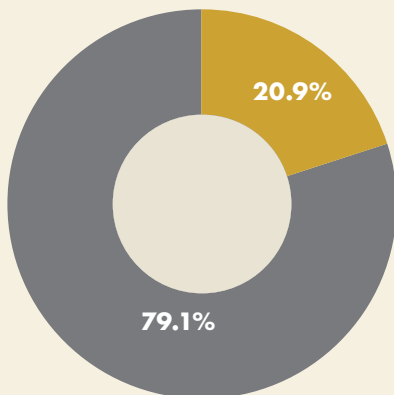
HOSPICE

SENIOR CENTER

ADULT DAY

PACE

## SECTOR COMPOSITION



- Nonprofit (1,545 life plan communities)
- For-profit (409 life plan communities)

## A TYPICAL LIFE PLAN COMMUNITY

- > Serves **288** people.
- > Who pay nationwide an average entrance fee of between **\$107,277** and **\$427,054**.
- > ... and then pay average monthly fees between **\$2,089** and **\$4,154**.
- > Average annual budget of **\$12.2 million**.

## FAST FACTS

- Most are located in metropolitan areas with populations over **50,000**.
- **65% to 75%** offer contracts that include a lump-sum initial payment.
- The average age of recent movers into entrance-fee life plan communities was **81**; into rental life plan communities, **80.2 years**.
- Roughly **65%** are sponsored by a faith-based organization.
- Currently, roughly **62%** of the nation's life plan communities are sponsored or owned by multi-site organizations.
- Only about **300** are accredited.

## SECTOR TRENDS



In the last 10, years, the average annual growth rate in total units is **2.7%**.



Many continue to **add services**, such as wellness, rehabilitation, therapy and memory care.

> Some extend beyond campus walls (i.e., home health care).



Life plan communities are expanding their array of **payment options** for entrants, including refund policies.



Positive outlook for life plan communities is due in part to forecasts of the home **real estate** market.



Life plan communities are increasingly **affiliated with multi-site providers**.

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# NURSING HOMES

## MARKET SNAPSHOT REPORT 2019

# NURSING HOMES

## SECTOR SIZE



15,600

NURSING HOMES  
NATIONWIDE



1,347,600

CURRENT  
RESIDENTS



\$100,375\*

PRIVATE ROOM COST ANNUALLY  
\*\$89,297 FOR AVERAGE SEMI-PRIVATE ROOM

## RELATIVE TO OTHER LTSS SECTORS, NURSING HOMES ARE...

**#2** **Second largest**  
in terms of  
service providers

**#4** **Fourth**  
in terms of  
people served

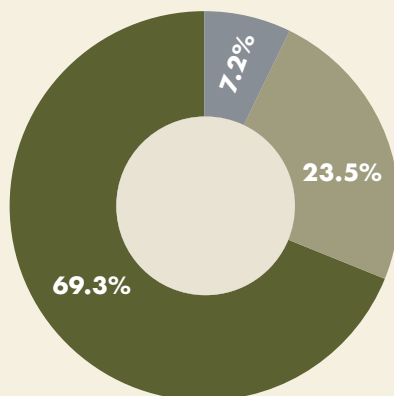
**#1** **Largest by far**  
in terms of  
revenue

ASSISTED LIVING  
**NURSING HOME**  
HOME HEALTH  
SENIOR CENTER  
HOSPICE  
ADULT DAY  
LIFE PLAN COMMUNITY  
PACE

SENIOR CENTER  
HOME HEALTH  
HOSPICE  
**NURSING HOME**  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
ADULT DAY  
PACE

**NURSING HOME**  
HOME HEALTH  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
HOSPICE  
SENIOR CENTER  
ADULT DAY  
PACE

## SECTOR COMPOSITION



- For-profit (10,811 nursing homes)
- Nonprofit (3,666 nursing homes)
- Government owned (1,123 nursing homes)

## A TYPICAL NURSING HOME

- > Has **106 beds**.
- > Operates at **81% occupancy**.
- > Serves **86 people**.
- > Average total nursing staff hours: **5.8**.
- > Average annual budget of **\$6.83 million**.

# NURSING HOMES

## FAST FACTS

- **2.8%** of America's 65+ population live in nursing homes.
- Over half — **58%** — of nursing home organizations have multiple locations, while **42%** are independent.
- **5%** are hospital-based.
- Average resident is 82.6 years — but **16.5%** of residents are under 65.
- **2/3** of residents are women.
- Nearly all nursing homes — **96%** — are dually-certified (Medicare & Medicaid).

## SECTOR TRENDS



The nursing home sector is expected to be relatively **flat**, even as other sectors grow.

- > Revenue is forecasted to **grow modestly** through 2021.
- > Total homes in operation is forecasted to be *flat* through 2021.

**3.2%/yr**



**Nonprofit** representation continues to decline.



**-7.1%/yr**



**Increased** transparency in quality and accountability.



**Cost per resident** is on the rise, as case mix shifts more toward rehabilitation.



Nursing homes are experimenting with **new models** in order to survive and thrive.

- > Alternative formats like "greenhouse neighborhoods."
- > Expanding into adjacent services like hospice care.

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# PACE

PROGRAMS OF ALL-INCLUSIVE CARE FOR THE ELDERLY

MARKET SNAPSHOT REPORT 2019

## SECTOR SIZE



# 126

ORGANIZATIONS  
IN 31 STATES



# 3.8K

(49,000) PARTICIPANTS



# 13%

LOWER COST FOR STATES THAN  
OTHER MEDICAID SERVICES

## RELATIVE TO OTHER LTSS SECTORS, PACE IS...

### #8

**Smallest**  
in terms of  
service providers

ASSISTED LIVING  
NURSING HOME  
HOME HEALTH  
SENIOR CENTER  
ADULT DAY  
HOSPICE  
LIFE PLAN COMMUNITY  
**PACE**

### #8

**Smallest**  
in terms of  
people served

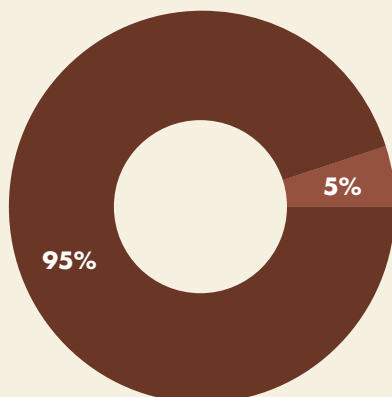
SENIOR CENTER  
HOME HEALTH  
NURSING HOME  
HOSPICE  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
ADULT DAY  
**PACE**

### #8

**Smallest**  
in terms of  
revenue

NURSING HOME  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
HOME HEALTH  
HOSPICE  
ADULT DAY  
SENIOR CENTER  
**PACE**

## SECTOR COMPOSITION



- Nonprofit (122 PACE programs)
- For-profit (4 PACE programs)

## A TYPICAL PACE PROGRAM

- > **260 pace centers and 126 sponsoring organizations**, in **31** states. PACE enrollees are less likely to suffer depression. **97.5%** of family caregivers recommend PACE.
- > **PACE enrollees average less than 1 ER visit per year.** The average enrollee: **90%** are dually eligible for Medicaid and Medicare, **95%** living in the community.
- > In the average month, a participant take: **8** visits to PACE center, **4** trips to outpatient therapy centers, take **9** prescriptions.
- > PACE serves **18,506 meals a day.**

## FAST FACTS

- PACE programs operate in **31** U.S. states.
- Qualifying citizens must be at least **55 years** and be judged to need nursing home level of care.
- **9 in 10** participants are also dual-eligible for both Medicare and Medicaid.
- Average age is **76**, have **5.8** chronic conditions, and **35%** of them need assistance with 5-6 ADLs.
- **7 in 10** participants are women.
- Nearly half of PACE programs — **42%** — are sponsored by hospitals or hospital partners.

## SECTOR TRENDS



PACE programs have been **expanding rapidly** nationwide.

- > 47 programs in 2007 vs. 126 today.
- > Another **20 in development**.



Existing PACE programs are also growing in **scope**.

- > 57% are planning to expand.



**For-profit ownership** within PACE is emerging, as HHS and CMS recently enabled for-profits to launch PACE programs on a pilot basis.



**Possible trends:** reduced hospital admissions, decreased rehospitalizations, reduced ER visits.

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# SENIOR CENTERS

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# SENIOR CENTERS

## SECTOR SIZE



11,000

SENIOR CENTERS  
NATIONWIDE



1M

PEOPLE  
SERVED



\$385.1M

2019 FY BUDGET  
THROUGH ACL

## RELATIVE TO OTHER LTSS SECTORS, SENIOR CENTERS ARE...

**#4** **Fourth largest**  
in terms of  
service providers

**#1** **Single largest**  
in terms of  
people served

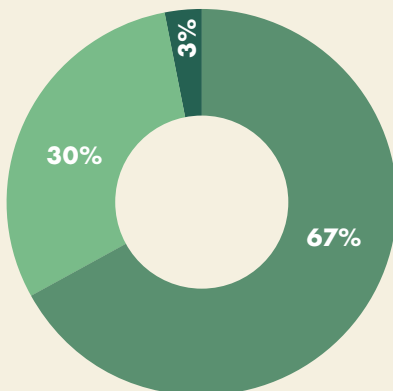
**#7** **Seventh**  
in terms of  
revenue

ASSISTED LIVING  
NURSING HOME  
HOME HEALTH  
**SENIOR CENTER**  
ADULT DAY  
HOSPICE  
LIFE PLAN COMMUNITY  
PACE

**SENIOR CENTER**  
HOME HEALTH  
NURSING HOME  
HOSPICE  
ASSISTED LIVING  
LIFE PLAN COMMUNITY  
ADULT DAY  
PACE

NURSING HOME  
ASSISTED LIVING  
HOME HEALTH  
LIFE PLAN COMMUNITY  
HOSPICE  
ADULT DAY  
**SENIOR CENTER**  
PACE

## SECTOR COMPOSITION



- Nonprofit (7,600 senior centers)
- Government owned (3,420 senior centers)
- For-profit (380 senior centers)

## A TYPICAL SENIOR CENTER

- > Receives a total of **\$447,000 per year** to operate.
- > Spends about **\$510 per year** in operating costs per user.

### DID YOU KNOW?

Research shows that older adults who participate in senior center programs can learn to manage and delay the onset of chronic disease and experience measurable improvements in their physical, social, spiritual, emotional, mental, and economic well-being.

# SENIOR CENTERS

## FAST FACTS

- Nationwide, senior centers serve **1,000,000** people every day.
- **3/4** of senior center visitors visit **1–3** times per week, and stay an average of **3.3** hours.
- The average senior center visitor is **75** years old; **7 in 10** are women and **50%** live alone.
- **6,610** senior centers (**60%**) are also Administration on Aging (AoA) designated focal points — connecting users to vital community resources.
- Senior centers are typically **funded by a wide variety of sources**, including government funds, private and public grants, local businesses, in-kind donations, special events and volunteers.

## SECTOR TRENDS



The sector has been **growing slowly**.

- > 10,793 centers nationwide in 2005, vs. an estimated 11,000 today.



Senior centers are increasingly catering to the **“young old”** (55–65 years).

- > Offer fitness centers, continuing education, cafes and more.



**“Virtual”** senior centers are emerging, taking advantage of today’s technology.

- > Offer interactivity for home-bound seniors, such as painting and armchair yoga.



Senior centers are an increasingly important resource as more older persons live in **poverty**.

- > Provide services, meals and activities at low or no cost.

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# SUBSIDIZED SENIOR HOUSING

MARKET SNAPSHOT REPORT 2019

# SUBSIDIZED SENIOR HOUSING

## SECTOR SIZE



1.8M

HUD AFFORDABLE HOUSING APARTMENTS

headed by a senior (62 or older)



812,000

LOW INCOME HOUSING TAX CREDIT PROGRAM

headed by a senior (62 or older)



124,480

USDA RURAL HOUSING SERVICE SECTION 515

headed by a senior (62 or older)

## HUD 202 SUPPORTIVE HOUSING FOR THE ELDERLY

### 400,000 UNITS CONSTRUCTED:

- 205,000 units with section 8 rent subsidy
- 122,000 units with project rental assistance contract subsidy

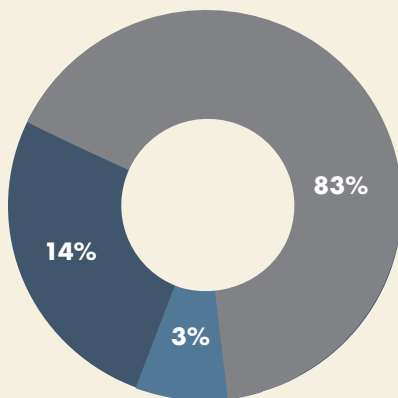
*average annual household income: \$13,591*

*38% of residents frail or near-frail*

*16% units have household head 85 or older*

*50% of 202 communities have a service coordinator*

## FEDERAL FUNDING (ANNUALLY)



- HUD Funding: \$53.8 Billion
- Low Income Housing Tax Credit: \$8.6 Billion
- USDA Rural Housing Service: \$1.6 Billion

## KEY FEATURES OF HUD ASSISTED HOUSING

### INCOME TARGETED

- > Section 202 program serves households with incomes below **50%** of area median income.

### AFFORDABLE

- > Households pay **30%** of their adjusted household income for rent. The average Section 202 household pays **\$304** a month for rent.

### STABLE

- > Households can remain in their **HUD apartments** for as long as necessary. The average age at which older households leave assisted housing is the highest for Section 202 residents compared to other housing programs.

## DEMOGRAPHICS AND HOUSING DEMAND

*from the Joint Center for Housing Studies of Harvard University*

### FAST FACTS

- Currently, only **36%** of those who qualify receive housing assistance benefits (roughly 1.4 out of 4 million households).
- The number of older households will increase from **29.9 million** in 2015 to **49.6 million** in 2035.
- In 2015, 15 million older adults earned less than **80%** of their area median income. By 2035, this group will reach 27 million.
- Between 2015 and 2035, the number of households headed by a person aged 70 and over will grow by **90%**.
- The number of single-person and married couple households headed by someone aged **65 or over** will more than double by 2035.
- By 2025, the number of older households with a disability will increase by **76%** to reach 31.2 million households.
- Today, only **1%** of the housing stock offers zero-step entrances, single-floor living, wide halls and doorways, electrical controls reachable from wheelchairs, and lever-style handles on faucets and doors.
- Of the projected **31.2 million** older adult households with a disability in 2035, **17 million** will have at least one person with a mobility disability.

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## LINKAGES

### Health Services

- Housing is a key social determinant of health.
- The availability of an on-site service coordinator reduced the odds of having a hospital admission among residents by 18%.
- Residents with a social worker and a registered nurse who coordinates and additional health services are less likely to visit the emergency room and move to a nursing home.

### Health care savings

- Having an enhanced service coordinator and a wellness nurse on-site slows Medicare growth by \$1500 per year, per resident participating in the program for more than three years.
- Medicaid home and community-based service waiver programs produced savings of \$43,947 per participant for the year studied compared to institutional care.

### Americans with Disabilities Act

- Affordable housing allows states to comply with the ADA and the Supreme Court's *Olmstead* decision, which requires favoring community-based and integrated settings over institutional settings for older adults with disabilities.
- Without the availability of housing affordable to them, older adults do not have a place to receive community-based services.

### Life's Necessities

- According to Harvard's Joint Center for Housing Studies, housing cost burdens among older adults can put considerable strain on households' budgets.
- Older adult renter households with the lowest incomes who also spent more than half of their incomes for housing spend 51% on health care, 37% less on food, and 67% less on transportation than their non-housing cost burdened peers.
- Older adult owner households with the lowest incomes are similarly left with less for other life necessities, spending 67% less on health care, 34% less on food, and 49% less on transportation compared to their non-housing cost burdened peers.

The mission of **LeadingAge** is to be the trusted voice for aging. Our **6,000+ members** and partners include nonprofit organizations representing the entire field of aging services, 38 state associations, businesses, consumer groups, foundations and research centers.



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